



# Plunet Business Manager - Freelancer Manual

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## Introduction

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This manual is aimed to help all Service Providers who work with Plunet Business Manager. It allows you to easily track, deliver and invoice your jobs. Below is an overview of how to use Plunet, the normal workflow for projects, as well as some other useful tips on how to use the program.

To log in visit: <https://mcis.plunet.com> and sign in using the login credentials you received from us by email when your account was created.

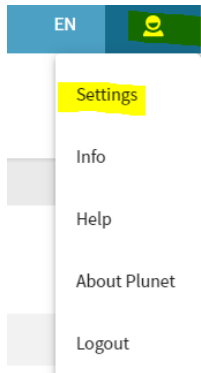
## Overview

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This section goes over the various menus and basic functions of Plunet. For information on our specific workflow, see the “Project Workflow” section.

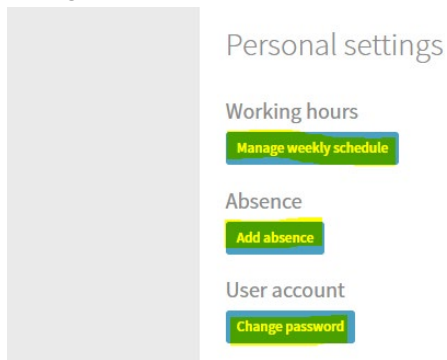


## Settings



Under “Settings” you can:

- ✓ Add absences and manage your weekly schedule
- ✓ Change your login password (required every three months)
- ✓ Change the color of the interface and the date format display, etc. (these are optional)



To add an absence on Plunet:

Click the “Add absence” button. Enter the reason and the time period and then click “Add”.



**Create absence**

Reason: Not available (Working hours)

Memo:

Type of absence:  All-day  Hourly

Period: 2021 - 10 - 20 hh : mm AM  
2021 - 10 - 25 hh : mm AM

Buttons: Cancel, Add

To manage your weekly schedule:

Hit “Manage weekly schedule” and then enter the relevant information about your regularly scheduled working hours and will help PMs to avoid assigning your work when you are not available. Use “Schedule valid from” to enter how long this schedule is applicable for, the specific times you are available (i.e., 5 pm to 10 pm), and which specific days this applies to. Once you are done, hit “OK”:

Weekly schedule

Resources: McGregor, Lindsay (Freelance)

Time zone: UTC -04:00 Canada/Eastern (User & Resource)

Weekly schedule: 2022-09-20 (Currently valid)

Schedule valid from: 2022 - 10 - 27 OK

New: 05 : 00 PM - 10 : 00 PM Monday Tuesday OK

	Monday	Tuesday	Wednesday	Thursday	Friday
12:00 AM					

Dropdown menu: Sunday, Wednesday, Thursday, Friday, Saturday

**NOTE:** Adding absences and managing your weekly schedule are helpful because it allows project managers (PMs) to work around this/avoid assigning you projects when you are unavailable.

My Data



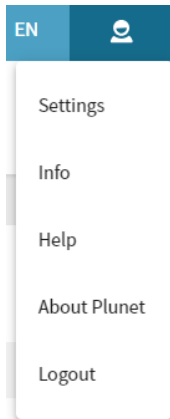
Under the **My Data** menu, you will find your contact information, address, calendar, and payment method. If your address, banking information, or email needs to be changed please contact [vm@mcis.on.ca](mailto:vm@mcis.on.ca).

**NOTE:** Do not use the “Contact persons” section unless you are a translation agency and you have more than one contact.




## [Action bar](#)

In the top right of your screen, you can find the action bar, which allows you quickly access certain pages, resources, and settings.




**EN** – You can click on **EN** to change the language. Currently Plunet is available in English, French, and German.

When you click on  in the top right-hand corner, it will open a dropdown menu for the following pages.

**Settings** – As described above, this section can be used to add absences and update your weekly schedule, but also to reset your password.

**Info** – Here you can find useful documents and links that MCIS may share when needed, including this training manual.

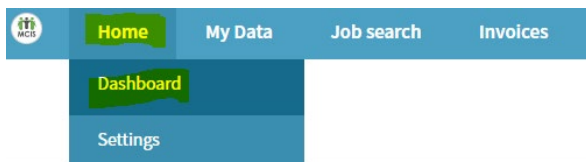
**Help** – Clicking on  opens a window with a link to further information about the resource login.

**About Plunet** – Information about the version of Plunet you are using, the release date, etc.

**Logout** – Clicking this will end your session in Plunet.

## [Dashboard](#)

Your dashboard is your homepage and is a list of all your jobs and invoices, organized by status. You can access it from the Home tab:





## Jobs

Here are what each of the sections under Jobs mean:

1. **All** → Jobs currently assigned to you with one of the following statuses: Requested, Assigned – waiting, In progress, Delivered, and Approved.
2. **Requested** → We are not currently using this.
3. **Assigned – waiting** → Jobs you have been assigned which are not currently In progress (i.e., you have been assigned revision, but the translation has not been completed yet).
4. **In progress** → Jobs you have been assigned to that are currently available for you to work on.
5. **Delivered** → Jobs that have been successfully delivered to the PM.
6. **Approved** → Jobs that have been finalized and sent to the client which can now be invoiced.
7. **Approved partial payments** → We are not currently using this.
8. **Calculated (Job search)** → Allows you to search all previous jobs.

**NOTE:** Once jobs have been invoiced, they do not have a designated section in your dashboard, but you can use this to locate them. Please see the section called “Searching previous jobs” for more information.

## Invoices

Here is what each of the sections under Invoices means:

1. **All** → Invoices that are either: Not submitted, Submitted for approval, or Outstanding
2. **Not submitted** → Invoices that are in preparation and **have not** been submitted to us for processing.
3. **Submitted for approval** → Invoices that have been successfully submitted to us but have not been processed for payment yet.
4. **Outstanding** → Invoices that we have processed and are pending payment.



**NOTE:** Once invoices have been paid, they do not have a designated section in your dashboard. Please see the section called “Searching previous invoices” for more information on how to find these invoices.

## Project Workflow

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### 1. Receive job

When a job is assigned to you, you will receive an email notification. The subject line contains the order reference number and the body includes information such as the price, timing, special instructions, and a link to log in to Plunet. If you are unavailable, please email the PM immediately so it can be reassigned or they can give you an extension.

**NOTE:** If the project is going to be completed in MemoQ, you will also receive a separate email notification about this. If you are using MemoQ, please see the training material provided for further instructions.

### 2. Review job

Once the job has been assigned to you, it should be visible in your dashboard under “In progress” or “Assigned – waiting”. If the job is “In progress” you can proceed to work on it immediately, but if it is “Assigned – waiting” you will need to wait until you receive an email notification that the previous step is completed.

Once you have located the job in your dashboard, please carefully review the relevant details under the “Specification” tab, as seen in the image on the next page.



- A** – Order number
- B** – Job type
- C** - Contact person (email them if you have any questions)
- D** – Start date
- E** – Due date
- F** – Project status
- G** – Price
- H** – Quantity (i.e., the number of words, hours, etc.)
- I** – Language combination
- J** – Work instructions
- K** – Comment (special instructions about the project)

O-2022-100186-TRA-001 **A**

Z\_City of Toronto, Animal Services - FRENCH/ENGLISH - Test

**F** ■ In progress

Contact person for job	McGregor (PM), Lindsay <b>C</b>	Start date	2022-10-13 1:00PM <b>D</b>	Price	25.00 CAD <b>G</b>
Files	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 2px;">S 1</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 2px;">T 0</div>	Due date *	2022-10-14 2:00PM <b>E</b>	Gross quantity	1 Minimum price <b>H</b>
				Net quantity	1 Minimum price

**SPECIFICATION** PRICES & TIME FEEDBACK DELIVERY

**Details**

Job no.	O-2022-100186-TRA-001 <b>A</b>
Job types	Translation <b>B</b>
Creation date	2022-10-13
Company code (invoices)	Company FFS
Description	Translation   FRENCH/ENGLISH - Test
Languages	FRENCH → ENGLISH <b>I</b>

**Work instructions** **J**

Comment  
Please only translate the highlighted text. **K**

**Source files**



### 3. Download files

In the Specification tab, you will see two blue folders labelled “S” (for source) and “T” (for target). The “S” folder will include the files to be translated as well as any reference material. To access these files, click the “S” folder:

O-2022-100186-TRA-001

Z\_City of Toronto, Animal Services - FRENCH/ENGLISH - Test

Contact person for job      McGregor (PM), Lindsay

Files



A new window will open, and you will be able to see all the files available. To download, simply click on them.

order / O-2022-100186 / \_TRA / 001 / !\_Out

Name ↑

This folder does not contain any files.

#### Released folder

-- Action for selection --    OK    Copy

Name
/source - FRENCH
Reference letter Template
/ref - FRENCH (This folder does not contain any files.)
/ref - ENGLISH
Reference Letter Template - Interpretation and Translation
343/Download
Document request template

As you can see above, this folder has multiple subfolders. Here is what these are:

- **Source:** The file(s) to be translated. **DO NOT TRANSLATE ANY FILES IN THE OTHER FOLDERS.**
- **Ref:** There are two REF folders, one for the source language and one for the target language, where any project-specific reference material will be saved.  
*NOTE: For update projects, the file you need to work on may be saved here. This should be explained in the Work Instructions.*
- **Download:** Non-project-specific reference material. This could include glossaries, style guides, etc. which should be used for all jobs for the client.





#### 4. Complete job

Once you have reviewed the job and downloaded the files, you can begin to work on the project (unless it is Assigned – waiting). For some orders, you will notice that you are assigned to multiple jobs, as our translations are all revised by a second translator, after which they are sent back to the original translator to validate. Additionally, if you are required to sign a translator’s declaration for certified or notarized translations, this is sent as a separate job. The job type will be listed in the specification tab and you can also quickly identify the job type by the 3-letter code in the name:

O-2022-100186-TRA-001

Here is what these codes stand for/the types of projects you may be assigned to:

- **TRA** – *Translation*: Initial translation for projects not being completed on MemoQ.
- **MAT** – *Machine-assisted human translation*: For projects being completed on MemoQ where machine translation will be provided for segments where there isn’t a match in the translation memory.
- **PTE** – *Post-editing*: Post-editing of machine translation output.
- **REV** – *Revision*: Either revision of a file(s) or in some cases, a revision only project for a file provided by the client.
- **VLR** – *Validation of revision* – Accepting/rejecting suggested changes made by reviser.
- **TFV** – *Target file validation* – **ONLY FOR MEMOQ PROJECTS**. Review of final file after exported from MemoQ.
- **PRD** – *Proofreading* – Normally this is post-desktop publishing review of a file(s) to ensure everything looks correct (proper line breaks, no missing text or accents, etc.)
- **UPD** – *Update* – Implementing changes, deletions, or additions made to existing translations.
- **AFF** – *Affidavit* – **ONLY FOR CERTIFIED OR NOTARIZED TRANSLATIONS**. Completion of translator’s declaration (template should be in the source folder for you).
- **TRV** – *Translation-Revision* – **ONLY FOR TRANSLATION AGENCIES**. Essentially TEP or translation, editing, and proofreading to be completed by the same agency.
- **TRN** – *Transcription* – Monolingual or cross-lingual transcription of an audio or video file.

#### 5. Deliver job

Once the job is done, it needs to be uploaded to Plunet and delivered. Click on the target folder to open it:

O-2022-100186-TRA-001  
Z\_City of Toronto, Animal Services - FRENCH/ENGLISH - Test

Contact person for job      McGregor (PM), Lindsay

Files      1      0

Click and drag your file(s) into the box provided:



Upload files

Upload files via Drag & Drop

Select files... Upload

Then hit "Upload".

Upload files

Reference letter Template-EN.docx	14.72 KB	Upload
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Select files... Upload (14.72 KB)

Now that the file is uploaded, you need to deliver it. However, if you are working on a revision, you will need to enter feedback first. To do so, go to the Feedback tab, rate the translation, enter a comment (if needed), then hit "Finalize feedback".

[O-2022-100186-REV-002](#)

[Z\\_City of Toronto, Animal Services](#) - FRENCH/ENGLISH - Test

Contact person for job: McGregor (PM), Lindsay Start date  
Files: S I Due date \*  
T 0

**SPECIFICATION**   **PRICES & TIME**   **FEEDBACK**   **DELIVERY**

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**Feedback**

Feedback for job TRA-001

• How familiar was the translator with the subject matter of the text?		100%
• How appropriate was the terminology used in the translation?		80%
• How well was the translation formatted compared to the source document?		100%
• How accurate was the translation?		100%
• How would you rate the translator's use of grammar and punctuation?		80%
• How appropriate was the tone used in the translation?		100%

Overall rating in percent (weighted) 93%

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Comment

Translation was good, only minor grammatical errors

Reset Finalize feedback



Now you can deliver the file by going to the deliver tab and selecting “Final delivery”. You may have the option to make a partial delivery, but this is only if you are working on a project with a lot of files or a tight deadline and you are delivering files as they are completed. The PM will inform you if this is required.

O-2022-100186-TRA-001  
Z\_City of Toronto, Animal Services - FRENCH/ENGLISH - Test In progress

Contact person for job	McGregor (PM), Lindsay	Start date	2022-10-13 1:00PM	Price	25.00 CAD
Files		Due date *	2022-10-14 2:00PM	Gross quantity	1 Minimum price
				Net quantity	1 Minimum price

SPECIFICATION PRICES & TIME FEEDBACK **DELIVERY**

Deliver data to server

Target files

Send delivery

Delivery comment

Partial delivery Final delivery

Save

Once you have successfully delivered your file, you should see that the status has changed from “In progress” to “Delivered”. If it still says, “In progress”, you have not successfully delivered it, meaning the next step of the project will not be triggered to start/the PM may not realize the project is ready to be delivered, causing delays.

## 6. Invoice

Once the order is delivered to the client (which may be a couple days after you finish your jobs), you will receive an email notification that the job has been approved. Now you can invoice by going to the “Approved – Please create invoice” section of your dashboard:

Dashboard

- Jobs
- All (2)
- Requested
- Assigned - waiting
- In progress (1)
- Delivered
- Approved (1) - Please create invoice

Select the order(s) you want to invoice (you can invoice multiple projects at the same time) and hitting “Create invoice for approved jobs”:



## Jobs

--- Options ---  Order no. Job no. →

Customer ↓	Job no. ↑	Start date ↓	Due date ↓	Delivered on ↓	Project name	Status ↓
<input checked="" type="checkbox"/> Walk-in / Non-Contract Client	O-2022-100116-TRA-001		2022-10-11 8:00 PM	2022-10-12 8:17 AM	Oncology Report - Certified	<input checked="" type="checkbox"/> Approved

Total price in CAD 113.00 CAD 1 Results

Create invoice for approved jobs

Now your invoice has been created (but not submitted) and you can enter your own internal invoice number, if needed. Once you have done this, hit “Submit invoice for approval”.

Invoices 0024318

After checking all the details, please submit the invoice for approval.

### General invoice data

Internal invoice number	0024318	Status	Not submitted
My invoice number	<input type="text"/>	Invoice date	2022-10-13
Sender	McGregor, Lindsay (Freelance)	Value date	2022-10-13
Invoicing statement	<input type="button" value="Print invoice"/>	Payment due	2022-11-12

**NOTE:** If you do not hit “Submit invoice for approval”, it will remain in preparation and will not be processed for payment. You can tell it was properly submitted if it shows here in your dashboard.

## Invoices

All (1)

Not submitted

Submitted for approval (1)

Outstanding

If it shows under “Not submitted”, you need to go back into the invoice and hit “Submit invoice for approval”.

You can download a copy of your invoice for your records by hitting “Print invoice”:

Invoicing statement

This will generate a PDF version that you can click on and download:



Invoicing statement

Print invoice

2022-10-13 0024318.pdf

**PAYMENT TERMS – Invoices are processed by MCIS twice a month on the 15<sup>th</sup> and the last day of the month. Any invoices received before those cutting dates should be processed and paid within 2 weeks (unless you are being paid by Telpay or Paypal, in which case it should be paid within 30 days).**

## Useful Tips

### Searching previous invoices

Once invoices have been paid, they will no longer show up in your dashboard in any of the sections described above. To locate these invoices, you can run an invoice search by going here:



Filter by date and invoice status and hit “Update search”:

Select

Description Select

Invoice date  to  Day | Month | Year

Company code (invoices)

Status

Invoice type

Additional filters

Display results in

Once you have your results, click on the invoice to open it:

### Result

--- Action for selection ---

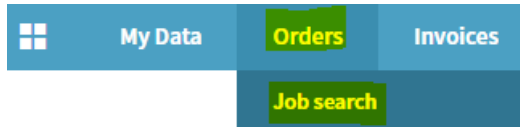
Exported ↓	Creditors ↑	Invoices ↓
<input type="checkbox"/>	✓	McGregor, Lindsay (Freelance) 0020256
<input type="checkbox"/>	✓	McGregor, Lindsay (Freelance) 0019553



From here you will be able to see all the relevant information (status, invoice date, date paid, etc.) and you can also download a PDF version as described above.

### [Searching previous jobs](#)

Similar to invoices, jobs will no longer show up in the “Jobs” section of your dashboard once invoiced. To search these previous jobs, select “Calculated (Job search)” or go here:



You can filter by all of the job statuses previously described (Requested, Assigned – waiting, In progress, Delivered, and Approved), but there are also other options:

1. *Invoice created* → Invoice for job has been created and submitted to us, but not processed.
2. *Invoice checked* → We are not currently using this.
3. *Invoice accepted* → Invoice for the job has been processed and is pending payment.
4. *Paid* → Job has been invoiced and paid.
5. *Without invoice* → Job is not to be invoiced because it is unpaid. For example, VLR and TFV steps are not paid because it is included in the price of translation, so once the job is finalized this is how they are marked.

Filter by desired date range and job status, then hitting “Update search”.

Then you will see a list of all jobs that meet those parameters below.

### [Locked Projects](#)

Plunet only allows one person to have the same job open at once. If someone else has it open, you might notice that you see a red lock icon or find that you are unable to make any changes.



**O-2017-010038-TRA-001**  
Z\_City of Toronto, Animal Services - ENGLISH/ARABIC - TEST - Training session...

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Contact person for job	Pedrogan, Williams	Due date *	2017-01-20 12:00AM	Prices
Files				Gross quantity
				Net quantity

To unlock the project, just click the red lock icon. If it asks if you are sure, hit “OK” and you should notice the lock icon has disappeared and you are now able to work on the project.

The screenshot shows a project record for 'O-2017-010038-TRA-001' that is locked. A red box highlights the lock icon and a message: 'This data record is locked by another user.' A dialog box is open with the question 'Are you sure?' and 'OK' and 'Cancel' buttons.

### [What to do if you forget your password](#)

If you forget your password, enter the wrong password three times in a row, or fail to update your password before it expires, you will need to use the “Set up a new password” option on the login page:

**Login** EN ▾

User name

Password

**Login**

Once you do, you will be prompted to enter your username and a security code (a text captcha):

### **Reset password**

Please enter your user name to reset the password.  
You will receive an e-mail from us shortly.

User name

Security code [Request audio captcha](#)



If you are having difficulties with the text captcha, you can also request an audio captcha:

Security code [Request audio captcha](#)

~~rw4vnc~~

Once you have correctly entered the security code and your username, you should receive a verification code to your email. Enter the verification code and hit Confirm:

## Reset password

Please enter the verification code that was just sent to the e-mail address associated with your user name.

If you did not get an email, please check if the user name [mcgregorlindsay@hotmail.com](mailto:mcgregorlindsay@hotmail.com) is correct. If the problem persists, please [contact your administrator](#).

Verification code [Resend code](#)

[Back to login](#)

[Confirm](#)

You can then enter a new password and then hit Change password, to finish:

## Reset password

Please create a new, strong password that you do not use for other websites or that is easy to guess.

New password

Password rules

- ✓ At least 8 characters long
- ✓ At least one lower case letter
- ✓ At least one number

Confirm new password

[Back to login](#)

[Change password](#)

If you are still unable to log in, please contact [translation@mcis.on.ca](mailto:translation@mcis.on.ca).