



Project Efficiency Solution (PES)
White Paper - *Language Industry*

This document provides an overview of Flow 2007, including the new features contained in the Beetext Flow 2007 R2. The new versions Lite, Standard and Advanced are outlined as well. All inquiries regarding the contents of this document may be addressed to Patrick Goupil at patrick.goupil@beetext.com.

Introduction

Beetext Flow is a complete Project Efficiency Solution (PES) originally conceptualized for the language industry but flexible enough for any process or workflow oriented industry. Designed for maximum efficiency, this flexible web-based application optimizes productivity by automating and streamlining most manual tasks, reduces operation costs by allowing your resources to focus on what's most important. All this, while ensuring quicker time-to-market by ensuring communication lines are clear and everyone is kept up to date with required information throughout the projects.

Project managers are the heart of any translation team, whether in a Language Service Provider (LSP) or a corporate translation department. In order for project managers to streamline key tasks such as scheduling work orders and meeting difficult customer deadlines, they require solutions that enable them to work more efficiently. Efficiency is the sole ideology of Beetext Flow.

The efficiency acquired by using Beetext Flow is measured by

- A direct gain of being able to handle increased demand without increasing human resource.
- Freeing up time by removing manual manipulation of tasks which could easily be automated.
- Eliminating the need of filing and archiving documents
- No need to distribute work manually via email
- Streamlining reception, process and delivery of projects

Beetext Flow Lite, Standard and Advanced enable users to create a more streamlined, efficient and automated work environment while ensuring control is constantly at a user's finger tips.

Beetext Flow is the most advanced PES on the market. To see how Beetext Flow can help streamline your current methodologies, please contact a Beetext representative for a consultative session and the development of a business case. We also invite you to carefully read the following pages, while keeping in mind your current processes and workflows.

This white paper addresses the following topics:

- Intelligent Centralization of Requests
- Intelligent distribution of delegated services
- Automation and provider filtering for workflows
- Real-time workflow monitoring
- On-demand reports, productivity, invoicing and financial
- Automatic document archiving
- Integration with Beetext Find (An enterprise document repository search engine)
- Integration with third party software (via APIs)

Overview of Beetext Flow

Beetext Flow is based on a flexibility, which means you can pick and choose the version you that benefits you — Beetext Flow Lite, Standard or Advanced versions are available for use within or outside the language industry.

New in Beetext Flow 2007 R2 (Release 2 of 2007)

- **Provider Search**
Project managers can now conduct advanced searches for providers from the workflow window in the request module. The search will display specialities, abilities, rates.
- **Improved Mail Management**
Beetext Flow now incorporates a mail queue to query status on sent mails. This ensures that mails sent via Flow can be checked to confirm the send action was successfully executed from the server.
- **Financial Reports (Phase 1)**
This report enables users to obtain financial reports outlining the cumulative total by customer per month and per year for invoices, quotations and Profit/Loss calculations. This report is single currency.
- **Mass Customer and Provider Export**
This function enables those with permission to export all customer and provider information in CSV format, to allow for imports or backups.
- **Additional Notifications**
The additional notifications enhance the project manager's visibility of projects. It ensures that the project manager knows the instant that a workflow has been completed in addition to knowing the instant a customer downloads a delivered document.
- **Scheduling Module (Phase 1)**
The scheduling module allows for a per request graphical overview of the timeline for the project based on providers capacities. The deadlines per task in the workflow could then be adjusted via this module.
- **Payable Invoice Currency**
Payable invoices delivered from providers can now be received in multiple currencies.
- **Enhanced Security**
Beetext Flow now uses one of the most advanced Database encryption methods to ensure the highest level of security.
- **Enhanced Customer Taxes**
Taxes are now configurable in relation to state or province (region) and can be configured to be applied to certain customers via the customer profile.

Beetext Flow's wealth of various features and modules are described in the following section.
 This list may not include all features, but is used for an idea of reference and may change without prior notice.

	FLOW LITE	FLOW STANDARD	FLOW ADVANCED
Administration	x	x	x
CSV Export			x
Custom fields			x
Default fields	x	x	x
Enterprise Productivity			x
Enterprise rates			x
Enterprise schedule			x
Enterprise services	x	x	x
Enterprise Teams			x
List Administration	x	x	x
Online Request Form configuration		x	x
Service Standards			x
System parameters			x
Workflow Templates			x
Customers	x	x	x
Rates	x	x	x
Document Versioning		x	x
Invoicing		x	x
Quickbooks			x
My Contracts			x
My Flow	x	x	x
My Invoices			x
Online Request Form		x	x
Administrator for Business Unit			x
Administrator for Customer		x	x
Per Contact			x
Document Status		x	x
Reports			x
Payable Invoices			x
Providers	x	x	x
Contracts			x
Rates	x	x	x
Reports			x
Financial		x	x
Production			x
Invoicing			x

Requests	x	x	x
<i>Notification (just TO DO)</i>	x		
<i>Notification (TO DO + CUSTOMER)</i>		x	
<i>Notification (ALL)</i>			x
<i>Contracts</i>			x
<i>Create Request</i>	x	x	x
<i>Modify Request</i>	x	x	x
<i>Document Versioning</i>			x
<i>Pool</i>		x	x
<i>Quoting</i>		x	x
<i>Projects</i>		x	x
Task List	x	x	x
<i>Customer Information</i>			x
<i>General Instructions</i>	x	x	x
<i>Pool</i>		x	x
<i>Search</i>			x
<i>Send documents to customer</i>		x	x

Beetext Flow gathers all information vital to your firm’s operation — ongoing requests, customer data, invoicing and provider information, completed tasks, requests — and automatically integrates seamlessly with QuickBooks. All information is available through the online interface within a secured environment.

This project management solution boasts enhanced features that accelerate routine operations and boost production capacity. It makes powerful tools available on a need-to-use basis so that every resource in the translation or localization environment—translators, editors, external providers, project managers, accounting staff, customers—have extreme accessibility to the exact information they need.

Intelligent Centralization of Requests

Beetext Flow offers a simple yet extremely effective method to centralizing the incoming work orders by utilizing a customer portal. The customer portal while not only providing any look and feel you desire through our custom “skin” development, enables customers to feel the “warm and fuzzy” and makes the entire request process much more efficient, clear and precise, which encourages them to come back time and time again.

The portal ensures that incoming requests are centralized for the customer enabling them to revisit past requests and download delivered or archived documents.

The customer contact may be assigned different access permissions, such as

- *Customer Administrator* which enables them to see all work order requests made by all contacts defined in Beetext Flow for that company or business unit.
- *Business Unit Administrator* which enables them to see all work order requests made by all the contacts defined in Beetext Flow for a specific business unit.
- *Can Connect to Flow* which enables the customers to make requests through the customer portal, however the user will only see the requests they themselves have made.

Project managers will always have access to search for customer work orders past and present through the search mechanism provider through the project manager’s Request module.

Intelligent distribution of delegated services

Once a translation request is received from the online request form in the customer portal, Beetext Flow can guide your project managers through the steps of processing the new work order request.

By being able to clearly visualize the request details, a project manager can decipher whether they would like to add additional information to the request or continue on to create an associated workflow for the work order.

By easily navigating through tabbed sections, the workflow tab enables a project manager to manually or automatically establish each step required in the projects workflow.

Have many providers?

No problem, service providers are easily selected via Flow’s workflow tab as it provides a service provider filter. The filter drills down to the resources that are capable of executing the selected task for the selected language combination in the specified domain, making the choice that much easier for the project manager. From that point a project manager can further investigate whether or not they would like to assign that service provider to the selected service by verifying the workload and their rates before confirming the selection.

Once a workflow and service providers have been chosen, Beetext Flow notifies the first service provider in the workflow via email that they have a task to perform. Once the service provider starts/completes their assigned service, the next service provider in line will receive an email notification notifying them they may begin their assigned service. This process continues throughout the workflow and is flexible enough to include the project manager at each step if desired. Project managers always have the ability to check status on each individual step of the workflows throughout the work orders life cycle.

And so, with minimal input, the system helps select your best choice to meet the customer's deadline, and helps maximize your teams' productivity.

Automated and Evolving Processes

Beetext Flow grows with you and can help automate the most mundane manual tasks. For example, through Beetext Flow, project managers can analyze a customer's previous requests to create efficient workflow templates and have them be automatically applied so that Beetext Flow distributes work more efficiently.

By starting with manual tasks and evolving to automated workflows via the auto-applied workflow templates, Beetext Flow can start the associated request process before the project manager even looks at the request. It's a matter of convenience.

Imagine you receive a request on Saturday morning, Flow can either indicate to the customer they're outside business hours and they'll be tended to on Monday morning, or it could, depending on configuration already email the first provider in the workflow (if workflow templates are used) so your providers may already begin the tasks, so upon arriving Monday morning, you may already be halfway through the workflow. Efficiency made easy.

Flow can also give project managers a clear idea of production capacities by analyzing statistics, such as average words per hour per translator, per service and domain.

Real-Time Workload Monitoring

Beetext Flow provides a real-time picture of current workload. Who is available? What's an individual workload? Have tasks in the workflow been completed? What is the profit / loss calculation for a specific workflow?

With Beetext Flow, a quick glance enables you to answer the aforementioned questions, giving project managers the ability to set accurate deadlines for customer requests, or to answer the following question: can we accept this request of 50,000 words and meet the customers' deadline?

Real-Time Reporting: Financial, Productivity and Invoicing

Beetext Flow works on a simply notion of retaining all information entered into the system. This notion enables users (with proper permissions) to produce financial, productivity or invoicing reports.

The reports are executed via the Reporting Module and work on a filter/sorting/grouping approach. You can drill down from a per customer or a general customer group to obtain details such as how many 75% SDLX or TRADOS matches did we translate last quarter. We can even drill down further to say, how many 75% SDLX or TRADOS matches did translator W translate for Customer X, Y and Z last quarter from English to French.

Since Beetext Flow covers virtually every aspect of a translation request, it can produce a plethora of reports with associated graphs and charts.

Want to know when your rush periods are or evaluate whether a customer's requests are increasing or decreasing? Flow can produce this information on demand in a graphical method. Need statistics such as how many words each translator produced last month or how many requests were received last year? Flow can provide the answers, quickly, easily and accurately.

Automatic Document Archiving

Beetext Flow automatically manages archives and document versioning the moment they are submitted to Beetext Flow by creating project folders within customer folders. There's no need for you to keep your complicated directory structures and naming conventions.

This saves project managers from having to search through countless folders to find documents or browse manually through complex file structures to decide where to save a document and which document is of course, the most recent.

Documents are archived automatically based on your preferences. In addition, when integrated with Beetext Find (see section Integration with Beetext Find), Beetext Flow lets you quickly search for documents by date, customer, translator, even by document keywords in addition to receiving bitext and contextual search results for any archived document.

When used in conjunction, **Beetext Find** and **Beetext Flow** combine to form a uniquely powerful solution.

Integration with Beetext Find

Beetext Find is an enterprise document repository search engine, enabling a multitude of benefits from, bitext visualization, contextual search results, direct document links and project reference numbers when combined with Beetext Flow.

Beetext Find supports a wide array of document formats, including PDF, Word, HTML, Excel, PowerPoint, WordPerfect, FrameMaker, Visio and many more, in addition to legacy formats. It supports 250 file formats in all.

Beetext Find also provides keyword searching within Beetext Flow that allows you to search your folders for a specific document using plain text. Beetext Flow can then associate this document with the translator who worked on it, the date it was requested, how much was invoiced and such. Beetext Flow will also automatically feed Beetext Find indexes, constantly increasing their reference potential.

Need an external provider to reference all ready translated material for context but do not want to send out a Translation Memory or Project Translation Memory. Give them restricted, secure access to the customers source and target documents to ensure what they're translating is accurate.

Integration with Third Party Software

Beetext Flow blends seamlessly with other programs to ensure your key environments are not jeopardized by Beetext Flow. In turn, we aim to maximize their efficiency. Via our flexible API's the Beetext development team is always eager to work together with you to make integration a true and viable option for you.

The **Beetext** development team is always open to suggestions on how to increase the power of Beetext Flow. We are also open to requests regarding third party software integration. Integration inquiries should be directed to our Sales Department at sales@beetext.com or 1-866-4-Beetext.

Training

Training sessions are available upon request by contacting the sale department at sales@beetext.com.

Training can be provided via an interactive online web session or a full day on-site presentation.

The topics for the online web session are selected from the Familiarization of Account (FOA) document.

A full day on-site training session curriculum would be defined upon request.

Flexible Hosting options (Beetext Hosting)

Beetext offers several hosting options ranging from budget hosting to high security hosting, all with 99.9% guaranteed availability.

Don't want to have your solution hosted? Just ask a representative about our options by contacting sales@beetext.com.

A hosting architecture document is available upon request by contacting sales@beetext.com.

Contact Information

For more information about our products and services offering or our partner program, please do not hesitate to contact us:

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