

MLIS-5016 TransAccount

WP 5

Deliverable D5.2

Adaptation of the work plan

Version 1.0 from 03/08/2001

TransAccount Consortium

MLIS PROGRAMME

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Contract Reference

The following changes refer to the pages 12 – 18 in the MLIS contract MLIS-5016 TRANSACCOUNT 26294/0, generation No. 9576, signed by the Commission, 27.12.1999.

MLIS PROGRAMME

FORM INF3

WP Description	For WORKPACKAGE N° WP0		
WP title	Requirements and Specifications		
WP leader	PricewaterhouseCoopers (PWC) [AMYOT-EXCO (AM)]		
WP contributors	PWC (EU) - SYS - EP		
Start month	Month 0	End Month:	Month 5
Estimated labour effort	7 person-months		
Initial state of work, (inter-)dependencies and intended income	<p>Objectives : Define accurately user requirements and terms of reference of the project</p> <p>This WP will provide knowledge specific content which addresses the need for users to understand differences between French GAAP and IAS, beyond translation of text and transposition of accounting elements. It provides linkages to other knowledge sources and related information on international initiatives (e.g. XBRL and IAS)</p> <p>Assessment translatability of financial statements and similar documents.</p> <p>Multilingual Accounting and Management Terminology: Collection and assessment of accounting multilingual terminology; Survey and collection of accounting and management supporting documentation, e.g. annual accounts forms and plans, literature and helps explaining and/or underlying accounts, such as national or sector guidelines, regulations, etc...</p> <p>Accounting systems: Survey and assessment of technical documentation as well as regulatory and legislative materials, for each national accounting system.</p> <p>Validation Procedure and Validation Suite.</p> <p>Extend existing comparative accounting knowledge base from PWC.</p>		
Constituent task(s)	Assessment of content and format (AM)		PWC
	Multilingual Accounting and Management Terminology (EU)		PWC
	Accounting systems (AM)		PWC
Deliverables	<p>D0.1, User requirements, Report (delivered as D0a)</p> <p>D0.2, Assessment of translation quality levels, Technical report (old D0d)</p> <p>D0.3, Validation suite, Data file (delivered as D0h)</p> <p>D0.4, Validated Translation Corpus (new)</p>		

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FORM INF3

WP Description	For WORKPACKAGE N° WP1		
WP title	Accounting Knowledge Base		
WP leader	PricewaterhouseCoopers (PWC) [<i>EUROSOURCES (EU)</i>]		
WP contributors	SYS - EP – PWC (<i>AM</i>)		
Start month	Month 2	End Month:	Month 14
Estimated labour effort	12 person-months		
Initial state of work, (inter-)dependencies and intended income	<p>Objectives : Build an accounting knowledge base; implement the component that will integrate the sub-databases in the accounting knowledge base and the knowledge-based browser.</p> <p>This work package is meant to design and implement the accounting knowledge base that includes and integrates :</p> <ol style="list-style-type: none"> 1. A collection of a multilingual aligned corpus of financial accounts/reports that will be used to feed the translation memory ; 2. A monolingual terminological database ; <p>The knowledge-base will be accessible by using a knowledge-based browser, which will provide a unified view of the knowledge base.</p>		
Constituent task(s)	Multilingual Aligned Corpus (EU)		EP
	Monolingual terminological database (EU)		PWC
	Development of Accounting knowledge base website (<i>old: Design of the Conceptual Database</i>)		PWC
Deliverables	<p>D1.1, Accounting text database (multilingual and aligned), data file (<i>old D1a</i>)</p> <p>D1.2, Monolingual terminological knowledge base, data file (<i>old D1c</i>)</p> <p>D1.3, Design of the accounting knowledge base, technical report (<i>delivered as D1f</i>)</p> <p>D1.4, Accounting knowledge base software (<i>new</i>)</p>		

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FORM INF3

WP Description	For WORKPACKAGE N° WP2								
WP title	Thesaurus-based Account Translator								
WP leader	ALPNET Technology (EP) [<i>ELECTRONIC PUBLISHING (EP)</i>]								
WP contributors	(EU -) SYS – PWC (AM)								
Start month	Month 0 End Month: Month 23								
Estimated labour effort	10 person-months								
Initial state of work, (inter-)dependencies and intended income	<p>Objectives : Construction of thesauri for 2 accounting systems (FR, IAS), development of an account translator between these systems.</p> <p>This work package is meant to develop thesaurus-based translators to translate balance sheets, income statements and notes to the balance sheet between the FR accounting system and IAS accounting systems.</p> <p>It involves the construction of specialised unified thesauri for accounting systems including translation rules between idiosyncratic concepts, and the development of parsers and generators to build a conceptual representation from an accounting document or generate an accounting document from the conceptual representation.</p> <p>The development of thesauri will build on previous results achieved by PWC in the domain of multilingual thesauri.</p>								
Constituent task(s)	<table style="width: 100%; border: none;"> <tr> <td style="width: 80%;">Thesaurus-based Account Translators</td> <td style="text-align: right;">EP</td> </tr> <tr> <td>Accounting terminology ontology development in French / English (<i>old: Specialised Unified Thesauri</i>)</td> <td style="text-align: right;">PWC</td> </tr> <tr> <td>(EU)</td> <td></td> </tr> <tr> <td>Parsers and Generators for Conceptual Representation</td> <td style="text-align: right;">EP</td> </tr> </table>	Thesaurus-based Account Translators	EP	Accounting terminology ontology development in French / English (<i>old: Specialised Unified Thesauri</i>)	PWC	(EU)		Parsers and Generators for Conceptual Representation	EP
Thesaurus-based Account Translators	EP								
Accounting terminology ontology development in French / English (<i>old: Specialised Unified Thesauri</i>)	PWC								
(EU)									
Parsers and Generators for Conceptual Representation	EP								
Deliverables	<p>D2.1, Form-based parser/generator for accounts for US and FR accounting systems, software (<i>delivered as D2a</i>)</p> <p>D2.2, Multilingual terminology database (<i>old: Accounting thesauri for FR, IAS systems</i>), data files (<i>old D2c</i>)</p> <p>D2.3, Integrated thesaurus-based translators between US and FR systems (<i>delivered as D2f</i>)</p>								

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FORM INF3

WP Description	For WORKPACKAGE N° WP3	
WP title	Financial Text Translator	
WP leader	SYSTRAN (SYS)	
WP contributors	PWC (EU) - EP – PWC (AM)	
Start month	Month 0	End Month: Month 29 (23)
Estimated labour effort	18 person-months	
Initial state of work, (inter-)dependencies and intended income	<p>Objectives : Provide a toolset for the translation of text elements of accounting documents between the different accounting and management texts by integrating existing translation components and adapting and/or developing translation components.</p> <p>This work package will:</p> <ol style="list-style-type: none"> 1. integrate an existing memory-based translation (MBMT) system using the translation memory developed in WP1 to translate repetitive elements of a text, 2. adapt a robust transfer-based machine translation (TBMT) system developed by one of the partners to the domain of financial texts to translate free variable elements of text, and <p>Each of these components will be designed to address specific translation issues and the final translation will include translation fragments provided by each translation component. These components will be integrated using the multi-level translation architecture developed by SYS. The language pairs will be EN/FR and FR/EN.</p>	
Constituent task(s)	Integration of Memory-Based Translation Memory System (EU)	EP
	Adaptation of Transfer-based Machine Translation System	SYS
Deliverables	<p>D3.1, translator for financial reports (text) between EN →FR and FR →EN, software, SYS</p> <p>D3.2, Integrated text and form translator for accounting reports, report : SYS</p>	

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FORM INF3

WP Description	For WORKPACKAGE N° WP4		
WP title	System Integration and Validation		
WP leader	SYSTRAN (SYS)		
WP contributors	PWC (EU) – EP (- AM)		
Start month	Month 6	End Month:	Month 29 (23)
Estimated labour effort	18 person-months		
Initial state of work, (inter-)dependencies and intended income	<p>Objectives : Analysis and design of the system's architecture; implementation of the communication sub-system; implementation of the user interface sub-system; integration of the sub-systems and self-assessment.</p> <p>The work package includes the following tasks:</p> <p>Integrate in browser, provide on demo website and test system with pilot group from PWC.</p> <p style="padding-left: 20px;">1 - assess and evaluate the effectiveness of the equivalence of the financial statements presented in their own system and language, once they have been analysed by the project.</p> <p style="padding-left: 20px;">2 - They will evaluate the results and the accuracy of the results of the processed financial statements, initially defined by them.</p> <p style="padding-left: 20px;">3 - They will report the differences, inaccuracies or errors, which will then be integrated</p> <p>Implement feedback and provide showcase demonstration site in final phase of project.</p>		
Constituent task(s)	User Interface deployment in web browser		SYS
	System Integration and Implementation		SYS
	Pilot group testing, feedback and refinement, project validation		PWC
Deliverables	<p>D4.1, Communication Sub-System: Browser deployed demonstration prototype :</p> <p>D4.2, User feedback report :</p> <p>D4.3, Validation Report</p>		

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FORM INF3

WP Description	For WORKPACKAGE N° WP5		
WP title	Management, exploitation plan and dissemination		
WP leader	ALPNET Technology (EP) [EUROSOURCES (EU)]		
WP contributors	SYS - EP – PWC (AM)		
Start month	Month 0	End Month:	Month 29 (23)
Estimated labour effort	15 person-months		
Initial state of work, (inter-)dependencies and intended income	<p>Objectives : 1 - Provide timely and efficient administration and financial co-ordination for the project, ensure timely and qualitative performance of the project and its results; 2 - Promote the project concepts and solutions for widespread adoption, elaborate an exploitation plan for deployment of TransAccount application and commercialisation of derived products.</p> <p>Make project records and reports accessible to partners through the project management web site.</p> <p>1 - Financial and contractual administration: Establishing and maintaining financial records - Project administration - Document production and archive - Administrative guidance - Logistics - Technical co-ordination - Project strategy - Quality control - Reporting - Clustering</p> <p>2 - Exploitation Plan and IPR: Study of market aspects and a suitable business case for the products and services derived from TransAccount results and planning optimal commercial exploitation. Preparation on a Technology Implementation Plan (TIP) following the EC format.</p> <p>3 - Information Dissemination: Elaboration of an information dissemination plan, defining actions, dates and dissemination channels such as flyers, WEB server, workshops, participation in conferences and fairs, etc.</p> <p>Information dissemination actions will cover 3 streams: - Public: Widespread dissemination of public available material through a WEB server, flyers, press announcements, etc.</p> <p>- Sector focussed: Links with external organisations, special interest groups, conferences and relevant programmes. Presentation of project results on relevant industry events and workshops. This could be done as part of a clustering activity.</p> <p>- Standardisation: The experience gained in the project will be formulated as proposals in relevant groups such as those formed around the PAROLE / SIMPLE models.</p> <p>Dissemination plan to demo at Cebit, IJCAI, COLING; Paper writing for EAFT, ELRA, INFOTERM; Workshop(s) on translation of ontologies.</p>		
Constituent task(s)	Financial and Contractual Administration	EP (EU)	
	Exploitation Plan and IPR	EP (EU)	
	Information Dissemination	PWC (AM)	
Deliverables	<p>D5.1, Detailed work plan (delivered as D5a)</p> <p>D5.2, Adaptation of the work plan (new, replaces D5c)</p> <p>D5.3, Information dissemination plan and material (old D5d)</p>		

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Form INF4

PROJECT DELIVERABLES

Due End of Month No	Ref	Deliverable title	Nature RESPONSIBLE	Dissemination level
Month 1	WP5 (D5.a) D5.1	Detailed work plan (<i>delivered</i>)	R / EU	CO
Month 5	WP0 (D0.a) D0.1	User requirements, report (<i>delivered</i>)	R / AM	CO
(Month 5) Month 21 (add +1)	WP0 (D0.d) D0.2	Assessment of translation quality [<i>General quality levels of the project, technical report (deleted)</i>]	R / PWC (AM)	CO
Month 5	WP0 (D0.h) D0.3	Validation suite, data file (<i>delivered</i>)	O / AM	CO
(Month 12) Month 22	WP1 (D1.a) D1.1	Accounting text database (multilingual and aligned), data file	O / PWC/EP (AM)	CO
Month 12	WP2 (D2.a) D2.1	Form-based parser/generator for accounts for US and FR accounting systems, software (<i>delivered</i>)	P / EP	CO
(Month 14) Month 24	WP1 (D1.c) D1.2	Monolingual terminological knowledge base, data file	O / PWC (EU)	CO
Month 14	WP1 (D1.f) D1.3	Design of the accounting knowledge base, technical report (<i>delivered</i>)	R / EU	CO
(Month 14) Month 24	WP2 (D2.c) D2.2	Accounting thesauri for FR - IAS systems, data files	O / PWC (EU)	CO
Month 18	WP2 (D2.f) D2.3	Integrated thesaurus-based translators between US and FR systems, software (<i>delivered</i>)	P / EP	CO
Month 18	WP3 / D3d D3.1	Translator for fin. reports (text) EN→FR and FR→EN, software (<i>delivered</i>)	P / SYS	CO
Month 20	WP5 (D5.e) D5.2	Adaptation of the work plan [<i>Technology Implementation Plan (TIP)</i>]	R / PWC/EP/SY S	CO

(Month 18) Month 22	WP3 / D3.e D3.2	Integrated text and form translator for accounting reports, report	P / SYS	CO
(Month 19) Month 26	WP4 (D4.c) D4.1	Communication Sub-System: Browser deployed demonstration prototype	R/P / SYS	CO
Month 21	WP0 D0.4	Validated material (<i>new</i>)	O / PWC	CO
Month 26	WP1 D1.4	Accounting knowledge base software (<i>new</i>)	P / PWC	CO
(Month 23) Month 29	WP4 (D4.e) D4.2	User feedback report	D / PWC	CO
(Month 23) Month 29	WP4 (D4.f) D4.3	Validation Report	R / PWC (AM)	CO
(Month 24) Month 30	WP5 (D5.d) D5.3	Information dissemination plan and material	R / PWC + SYS + EP	PU