cApStAn Plunet User Guide

Introduction

This description is aimed at all active cApStAn vendors. With Plunet you can prepare and deliver your jobs, create invoices and maintain your own data in the system. This description gives you a brief overview of the workflow in a typical job.

Login

Go to **http://plunet.capstan.be**.

Log in by entering the user name and password that has been set up for you or that you have created.


If you have forgotten your password, please click on the **Set up a new password** dialog to start the password reset procedure.

If you have forgotten your username, please click on the **Problems during login?** dialog to request your details.

NOTE

If you enter the wrong password three times in a row, you will be automatically locked out of your account. To unlock your account, please follow the **Problems during login?** dialog.

Navigation
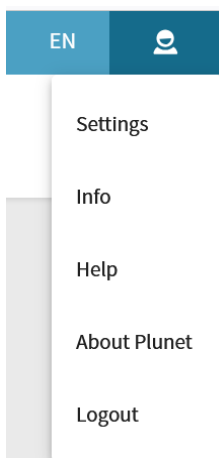
Click on the User icon in the top right of the screen to view the various menus about your user account.

Settings

Here you can specify your working hours and your weekly working schedule. If you keep this up-to-date, we will know when the best time is to assign tasks to you. It will also help us calculate when you could be able to deliver a task. For example, if on some days you work only 2 hours, it helpful for PMs to know that when assigning tasks.

You can specify for which time period a schedule is valid for, or create a new one for a new period of time.

You can add or remove hours by clicking on the half-hour increments in the hourly breakdown below.

If you are going on holiday, or will not be available over a certain time period, please use the Absence menu to add this to our system. This is the only place where absences are logged and it helps our PMs when they assign

tasks.

User account

It advised that if you did not set your own password, that you use the change password function to set it up yourself.

Some further miscelaneous settings appear on the right of this screen, but those can be left as is.

Info

The Info menu gives you helpful articles and guides about using Plunet and working with cApStAn. For example, here you can find our full guide to using OmegaT, as well as a link to our Odoo Knowledge Base.

Help

The Help button will open the present guide.

Logout

Click on this btton to log out of Plunet.

Dashboard

As soon as you log in, you will see the **Dashboard**. This page contains an overview of your jobs and invoices, organized by status. By clicking on a status (e.g. In progress or Delivered), you open a detailed list of all elements with that status.

The Dashboard can also be accessed at any time via **Home → Dashboard**.

My Data

The **My Data** screen shows you your vendor profile in the cApStAn database on Plunet.

Here, you can edit some of your details and view the rest of your details.

If some details in your profile are incorrect, incomplete or have changed, please contact our EHR at **external.resources@capstan.be**

Some fields here are optional or unnecessary, so please only fill in what is necessary for cApStAn. We will need your **First Name, Last Name, Opening (how you wish to be addressed), telephone numbers and email addresses**.

If there are more than one people working at your agency or business, please indicate them here.**If you work alone as a freelance linguist, you do not need to fill in anything here.**

Below the communication details, you will find other details relevant to your work for cApStAn. This includes your addresses, properties and price lists. You cannot edit these details, so please contact **external.resources@capstan.be** for any changes.

Job statuses

Your current and past jobs are listed under **Dashboard → Jobs**. The statuses are as follows:

- **Requested →** We have sent you a request about these jobs and are waiting for you to accept/decline the jobs.
- **Assigned - waiting→** You have been assigned to these jobs, but you cannot start working on them yet (for example, you will be proofreading a translation, but that translation is not complete yet).
- **In progress →** The jobs that you are currently working on or can start working on.
- **Delivered →** The jobs that you have delivered.
- **Approved→** The jobs that have been approved by us and can be invoiced. You will have received an automated message from us when the job was approved, letting you know that you can invoice it.

Generally, you'll find your new jobs in the **In progress** status. When you click on a job, the job view opens as an overlay with all of the relevant data for the selected job.

In case you see new jobs in the **Requested** status this means we're waiting for your confirmation. Please reply to view the list of jobs that have been requested by the project manager, and their details. You can then confirm your availability under **Job → Specification**.

Job Assignment

You will receive an e-mail with all of the relevant details from a cApStAn PM. The subject line contains the job number and other relevant details, and the message body contains the further info about the job. The job e-mail is also a request to log into Plunet and download all of the documents required to complete the assigned job. The whole workflow is described in detail below.

Working on a job

You can find your job in the **Dashboard** under **In progress**. Clicking on the job number opens the job view in an overlay.
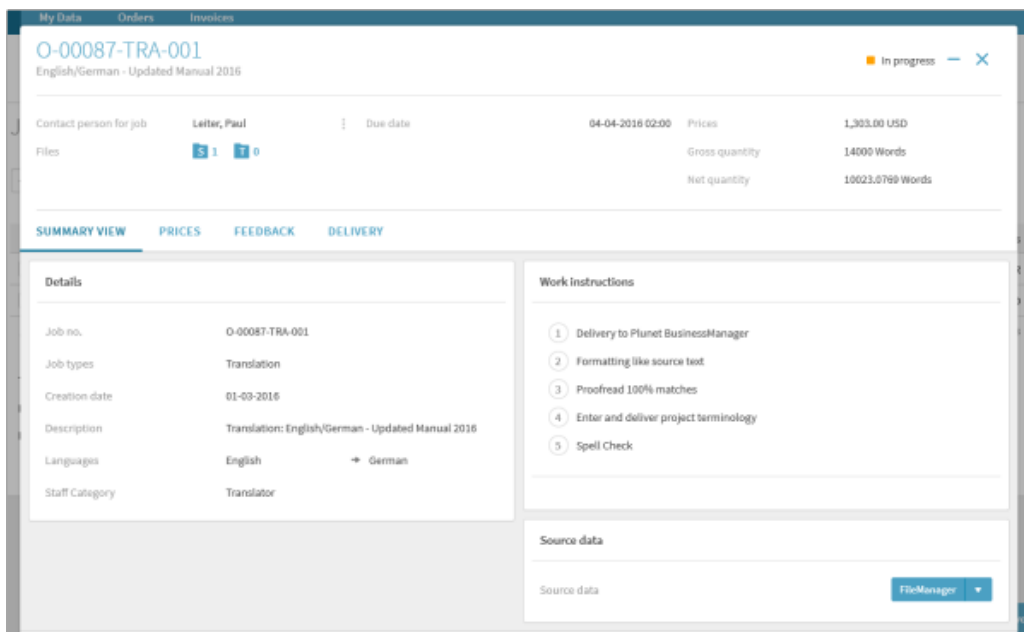
Download source data

Go to the Source data section and click on the **FileManager** button to pick up the source documents.

The **!_out** folder contains all of the files you need to carry out the job, as well as a copy of the job e-mail you have already received.

Deliver target data

JOB → DELIVERY

Once you have completed the job, you can deliver the documents in Plunet. Open the job and go to the **Delivery** tab.

1. Under **Deliver data to server**, click on **Target data**. Upload your completed documents by clicking on **Search...** and selecting the documents. Alternatively, you can simply Drag & Drop the files to the Plunet FileManager.

2. Click **Upload** and the data will be saved in the **!_in** folder for your job. Once the upload is complete, you can close the window and return to the detailed view of the selected job.

3. If a checklist of work instructions needs to be completed for the job, you need to review the checklist under **Check work instructions** and save the changes before the job can be delivered. To do so, select all of the work instructions with **Not carried out** or **Carried out**.

4. Under **Send delivery** you have the option of leaving a delivery comment. Afterwards, click on either **Partial delivery** or **Final delivery**, depending on the process of the job. A message appears stating that this action will confirm the delivery of the job. The delivery date appears underneath your delivery comments. We will then receive a delivery e-mail containing the job data and your delivery comments.