termweb®

Administrator and User Manual

interverbum Tech
Making Terms Matter

Administrator and User Manual
TermWeb® Professional Version 3.18.x

General information

The following description covers all the functions available in Term Web Professional V3.
The functions, and also the dictionaries and dictionary sections, to which you have access, are associated with your user group and authorization.
Important note: Certain functions described in this document may or may not be available in your installation (or enabled by the administrator of your installation).

Log in

Enter your company name (**Client**) if it has not been automatically entered, your **User name** and **Password** issued by the administrator and then click **Log in**. (In applicable cases, also please select user interface language.)
If the administrator and installation require that members of your group change password at regular intervals, the following dialog will appear after that interval:

Then just enter a new password twice and click **Save**.
You use the same process if you have got an email with information about your new account and the administrator requires you to select and fill in a password before logging in.
If the multiple-client function has been enabled, the login dialog will look like this:

If you are a user in just one client, the user name and password will give you access to the selected data of that client.

If you are defined as a multiple-client user (defined with the same login credentials in more than one client), you will be asked to select the client in a separate dialog:
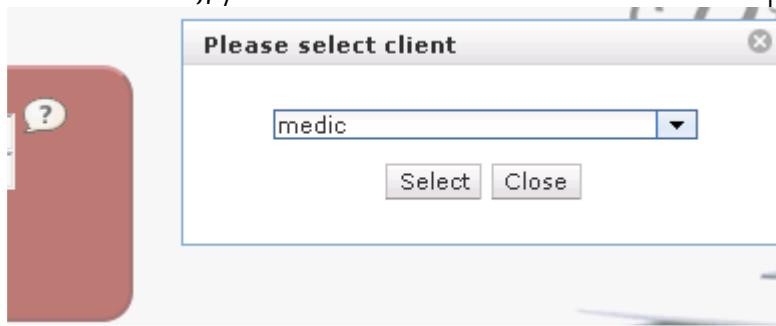
Then select the client from the list and click **Select** to log in.

If you are already logged in but want to log in using a different authorization, log off (click **Log out** in the top right-hand side of the window), enter the new **User name** and **Password** issued by the administrator and click **Log in**.

Note: If you have a multiple-user-interface-languages installation, you should first select the desired language.

In case you have forgotten your password and the show forgotten link function has been enabled by the administrator, you can click the **Forgot Password?** link. Then you will get a dialog

where you enter your client name and user login name.
The following is displayed:

Then just click **Back to Login Page**.
An email will then be sent to your email address registered in TermWeb with a link that you can use to set a new password:

Enter the desired new password twice and click **Save**, and you will be able to log in using the new credentials.

Overview
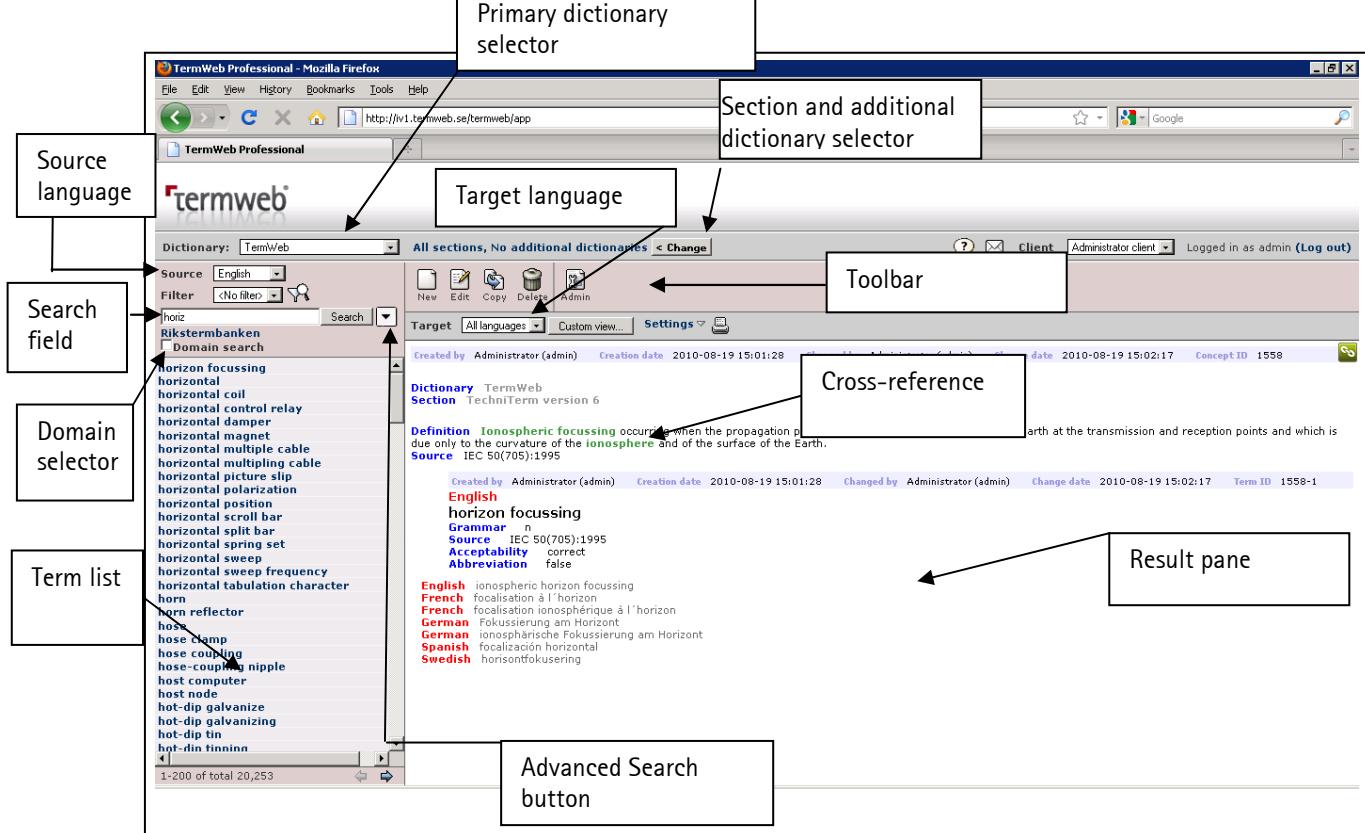
The number of terms in the current source language (possibly filtered) term list is shown at the bottom of the list. (For more than 200 terms, page using the right arrow below the term list.):
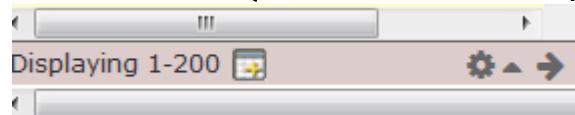
Set the source language, target language and how much you want to view in the result pane

If you want to find a term in a language other than the current source language, then select the desired source language from the dropdown in the **Source** field.

You can also limit the results shown to *one* target language.
Click the box beside **Target** above the result pane and choose the desired target language.
If you would like all languages to be displayed, choose **All languages** in the **Target** box.
To specify how much term information is shown for each language in the dictionary:
Click on **Custom view** and choose which languages should be shown along with the level of detail you want for each language (i.e. the term only or all term information).
Using one of the **Select all** links, you can choose to show all language terms expanded or collapsed or hide all languages. Please note that the term in focus will always be displayed expanded (with maximum term information as defined by the view applied to the user's group).
Then choose **Custom** from the **Target** dropdown.

If you (are authorized and) would like to display the concept's history (information about when and by whom the term record was created and changed), click Click ⚙▾ (previously Settings) and check the **Show history** box. Deselect the **Show history** checkbox when you want to hide the information.
If you would like another date format displayed (the default is the ISO format YYYY-MM-DD), click the cogwheel icon ⚙▾ and select the desired date format pattern from the **Show dates as** dropdown.
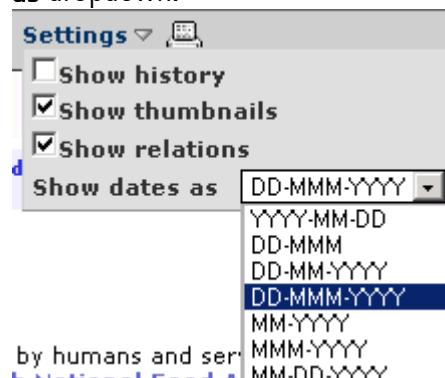
Then, in the example, date fields as well creation date and change date metadata will be displayed in the selected date format:

Note!

The administrator can also specify which fields are displayed for each user, e.g. which level of information is shown. A single term record can thus be displayed differently depending on which user is logged in.

Search for a term

You may want to choose the dictionary first. See What is a dictionary?.
If you want to limit the search to certain sections in the dictionary, begin by choosing the desired sections. See the section What is a section?.
Select the language of the term you want to find.
If you want to search for a term in Spanish, for example, then select **Spanish** from the **Source** dropdown.
Then type the search string in the **Search** field.
If you want to limit the search to a certain domain or subdomain, click **Domain search** under the search field and select the domain(s). See also the section entitled Show a particular domain or subdomain.
The default search methods may vary according to the settings made at installation time (as an example if asterisks are needed or not).
Example 1: Type *dog* and click **Search**. A list of all the terms beginning with "dog" will be shown.
Example 2: Type *dog* and click **Search**. A list of all the terms that contain the text string "dog", e.g. 'dog', 'army dog training centre' and 'watchdog' will be shown.
Example 3: Type *dog* and click **Search**. A list including the term "dog" and following terms will be shown.
Click the term you want to see.
If more than two languages are displayed and you want to see *all* the information in a particular language for a given term, click the term in the desired language. The term and all of its detailed information will be shown in the result pane.
(See also information for customizing the display under "Set the source language, target language and how much you want to view in the result pane" above.)

Advanced search

If you are not sure of the spelling, or wish to search for a term or character string in fields other than the term field, you can use the Advanced search options. Also, you can select if you want to clear the search field (or keep the search string) when changing search language and choose if you want to enable normalized search.

Fuzzy searches – searching for approximate strings

If you are unsure of the exact spelling of the term:

1. Click on the advanced search button (   ). (To close the dialog, just click the button again.)
2. Check the box **Enable fuzzy search** and then click **Apply**.

Advanced search options

Please note! Wildcards are not supported when using fuzzy or multi-field search.

☐ **Clear search on language change**

☐ **Enable normalized search (single-byte and double-byte characters)**

☑ **Enable fuzzy search**

☐ **Enable multi-field search**

Apply   Cancel

3. The button for advanced searches changes color: .
4. Write the term "plattform" or a part of the term (without asterisks, unless the text you are looking for includes asterisks) in the search field, with Italian as the source language. The terms that approximately match the search string will be shown, e.g. *piattaforma.*

Search in multiple fields

If you want to search for a particular string that might be found not only in a term but even in a definition or comment field:

1. Click on the advanced search button ( ).
2. Check the box **Enable multi-field search.** Check then the **Selected fields** box and choose the fields that you want to search. Click **Apply**.

3. Type the search string (<u>without asterisks</u>, unless the text you are looking for includes asterisks) in the search field. All the term records are then shown where some part of the chosen fields (on the concept level as well as the source language term fields) includes the search string. Note that the advanced search button changes color when the multi-field search option is activated.

Clear search on language change

Select this checkbox if you do <u>not</u> want to keep the search string when you change Source language.
If you want to search for the same string after having changed Source language, please deselect this checkbox.

Enable normalized search (single-byte and double-byte characters)

This option applies to wildcard searching only. If you select this option, characters with the same function but stored differently, as single-byte or double-byte characters, will be considered equal during filtering and term list sorting. If the option is selected, the normalized

value will be used in filter criteria and thus filters can return results for both single-byte and double-byte characters. Also, normalized values are used when calculating the term list order so that both single-byte and double-byte characters are considered equally during term indexing. (For existing entries in existing pre-3.18 databases the administrator will have to reindex the dictionary for the new term list order to take effect.)

Two-language search and display

To search for a string simultaneously in two languages, click the right-arrow > below the cogwheel icon:
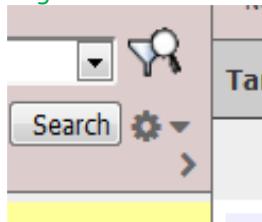
Then select one of the following options:

a) If you just want to display the second language terms corresponding to the search results in the first language, select **Display terms** in the **Right column** dropdown. Then select **Source** (language) under "Right column":

b) If you want to perform the search also in the second language and display all results, select **Display and search** in the **Right column** dropdown and then select **Source** (language) under "Right column".

Here, all the terms in either of the languages fulfilling the search criterion are displayed, paired with one corresponding term in the other language. If no term exists in the other language, there will be an empty space in the column of that language.
If you then want to narrow the two columns, click the left-arrow **<**
To widen the columns and view the right column options again, click the right-arrow **>**.
To disable two-language search and display, select **Disabled** in the **Right column** dropdown (and preferably click the left-arrow **<**)
Please note that the two-language search and display setting is user-specific and remembered between logins.

Use filters to search and export

If you want to search for term records or term equivalents that fulfill specific criteria, e.g. all term records that do not have a definition, term records that do not have a term equivalent in a certain language or term equivalents in a certain language with a certain status, you can use the filter function.
Note! A filter limits the search to the selected dictionary (current main dictionary). A filter can be defined to be private (only accessible for the creator) by setting its visibility to **Owner** or accessible for a certain group selected in the **Visibility** dropdown, or to all users, if **Default group** is selected in the Visibility dropdown. However, only the owner of the filter, or an administrator, can edit or delete a filter.
If an administrator is unable to delete a filter, it is because it is in use (in an export setting or as a standard filter for a group).

You can use several combinations of conditions in the filter.
You can also select a combination of filters, see below.
You can create a set of filters for a certain dictionary and then select them from the **Filter** dropdown or by clicking the Filters icon and then > **Apply filter**. Note that the term list gets a yellow background to signal that a filter is applied. Filters can also be applied to term export by clicking on the **Admin** icon and then on the **Export** icon. The filter is then chosen under **Export settings** in the **Select concepts by filter** field.
The conditions for the field contents can be set as follows:
a) fields that contain an exact string (typed after "EQUALS" or, if you do not enter a search string, empty fields)
b) fields that contain the string and additional contents (typed after "CONTAINS")

c) fields that do not contain the string (typed after "NOT CONTAINS")

d) fields that are not equivalent to a specific string (typed after "NOT EQUALS" or, if you do not enter a search string, fields that contain *something; i.e.* "not equal to nothing")

e) fields that start with a certain string (typed after STARTS WITH)

f) for certain fields: that fulfill a specific time value, e.g. that were changed before (BEFORE) or after (AFTER) a specific point in time (date and time) or on a specific date (EQUALS), or outside of a specific date (NOT EQUALS)

g) for numeric fields: where the field value EQUALS, NOT EQUALS, is LESS THAN or GREATER THAN a typed-in integer value

Temporary and saved filters

You can create a temporary filter. (If you want to reuse it you can save it later.)

To create a temporary filter:

1. Click 🔍 beside the Search button.
2. Click **Create temporary filter**.
3. Enter filter criteria in the dialog box.
   Example A:
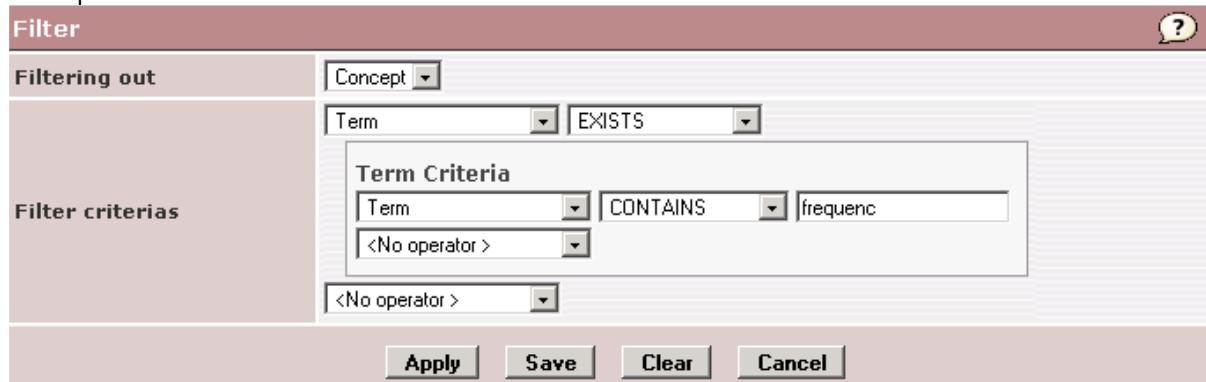
4. Click **Apply**.
   Only the term records that fulfill the criteria you have entered are shown.
   In the example, only those term records are shown that have at least one term (in any language) that contains the string "frequenc".

   Example B: If you want to show only the terms that contain a certain string (not their possible synonyms) in the term list, select **Term** instead of Concept in the **Filtering out** dropdown:
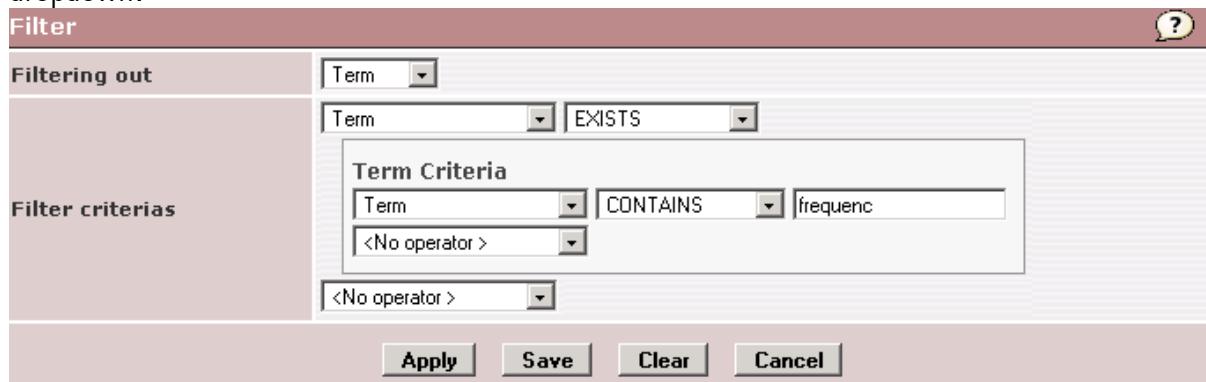
   In this example, only those terms are shown in the term list that contain the string

"frequenc" (in the current source language).

5. The temporary filter is applied to the current main dictionary until you create a new temporary filter for any dictionary.

6. If you want to deactivate the filter, select <No filter> in the **Filter** dropdown box in the upper left-hand column:

7. If you want to edit or save the filter, click the filters icon again.

If you want to create and save a filter or edit an existing filter, use the button and click **Add new filter** or click **Edit** to the right of the filter name. See the example below.

If you want to send a permalink for a filter, click the green permalink icon on the line of the filter and (as an example) copy the permalink (shown in the web browser address field) into a message to the person with whom you want to share the filter.

Please note that the filter has to be visible for the recipient's user group or to All users and the user has to have the rights to view the dictionary or section (or the user has to be an administrator). This way the recipient will see a number of concepts (as allowed by permission schemes) instead of a single concept as is the case for a concept (or term) permalink.

Available filters						
Filter	Concepts	Owner	Visibility	Filtering out		
Abbreviation	18	admin2	All users	Term	Apply	
Animals	54	admin	All users	Concept	Apply	

Example:

You can filter term records on the basis of the concept level fields that apply to the <u>term record</u> or to the fields that belong to the terms of a certain language (under Term level).

Note! Use only search strings in the field, **not** wildcard characters.

All filters are private, i.e. connected to a specific user name. Filters that have been created by the administrator can, however, be applied by other users if selected to be visible for, as an example, All users or Guests.

Note: All the examples below are taken from the TechniTerm glossary.

Example: To find all the term records with definitions containing the text string *phase shift*:

1. Click the **Filters** icon .
2. Click **Add new filter>>**.
3. Name the filter. Note! A filter name cannot be more than 25 characters.
4. Indicate whether the filter should be available to yourself only or to all users within a specific user group in the **Visibility** field. (Please note: Administrators can see and use all filters.)
5. Select **Concept** in the **Filtering out** dropdown.
6. Replace the text <Select field> with the name of the field, for example **Definition.** Select **CONTAINS** in the box beside it and fill in the search string, e.g. *phase shift*.
   Click **Save** and then **Apply** by the filter's name if you want to use the new filter immediately. (If the filter is already selected (applied) when editing in the future, simply click **Close**.)
   All the term records with definitions containing *phase shift* will be shown.
7. Click the term you want to see.

Example 2: To find all the term records with *phase shift* in their definition and *key* in any of the English terms:

1. Click the **Filters** icon .
2. Click **Add new filter>>**.
3. Name the filter and indicate its visibility.
4. Select **Concept** in the **Filtering out** dropdown.
5. Select a field from the Filter criteria dropdown <Select field> such as **Definition** (make sure that **CONTAINS** is selected in the box to the right of Definition), and fill in a search string in the box that appears to the right of CONTAINS, e.g. *phase shift*.
   Select **AND** in the dropdown below Definition (instead of <No operator>).
   Choose **Term** and **EXISTS** on the next line.
   On the line, under Term Criteria, choose **Term** and **CONTAINS** and write *key* in the field to the right of CONTAINS.
   Choose **AND** in the dropdown (instead of <No operator>).
   Choose **Language, EQUALS** and **English** on the next line.
   Click **Save** and then **Apply** by the filter's name if you want to use the new filter immediately.
6. Click the term you want to see.

Note! 1: If you want to deactivate the filter, select <No filter> in the **Filter** dropdown in the left-hand column.

Note! 2: If you want to use a previously defined filter, then select the filter shown in this **Filter** dropdown:

Example 3: Find all the term records that have a definition and a term with Usage USA:

1. Click the **Filters** icon .

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2. Click **Add new filter>>**.
3. Name the filter and indicate its visibility.
4. Select **Concept** in the **Filtering out** dropdown if you want to filter out concepts irrespective of source language, or select **Term** in the **Filtering out** dropdown if you only want to display these concepts when English is the source language.
5. Replace the text <Select field> in the dropdown with **Definition**.
   Make sure that **NOT EQUALS** appears in the box to the right.
   Do not fill in anything in the box that appeared to the right of the NOT EQUALS field.
   Then choose **AND** from the dropdown (instead of <No operator>).
   Choose **Term** and **EXISTS** on the next line.
   On the line under Term Criteria, choose **Usage** and **EQUALS** and select *USA* from the dropdown to the right of EQUALS.
   Click **Save** and then **Apply** by the filter's name if you want to use the new filter immediately.
6. Click the term you want to see.

Example 4: Find all the term records that have been changed during the last week:

1. Click the **Filters** icon 🔍..
2. Click **Add new filter>>**.
3. Fill in the dialog in a similar way as below, selecting a date 7 days before today's date and ticking the **Relative** tickbox:
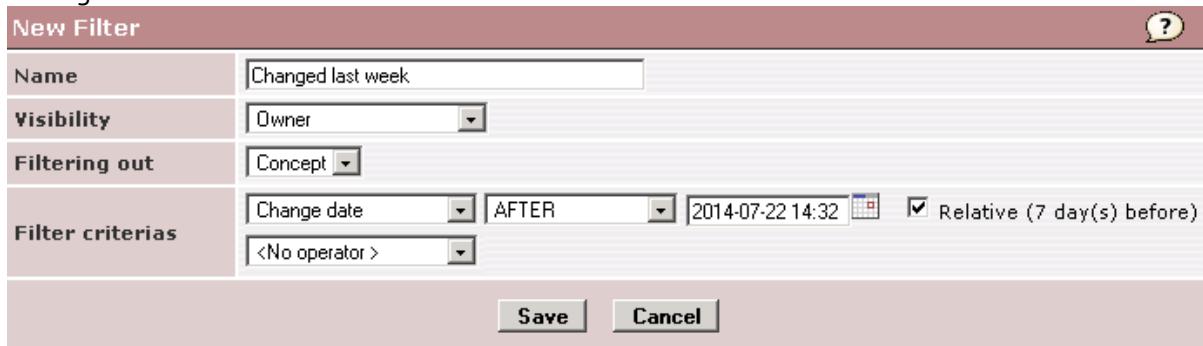
4. When the filter is applied at a later date than 2014-07-29, it will present not term records that were changed after 2014-07-22, but that were changed during the seven days preceding the actual date. Please note that only full 24-hour periods are counted.

Applying a combination of filters

Instead of building many filters with combinations of conditions, you can apply two or more filters. As an example, if you want to check new concepts missing a term in a specific language, you can combine a date filter with one of existing filters for missing terms in the desired language.

Proceed as follows:

1) Click the Filter icon 🔍

2) Click **Apply** by the filters you want to use.

Filter	Concepts	Owner	Visibility	Filtering out		
Changed last 24 hours	1	admin2	All users	Concept		Apply
Changed last month	20	admin	All users	Concept	✔	Apply
Created or changed last day	2	Wies	All users	Concept		Apply
Definition missing	1692	Wies	All users	Concept		Apply
English term missing	62	admin2	All users	Concept		Apply
excluding avoidable terms	2081	admin	All users	Term		Apply
French term missing	1943	Wies	All users	Concept		Apply
non-obsolete terms only	2083	admin2	All users	Term		Apply
Non-recommended terms	43	Wies	All users	Term		Apply
Preliminary terms	77	admin2	All users	Term		Apply
Swedish term missing	1670	admin2	All users	Concept	✔	Apply

OR:

Filter	Concepts	Owner	Visibility	Filtering out		
Changed last 24 hours	1	admin2	All users	Concept		Apply
Changed last month	20	admin	All users	Concept	✔	Apply
Created or changed last day	2	Wies	All users	Concept		Apply
Definition missing	1692	Wies	All users	Concept		Apply
English term missing	62	admin2	All users	Concept		Apply
excluding avoidable terms	2081	admin	All users	Term		Apply
French term missing	1943	Wies	All users	Concept	✔	Apply
non-obsolete terms only	2083	admin2	All users	Term		Apply
Non-recommended terms	43	Wies	All users	Term		Apply
Preliminary terms	77	admin2	All users	Term		Apply
Swedish term missing	1670	admin2	All users	Concept		Apply

3) Click **OK**.
The term list will then show all concepts fulfilling the conditions of both filters.
Please note that
a) only one of the selected filters will be shown in the **Filter** dropdown:

Filter [Changed last month (C) ▾]
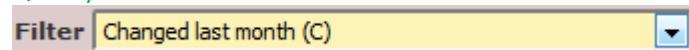
b) selecting another filter in the **Filter** dropdown will deselect any additional filters.

Clicked terms marking

As an option, terms clicked in the term list can be given a tickmark. See illustration below.
You activate this function by clicking the cogwheel below the term list:

and ticking the **Show markings for visited terms** tickbox:

(To deselect the function, just deselect the tickbox.)
To clear the markings, just do a new search. If enabled in your installation, the markings will be persistent, even until your next login. If you want to clear these markings for visited terms, please click the little red and blue eraser symbol ( ) below the term list.

Creating a permalink to refer to a term record 🔗

To create a link to a specific term record:
1. Click the desired term in the term list.
2. Click the green Permalink button 🔗 in the upper right part of the result window.
3. Copy the link information from the web browser address field.
4. Paste and use this link in other documents, to refer to the specific term or term record.
   Please note: A link similar to the following refers to a specific term;
   http://demo.termweb.se/termweb/view/3d31b/9qp4f, whereas the link
   http://demo.termweb.se/termweb/view/3d31b refers to the whole term record.
5. Users who are not authorized to see the term record (e.g. guest users), will get a TermWeb view with no concept in focus (empty result window).

Please note that you can also create a permalink for a filter. See above under Temporary and saved filters.

Enter a new term record 📄

Please note that a new terminological record (concept) can also be added from Grid View (see below).
1. Check first to make sure that the term, with the same or a similar definition, does not already exist in a dictionary. This can be done for many "term candidates" at a time using the Batch Search Tool, see below.
   Otherwise, see Search for a term above.
   Please note that while editing you can "restore" and return to the previous page by pressing **Alt+X** (in Internet Explorer) or **Alt+shift+X** (in Mozilla Firefox), or by clicking Cancel at the bottom of the windowpane, or by clicking on the red x icon ❌ in the upper right-hand corner of the windowpane.

2. Click the **New** icon ⬜.

3. Press **Alt+O** (in Internet Explorer) or click **Edit concept level fields...**. Enter the information you have for the concept level fields, e.g. enter the term's definition and specify the domain and subdomain. For more information about domains, see the section [Show a particular domain or subdomain](#).)
   In order to show as much of the domain selection frame as possible, you can switch to full screen view (F11 in Internet Explorer). Specify the term record subdomain(s) by clicking **Select domains** and then the plus sign beside the desired domain and subdomain.
   Here you can also choose the <u>section</u> in which the term record will be placed.
   Then press **Alt+S** (in Internet Explorer) or click on **Save.**

4. Press **Alt+A** (in Internet Explorer) or click on **Add term...**, choose the language and fill in the term along with the information for the chosen language. Then press **Alt+S** (in Internet Explorer) or click on the green tick icon ✅ in the upper right-hand corner or click on **Save** at the bottom of the page.

Duplicity check: When you click Save, in case there is already a homonym (homograph) term, i.e. a term with the same spelling, in the same language, in the present dictionary, you will get a question like the following:

Dictionary   Animals, TermWeb info and more
Section   Suggestions

Status   Preliminary

Swedish
räka
Process status   Unprocessed
Part of speech   Noun
Gender   Other gender

Please confirm

The term "räka" already exists in concept(s) 283. Do you want to save it in this concept?

[Yes]   [No]
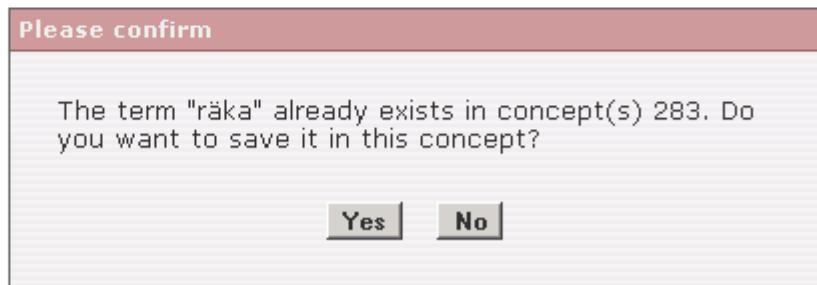
This gives you the possibility to skip creating a new concept with the term (in case the existing term is representing an identical or very similar concept) or click Yes and go on creating the concept with the identified duplicate term.

5. If you want to enter a term in another language, click either

    Add term... (**Alt+A** in Internet Explorer) or **Copy term...** (**Alt+C** in Internet Explorer), select the new language and enter the term as instructed in the previous step.

6. Press **Alt+S** (in Internet Explorer) or click **Save** when you have finished updating the term record.
    If you want to create another term record, press **Alt+N** (in Internet Explorer) or click **Save & New**.
    If you want to create another term record based on the current entry, click **Save & Duplicate** (**Alt+D** in Internet Explorer). In the latter case, all information will be duplicated, including the information about the domain(s) and section.

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Check for existing terms in a dictionary – Batch Search Tool 🧩

If you want to check what terms are already in a dictionary before importing or adding a set of new terms, use the Batch Search Tool. The search terms can be entered manually or imported from a simple Excel file, and the customizable report of found terms can also be exported as an Excel file.

Do as follows:

1. Click **Admin** and then click the Batch Search Tool icon.
2. Select the dictionary you wish to search, and the language of the search terms. Then either enter (type or paste) the terms you wish to look up in the box, as in the example below. As an alternative, save the term candidates in the leftmost column of an Excel file, click the **Excel file** radio button, browse to and select that file. Please note: Only the first sheet in the file is read, any additional sheets are ignored.
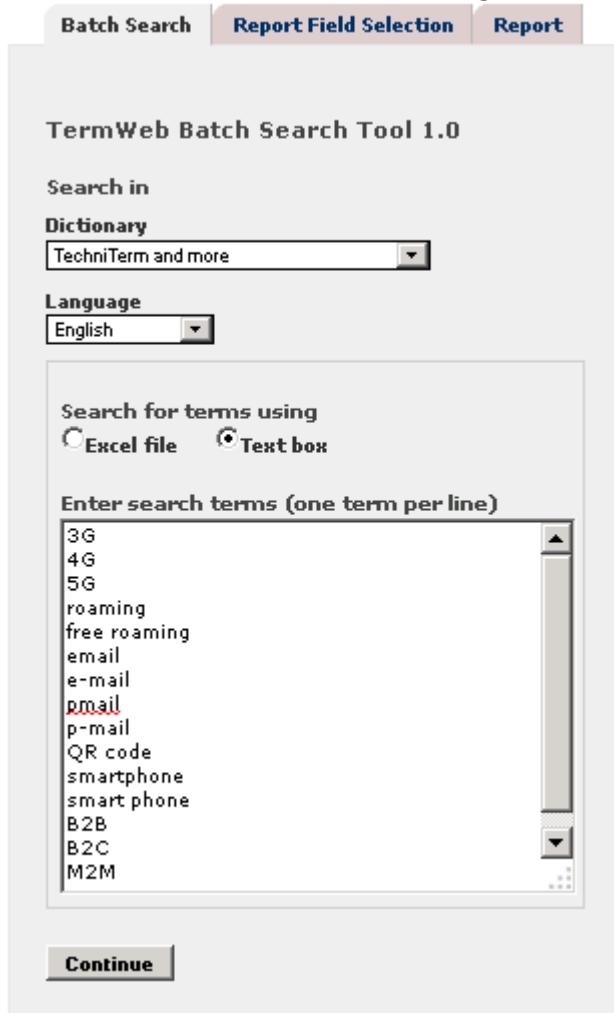
3. Click **Continue**.

4. Select the fields to be included in the report for found terms on the **Report Field Selection** tab.
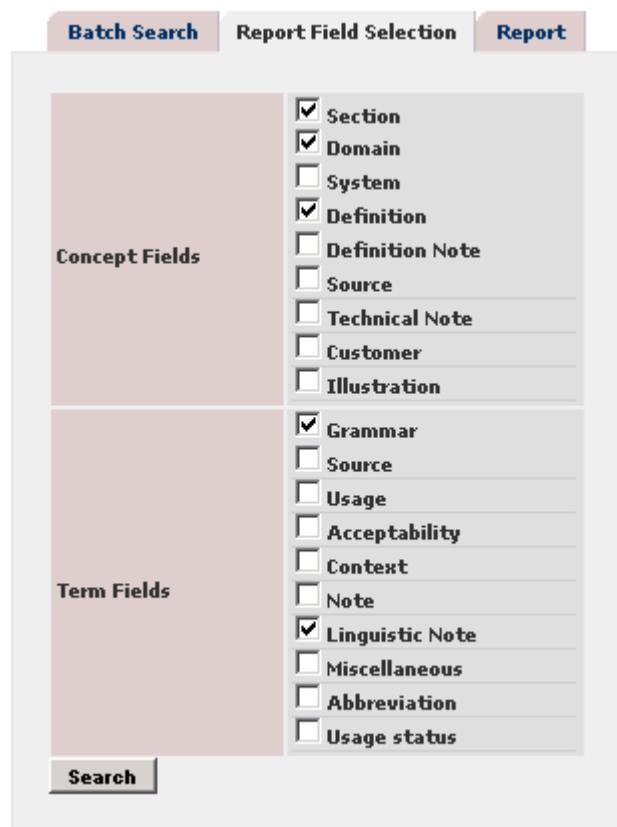
5. Click **Search** to start the search.
6. The report, including the text and values of the selected fields is displayed on the **Report** tab. If you wish to save it as an Excel file, click the **» Export to Excel** link:

English	Exists	Section	Domain	Definition	Grammar	Linguistic Note
3G	No					
4G	No					
5G	No					
roaming	Yes	TechniTerm version 6	telecom networks	Use of networks other than your own when travelling abroad.		
free roaming	No					
email	No					
e-mail	Yes	TechniTerm version 6	computers	Correspondence in the form of messages transmitted between user terminals over a computer network, or between workstations over a network.	n	
pmail	No					
p-mail	No					
QR code	No					
smartphone	No					
smart phone	Yes	TechniTerm version 6	telephone sets	Combination of mobile phone with other functions, like organizer, web browser, camera, maps, and email.		
B2B	No					
B2C	No					
M2M	No					

7. The entered search data, report settings, as well as the latest generated report, are kept during the user's session. Dictionary and source language selections are saved and restored for the user's next session.

Enter a new term record based on an existing term record

1. Check first to make sure that the term, with the same or a similar definition, does not already exist in a dictionary. This can be done for many "term candidates" at a time using the Batch Search Tool, see above.
   Otherwise, see Search for a term above.
2. Click on a term from the term list that you would like to use as a template.
3. Click on the **Copy** icon .
4. Continue from step 3 Change a term record below.

Change a term record

Please note: For change of more than one term record, the Grid View editing mode, described below, is recommended.

You can easily change or modify a term record, including the information in the concept level fields and the information about term equivalents in each language.

For example, if you want to change the information about a German term equivalent:

1. Show the term record. Click on the term in the list in the left-hand column to make the contents of the term record visible in the result pane to the right.
2. Click the **Edit** icon .
3. Click the German term (if German has not already been set as the source language).
4. Click **Edit term** (**Alt+E** in Internet Explorer).
5. Change or add the desired information in the fields shown.
   If you want to **copy** a certain **field value**, e.g. "Source" or "Part of speech" to all existing terms (in all languages) in the concept, select or type a field value and click the icon to the right of the field and confirm the operation. The field value will the be copied to the field in all terms in the concept, replacing any previous content of the field.
   Please note: This function does not apply to multi-line fields.
6. Click the green tick mark at the upper right-hand side of the term field box or click **Save**.
7. If you want to change a term equivalent in another language:
   Click the term in that language.
   Click **Edit term** (**Alt+E** in Internet Explorer).
   Change the information and then press **Alt+S** (in Internet Explorer) or click on the green tick at the upper right-hand side of the window or click **Save**.
8. If you want to change the information in the concept level fields, press **Alt+O** (in Internet Explorer) or click **Edit concept level fields...**, change the information and then press **Alt+S** (in Internet Explorer) or click **Save**.
9. Press **Alt+S** (in Internet Explorer) or **Save** in the button field at the bottom of the window when you have finished updating the term record.

Add a term to an existing term record

You can add a new term equivalent in another language to an existing term record.
If you wish to add a Portuguese term equivalent, for example, do the following:

1. Show the term record. Click on the term from the list so the content of the term record will be visible in the result pane.
2. Click the **Edit** icon .
3. Press **Alt+A** (in Internet Explorer) or click **Add term...**.

4. Enter the additional information about the Portuguese term.
    (Scroll down if necessary.)
    Write the Portuguese term in the "Term" field and change "Language" if necessary, to Portuguese.
5. Then press **Alt+S** (in Internet Explorer) or click on the green tick in the upper right-hand corner or click **Save**.
6. Press **Alt+S** (in Internet Explorer) or **Save** in the button field at the bottom of the window when you have finished updating the term record.

Undo changes in a term record

If you want to undo changes that you have made in a term record, click the cogwheel icon

(previously Settings), select the **Show history** checkbox and then click on the restore arrow 🔙 under **Restore** beside the earlier version of the term record which you want to restore. Other users with edit rights to the term record as well as system administrator and administrators can normally also cancel other users' changes by restoring previous records.
Notes!
It is not possible to undo a change made using the **Restore** function described above. Furthermore, changes in concept relations and attached objects (including thumbnails) are not registered in the history and thus cannot be undone.

Add a comment to a term record

All users (but guest users) can comment on existing term records, for example suggest additions and modifications, provide usage examples etc. (See also the *Send feedback* function, that can be used to send system- or dictionary-related email comments to the respective administrator.)

Do as follows:

1. With the desired term record in the result window, click the **Add Comment** (or **"n comments"**) link.
2. Enter (type or paste in) your comment and click **Save.**
3. If you change your mind and do not want to save the comment, click the Cancel icon in the upper-right corner of the comment dialog to close the dialog. (The dialog is also closed if you click another term in the term list.)
4. If you want to remove your comment, click the dustbin icon on the same line as your comment.
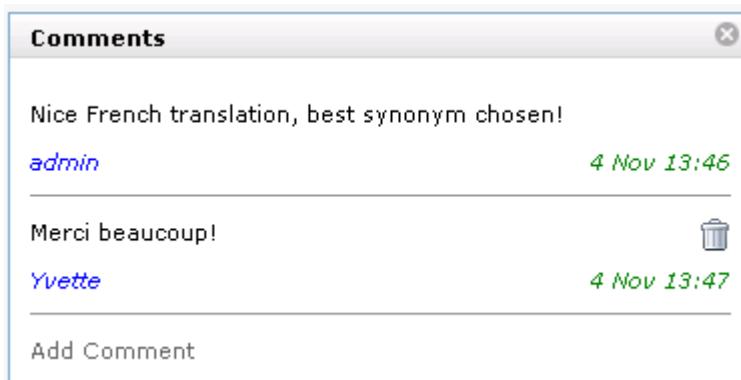
5. Please note that you may only remove your own comments, unless you are an administrator, who may remove the comments of all users:
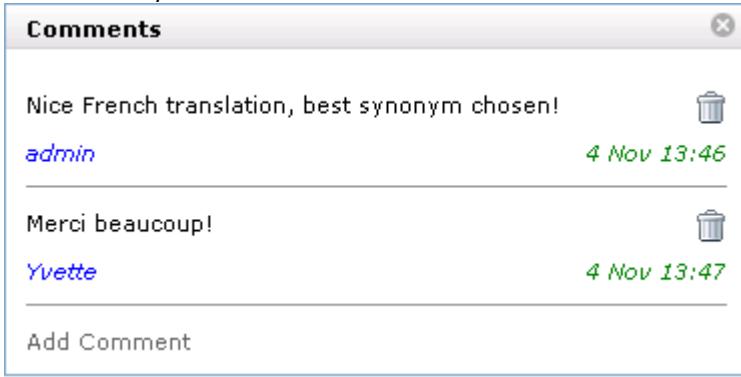
Using multivalued fields

If you want to select more than one attribute for a certain concept, you can use a multivalued field. Enter data in the following way:
1. Ctrl-click the values (e.g. concept attributes) that apply
2. Click the blue right-arrow to move the values to the **Selected** list
3. Click **Save** to save the information (and **Save** again to save the concept).

For import and export files, the format is comma-separated, for the example above:
Asia, Europe, North America
e.g.
<descrip id="c263-f3" type="Lives in">Asia, Europe, North America</descrip>
in a TBX export file.

Add or change one or more term records using Grid View

You can easily change or modify one or more term records, including the information on the concept level, by using the Grid View. One possibility offered by Grid View is reviewing a number of term records or terms, making necessary changes and then select to change the status of all (or a subset of all) reviewed term records e.g. to Approved or Rejected.

You select a number of term records to put in Grid View, where they are available as drafts until you decide to save them.

In short, the steps are:

1. Select which term records to put in Grid View
2. Open Grid View
3. Edit the desired term records in Grid View
4. Save the changed term records in the dictionary

1) Copying term records to the Grid View

If you want to add the current term record (that is displayed in the result window) to your grid

view, click the Add Concept to Grid View icon in the top right part of the screen.

If you want to add all term records (from the main dictionary) with terms displayed in the term

list to your grid view, click the Add All Terms in List to Grid View icon Displaying 1-7 below the term list.

2) Going to the Grid View window

Proceed as follows:

Click the Grid View icon in the toolbar (or click **Open Grid View** directly after having added the term records to the grid view) to display the selected term records.

If you want to display more than 10 term records in the list, click the desired number (15, 20, or 25):

1 - 10 of 15 items   **10** | 15 | 20 | 25

Otherwise, or for higher numbers of term records, you will have to page through the list using the page numbers or arrows:

|◄ ◄ **1** 2 ► ►|

If you wish to hide certain of the concept-level fields and/or certain of the languages from the

Grid View, click the **Display Settings** button: Display Settings

As an example, if you just want to view and work with the Definition and the French terms, unmark the tickboxes on the respective tabs as follows and click **Apply**.

In the same way, unmark any "unwanted" term-level fields (for all displayed languages) on the Term Fields tab.

3) Editing in Grid View

1. Edit as desired. To change or add data in a certain field for a certain term record, just double-click the field, and then (for text fields), in the box that appears, type the text
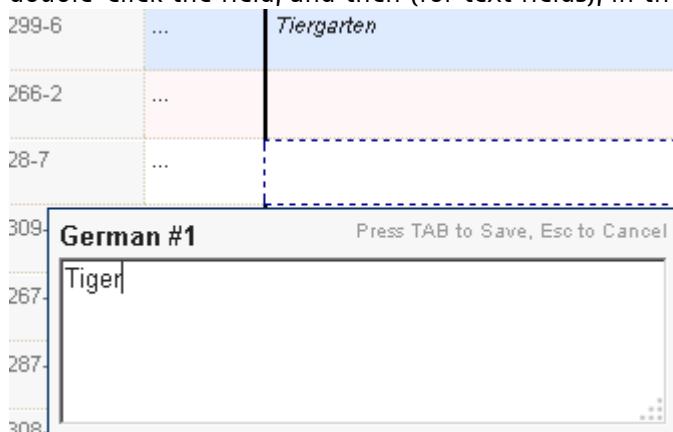
and then press TAB to save the text
OR
select a dropdown value
OR
select domain(s) for the term record.

Please note that certain editing functions, like adding or editing attachments, relations and links, as well as adding or editing values for multivalued fields still has to be done for each term record, not from Grid View. Also, duplicity check is at present not active for term addition in Grid View.

Important: It is a strong recommendation not to edit any fields containing internal or external links in Grid View.

Also, please note that terms that you are allowed to change are displayed with black characters and terms that you are not allowed to change with grey characters.

If you wish to **add another term to the term record**, right-click a term and either select **Add New Term in [language of current term]** or select the language (German in the example) in the **Add New Term in** dropdown.
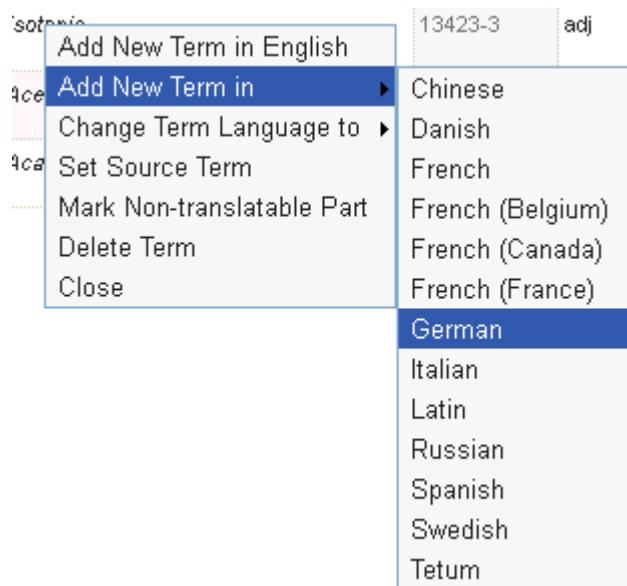
In the above menu, you can, if you have the necessary access rights, also **delete the term** that you right-click. Just click **Delete Term** and the term will be marked with a strikethrough in Grid View.

In case you change your mind before you save the Grid view concepts, just right-click the term again and click **Cancel Deletion:**
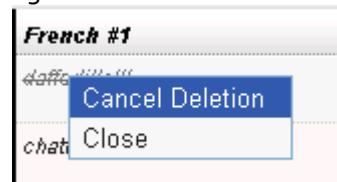
In a similar manner, you can also **change the language of the term** that you right-click.

If you want to set a part of the term, like a trademark or product name, as non-translatable, please right-click and select **Mark Non-translatable Part**.
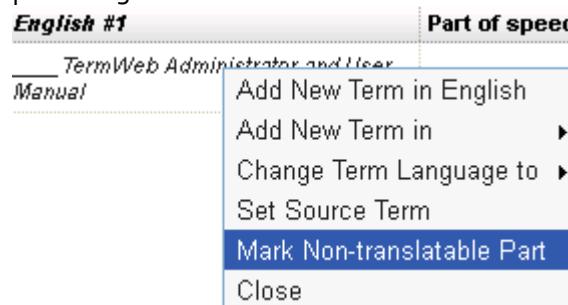
Then, mark the term part not to be translated and click **Mark:**

Mark Non-translatable Part

TermWeb Administrator and User Manual

[Mark] [Clear] [Close]
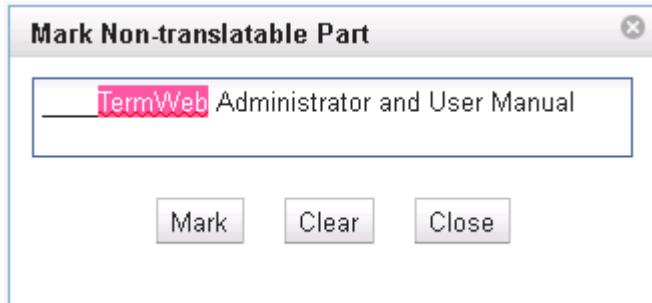
The part will then be marked as a signal to translators, in Grid View:

English #1	P:
_____ TermWeb Administrator and User Manual	

and also in the normal result window view:

English
_____ TermWeb **Administrator and User Manual**

German TermWeb-Handbuch (Englisch)

Furthermore, if concepts are exported to Excel, e.g. for offline supplementation of translations, the non-translatable parts of the terms will be signalled to the translators with a contrasting color also in the Excel sheet:

O	P		Crea
Project su	**English**		
	Excel term entry template		adm
	_TermWeb Administrator and User M		adm
	TermCentral		adm
	TermWeb-Rikstermbanken connecti		adm

Technical note: In a TBX file, the syntax is the following:

`<term><hi translate="no">TermWeb</hi> Administrator and User Manual</term>`

If you want to **change a value for more than one term record**, select these records and then

✓	✗	49	Sugges
✓	✗	48	Sugges
☐	✗	19	Animals
☐	✗	47	Sugges

◄ ►

1 - 4 of 4 items

With selected: [Edit ▼]

click the **Edit** button.

(If you want to select all displayed term records in the Grid View before an action, tick the uppermost box.)

2. Then
   a) select if the field is a concept-level or language term field,
   b) select the field,
   c) select the value and
   d) then click **Update.**

Another example, adding the same <u>text</u> to the Source field of all selected term records:

Here, if you want to change a value or set a text for a term-level field for many term records, take care to see that terms exist for all the selected records for the language in question.
If the bulk update gives an error when you try to save, a warning symbol will be displayed in the Concept ID column, and the erroneous field will display a red background (in this case the French term No. 2 field lacks a term if Noun is specified for the Part of speech field):

If there are term records in the list that you do not need to edit, and want to remove from the

list, click the Delete Draft icon.

If you want to delete more than one draft term record from the list, select the term records and then click the **Delete Drafts** button.
If you want to remove all term records from Grid View, click the **Clear Grid** button.
(If you have modified any entry, you will get a warning.) Please note that this action will not delete the term record from the dictionary, just from the Grid View draft list.
If you click the **Delete Concepts** button however, you may delete the selected term records from the dictionary (if allowed by your access profile).

4) Saving the changed term records in the dictionary

To keep all the draft Grid View entries with all changes that you have made and close the Grid View window, click the **Close** button. You can open Grid View again at any time by using the

 button.

To save all changes that you have made to the draft Grid View entries in the dictionary, remove the changed records from Grid View and close the Grid View window, click the **Save** button. Please note that you have to leave the last edited field for the changes to be saved and you to get the acknowledgement message "Concepts have been saved successfully".

Merge term records (if other users have made changes to the same term records in the dictionary)

If another user has saved one or more term records from his or her Grid View (after you put the term records in your Grid View), when you save the term record(s) from your Grid View, the following symbol will show up at the lines of the changed term records. A message like this will also be displayed: "No concepts were saved. Concept 10 was changed by another user and needs to be merged before saving." OR, at the bottom of the window: "Cannot save drafts. Merge changes first".

Then click the symbol (or select the remaining term records and click the **Merge** button).
A screen like the following will appear (for the first term record to merge):

Merge Concepts

Concept #518

Term #518-2 (deu. *Arm*): Created in database

	Grid Value	Database Value
Term	*<No value>*	Arm
Language	*<No value>*	German
	○ Skip Term	◉ Add Term

Term #518-4 (fin. *käsivarsi*): Created in database

	Grid Value	Database Value
Term	*<No value>*	käsivarsi
Language	*<No value>*	Finnish
	○ Skip Term	◉ Add Term

Term #518-5: Deleted in database

	Grid Value	Database Value
Term	bras	*<No value>*
Language	French	*<No value>*
	◉ Keep Term	○ Remove Term

Previous   Next

Apply   Cancel

The normal operation is to accept the value for the German and Finnish terms (saved to the database by other users after you put the term records in your Grid View) by selecting the **Add Term** radio button and merging these with your French term by selecting **Keep Term**. This applies for example when you create terms in one language and other users terms in other languages. Then click **Next** or **Apply.**

(If more than one term record selected for merge, please click **Next**, otherwise, for the only or last term record to merge, click **Apply**.)

Then click **Save** to save your changes along with the merged changes.

Please note: In special cases, e.g. where you have no change or write access to other language terms, you might be presented with a white (empty) dialog box. Then just click **Apply** to merge your changes with the saved changes of other users.
.

In case of conflict for the same field, please select if to use your Grid View value or the present value in the database.

Merge Concepts

Concept #24

Term #24-7 (ces. *ulozit*): Created in database

	Grid Value	Database Value
Term	*<No value>*	ulozit
Language	*<No value>*	Czech
	◉ Skip Term	○ Add Term

In this case, you have a better Czech translation (under another Term ID) in your Grid View, so you select the **Skip Term** radio button and click **Next** or **Apply**.

Then click **Save** to save the term record(s) in the database etc.

Another example, a conflicting value of the Definition field. Here, the grid value is selected:
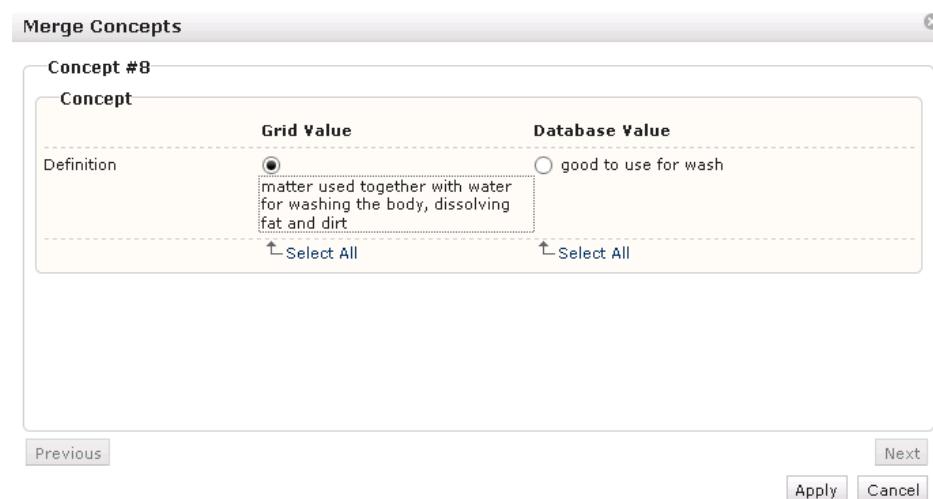
Summary:

1) If the merge symbol (⚠) turns up in your Grid View, this indicates another user has saved changes to the term record.

2) Select these term records and click the **Merge** button.

3) Proceed as indicated above, selecting saved values or the best of the grid view or saved (database) value.

Click **Save**.

Entering a new term record from within Grid View

If you want to create a new term record (concept) from Grid View, proceed as follows:

1. Click **Add New Concept**:

2. Enter data in the required fields:

☐	✖	290 ...			animal, usually aquatic, with two pairs of antennae on the head, jointed legs and a hard shell	*crustacean*	290-1	Unprocesse
☐	✖	641 ...				*cuckoo*	641-1	Provisionally
☐	✖	314 ...				*cuckoo clock*	314-1	Unprocesse
☐	✖	0 Biology > Animals				*swan*	0-1	Unprocesse

3. Perform any other changes to the term records in Grid View.
4. Save the new (and changed) term records in the dictionary clicking **Save**.
5. Clear the grid and click **Close**.

General Grid View recommendations

Please note that you can only edit a term record in either the Grid View window OR in single term record editing mode (clicking Edit in the main TermWeb window).
<u>Please note:</u> When you are done editing, make it a habit to always
1) if the remaining term records need no later change: remove these records by clicking the **Clear Grid** button,
2) close the Grid View by clicking the **Close** button.

Locking term records before editing

As soon as you open a specific term record for editing by clicking the Edit concept icon, other users will see a "Locked by another" icon 🔒 for that term record.
If you want to lock a term record for an entire session, before you start working with it in Grid View, e.g. when you intend to edit a group of related term records, please click the corresponding term in the term list to display the term record in the result window and then click the toggling Lock icon 🔓 in the top right part of the screen. The icon will change to Locked: 🔒 .

Then the term record will display a "Locked by another" icon 🔒 for other users until you log off or until you are done editing it. If any other user tries to edit the concept before that, the message "The concept is locked by another user" will be displayed for these users. When you save the record after editing, it will be unlocked automatically.

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Setting source and target subterms

In cases where you want to define pairs or sets of terms with common attributes, like style (level) within one concept, proceed as follows

1. Enter the terms in the desired languages.
2. Place the concepts in Grid View and open Grid View.
3. Right-click one target term and select **Set Source Term**.
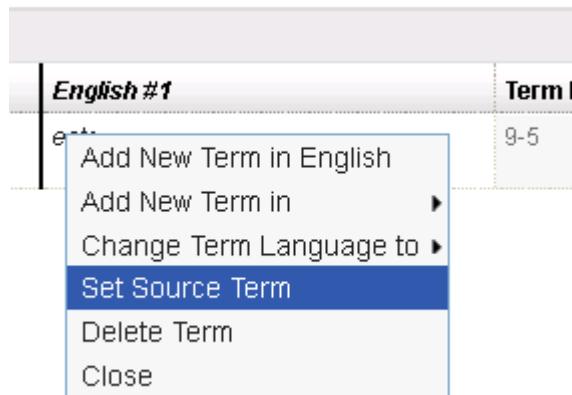
4. Select the desired source term and click **Select**:
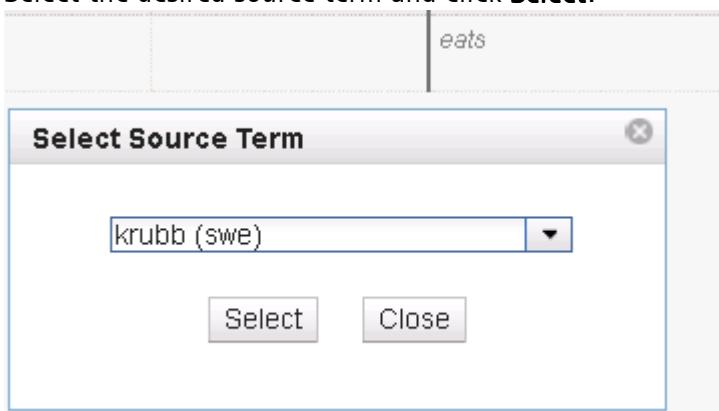
5. Proceed in the same way for other languages, and possibly for other concepts, and then click **Save** to save the concept(s).
6. The concept will then be displayed with the terms paired or grouped:

Add cross-references, pictures and other objects to term records

You can easily add a **cross-reference** from one of the text fields in the term record (excluding the term name field or fields that may only have numeric contents) to either a specific term record or to a term in a specific language.

Right click on the field that you want to add a cross-reference to and choose **Add Internal Link**. For example, type *See also shaft*, highlight the word *shaft*, right click and choose **Add Internal Link**.

A search box is then opened and you can search for desired terms or term records in any language:

(Note! This applies only to the sections in the dictionary to which you have access!)

Search for the entry with the English term *shaft* and click on the desired term.

Then choose if you want to create a link to the term record (concept) with the word *shaft* or the actual term itself ("Link is referring to" is linked to Concept or Term). Then click **Save**.

If you select Term(Static text), the link text will remain as is, even if the referred-to term is changed. If you select Term(Name), the link text will change if the referred-to term later is changed. In case you select the link to refer to a Concept, when the link is clicked, the term record is shown with the terms in the database's order of languages. In case you select the link to refer to Term(Static text) or Term(Name), when the link is clicked, the term record is shown with the chosen term at the top.

Note! When making changes, the link is shown in double angle brackets, e.g. «link word». If you later want to change the link, select the link word including the angle brackets, right click and choose **Edit link**.

Note! Links should normally not be created for terms that are not approved. (Term records or terms should be marked with a status "Approved" or "Correct" if the dictionary offers a status option.)

If you want to add a **link to** an explanatory **PDF image** (or a **GIF** or **JPG image**) of a term record, then save the picture in a picture archive, right click on the link text as in the instructions above, choose **Add External Link** and copy to or type a link in the **URL** field. Finish by clicking **Save**.

The link should be typed as a normal web link:
http://www.my_terminology.com/graphics/figure.pdf.
You can also add a link to a website in the same way:
http://www.website.com

If the administrator places all objects to be linked (picture, sound, video clip files etc.) in the TermWeb <u>File repository</u>, you can then easily create links from different term records to each object by selecting a text in a field, right clicking, selecting **Add External Link**, if necessary displaying the file repository objects by clicking the **File repository>>** button, double-clicking the desired object and then clicking **Save.**

To open the list of File repository objects, if not displayed: Click **File Repository>>**.
To search for a File repository object: Enter any text string contained in the object's file name (no asterisks needed here) and click **Search**.

<u>To prepare for this; as an administrator, to add files to the file repository</u>, select **Admin View** > **File Repository**, click **Add file**, browse to and select the desired file and, optionally, add a description of the file. Then click **Create file**.
To <u>view (or play) the file</u>, click **View file**.
It is also possible to upload files in batch to and download files in batch from the file repository:

<u>To upload files in batch to the file repository</u>, click **Import files from a zip file**, browse to and select the ZIP file containing the objects, and then click **Import**. The ZIP file will be automatically uploaded and the objects unpacked into the file repository.
<u>To download files in batch from the file repository to a ZIP file</u>, e.g. for backup purposes, click **Export all files in repository to zip file**. You will then be able to save the ZIP file in a selectable directory in your computer or network.

If you wish to **attach a document** to the TermWeb concept (to display an image or another binary object, e.g. a PDF file), optionally write any text that is to be shown before the object symbol (or illustration thumbnail), right click in the field where to display the object, click **Add Attachment**, indicate the text that is to be shown when someone points to the object symbol in the field **Display name** and browse to the field or copy the link to the file that you want to read into the database to the **File to attach** field.
In this case the object is saved in the internal TermWeb database.
Example of object symbols: 📕, 🔷

To *remove* a file that has been attached according to the instructions above, do as follows:
1. Edit the term record and right click on the image field in question.
2. Choose **Edit Attachments.**
3. Click **Delete** on the line of the file in question and confirm.
4. Save the field in question and the term record (press **Ctrl+S** twice).

If you want to replace a file that was attached according to the instructions above or add an informative text to be shown when you point to the object symbol:
1. Edit the term record and right click on the image field in question.
2. Choose **Edit Attachments.**
3. Click **Edit** on the line of the file in question.

4. Indicate any "display text" for the file (the object) in the **Display name** field and/or new object in the field **Replace with file**.
5. Click **Save**.
6. Save the field in question and the term record (press **Ctrl+S** twice).

Show a picture that is associated with a term record

Some term records include links to web sites, explanatory images or other multimedia objects. In these cases a link with a different color or possibly text with a small image symbol is visible in the relevant field.
When you click on one of the latter, the picture will be shown in a new window.
Close the window with the picture by clicking the 'x' in the upper right-hand corner (or on the Close tab symbol or corresponding for tabbed browsing).

Alternatively to symbols, thumbnails can be displayed (for attached jpg and gif illustrations):
To *show illustration thumbnails*:

Click the cogwheel icon (previously **Settings)** and check the **Show thumbnails** box.

To *hide illustration thumbnails* and show object symbols only:

Click the cogwheel icon (previously **Settings)** and deselect the **Show thumbnails** checkbox.

Attached images (shown as symbols or thumbnails) as well as links to images in the File repository are shown/expanded when the symbol, thumbnail or link is clicked. Then the image will be shown "floating", i.e. can be moved around in the result window as desired. Just click again to restore to the original view.

Creating and displaying relations

TermWeb allows you to define, edit and view relationships like subset, part-of, etc. for the concepts in your dictionary. Concept relations are also displayed graphically in a navigable map to let you find and view the related concepts in an easy way. The terms in the relation graphs are displayed in the currently selected source language.

To *display relations*, click the cogwheel icon (previously **Settings)** and check the **Show relations** checkbox.

To *view a diagram* of the current concept's relations, click **Show graph »**.
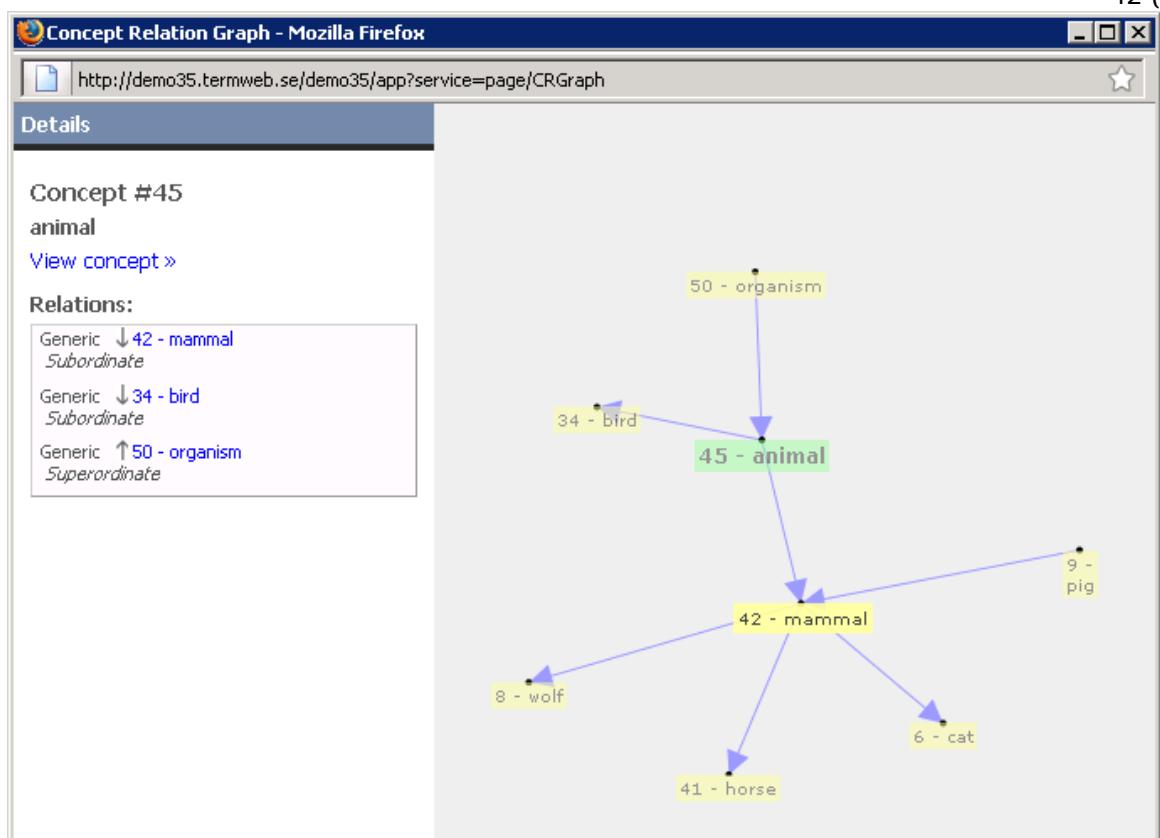
Here, click **View concept** to go back to normal view.

You define and delete relations under **Add/Edit** > **Edit concept level fields**

If you click **Add relation**, a list of terms is displayed. Find and select the term you want to create a relation <u>to</u>. Then define which relation the selected new term has to the concept you started out working with.

An example: If you start out working with the concept *chassis*, click Add relation, find the *car* concept and define the relation as Partitive and Superordinate, as car is superordinate to chassis.

If you want to create a specific label for the chosen type of relation, you can fill in the **Specification** field as in the following example:

That specific information will then be shown when the mouse is hovered over the relation arrow in the result window:

or in the left pane of the concept relation graph:

Print term data

To print a selected subset of term data, either to a PDF file or to a printer, proceed as follows:
1. Display the desired list of terms, using search criteria, filters etc.
2. In the Search view, click the **Print** icon.
3. Now you can select whether to print only the concept currently displayed in the result window, or all concepts in the term list. Also, you can select to print to your standard printer (via html) or to a PDF file.
   In case you select normal (html) printout with the **Print only the selected concept** or **Print all concepts in the current list** radio button, you can choose to save the html file for later use.
   Furthermore, you can choose to add a list of contained concept ID numbers at the top of the printout by selecting **Create a table of contents**.

Please note that the fields appearing in the printout depend on the view used for your user group. Also, not all installations allow term printout.

Check the history of a term record

To show a list of all the important changes made to a term record:
4. Show the term record. Click on the term from the list so the content of the term record is visible in the result pane.

5. Click (previously **Settings**) and select the **Show history** box. An overview of changes made to the term record will appear.
   Click the link text under Action, e.g. "The concept was changed" if you want to see more information about the change.
6. Deselect **Show history** when you want to hide the information.

See also Undo changes in a term record.

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What is a dictionary?

A dictionary is a major part of the database of a given structure, e.g. a limited number of languages and fields.

The fields may be valid for the entire term record *(concept level fields)*, e.g. a definition. The fields may also be valid only for terms *(term fields)*; used to specify e.g. grammar or source of a translation of a term in a particular language (a term equivalent).

The administrator defines dictionaries. You specify which dictionary will be shown by clicking the scroll arrow beside the **Dictionary** dropdown and choosing the dictionary from the list. The list of terms in the chosen source language is then updated.

More than one dictionary:

There is possibly more than one dictionary available to you. In this case, you can either change which dictionary to view, search, and work with, as described above, OR select one ore more additional dictionaries to view and search in the same time as the main dictionary.

Note!

You should only add, change, and delete concepts in the currently selected main dictionary.

Selecting additional dictionaries

If there are more than one dictionary available, you can select one or more dictionaries (besides the main dictionary selected in the Dictionary dropdown) to search in. These are referred to as additional dictionaries and are also selected in the same window as sections.

1. Click the "All sections ..." link or the **< Change** button (to the right of the Dictionary dropdown).

2. Press and hold Ctrl and click the additional dictionaries you wish to select for searching.

3. Click the **Select** button. The number of additional dictionaries is displayed in the link text and the term list is updated to include terms from selected additional dictionaries. Terms from additional dictionaries are displayed with pink background in the term list.

Searching in additional dictionaries has some limitations compared to main dictionary searching:

- Terms from all available sections are displayed from additional dictionaries.

- Domain, filter and multi-field searches only return terms from the main dictionary.

- Fuzzy search returns matches from main and additional dictionaries.

- Editing of concepts is only possible in the main dictionary.

When a concept from an additional dictionary is displayed in the result window, a message is shown at the top of the window with a link for setting the concept's dictionary as main dictionary. This provides a quick way of changing the main dictionary if you for example want to edit the concept. The previous selected main dictionary is automatically selected as additional dictionary when this link is used.

If you change the main dictionary using the Dictionary dropdown, the previous main dictionary is **not** selected as additional dictionary.

What is a section?

A dictionary can contain a number of sections with various types of terms and phrases. For instance, there might be a section with terms that are still being worked on, one with abbreviations and acronyms, and one with approved terms that are standard in various languages.

If you click on the **"All sections ..."** text, you will see all of the sections (and possibly additional dictionaries) that are available to you.

You can choose to show terms from one or more of the sections:

1. Click the **< Change** button (or click the text, normally **"X of Y sections ..."**, to the right of the Dictionary dropdown). Usually the text **"All sections ..."** is shown here.
2. A list of available sections appears in a box in the result pane. Select the section that you want to search. Hold **Ctrl** and select other sections that you want to search.
3. Click **Select**. (Note that the term list gets a yellow background to signal that only terms from a subset of the available sections are displayed.) When you then click the **< Change** button again, the names of the sections which you have selected appear in the **Selections for searching** box in the result pane.

If you want to show terms from all the sections in a dictionary:

1. Click the **< Change** button (or click the text, normally **"X of Y sections ..."**, to the right of the Dictionary: dropdown).
2. Click the word **"All"** (Select **All**) in the **Sections in current dictionary** part of the **Selections for searching** box.
3. Click the **Select** button at the bottom of the dialog box.

Show a particular domain or subdomain

The terminological entries in a dictionary and its sections can be classified according to their subject areas, i.e. domains, such as DATA PROCESSING or BUSINESS & ADMINIST.

If you want to only show terms from a single domain or subdomain:

1. Tick the **Domain search** box.
   In order to show as much of the domain selection frame as possible, you can switch to full screen view (F11 in Internet Explorer).
2. Select the desired *domain(s)*. If you select a domain, its *subdomains* are also selected automatically. To select or remove *subdomains*, first click the plus sign to the left of the main domain selected and then the subdomain(s)which you want to select.
   Click **OK** at the bottom of the result pane when you are finished.
3. Only terms from the selected domains/subdomains will be visible in the chosen source language.

You can see which domains and subdomains you have chosen in when you point to the heading **[n] selected domains [change]** at the top of the result pane.

Move a term record

To move a term record:
1. Show the term record. Click on the term from the list so the content of the term record is visible in the result pane.
2. Click the **Edit** icon .
3. Press **Alt+O** (in Internet Explorer) or click on **Edit concept level fields....**
4. Choose a different section from **Section** box and press **Alt+S** (in Internet Explorer) or click **Save** at the bottom of the window when you are finished.
5. Save the term record by clicking **Save**.

Remove a term record

To remove an entire term record (e.g. a duplicate entry):
(You can also remove a term record from its current place by moving it to a "hidden" section for removed records by following the instructions under "Move a term record".)
1. Show the term record. Click the term on the list so the content of the term record is visible in the result pane.
2. Click the **Delete** icon .
3. Confirm that you wish to remove a term record by clicking **Delete** in the text box shown. The term list is updated.

Remove a term

You can remove a term equivalent from a term record as follows:
1. Show the term record. Click on the term in the list to the left so that the content of the term record is visible in the result pane.
2. Click the **Edit** icon .
3. Click once on the term you want to remove so that it is appears at the top of the result pane.
4. Click **Delete term** to confirm that you want to delete the term.
   (If you change your mind, press **Alt+X** (in Internet Explorer) or click **Cancel** in the button field at the bottom of the window. You can also later use the Restore function in Show history.)
5. Press **Alt+S** (in Internet Explorer) or click **Save** in the button field at the bottom of the window when you have finished updating the term record.
   The term list is updated.

Import and export term data

If allowed by the administrator, even if you are not an administrator, you may have the right to import and/or export data to and from certain sections of a dictionary. Please refer to sections "Import: To import term data" and "Export: To export term data" below.

Send feedback ✉

This is how you send a message to the system administrator or the dictionary administrator:
(To save a comment with a specific term or term record, please use the Add comment function.)

1. Click on the mail symbol ✉.
2. Select the name of the addressee from the dropdown in the **To** field.
3. Your name and email address should already be filled in (if registered by the administrator). Otherwise, fill in these together with the subject and your message. You can also attach a file with additional information. (Attach).

Send feedback

To	System administrator (support@termweb.se)
Name	Terry T. Reader
Email	Terry@company.com
Subject	Additional user ID required
Attach	Browse...

Message

Hi,

We need one more terminologist id, with Read/Write access to all concepts in Preliminary status.

Best regards,
Terry

Send   Cancel

4. Click **Send.** Confirmation that the message has been sent appears in the result pane.

Log out

Click **Log out** in the upper right-hand side of the window.

Administration ⊠ (for administrators only)

If you click the **Admin** icon in the search mode (with search field, term list and result pane visible) the following function icons will appear:

- **New Dictionary Wizard**: Create/add a new dictionary
- **Dictionaries**: Modify or remove a dictionary (languages, fields, layout), copy a dictionary, export a dictionary definition and create a new dictionary elsewhere by importing it
- **Sections**: Add, rename and delete sections
- **History**: View changes in the overall structure and content of a dictionary and "undo" the ones you do not want. If you want to "undo" changes (i.e. restore previous data) for

  a specific term, go to Search View > click the cogwheel icon ⊞ ⚙▾ (previously Settings) > Show history.
- **Edit Domains**: Add, edit and delete domains and subdomains
- **Subclasses**: Add, edit and delete subclasses (groups of term records that can be located in different sections and are viewed in a certain way by all users, except administrators.)
- **Edit Views**: Add, change and remove views for a specific dictionary. Different views, such as differences in the information that is visible, can be selected for different user groups. Different views can be used, for example, to hide fields with exclusively administrative information from most users, except terminologists and administrators.
- **Import**: Import data with variable formats into TermWeb 3
- **Export**: Export a complete dictionary or a (filtered) part of a dictionary
- **File Repository:** Work with objects like pictures, sound files, etc. in the internal TermWeb file repository, import and export objects in batch
- **Users:** Add, modify, deactivate/activate or delete a user
- **Groups:** Add, modify and delete groups (with any filters and views)
- **Group Members:** Assign the user to one or more groups.
- **Guest Account:** Activate/deactivate a guest account (for several simultaneous users without personal user names). Indicate automatic login or normal login to be associated with a guest user name and password.
- **Change Password:** Change your own password
- **Access Editor:** Select the level of user group(s') access (no access, read access or read and write access) as well as export/import rights to various dictionaries and sections
- **Permission Schemes:** An alternative to Access Editor, providing a more detailed configuration of access permissions, including delete rights, and easier management. A permission scheme consists of a set of permissions granted for different user groups. The scheme is assigned to selected dictionaries and/or sections.
- **Lock Languages:** Select (for each applicable dictionary) which languages should not be editable for members of certain user groups
- **Language Replace:** Move terms between languages and sublanguages. As an example, you can move (redefine) all generic terms in a certain language to a specific geographical (region) or orthographical (script) variant of the language or vice versa.
- **Scheduled Jobs:** Automate regular exports of terminology data that fulfill criteria.
- **Statistics:** View usage (user login) statistics for the installation, listed per client, user etc.
- **Workflows:** Define and automate tasks, control access permissions on the field level, and add condition-dependent styling to your term data.
- **Administrator Tools:** Reindex dictionaries to speed up access. Convert old static internal links to terms (cross-references) to dynamic links (reflecting any change in referred-to terms). Customize message for error page. Specify password requirements.

- **<u>Projects:</u>** Define and automate certain project-related tasks, including defining filters and workflows

- **Client Info**: Here, you get information on login name, possible API key (to be stated in TermWebIntegrator products), total number of active users, maximum number of user accounts, maximum number of individuals who can be logged in at the same time, and, if enabled, the maximum number of concurrent guest users.

- **Clients** (can only be used by the system administrator): Add, modify or delete clients. Specify a maximum number of user accounts and/or a maximum number of individuals who can be logged in at the same time for each client, and, if enabled, a maximum number of concurrent guest users.
- **License** Here, you enter your license key that you receive at installation time, to activate your defined number of user licenses.
- **Batch Search Tool:** Search a dictionary for existence of a batch of terms, e.g. before an import of new data. This function is normally available for all users. See section Check for existing terms in a dictionary – Batch Search Tool.
- **API Templates** Here, you create templates to be used by different customers, stating what dictionary/dictionaries (or section/sections) to use for lookup and possible term suggestions e.g. for different customers in the TermWebIntegator for XTM Cloud product.

New template data	
Name	First customer template
Description	For TermWebIntegator for XTM Cloud
Dictionaries/Sections	
Dictionaries	TBX Basic dictionary ▾ ✕ ◘ Add Dictionary
Sections	◘ Add Section
Deprecated Terms	
Deprecated Terms	☑ Show
Deprecated Field	Acceptability
Deprecated Value	Do Not Use
Accepted Terms	
Accepted Terms	☑ Show
Accepted Field	
Accepted Value	
Non-translated terms	
Non-translated terms	☐ Show terms with no translation
	Save Cancel

Note!
- You can always return to the window with all the administrator function icons by clicking **Admin View** in the upper left-hand side of the window.
- You can always return to search view by clicking **Search View** in the bar to the left of Admin View link.

New Dictionary Wizard: Add a new dictionary

Note that a section with the same name as the dictionary is always created as a dictionary is created. Note also that authority to access a dictionary and its sections is always initially set as Undefined if Access Editor is used. You need to define the Users and User groups and their authority if you want to limit access to a dictionary. In case Permission Schemes is used, the Default Permission Scheme will be applied to the new dictionary.

Dictionaries: Edit/delete/empty dictionary, export/import dictionary definitions

To work with your dictionaries, go to **Admin** > **Dictionaries**.
You will see a list of dictionaries with the present number of concepts and other data and options for the dictionary. Please note that the **Delete** (delete both dictionary structure and contents) and **Empty** (delete only dictionary contents while keeping the structure) functions are irreversible. For the **Copy** function, please refer to section Create a copy of an existing dictionary. To **edit** a dictionary as described below, just click the dictionary name.

Defined dictionaries								
Dictionary	Concepts	Created	Modified					
Organisms, TermWeb info, and more	631	31 Oct 2008	25 Nov 16:21	Export	Edit Layout	Copy	Delete	Empty
Japanese-English Dictionary	15	19 Oct 2009	25 Nov 11:26	Export	Edit Layout	Copy	Delete	Empty
TBX Basic dictionary_2015_for_IATE	21893	11 Aug 2015	5 Nov 17:01	Export	Edit Layout	Copy	Delete	Empty

Important note: When you have added or edited a language or field, click **Save** for the language or field and then click **Save Changes** in the Dictionary data screen.

You can rename a dictionary as well as the language, concept and term level fields by first clicking the dictionary name. Here, you can also define at which place the dictionary should be placed in the list of dictionaries (dictionary selector etc.). Type the desired order number in the **Sort index** field. Note that this has to be done starting at number 1, and preferably for all dictionaries in the database.

Furthermore, you can define the dictionary administrator (in the Email recipient field; see also the "Send feedback" section), You can also change the order between languages, concept-level fields and term-level fields in the dictionary, and also, as an example, the order between values in picklist and multivalue fields; custom order (move selected value up or down) or alphabetic order:

```
─ Picklist ────────────────

Picklist items

┌─────────────────────┐  ┌─────┐
│ Plural (TBX)        │  │ A↓  │
│ Singular (TBX)      │  │ Z   │
│ Dual (TBX)          │  └─────┘
│ Mass noun (TBX)     │  ┌─────┐
│ Other number (TBX)  │  │ ⬆   │
│                     │  └─────┘
│                     │  ┌─────┐
│                     │  │ ⬇   │
└─────────────────────┘  └─────┘
```
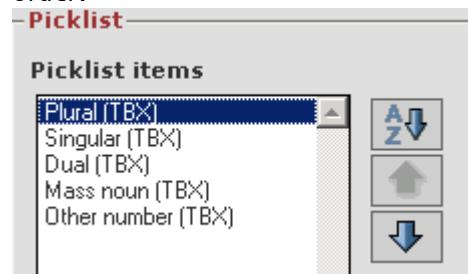
Important note for creating a value set for a multivalued field: It is recommended to create non-overlapping values, as this simplifies the task of creating filters including the values.
As an example, rather than *projA* and *projA1* etc. as values, use *projA* and *projB* etc.

Please note that you can create a value set for a multivalued field in the following way:

1) Create a dictionary with the multivalued field-to-be defined as a text field.
2) Import the desired term records including multivalued field-to-be values.
3) Go to **Admin** > **Dictionaries** and click the desired dictionary.
4) Select the field and click **Edit**.
5) Change the Field type to Multivalued.
6) Click the **Generate...** button.
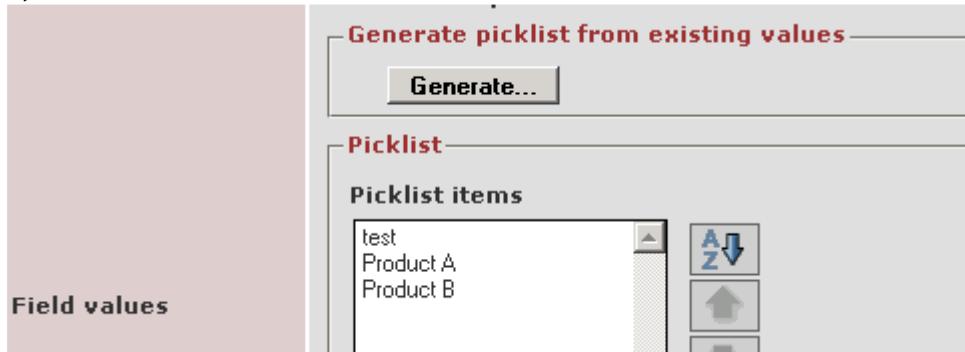
7) Click **Save** to save the field settings.
8) Click **Save changes** to save the dictionary structure.

Languages:

For each language you choose to add to a dictionary (from a list of all languages, common languages of the world, or European Union languages), you can select to specify the following:

- Possible geographical variants; regions (either predefined like US English, UK English, etc. or user-defined)
- Possible orthographical variants; character sets (like traditional and simplified Chinese scripts)
- If the language (or language variant) is written from left to right or right to left

Edit Language

Language settings	
Language	English
ISO 639-1 code	en
ISO 639-2 code	eng
Direction	**Language is written** [Left-to-right ▾]
Geographical variants	**Selected regions**
	Australia AU [Same as language ▾] [Remove]
	United States US [Same as language ▾] [Remove]
	United Kingdom GB [Same as language ▾] [Remove]
	Add region **Add** [Select region ▾]
	Add custom region **Name** [_____] **Code** [____] [Add]
Orthographical variants	☐ **Use orthographical variants**
	[Save] [Cancel]

The "language" **Not applicable** can for example be used for manual numeric concept or item numbering or for lists of terms or acronyms common to more than one language. If a dictionary only containing "Not applicable" language terms is selected as main dictionary with another secondary dictionary, searches will present results from a) the main dictionary and b) terms from the first language in the additional dictionary in the term list. If a "normal" dictionary is selected as main dictionary with a secondary dictionary only containing "Not applicable" language terms, searches will present results from a) current source language terms of the main dictionary and b) terms from within the set of "Not applicable" language terms in the term list, (irrespective of currently selected source language).

Field types:

You can create single-line and multi-line text fields, date fields, incremental fields (the value of which is automatically recalculated for each new term record), as well as picklist fields (allowing the selection of one of several fixed values) and multivalued fields (allowing the selection of one or more of several fixed values):

Edit Concept Level Field

Field settings	
Field name	Batch date
Field type	Date ▼
Field values	Date
	Text (multi-line)
	Text (single-line)
	Picklist
	Multivalued
	Incremental (unique number)

A multivalued field "Product(s)" with several values selected could for example be displayed as follows: **Product A, Product C, Product D, Product V.** Please note that values in multivalued field cannot contain the separator character , (comma).

Also, to simplify later filtering on the values, preferably avoid partly overlapping values like *projA* and *projA1*!

Character encoding, mandatory fields and min/max no. of characters allowed:

You can also indicate how character encoding of data, whether or not fields are mandatory, and the kind of data permitted in the field (see below) as well as the min./max number of characters allowed.

If Unicode is selected for a field, then it is possible to write or copy in characters other than the Latin as well special characters, such as a dash. Note that the term field (in all languages) is specified as Unicode.

Mandatory fields are indicated by an asterisk. If you try to save a term record without filling in a mandatory field, an error message will appear and/or the field will be indicated with a colored background.

Data type (Allowed value):

In addition you can indicate what kind of data is allowed in the field, i.e. any text, integer number (without a decimal or comma to indicate thousands, max 9 characters), or data that corresponds with a regular expression. An example of the latter is the simplest form of syntax control of the date, i.e. 20YY-MM-DD:

20\d{2}(-)((0[1-9])|(1[0-2]))(-)((0[1-9])|([1-2][0-9])|(3[0-1]))

If you want to add your own definition of a field on the concept level, with a limited number of possible values, do as follows:

1. Click the dictionary's name.
2. Click **Add...** in Concept Level Fields.
3. Select **New custom field** and then click **Continue**.
4. Enter the field name.
5. Specify the type of field in **Field type** (Picklist).
   Note! A single-line field can theoretically contain a maximum of 16,383 characters, but as the name indicates it is intended for less information, e.g. a maximum of about 70 characters which can be shown on one line in the result window without sideway scrolling.
   A multi-line field can contain a maximum of 16,383 characters, if not otherwise specified under Data length limit.
6. Select **Latin-1** in **Encoding** if the field only will include Latin-1 characters.
7. Select **Value is required** if the field must be given a value when a term record is created.
8. Click **Add...** beside the box for "Picklist items".
9. Enter one of the fixed values in the typing field and click **Save** beside the typing field.
10. Repeat step 9 for other possible values.
    Note that the value you write in first will be shown at the top of the list.
    If necessary you can move the various values up or down in the list.
    If the field is defined as mandatory, then the upper value of the list will be filled in automatically when someone creates a new term record.
11. Click **Save** at the bottom of the box.
12. Click **Save Changes** if you do not want to add or change more fields.

Important: An alternative and often quicker method to prepare for already existing data is to create the field as a single-line field, import the data into the field and then change the field to Field type Picklist, and click **Generate...** under **Generate picklist from existing values** before saving the field and dictionary definition.

Note 1: Initial zeros in numeric fields are automatically truncated when the term record is saved.
Note 2: Fields intended for numeric values or integer numbers longer than 9 characters should be defined as single-line or multi-line fields with "Any text" allowed, and for import of data into such a field from Excel, these values should be preceded by an apostrophe and formatted as text in the Excel file, for the numeric data to be interpreted and imported correctly.

Export a dictionary definition

This is how to create a file with all information on the structure of an existing dictionary (languages, fields and sections, and, optionally, layout and/or filter definitions), e.g. for use on another TermWeb installation or client:

1. Click **Dictionaries**.
2. Click **Export** beside the dictionary from which you want to export the definition.
   Then select the export format and details in the following dialog:

Select Export Settings	
Export Format	⦿ TermWeb XML ○ MultiTerm XDT ○ TBX
Detailed Settings	☑ Include Layout ☑ Include Filter Definitions
	Export Cancel
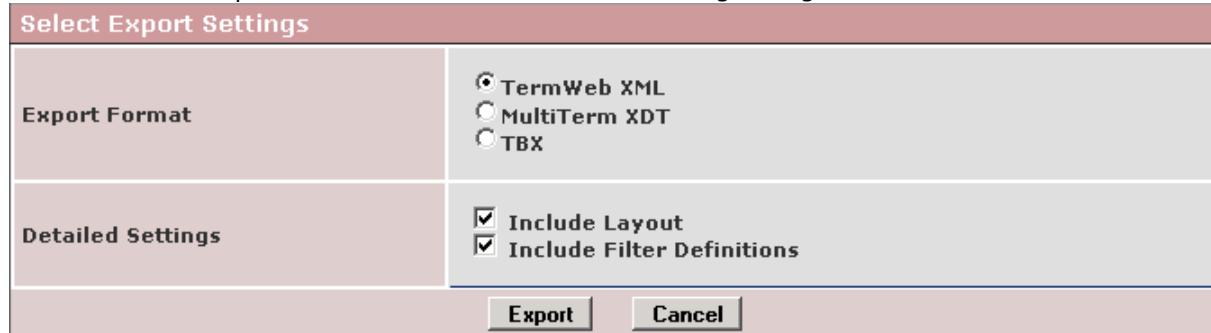
3. Save the resulting XML file in an appropriate location and with an appropriate name.
   Note! Only the dictionary structure is exported, no term data, user data, view data or access rights (permission schemes) data is exported. However, user and group data can be exported using the **Export all users and groups to file** option on the Admin > Users or Admin > Groups dialog.

Import a dictionary definition

Important notes: If you want to create an identical copy of an existing dictionary, with or without term data, in the same TermWeb installation and client, use the Copy dictionary function, see the section Create a copy of an existing dictionary.

It is also possible to create a dictionary structure <u>and</u> import the data in one step by importing an earlier exported dictionary data file (or a correctly structured import file). Then TermWeb will recreate the structure. See the section Quick import in the chapter "Import: To import term data".

Otherwise, this is how to create a new empty dictionary with the same structure (languages, fields and sections, and, optionally, layout and filter definitions) as one which you have previously exported:

1. Click **Dictionaries**.
2. Click **Browse** and choose an exported dictionary definition file from the **Import dictionary definition from file** box.
3. Click **Import dictionary**, select **Create new dictionary** and select whether to import also layout and filter definitions. Then click **Import dictionary**, and a dictionary with the same languages, fields and characteristics as the previously exported dictionary is created.
   If you import the dictionary definition while logged on to the same TermWeb site and client that created the original dictionary, the new dictionary will have the same name as the exported dictionary definition but with an added number, e.g. (2).
   Note! Term information is not imported, but you can import it via (Export and) Import in Admin View.

Alternatively, you can choose to import filters and/or layout from the selected dictionary definition file into an existing dictionary by selecting **Import to existing dictionary** and then clicking **Import dictionary**:

If you want to recreate the structure of a dictionary from an earlier exported dictionary data file (or a correctly structured import file in Excel or TBX format), you can choose the Quick import option from the **Admin** > **Import** screen (see page 59 below). This will both create the structure (dictionary definition) and import the term data into the dictionary.

Edit dictionary layout

If you want to change the appearance (character size, color etc.) of the field names and/or text, please do as follows:

1. Click **Dictionaries**.
2. Click **Edit Layout** on the line of the relevant dictionary.
3. Change the style parameters as desired.

(Here, you can also import a MultiTerm XDL file if you wish to create a similar layout as defined in such a file.)

An example of a CSS file (Cascading Style Sheets, that decides the appearance of the terminology display window):

```
/* $Date: 2007/04/05 15:01:44 $ */
span {font-family:verdana;font-size:11px}
br {display:none}
div {text-align:left}
div.t {margin:10px 0}
.l {white-space:nowrap}
.d {margin-left:1em}
.d br {display:inline}
.l_dom .l {display:block;float:left}
.l_dom .d {display:block;float:left;margin-left:5px}
.md {background:#eef;padding:.2em .4em}
.md .d {white-space:nowrap}
.md .f {display:inline;margin-right:20px}
.md .f span {font-size:9px}
.md .f .l {color:#99d;font-weight:bold}

.cf {display:block;margin:20px 0}
.cf .f{display:block;font-weight:bold}
.cf .f .l {color:#99d}
.cf .f .d {color:#999}

.f .l {color:blue;font-weight:bold}
.f {display:block}

.t,.tc {text-align:left}

.tx * {margin-left:20px}
.tx .t {margin-top:0}
.tx .md {margin:1em 0 0 40px}
.tx .md * {margin-left:0}
.tx .md .d {margin-left:1em}
.tx a, .tx img {margin-left:0}
.tx .ILANG {display:block}
.tx .ILANG .d {font-size:13px}
.tx .ITERM .d {font-size:15px;font-weight:bold}


.tc {display:table}
.tc .t {margin:.2em 0;display:table-row}
.tc .ILANG {display:table-cell}
.tc .ITERM  {display:table-cell}
.t .ILANG .l {display:none}
.t .ILANG .d {font-weight:bold;color:red}
.t .ITERM .l {display:none}
```

(Font and) font size of displayed data

Color of field labels (acc. to CSS color names)

Color of language names

Note!
You can always revert to the original layout for the dictionary at any time by clicking **Use Default CSS.**

Sections: Working with sections

Go to **Admin** > **Sections**

Defined sections			
Section	**Dictionary** ▼	**Concepts**	**Created**
☐ **Test_2_from_Excel**	TBX dictionary with all predefined TBX fields	6	15 Mar 2
☐ **Geography Demo**	TechniTerm and more	40	1 Dec 20
☐ **Geography, languages and currencies**	TechniTerm and more	1322	4 May 20
☐ **Sailing terms**	TechniTerm and more	365	15 Sep 2
☐ **TechniTerm version 6**	TechniTerm and more	17018	30 Oct 2
☐ **Term proposals**	TechniTerm and more	36	30 Oct 2

<< < 1 2 3 4 5 6 > >>

[New Section] [Empty Selected...] [Delete Selected...]

This is where you can add, modify and delete sections as well as purge the contents of a section. You also can see the current number of concepts in each section.

Please note that you can sort the list (in ascending or descending order) by section name, dictionary name, number of concepts, creation date or modification date by clicking the respective heading

If you wish to merge the contents of two sections into one, place the concepts of the section to be deleted in Grid View, batch-change the section of all these concepts to the new section and click Save. Then go to **Admin** > **Sections** and delete the now empty section.

- You can *add* a section by clicking **New Section**, specifying the name, dictionary and, specifying the *)default view for the section and then clicking **Save**. Here, you can also define at which place the section should be placed in the list of sections (section selector etc.). Type the desired order number in the **Sort index** field. Note that this has to be done starting at 1, and preferably for all sections in the dictionary.
- You can *change* the *name,* the *sort order* and the *)*default view* of the section after clicking the section's name on the list.
- You can *remove* one or more sections by selecting the box(es) beside the section name(s) on the list and clicking **Delete Selected....**
  Note! When you remove a section you also delete all content, i.e. all term records in the section!!!
- If you wish to purge the contents of a section or sections, but keep the section, select the box(es) beside the section name(s) on the list and click **Empty Selected....**

User groups that should be able to read the terms in the section and change, add or remove term records (and export and import data) in the section are described under Access Editor and Permission Schemes respectively.

*) Please note: The selected default view for the section will be applied to all user groups, including administrators.

History: Show changes in a dictionary and undo changes

If you wish to undo an import, you can do for example as follows:

1) Choose the desired dictionary.
2) Click on the arrow (in the Restore column) alongside the position to which you want to restore the database.

3) Confirm that you want to restore the database to the selected position (e.g. 21 February 9:05).

Note! The dictionary history only runs back to the latest change of the dictionary structure.

Edit Domains: Add, edit and delete domains and subdomains

How to specify domains and subdomains. While working you can show or hide subdomains by clicking on their name.

Add a domain:
1. Select the desired dictionary from the **Dictionary** dropdown.
2. Right click **All domains** and choose **Add domain**.
3. Write over the text "*New domain" shown* in the box at the bottom of the domain list with the name of your new domain.
   Tips (in Internet Explorer): Press **shift+Ctrl** and type in the name. Confirm by pressing Enter.
4. Repeat steps 2 and 3 for all main domains.
   If you want to have subdomains:

5. Right click on a domain and choose **Add domain**.

6. Write over the text *New domain* in the box that appears with the name of the subdomain and confirm by pressing Enter.
7. Repeat steps 5 and 6 for all subdomains of a main domain.
8. Repeat steps 5 and 6 also for other main domains that are to have subdomains.
   When the domain tree is ready, click **Save**.

To rename a domain:
1. Right click on the domain name and choose **Edit domain**.
2. Write over the domain name that is shown in the box with the new domain name.
3. Confirm by pressing Enter.

To remove a domain:
1. Right click on a domain and choose **Delete domain**.
2. Confirm with **OK** (or undo by pressing **Cancel**).
Note! When you remove a domain, the term records that belonged to that domain will then belong to the nearest preceding domain (above).

Subclasses: Create subclasses of term records

Please note that the subclass functionality will not be supported in coming TermWeb versions.
Terms in a certain subclass can be found in several different sections of a dictionary.
A subclass for a term record is created among the general fields in the same way as for a section (Edit concept level fields).
Subclasses of term records can be used for two different purposes:
1) To show term records in the subclass in the same way (with the same view) for all users except the administrator.
2) To limit a specific user group to viewing term records of a certain subclass only.

A) How to create the same view of a subclass for all users except the administrator:
(You can otherwise apply a user-group specific view under "Groups".)
  1) Create a new view, e.g. without administrative information. See **Edit Views**.

  2) Create a subclass: Click **New subclass**, type in the name of the new subclass, select the dictionary for which the subclass is to be valid and choose the view created in step 1.

B) How to create a subclass that is user-group specific:
  1) Create a filter with the condition that term records belong to a specific subclass (Subclass EQUALS...).
  2) Apply this filter to the user group.
This user group will then only see the term records that belong to this subclass, and with the view that has been specified for the subclass.

Edit Views: Add, change, and delete views for a specific dictionary.

For example: If you want to hide the fields "Created by", "Creation date", "Changed by", and "Change date", on the term level for a specific user group, do as follows:
  1) Click **Edit Views**.
  2) Click **Add view....**
  3) Give the view a descriptive name.
  4) Specify which dictionary applies.

5) Deselect the fields that are to be hidden from view.

6) Click **Create view**.
7) Click **Admin View** and then **Groups**.
8) Click the group's name. The **Group data** dialog appears.
9) For each dictionary, Ctrl-click the view or views to be available to the group in the **View:** dropdown and then click **Update Group**.
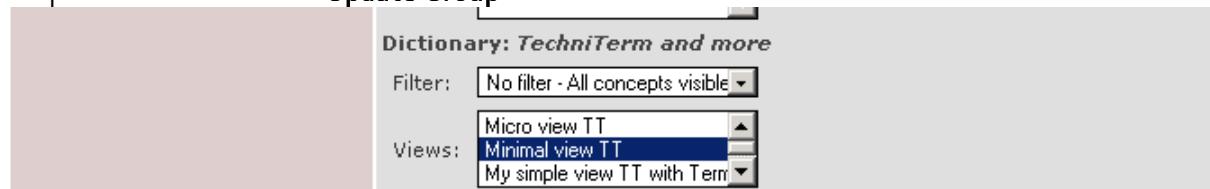
The users in the group will then not be able to see the deselected fields in the view or edit mode (assuming that the group has Write access to a part of the relevant dictionary).

When a member of the group logs in, he or she will be able to choose between the available views (if more than one view was selected above):
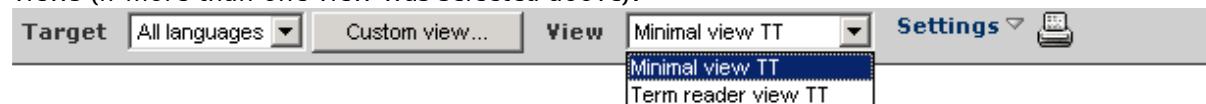
Note: If a view is used elsewhere in a system, e.g. as a default view for a user group, it cannot be deleted from the list.

Import: To import term data

Please note that there normally has to be a dictionary structure into which term data can be imported. The alternative is to use the Quick import option (see below).

Quick import

If you want to import an earlier exported dictionary data file (or a correctly structured import file in Excel or TBX format) and make TermWeb recreate the structure, you can choose the quick import option from **Admin** > **Import**. This saves the job of having to import the dictionary structure before importing the term data. Then, just give the dictionary a name in the Dictionary name field, browse for and select the dictionary data file and click **Create Dictionary and Import**.

Quick Import		
Select a TBX or Excel file to automatically create a dictionary and import the file data		
Dictionary name	My New Dictionar	
Import File	Browse...	No file selected.
	Create Dictionary and Import	
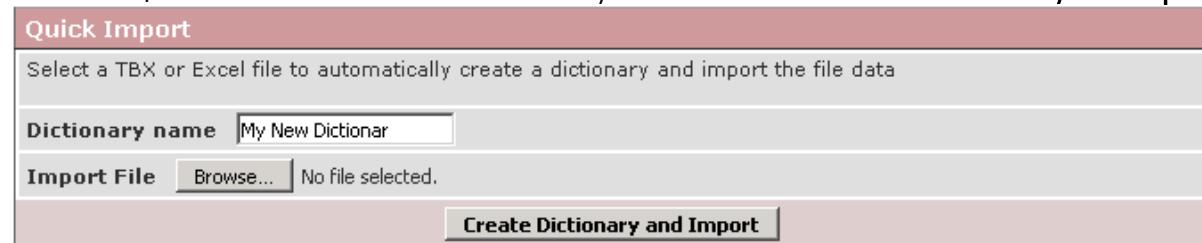
If you import an Excel or TBX file using the Quick import option, though, a dictionary structure can be created automatically. Please note that also domains and subdomains will be created automatically, but picklist fields like Part of speech will be created as single-line text fields, but can be changed into picklists with existing values by using the **Generate picklist from existing values** option in the dictionary definition.

Refer also to the section "Dictionaries: Edit/delete dictionary, export/import dictionary definitions" above.

Data import only

Data in the following formats can be imported to a TermWeb dictionary:

– **TBX** (TBX basic fields are available for dictionary setup in TermWeb.)

– **Excel** (xls or xlsx file), where tab names are mapped to existing dictionary sections, and column headings (from left to right) are mapped to existing concept-level fields (term record fields) and existing languages followed by their term-level fields, with a set of columns per language; the language name followed by the corresponding term-level fields.

Tip: If using Excel for collection and import of additional concept data, e.g. terms in another language, first export desired term records with desired fields (including Concept ID) and desired languages, e.g. source language and new target language, from the dictionary. Then have the empty target language columns filled in. Finally, import only the target language data with synchronization on Concept ID.

– **TermWeb 2 XML** (for compatibility with earlier installations)

– **MultiTerm iX XML**

Procedure:

1) Click Admin and then the **Import** icon.

Import Settings

Selected Dictionary   [Organisms, TermWeb info, and ▾]

Available settings					❓
Name	**Dictionary**	**Synchronization**	**Owner**	**Visibility**	
New language terms	Organisms, TermWeb info, and more	Index term - Overwrite parts	admin	Private	Edit | Delete
Organisms_New concepts import	Organisms, TermWeb info, and more	No synchronization	prod	Private	Edit | Delete

2) If you want to import terminology data using an existing settings file, first select the dictionary name in the **Selected Dictionary** list and then click the settings file name under **Available settings**.
   To change an existing settings file, click **Edit** on the line of the settings file.
   To create a new settings file click **Add new settings**, name the settings, choose a dictionary from the **Import in Dictionary** dropdown, define whether the import settings are to be visible to yourself (and administrators) only (Private), or to all users with import rights (Public) in the **Visibility** dropdown. Then specify the new settings for import synchronization, i.e. how the import file will be synchronized with existing information in the section(s), what will be imported, etc.
   Click **Save**, and then click the settings file name.

3) Click **Browse,** scroll to and choose the file you want imported.

4) Click **Next >**.

5) Click **Next >** if the validation report is OK.

6) Unless already decided, select to what dictionary section the terminology data should be imported by mapping the dictionary section(s) to the section name(s) in the import file and then click **Next**.

7) If there are fields on the term record (concept) level in the import file that were not already connected (mapped) with the fields in the dictionary, select the fields that should be mapped and then click **Map** for one field name pair at a time in the **Map concept fields** text box.
   When you are finished, click **Next >**.

8) Repeat step 7 if necessary on the term level (**Map term fields**) and then click **Next >**.

9) Repeat step 7 if necessary for languages (**Map languages**) and then click **Next >**.

10) You may now get a question if languages, sections, domains or fields existing in the import file, but missing in the receiving dictionary should be created in the dictionary:

Select the desired data categories to be created and click **Next >**.

11) If you are satisfied with the mapping, click **Next >** in the **Import settings complete** text box. Otherwise, you can click **Change** by the mapping you want to change.

12) Click **Finish** in the **Import complete** box.

Note! The next time you want to import a similar file, the settings for mapping the import file and dictionary are remembered and will be available.

Note! When importing data from a file in the TermWeb 2 XML format:

▪ If you want the same Concept ID in TermWeb 2 to apply in TermWeb 3: Tick "Synchronize on concept ID".

▪ If you want to create a new Concept ID for term records: Tick "Add import concept as new" (recommended).

For any supplementary import of previously exported and supplemented TermWeb 2 data, tick "Synchronize on index term".

Note! Any domain information in the import file will be transferred to the database only if the domain or subdomains already exist in the database.

Example:

You have received an (earlier exported) Excel file including the concept ID and new terms in French and Dutch and want to import data to the existing database where there are already terms in other languages. Use the import settings indicated in the figure below.

Enter the settings for your import

Name for settings	Synk_Conc_ID_Fill_in_parts
Import in Dictionary	My dictionary

Synchronization

○ **Add import concept as new**
◉ **Synchronize on concept ID**
○ **Synchronize on index term**
   For language(s)

   Dutch
   English
   Finnish
   French
   German

Action

When concept IDs are identical:

Fill in parts

Select parts

Concept level fields

All / None
☐ Definition
☐ Explanation
☐ Number
☐ ISO date

Term entries in languages

All / None
☑ Dutch
☐ English
☐ Finnish
☑ French
☐ German
☐ Greek
☐ Japanese
☐ Swedish

[Save] [Cancel]

Use "Merge parts", however, if you want to supplement with new terms **and** possibly new detailed information about existing terms.

Import settings

An import setting defines how a file should be imported. You can define which fields and languages that should be affected, and also specify how concept and terms should be synchronized.

Select a setting

Your available settings are displayed in the *import settings selection view* when you click on the **Import** button in the Admin view. You will see both your own settings as well as settings defined by other users and declared to be public. If you are an administrator all import settings for all users are displayed (both private and public). Click on an import setting to select it and then click the **Import** button to start the import wizard.

Create or edit a setting

To add a new setting, click the **New** button in the import settings selection view. To edit a setting, click the **Edit** button for the setting you want to edit. You will see the settings editor where you define your import setting.

Start by entering a name for the settings. The name must be unique among all your defined import settings.

Select the dictionary in which the file should be imported. You can only select from the dictionaries where you have import permissions.

Select the visibility for the settings. *Private* means that only you and administrator users will be able to use the setting. Selecting *Public* lets all users with import permission in the dictionary use the settings.

Synchronization

With the synchronization features you can combine existing term data with imported data, e.g. adding translations for existing terms. You specify how concepts should be recognized for synchronization, and what action should be performed in that case. The preferred way of synchronizing concepts is to use the Concept ID, but TermWeb also lets you synchronize on index term. Since TermWeb 3.5 you also have the possibility to synchronize on Term ID on the term level.

Concept synchronization methods

The following methods are available for concept synchronization:

- **Add import concept as new** – No synchronization is performed, the imported concept is always added as a new concept and given a new concept ID.

- **Synchronize on concept ID** – The imported concept is matched against any existing concept with same ID in the database. If no such concept exists, the imported concept is added as a new concept, and its concept ID is kept as is.

- **Synchronize on index term** – The imported concept is matched against any existing concept with at least one term with same name in any of the selected languages. If no such concept exists, the imported concept is added as a new concept and given a new concept ID. You need to select at least one language for synchronization with this option.

Selected languages for index term synchronization does not affect which terms are imported, only which terms should be checked for concept synchronization.

Synchronization Action

The *Synchronization Action* defines what should be done with synchronized concepts. You can select one of the following actions:

- **Do not import** – No changes are done to the existing concept and no new concept is added.

- **Replace old concept** – The existing concept is deleted and the imported concept is saved.

- **Overwrite parts** – Selected parts from the imported concept is used to overwrite parts of the existing concept. See more details below.

- **Merge parts** – Selected parts from the imported concept is merged into the existing concept. See more details below.

- **Fill in parts** – Selected parts from the imported concept is filled in into the existing concept. See more details below.

Selecting parts

You select the parts of the **imported concept** that you wish to use for updating the existing concept in the database. You can select any field on the concept level, and/or terms in selected languages. Selected parts from the import concept are then used to update the synchronized concept, according to selected action.

The terms in the synchronized concepts can also be synchronized. You can select how TermWeb should attempt to synchronize the terms in the Term synchronization settings.

When two terms are synchronized, every field value of the term entries is handled depending on selected action:

- **Overwrite parts** - The imported field value always overwrites the existing value, or deletes it if the imported value was empty.

- **Merge parts** - The imported field value overwrites the existing value, but the existing value is kept if the imported value was empty.

- **Fill in parts** - The imported field value is only added if there was no existing value for the field.

Same rules also applies for concept-level fields.

For imported terms that are not are synchronized, the following actions take place:

- **Overwrite parts** - All existing non-synchronized terms in the imported term language are deleted, and replaced by the imported terms.

- **Merge parts** - The imported term is added to the existing concept.

- **Fill in parts** - The imported term is only added if there was no existing term in the imported term's language.

Term synchronization settings

You can select how terms should be synchronized within synchronized concepts. The options are as follows:

- **Synchronize on term ID** - The imported term is synchronized with any existing term with same term ID. This option is only available if *Synchronize on concept ID* is selected.

- **Synchronize on similarity** - The imported term is compared to the existing terms, and if there is enough similarity between the entries, they are synchronized. The fields being compared are term name, language, region and orthographical variant, and the probability for synchronization match depends on the combination of matching values in these fields. Two entries with same term name and language are always synchronized.

- **No synchronization** - No term synchronization is performed

Terms can only be synchronized within synchronized concepts, e.g. entries with matching term IDs will not be synchronized if their concepts not are synchronized.

When you are done defining your import settings, click the **Save** button to save them, or **Cancel** to leave the editor without saving your changes.

Note! If you want to "undo" a data import and restore the database to the position prior to the import, select **Admin > History**. It is not possible to "undo" a complete data import by using the history function for a term record.

Note! The metadata fields cannot be changed by editing the file to be imported. The "Created by", "Creation date", and "Change date" fields are set to the importer's ID and time of the import.

<u>Importing using Permission Schemes</u>

When term data is imported with Permission Schemes enabled the same permissions are enforced as for manual editing.

This means, that besides allowing the Import permission in the scheme, some other permissions should also be granted depending on what the users should be able to do during the import operation.

The table below describes what permissions are needed for different import and synchronization cases:

Import type	Synchronization type	Permissions needed (for type of change)
Import as new	*N/A*	**Create Concept** (for importing new concepts)
Import with concept synchronization (on concept ID or index term)	Replace old concept	**Create Concept** and **Delete Concept** (all changes)
	Overwrite parts	**Edit Concept** (all changes) **Edit Concept Level Fields** (for changes to concept level fields) **Create Term** and **Delete Term** (for all changes to non-synchronized terms) **Edit Term** (for changes to synchronized terms)
	Merge parts	**Edit Concept** (all changes) **Edit Concept Level Fields** (for changes to concept level fields) **Create Term** (for all changes to non-synchronized terms) **Edit Term** (for changes to synchronized terms)
	Fill in parts	**Edit Concept** (all changes) **Edit Concept Level Fields** (for changes to concept level fields) **Create Term** (for all changes to non-synchronized terms) **Edit Term** (for changes to synchronized terms)

Importing domain information from Excel

In Excel, add a concept-level column with the heading "Domain". Enter domain (or domain and subdomain) information in the following format for all **concepts** needing a domain classification.

Three examples:
1) SCIENCES

2) SCIENCES > geography

3) BUSINESS & ADMINIST > public administration;SCIENCES > geography

In the latter case dual subdomain classification is imported.
Please note: From version 3.9 a check is performed whether the domain names in the import file exist in the dictionary. If a domain does not exist, a message "Unknown Domain Values" is displayed and you are given the possibility to go back and adapt the import file OR the dictionary domains before a reattempted import.

Export: To export term data

To export term data, e.g. for review or supplementary information, you can do the following:
If you do not want to export an entire dictionary, create a <u>filter</u> under **Search view** > **Filters**.
1. Click **Export**.
2. If desired, filter the export settings by dictionary:

Export Settings

Filter by dictionary   TechniTerm and more

Available settings					
Name	**Dictionary**	**Format**	**Owner**	**Visibility**	
1152	TechniTerm and more	EXCEL	admin	Private	**Edit** | **Delete**

Select a completed settings file from **Available settings** list.
To change an existing settings file, click **Edit** on the line of the settings file.
If there are no appropriate export settings files for the dictionary, create a new one (click **Add new settings**). Write the <u>name</u> of the export settings file, for <u>which dictionary</u> it is applicable, whether the <u>export settings</u> are to be <u>visible</u> for you only, and administrators, (Private) or for other users with export rights (Public) and the desired <u>format</u> of the export file.
You can choose one of the following formats:
– TBX (TermBase eXchange); standard format according to ISO/DIS 30042
– TermWeb 2 XML; compatible with previous versions of TermWeb (This option is only available in earlier TermWeb versions than 3.18, e.g. version 3.9.)
– MultiTerm iX XML
– Excel. Here, section names normally become tab names. From version 3.16 you can select to place all exported concepts in one sheet (where the dictionary name will be present as the tab name) and also to include the Dictionary name in one column.

Concept-level field names, followed by language name and language-level field names become column names.

If you want to give a custom name to the export file (not only the Dictionary name followed by a numeric value), enter that name in the **Export file name** field:

If you wish to include permalinks in the export file, tick the **Export permalinks** tickbox.

Then, the term permalinks will be exported to Excel in a column with the heading **[permalink]** or to TBX in a line like the following:

<xref id="c1-1-pml" type="permalink" target="http://demo310.termweb.se/termweb/view/iseb/ised"/>,

where **c1** is the *termEntry id* (TermWeb Concept ID =1), and **c1-1** is the *tig id*, and http://demo310.termweb.se/termweb/view/iseb/ised is the permalink to the term.

If you want to export also possible attachments of concepts (thumbnail pictures), click the **Export attachments** tickbox:

Then choose the filter in the **Select concepts by filter** field.

Indicate which languages and fields you want in the export file.
Click **Save** when you have finished with the export settings.
3. Select the export settings file and click **Export**.
4. A picture is now shown with the mapping between the language names from the dictionary and export files. If you want to, you can rename the export file language names. Otherwise, click **Next >**.
5. A picture with the mapping between the concept level fields is shown as described above. Change as needed (does not apply to pre-defined TBX field names) and then click **Next >**.

6. A picture with the mapping between the field names at the term level is shown. Change as needed and then click **Next >**.
    The **Export complete!** box is shown with information about the number of exported term records.
7. Click **Open in browser** if you want to review the file. Click **Save file** and save the file at an appropriate location and with an appropriate name.
8. Click **Finish** when you are finished.

Note! You can use the same export settings, with minor modifications if necessary, the next time you want to create a similar export file.

Note! If you want to validate an exported TBX file, the dtd file (*.dtd) must be in the same folder as the TBX file.

Note! Concept relations are not included in the export file. From version 3.12, attached objects as well as permalinks can be included in the export file. Links to external objects are included but not (apart from web addresses) reimportable and thereafter directly usable. For export of an entire dictionary, internal links (cross-references between concepts) are included and will be recreated during import to another installation, but e.g. file repository data has to be packed (ZIPped) and copied separately to the new installation. (See information on File repository in the "Add cross-references, pictures and other objects to term records" section.)

Note: For Excel exports, you can choose to sort the exported terms according to a picklist field value, e.g. Usage status: Select the desired term-level field under **Order terms by field** and the resulting exported Excel file will contain the term with the first picklist value first, and to the right of these columns, the term with next picklist value. As an example, this is useful for export of structured term databases with pairs of preferred and non-recommended terms. There, all preferred terms (or single unclassified terms) will be in the leftmost columns for each language. Please note that unclassified terms (terms with no picklist value) will be put in columns after terms with a picklist value. Also note that the order between the picklist values is defined in the dictionary definition.

Sample export (acc. to standard order between picklist values of TBX Basic field Usage status):

Swedish	Usage sta	Swedish	Usage status
in situ-hybridisering med fluorescens	preferred	fluorescenshybridisering in situ	notRecommen
bestämning av vätgas i utandning	preferred	hydrogent utandningstest	notRecommen
difteri, stelkramp, kikhosta	preferred	DTP	notRecommen
Haemophilus influenzae typ B	preferred	HIB	notRecommen
EHEC	preferred		
xxx med svart hudfärg	preferred	svart xxx	notRecommen
etnisk tillhörighet: xxx	preferred	ras: xxx	notRecommen
födelseland (Xxx)	preferred	födelseland (xxxskt)	notRecommen
ledare	preferred	trådförare	notRecommen
xxx med ledare	preferred	trådförarxxx	notRecommen
positivt odlingsprov från xxx, taget m	preferred		

Groups: Add, modify or delete groups

(See also the section on using language groups.)

If necessary, you can add a new user group.

You can also use a standard filter (for a certain dictionary) and a view (for a certain dictionary) for the group, but they should be specified first, see the sections "Use filters to search and export" and "Edit Views: Add, change and delete views for a specific dictionary."

You can also change the name, description, filter and view for the group, or remove the group. Group members are specified under **Group Members**.

Which members are to receive access to which sections of dictionaries is set under **Access Editor** (or by using **Permission Schemes**, defining a set of rights for the user groups and then assigning this permission scheme to the desired dictionary or section).

Add a group

1. Click **Groups**.
2. Click **New Group**.
3. Indicate the **name** of the user group, **description**, the desired automatic logout after inactivity period **Session timeout** (if differing from the default, which is normally 60 minutes), and any **view** or **filter** that is to be applicable for the group. Filter and view can be set individually for each dictionary.

   For TermWeb installations with the API add-on product installed, you can choose if you want the users within the group to be able to access TermWeb via the API by using the **Allow API access** checkbox.

   If you want the group members to change their passwords at regular intervals, i.e. you want to set a maximum password age, you can also specify a **Change password** interval here:

   If a user is a member of several groups, the lowest value among the groups is applied for the user.

   (Views are defined under **Edit Views** and filters under **Search View** > **Filters**.)
4. Click **Create Group**.

Change information about a group

1. Click **Groups**.
2. Click the user group's name.
3. Change the name, description, session timeout, and, if desired, password renewal interval and any filter and view (or views) (per dictionary) that are applicable to the group.
   An example:

Dictionary: *TechniTerm and more*

Filter: | No filter - All concepts visible ▼ |

Views: | Micro view TT |
| Minimal view TT |
| My simple view TT with Term ▼ |
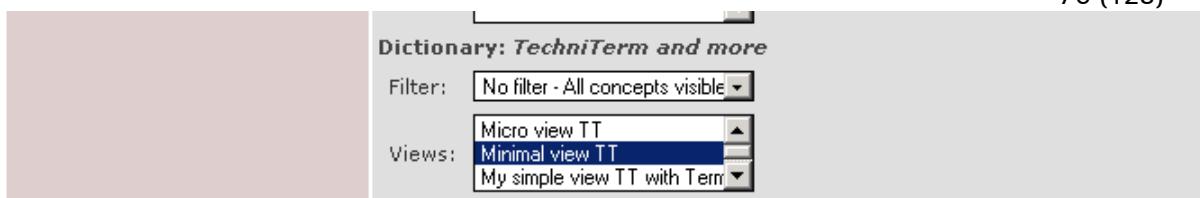
Here, no initial filter, but the view "Minimal view TT" is selected for the current group and the "TechniTerm and more" dictionary. To deselect a filter, select "No filter - All concepts visible" To deselect one or more views, Ctrl-click the currently selected view or views.
If you want more than one view to be selectable by the users in the group, select these views by Ctrl-clicking.

4. Click **Update Group**.

Remove a group

1. Click **Groups**.
2. Tick the box to the left of the user group name.
3. Click **Delete Selected...**

Exporting and importing user and group information

If you want to create a similar environment, e.g. a backup environment, to your existing client, it is possible not only to export and import dictionary structure (dictionary definition) and dictionary contents, but also all defined users and user groups. You can do thie either from the **Admin > Groups** or **Admin > Users** dialog.
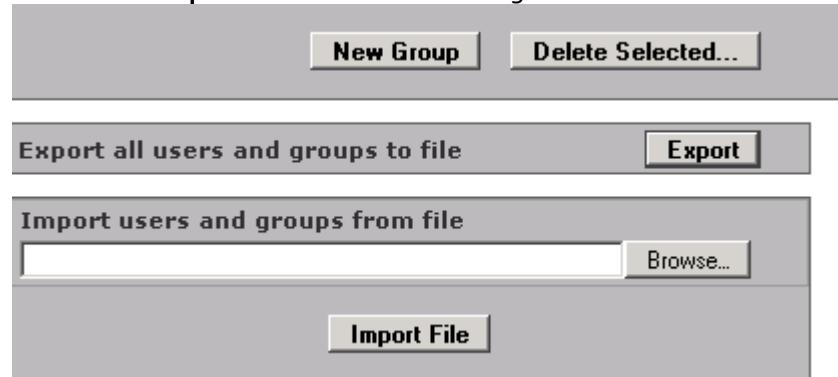
Click Export and save the file.

When you want to import the user setup to the new environment;

1. Click **Browse** and select the exported TermWeb_users_groups.xml file.
2. Click **Import File**. The following dialog will be displayed:
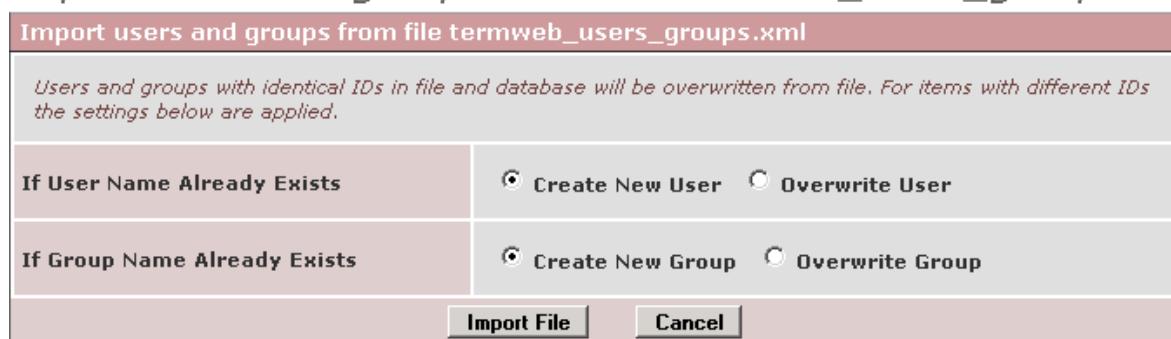
Here, you can select to create a new user/new group, if a user/group with the same name already exists in the new client or just overwriting existing users/groups with the ones in the imported xml file.

Please note that you will have to review and set group membership, permission schemes, etc. after users, groups (and dictionaries) have been imported to the new environment.

Guest Account: Activate/deactivate and change information about guest users

Note: This function requires guest functionality to be enabled in the installation.

1. Click **Guest Account**.
2. Activate a guest account by ticking the box **Enable guest account**.
3. a) If the guest user is to log in the usual way: Fill in the user name and password and select **Normal**.
   b) If the guest user is to log in automatically when they visit the web site: Select **Automatic (Always)** or **Automatic (when client is specified in URL)**.
4. Click **Save**.

Everyone who visits the web site will now be able either to log in
a) with the specified user name and password or
b) automatically (to only one predefined client of many) or
c) automatically to a client when that client name is specified in the TermWeb URL (e.g. http://demo38.termweb.se/demo38/client/klient, where "klient" is the client login name).

Note! Several users can use the guest account at the same time, if this function is enabled. What guest users can see is set under **Access Editor** or **Permission Schemes** and with filter and views per dictionary for the user group **Guests**.

Guest users cannot change term data; they can only search for terms, use pre-defined filters and create temporary filters. If you want, you can easily deactivate the guest account by clicking **Guest Account**, deselecting **Enable guest account** and clicking **Save**.

Users: Add, edit, deactivate/activate or delete a user

Add a user

1. Click **Users**.
2. Click **New User**.
3. Type in a user name, full name, e-mail address, and primary group membership (and indicate if the user is to be an administrator or system administrator).
   Note! If you have not defined any group membership this can also be done under **Group Members**.
   If you want to set the password for the new user, deselect the **Send password reset link in email** checkbox and fill in the desired password twice.
   If you want to create a temporary user only, fill in or select the **expiration date** for the account. If the user tries to log in later, a "This user account is currently disabled" message will be issued. For further options, see below under "Change information about a user".

New user data	
User name	reader3
Full name	Charles Reading
Email	charles.reading@company.com
Password	
☐ Send password reset link in email	
Password	●●●●●●●
Confirm password	●●●●●●●
Account Settings	
Expiration date	📅 *Leave blank to keep active forever*
Options	☑ Active ☑ User must change password at next logon
User Permissions	
Initial Group	Readers ▾
User Roles	☐ Add role
	Create User Cancel

In the above case, the user will get not get an email with the credentials (this will have to be communicated via another channel) but is required to change the password after logging in.
(If only the **Active** checkbox is selected, no email is sent and there is no requirement to change password.)

New user data	
User name	reader3
Full name	Charles Reading
Email	charles.reading@company.com
Password	
☑ Send password reset link in email	
Account Settings	
Expiration date	📅 *Leave blank to keep active forever*
Options	☑ Active ☐ User must change password at next logon
User Permissions	
Initial Group	Readers ▾
User Roles	☐ Add role
	Create User Cancel

If you fill in the form as above, the user will get an email and is required to select a new password him- or herself before logging in.

New user data

User name	term2
Full name	Terminologist 2
Email	term2@domainname.org

Password

☑ Send password reset link in email

Account Settings

Expiration date		*Leave blank to keep active forever*
Options	☑ Active ☐ User must change password at next logon	

User Permissions

Initial Group	French terminologists ▾
User Roles	☐ **Add role**

Create User	**Cancel**

4. Click **Create User** (and then **Admin View** if you want to return to the administrative function icons or **Search View** if you want to return to the search position).

For the Clients (**Add Client**) and User Roles (**Add Role**) functions, please see below.

Change information about a user

1. Click **Users**.
2. Click the user's name. A dialog box similar to the one below will appear:

User data	
Created	Jan 7, 2016 8:24 AM by Admin 2 (admin2)
Last modified	May 17, 2016 7:37 PM by Admin 2 (admin2)
User name	Wies
Full name	German Terminologist 1
Email	termin@kunden.com
Password	
Password	•••••••• *Leave blank to keep old password*
Confirm password	••••••••
Account Settings	
Expiration date	2016-12-31 *Leave blank to keep active forever*
Options	☑ Active ☐ User must change password at next logon
User Permissions	
User Roles	User editor ▾ ✖ ☐ **Add role**
	Update User **Cancel**

3. Make changes in the user data.
   If you want to set an automatic expiration date for the user account, enter the date in ISO format (or select it from the calendar). At the selected date, the user will be inactivated.
   Deselect the **Active** checkbox if you want to temporarily deactivate the user.
   Click **Add role** to add a role to the user in the **User Roles** dropdown. As an example, select *User editor* for the user to be able to edit other users' info and place these other users in groups.
   Here, a "normal" user can also be given the *Administrator* role for a certain dictionary:

User Roles	Administrator for 'Animals and Plants' ▾ ✖
	Administrator
	System administrator
	User editor
	Administrator for 'Organisms, TermWeb info and more'
	Administrator for 'Animals and Plants'
	Administrator for 'Demo Dictionary'
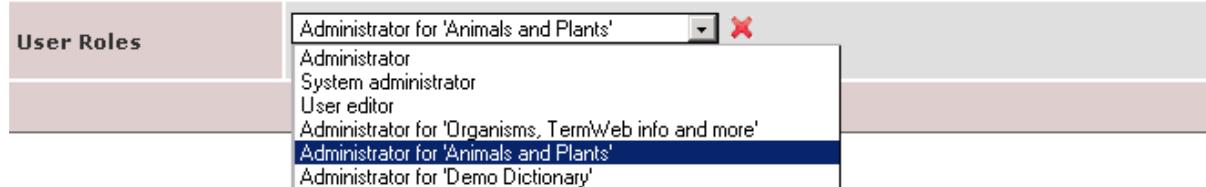
   This means the user is given the rights to
   a) edit the dictionary's definition
   b) add, edit and delete sections of the dictionary
   c) add, edit and delete views for the dictionary
   d) work with the history of the dictionary (including restore to an earlier state)
   e) import to and export from the dictionary.
4. Click **Update User**.

If the multiple-client user function is enabled in your installation, and you are logged in as a system administrator, you can also select more clients that the user should be able to access:

Click **Add Client** and select the client(s) that the user should be able to access using same login. Then be sure to place the user in the desired group(s) in the additional clients.

Remove a user

1. Click **Users**.
2. Tick the box to the left of the user's name.
3. Click **Delete Selected...**

Group Members: Indicate which user is a member of a particular group and to which groups a particular user belongs

Place users in one or more groups.

Group Members

Defined groups		
Group ▼	**Users**	**Users** ▼
admins	1	admin
Eric	4	Ericsson

Columns can be sorted (ascending or descending) on the basis of the group name, number of users, or user names by clicking on the relevant column heading.

You can either click a group name to find out which users are members of the group or click on a user name to find out and change the groups to which a user belongs. You move users and groups by selecting the name, using the blue arrows to move them, and then confirming by clicking **Apply**.

When you have completed the task click **Admin View** or **Search View**.

Access Editor: Set the user group access to dictionaries and sections

Note! See also the alternative method **Permission Schemes** below.

You can specify the following for every combination of dictionary, section and *user group*:

– which groups can read (or not) the terms in the section (**Read Access** or **No access**).

– which groups can add and edit terms in the section (**Read/Write access**)

– which groups can export, import, or both export and import data in the section

Note that the status for a specific term record can also determine who is able to view and work with a term record.

Note! Authority for the Default group to All dictionaries/All sections should normally be set to **No access** after an administrator group with at least the member Admin is created.

You can then give different authorities to the groups you create in the system.

Example of procedures for authority settings

This part of the manual is for a newly installed program (but there must be [sections](#)).

When setting authority settings at a later point in time, points 1–3 can be skipped.

1. Create a group for administrator(s).
   Click **Groups** > **New Group** and then specify the name and description of the group.
2. Specify who will be included in the administrator group. Directly after installation, it is the pre-defined user admin.
   Click **Group Members** and then the admin group's name. Select Admin and move admin to the **Users in group** box with the blue arrow. Click **Apply** and then **Admin View**.
3. Remove general authority for everyone.
   Click **Access Editor** and choose
   Read/Write Access for the admin group
   and
   No access for the Default group.
4. Create the user groups that are needed (groups of people that will have special authority to at least one section).
   Click **Groups** > **New Group** and specify for one group at a time name, description and which views and filters will apply to the TermWeb dictionaries.
   Click **Create Group** and **Admin View** when you are finished.

5. Create the users that will be in the system.
   Click **Users** > **New User** and specify user name, full name, and password. You can also choose which Initial group the user will be a member. (Note! A user can belong to several groups.) Finish by clicking **Create User** for each user.
   Click **Admin View** when you are finished.
6. Place the users in groups under **Group Members** as needed.
7. Specify authority for each group under **Access Editor.**
   When All Dictionaries and All Sections are chosen:
   Specify **No access** for all groups except the administrator's group.
   Then specify authority per dictionary and section.

Note! If you import a new section of a dictionary, the authority for the dictionary applies automatically to the section. If you want to change the authority of a new section, for example hide it for some groups, choose the dictionary and the section and then specify **No access** or **Read access** for the groups in question.

Permission Schemes: Setting detailed access permissions for user groups and assigning these permissions to dictionaries and sections

If you need to decide, for all or parts of the database, <u>more</u> than the no access, read access, write access and export/import rights provided by Access Editor, click **Permission Schemes** and **Enable Permission Schemes**.
Note!
This will deactivate the settings made in Access Editor, and activate any Permission Schemes settings. Please also note that certain rights may be given to individual users in the **Admin** > **Users** dialog.
A permission scheme consists of a set of permissions granted for the different user groups. The scheme is first edited and saved and then assigned to selected dictionaries and/or sections. After having created the user groups (and possibly the users of these user groups), first edit the default permission scheme, for all default access rights (normally disabling any automatic access for the All users group). Then add a permission scheme for any dictionary or section needing specific permissions. The following illustration shows an example of a special permission scheme to be applied to a "Suggestions" section.
Proceed as follows:

1. Click **Add Permission Scheme** and specify the name and description of the scheme.
2. For all access permissions on the concept and term level as well as regarding export and import, under each permission, add the groups to get the permission.
   Note! If you do not specify any group for a certain permission, only administrators will have that permission.

Please note: For later versions of TermWeb, also permissions to print concepts and to restore concepts are given to groups in this dialog.

Edit Permission Scheme

Name	Term suggestions only
Description	This permission scheme differs from the default one, and can be applied to the "Term Suggestions" section.

Permissions

Entry Permissions

View Concept	Translators ✖ French terminologists ✖ Production members ✖ Readers ✖ ☐ **Add Group**
Create Concept	Translators ✖ ☐ **Add Group**
Edit Concept	Translators ✖ French terminologists ✖ Production members ✖ ☐ **Add Group**
Delete Concept	Production members ✖ ☐ **Add Group**
Edit Concept Level Fields	French terminologists ✖ Translators ✖ ☐ **Add Group**
Create Term	Translators ✖ French terminologists ✖ Production members ✖ ☐ **Add Group**
Edit Term	Translators ✖ French terminologists ✖ Production members ✖ ☐ **Add Group**
Delete Term	Production members ✖ ☐ **Add Group**
View Concept History	German terminologists ✖ French terminologists ✖ French SMEs ✖ Production members ✖ Administrators ✖ ☐ **Add Group**

Import/Export Permissions

Import Concepts	Production members ✖ ☐ **Add Group**
Export Concepts	Production members ✖ ☐ **Add Group**

Save　**Cancel**

3. Click **Save**.
4. Click **Edit Scheme Assignments**.

Assign Permission Schemes
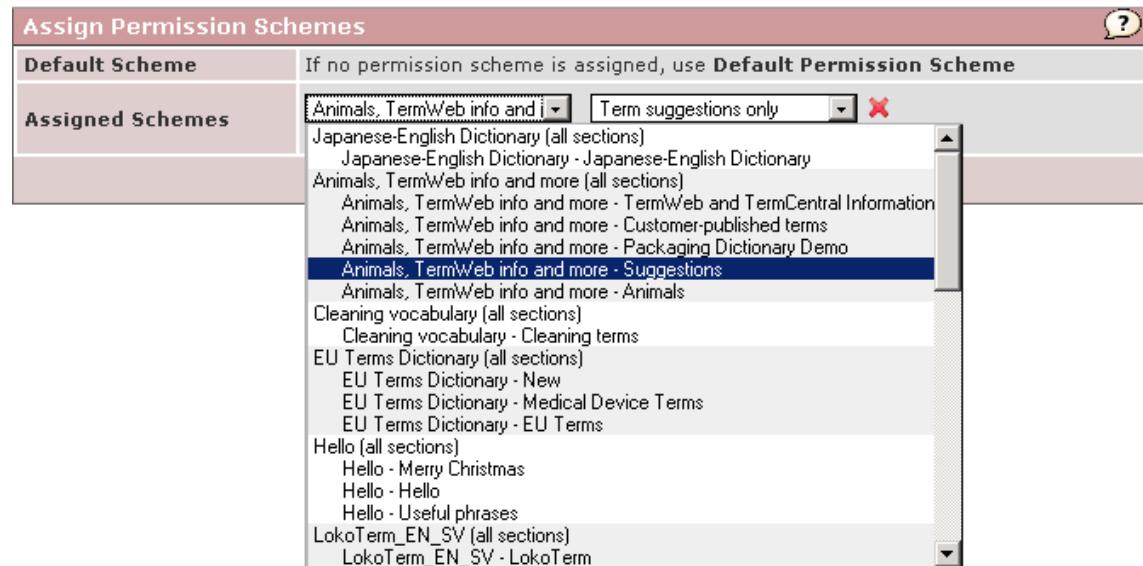
5. Select the dictionary (or section) for which the permission scheme shall be applied in the left dropdown.
6. Select the desired permission scheme in the right dropdown.
   If the permission scheme is to be assigned to more than one dictionary or section, click **Add** and repeat steps 5-6 for that dictionary or section
7. Click **Save**.

Default permission scheme

There is always a default permission scheme available. The default scheme can be edited but not removed. In the initial setup the default permission scheme is defined to allow all permissions to "All Users" group. It is assigned to "All dictionaries", which gives every user full permissions to all terminology data. Edit the default permission scheme to limit the base permissions if necessary.

Create and edit permission schemes

To add a new permission scheme, click **Add Permission Scheme** on the Permission Schemes list page. To edit an existing scheme click **Edit** for the desired scheme. You can also copy an entire scheme by clicking **Copy**. All these actions will open the Permission Scheme Details page.

Every scheme requires a unique name for identification. You can also optionally enter a description of the scheme.

You then define which groups should be granted permissions. For each listed permission you can add one or more group that should be granted the permission. Click **Add Group** to get a dropdown of the available user groups, and select the desired group. To remove a group from a permission, click on the delete icon (X) to the right of the group.

Any user will be granted a specific permission if she is a member of any group with that permission granted.

Permission dependencies

Some permissions have dependencies on other permissions. For example, a user cannot edit a concept which she cannot view, even if the Edit Concept permission is granted. The available permissions with dependencies are described in the table below.

Permission	Description	Depends on
View Concept	User can view concepts	
Create Concept	User can create new concepts	View Concept, Create Term (for at least one section in the current dictionary)
Edit Concept	User can edit the current concept	View Concept (and at least one of Edit Concept Level Fields, Create Term, Edit Term or Delete Term to be able to make any changes)
Delete Concept	User can delete the current concept	View Concept
Edit Concept Level Fields	User can edit fields on the concept level in a concept	Create Concept or Edit Concept
Create Term	User can create a new term in a concept	Create Concept or Edit Concept
Edit Term	User can edit an existing term in a concept	Edit Concept
Delete Term	User can delete an existing term in a concept	Edit Concept
View Concept History	User can view the history for a concept. Restoring from history is allowed if user has permission Edit Concept.	View Concept
Import Concepts	User can import concepts from file	See Importing using Permission Schemes
Export Concepts	User can export concepts to file	View Concept

When importing you may need additional permissions granted depending on your import settings. See Importing using Permission Schemes for more information.

Assign permission schemes

When you have defined your permission scheme you can assign it to dictionaries and sections. Click **Edit Scheme Assignments** on the Permission Schemes list page to open the Scheme Assignments page.

Click **Add** to create a new assignment. You will get a row with two dropdowns; one for dictionaries and sections, and one for the permission schemes. Select a combination of dictionary/section and scheme to create an assignment. You can delete an existing assignment by clicking the delete icon (❌) to the right of the scheme dropdown.

If no scheme is assigned for a specific section in a dictionary, the scheme assigned to "All sections" for the dictionary will be applied. If no scheme is assigned for "All sections", then the default permission scheme will be applied.

Lock Languages: Disable certain user groups from adding and editing terms in certain languages

1. First, lock <u>all</u> languages for the "All users" group, as every user is a member of that group.
2. Select the dictionary where e.g. write access to certain languages should be disabled.
3. For each relevant user group, click the languages that the members of the user group should not be able to add or edit.
   (If you change your mind, Ctrl-click the language.)
4. Click **Apply Changes**.

Please note that the basic access rights to the dictionaries (and their sections) are defined in Permission Schemes <u>or</u> Access Editor.

Scheduled Jobs: Regular automated exports of term data

Here, you can automate the export of terminology data.
(Please note that also scheduled actions resulting from workflows are listed here.)
Proceed as follows to schedule exports:
Click **Admin** > **Scheduled Jobs**. A list of currently defined jobs will be displayed.

Scheduled Jobs

Defined Scheduled Jobs

	Job Name	Status	Last execution	Next execution	
☐	**French missing - weekly**	Active	14 Jan 14:15	21 Jan 14:15	**Run now**

[Add Job] [Delete Selected...]

Job Result Log

	Job	Status	Started on	Execution time	Result	
☐	French missing - weekly	OK	14 Jan 14:15	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	7 Jan 14:35	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	31 Dec 14:35	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	24 Dec 14:35	1 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	17 Dec 14:35	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	10 Dec 14:35	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	3 Dec 14:35	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	26 Nov 14:35	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	19 Nov 14:35	0 secs	Successfully exported data using export setting...	**[more]**
☐	French missing - weekly	OK	16 Nov 14:21	0 secs	Successfully exported data using export setting...	**[more]**

Select: All, None
[Delete Selected...]

Here, you can select to order a job to be run immediately (**Run now**), as an example to make a test export, refresh the list (click the circular arrow on green background,), and view the results of a certain export (click **[more]** and the file link that is displayed). You can also delete selected exported files with their corresponding log entries and from the job result log.
To add a job:

1. Click **Add job**.
2. Give the job a descriptive name, select an export setting (if necessary, define an export setting under **Admin View** > **Export** > **New**), and enter the path to the server location where the export file(s) are to be stored. (Please note that involved software modules need access rights to this catalog.) Please note that you can create backups with unique names, including a date-time stamp: yyyy-mm-dd; hh:mm. This you do in the Scheduled jobs dialog, Path to Export File field. The strings to be inserted are e.g. %yyyy% for the current year etc., similar to http://docs.oracle.com/javase/7/docs/api/java/text/SimpleDateFormat.html. As an example, entering the compound string *mybackups/Full_backup_%yyyy%-%MM%-%dd%.xls* would give an export file Full_backup_2014-08-20.xls if the current date is 20 August, 2014. Similarly, the string *mybackups/Full_backup_%yyyy%-%MM%-%dd% %kk%.%mm%.xls* would give the export file Full_backup_2014-08-20 14.12.xls if the current date and time is 20 August, 2014, 12 minutes past 2 in the afternoon. Please note that the exported files in the example are stored in the *mybackups* subdirectory of the base directory on the file system specified at installation time. Details can be found by clicking **[more]** in the Job result log. Please also note that e.g. colons and semicolons cannot be used due to file system requirements.
3. Also, enter the interval in the **Schedule** section.

4. If you want to keep all runs in the job result log, enter 0 in the **Runs to keep** field.
5. If desired, enter the email address where export notifications are to be sent, and the sender email and name to be displayed in the notification email.
6. Click **Active** to activate the job immediately.
7. Click **Create job**.

For an existing job, click the job name and, in a similar way as described above, you can deactivate or activate the job, change parameters and then click **Update Job** to save your changes.

Scheduled Jobs

Edit Scheduled Job	
Last execution	17 Jan 11:01
Next execution	21 Jan 14:15
Job Name	French missing - weekly
Active Status	● Active ○ Inactive
Job settings	
Export Setting	French missing export (Anima ▼
Path to Export File	/usr/share/termweb-files/french
Schedule settings	
Schedule	Server time: January 17, 2011 11:02:56 Run job every on at hour minute Week ▼ Friday ▼ 2 PM ▼ 15 ▼ Show expression »
Runs to keep	0
Mail settings	
Send notify mail to	User.Userson@company.com
Email sender address	noreply@termweb.se
Email sender name	TermWeb
	Update Job Cancel

Show expression (cron expressions)

If you want to fine-tune the schedule parameters you can use the "cron expression". Then Click **Show expression**.
A UNIX crontab-like pattern is a string split in five space-separated parts. Each part is intended as:

1. **Minutes sub-pattern**. During which minutes of the hour should the task been launched? The values range is from 0 to 59.
2. **Hours sub-pattern**. During which hours of the day should the task been launched? The values range is from 0 to 23.
3. **Days of month sub-pattern**. During which days of the month should the task been launched? The values range is from 0 to 31.
4. **Months sub-pattern**. During which months of the year should the task been launched? The values range is from 1 (January) to 12 (December), otherwise this sub-pattern allows the aliases "jan", "feb", "mar", "apr", "may", "jun", "jul", "aug", "sep", "oct", "nov" and "dec".

5. **Days of week sub-pattern**. During which days of the week should the task been launched? The values range is from 0 (Sunday) to 6 (Saturday), otherwise this sub-pattern allows the aliases "sun", "mon", "tue", "wed", "thu", "fri" and "sat".

The asterisk wildcard character is also admitted, indicating "every minute of the hour", "every hour of the day", "every day of the month", "every month of the year" and "every day of the week", according to the sub-pattern in which it is used.

Once the scheduler is started, a task will be launched when the five parts in its scheduling pattern will be true at the same time.

Admin_and_User_Manual_TWPro_V3.18_R1B_EN.rtf 2018-02-23

Some examples:

5 * * * *

This pattern causes a task to be launched once every hour, at the begin of the fifth minute (00:05, 01:05, 02:05 etc.).

* * * * *

This pattern causes a task to be launched every minute.

* 12 * * Mon

This pattern causes a task to be launched every minute during the 12th hour of Monday.

* 12 16 * Mon

This pattern causes a task to be launched every minute during the 12th hour of Monday, 16th, but only if the day is the 16th of the month.

Every sub-pattern can contain two or more comma separated values.

59 11 * * 1,2,3,4,5

This pattern causes a task to be launched at 11:59AM on Monday, Tuesday, Wednesday, Thursday and Friday.

Values intervals are admitted and defined using the minus character.

59 11 * * 1-5

This pattern is equivalent to the previous one.

The slash character can be used to identify periodic values, in the form a/b. A sub-pattern with the slash character is satisfied when the value on the left divided by the one on the right gives an integer result (a % b == 0).

*/15 9-17 * * *

This pattern causes a task to be launched every 15 minutes between the 9th and 17th hour of the day (9:00, 9:15, 9:30, 9:45 and so on... note that the last execution will be at 17:45).

All the fresh described syntax rules can be used together.

* 12 10-16/2 * *

This pattern causes a task to be launched every minute during the 12th hour of the day, but only if the day is the 10th, the 12th, the 14th or the 16th of the month.

* 12 1-15,17,20-25 * *

This pattern causes a task to be launched every minute during the 12th hour of the day, but the day of the month must be between the 1st and the 15th, the 20th and the 25, or at least it must be the 17th.

Finally cron4j lets you combine more scheduling patterns into one, with the pipe character:

0 5 * * *|8 10 * * *|22 17 * * *

This pattern causes a task to be launched every day at 05:00, 10:08 and 17:22.

Workflows

Workflows introduction

With the workflow functionality in TermWeb you can define and automate tasks, control access permissions on the field level, and add styling to your term data, e.g. depending on term type or acceptability.

A workflow is connected to a task in TermWeb, e.g. creating a concept or deleting a term. When the task is performed, the associated workflows are executed. For a full list of available tasks, see Workflow tasks.

In a workflow you can define conditions, functions and validations to control what should happen when and where.

Conditions

Conditions provides more detailed control over when the workflow should be executed. You can add conditions for field values in a concept or term, and also check user group membership for the user performing the task that triggered the workflow. For instance, you can define a workflow only to be executed when the concept has status "Pending" and user is a member of the group "Translators".

For more information about defining conditions, see Editing Workflows.

Functions

A workflow function defines some action that should be performed when the workflow is executed. For instance, you can set field values in the concept or term, hide fields or make them read-only when editing, or change the field style (color, font style etc).

You can define the functions to be executed before or after the workflow's task. The functions to be executed before the task are defined as *prefunctions* in the workflow. The functions that should be executed when the task finishes are defined as *postfunctions*. For details about when pre- and postfunctions are executed for each task, see Workflow tasks.

Validations

By adding validations to a workflow, you can define that some fields in the concept or term are required to have a value before saving, besides the fields already defined to be required in the dictionary definition. Using validations you can, for instance, require Definition to have a value if Status is set to Approved.

Validations are only performed when saving after an editing task. For more information about validations see Validations under Editing Workflow Details below.

Create a workflow

To create a new workflow you must be logged in as an administrator in TermWeb. Go to the Admin view and click on the **Workflows** icon.

This opens the **View Workflows** screen. Here you see all defined workflows in the system. To create a new workflow, click **Add Workflow**.

This opens the **Add New Workflow** screen.

Add New Workflow

Here you enter a name for the workflow, set the order of execution for this workflow within the possible set of workflows for the dictionary, type an optional description, select the task (or tasks) that is to initiate the workflow (see Tasks for more information), and select the dictionary to which the workflow is connected. You can also set whether you want the workflow to be active or not.

Note: If you want either of two tasks to initiate the workflow, e.g. if both Create Term and Update Term is to initiate the workflow, Ctrl-click these tasks in the **Task(s)** list.

Workflow tasks

The following table lists the available workflow tasks and when pre- and postfunctions are executed

Task	Prefunctions run when	Postfunctions run when
Create Concept	User is opening the Edit screen for a new concept entry	The concept is saved
Edit Concept	User is opening a concept entry for editing *or* The concept entry is added to the Grid View	The concept is saved
Delete Concept	User is selecting a concept entry for deletion	After the concept is deleted from the database

Add Term	User clicks "Add term" when editing a concept entry *or* User clicks "Edit term" on a term entry that not has been saved to database *or* User selects "Add term" from context menu in the Grid View	User clicks "Save" in the term entry fields panel *or* Directly after prefunctions if editing in the Grid View
Create Term	A new concept entry is saved (for each term entry) *or* A concept entry is saved after editing (for each new term entry)	Directly after prefunctions
Edit Term	User clicks "Edit term" on a term entry already stored in database when editing a concept entry	User clicks "Save" in the term entry fields panel
	Never called when editing in the Grid View	
Update Term	A concept entry is saved after editing (for each modified term entry)	Directly after prefunctions
Delete Term	A concept entry is saved after editing (for each deleted term entry) *or* A concept entry is deleted (for each term entry)	Directly after prefunctions
View Term in List	A term is displayed in the term list	Directly after prefunctions
View Concept	A concept entry is displayed in the result window	Directly after prefunctions
View Term	A term entry is displayed (collapsed or expanded) in the result window	Directly after prefunctions
Select Term when Editing	A term entry is selected in the Edit concept window	Directly after prefunctions
	Never called when editing in the Grid View	
Import Term Data	An import is started	When the imported is completed, but not if the import is cancelled by the user

Editing workflow details

To specify what actions should be performed by a workflow you click "Edit Details" in the workflow list page. The "Edit Workflow Details" view opens.

Conditions

The conditions in a workflow determine when the workflow is executed. You can define a logical statement based on values in fields or the user's group. Click on "Edit Conditions" to open the conditions editor.

Only picklist fields can normally be used in workflow conditions.
From version 3.12, also "Created by" and "Changed by" fields can be used in conditions, as well as values in normal text fields. For "Created by" and "Changed by", EQUALS and NOT EQUALS can be used, and login names should be used. For values in normal text fields, the EQUALS, NOT EQUALS, CONTAINS, AND NOT CONTAINS operators can be used. The selected field values should match the values in the entry being displayed or edited for the workflow to run.
However, if one of the *Edit Concept* and *Update Term* tasks is selected (alone), a change of the contents of any field can be set to trigger a workflow email. For this to happen, select the *Field changed* condition.

If the workflow task affects a concept, e.g. Edit Concept or View Concept, and you have defined term level fields in the workflow conditions, all terms in the concept must fulfill the term level conditions. If the task affects a term, e.g. Edit Term or View Term in List, only the selected term and its concept must fulfill the conditions.

Functions

Workflow functions are actions that the workflow performs when executed. They are divided into Prefunctions and Postfunctions, where the prefunctions are executed at the beginning of the workflow's task, and the postfunctions are executed at the end. See **Workflow tasks** above for a full description.

Function types

The following workflow function types are available:

- Set Field Value
  Sets the value for a field in the current entry.

- Render Field
  Changes how a field in the current entry is rendered, e.g. hidden or read-only.

- Style Field
  Changes the appearance of a field in the current entry, e.g. color or size.

- Send Email
  Sends a customizable email to a single user or one or more groups of users. Emails can be sent directly or collected in a digest sent on a regular interval or when the initiating task has been performed a certain number of times.

- Send Reminder Email
  Sends a customizable email to a single user or group of users with delay. Delay value may use hours or days as time units. See details in the Procedural tips section.

- Set Permission Scheme
  Temporarily changes the permission scheme for the user for the duration of the task.

- Sort Terms
  Sorts the terms in a concept when displayed in the result window, based on a specific field value in the term.

Not all functions are applicable for all tasks, or as pre- or postfunctions. Only applicable functions are listed in the Add Function screen.

Validations

Validations allow you to specify fields that should be required during an editing operation, besides the fields already defined as required in the dictionary definition. The workflow validations are checked when the entry is saved, and if a required value is missing the user will be informed and not able to save until a value is entered in the required field.

Sorting workflows in execution order in workflow list

To specify in which order the workflows of a certain dictionary are executed, proceed as follows: This means that the workflow with the highest number will be executed last, that is; take priority over the workflows with lower numbers if in conflict.

1. Click **Admin** (Admin view) > **Workflows**.
2. Select the desired dictionary in the **Dictionary** dropdown.
3. The execution order is shown in the Order column. To decrease the order number for a certain workflow, click the arrow above the number. To increase the number, click the arrow below the number.

Usage examples of TermWeb workflow functions

A) Force term creators to fill in another field if a certain value is chosen for a certain field

In this example, to check that the definition is filled in when the concept status is changed to Approved.

4. Click **Admin** (Admin view) > **Workflows**.
5. Click **Add Workflow**.
6. Name the workflow function, add a description, select "Edit concept" in the **Task(s)** list and specify for which dictionary the workflow function should apply. Then click **Save**.
7. Click **Edit Details** for the workflow function.
8. To the right of **Defined conditions**, click **Edit Conditions** and specify under what condition the workflow function should be activated ("Status *is* Approved" in the example).
9. To the right of **Defined validations**, click **Edit Validations**, and, on the **Definition** field line, click the **Not required** value to toggle it to **Required** and click **Save**.
10. Click **Save** again.
11. Activate the workflow function by clicking the text **Inactive** to toggle it to **Active**.

Now, when the status of a concept is changed to Approved, the user will get a signal that the definition is missing when trying to save the concept:
"Field required by workflow. Please enter Definition."

B) Mark unapproved terms in term list with another color (red)

1. Click **Admin** (Admin view) > **Workflows**.
2. Click **Add Workflow**.
3. Name the workflow function, add a description, select "View term in list" in the **Task(s)** list and specify for which dictionary the workflow function should apply. Then click **Save**.
4. Click **Edit Details** for the workflow function.
5. To the right of **Defined conditions**, click **Edit Conditions** and specify under what condition the workflow function should be activated and click **Save**.
6. To the right of **Defined postfunctions**, click **Add Function**, select **Style Field** and click **Add**.
7. Select **Term** in the **Field** dropdown, red color in the **Color** field and font size, style and decoration as desired.
8. Click **Save**.

Edit Workflow Details

deprecated terms red in term list		
Task	View Term in List	
Dictionary	Animals, TermWeb info and more	
Workflow Conditions		
Defined conditions	Usage status is Not recommended **OR** Status is Rejected ☐ **Edit Conditions**	
Prefunctions		
Defined prefunctions	There are no functions ☐ **Add Function**	
Postfunctions		
Defined postfunctions	Style **Term** as Sample text with a second row ☐ **Add Function**	Edit | Delete
Validations		
Defined validations	There are no validations ☐ **Edit Validations**	
	Save Cancel	

9. Click **Save**.
10. Activate the workflow function by clicking the text **Inactive** to toggle it to **Active**.

Note!

If you also want the occurrence of a deprecated term to be signaled in red in the result window, add the task "View term" to the workflow. If you want to signal deprecated terms in a different way in the result window, create a separate workflow for the task "View term"!

C) Signal the addition of a term (or terms) by email from the system

1. Click **Admin** (Admin view) > **Workflows**.
2. Click **Add Workflow**.
3. Name the workflow function, optionally add a description, select "Create term" in the **Task** list and specify for which dictionary the workflow function should apply. Then click **Save**.
4. Click **Edit Details** for the workflow function.
5. To the right of **Defined conditions**, click **Edit Conditions** and specify under what condition the workflow function should be activated ("Sections *is* Suggestions" in the example) and click **Save**.
6. To the right of **Defined postfunctions**, click **Add Function**, select **Send Email**, and click **Add**.
7. Enter info as desired (send notification to group or to one user), if to send a **Text only** email or include an **HTML report** of affected <s in the email, and whether to collect info about more than one event in an email, e.g. daily (**Send emails as digests**).

Function: Send Email		(?)
Recipient(s)	○ User group(s) ☐ **Add Group** ○ Language group ⊙ Email address terminologist@interverbumtech.com	
Subject	${workflow_name} - three terms added in ${dictionary_name}	
Message	Please check new terms in the following term records	

Content Type	○ Text only
	⊙ HTML report
	   83 columns are included in report
	   ☐ **Select Columns**	

Email Digest Settings	☑ **Send emails as digests** ○ Send digest every [Day ▼] ⊙ Send when number of emails per digest is [3] *(1-99)* ○ Send when any of the above has occured	
	Save Cancel	

8. If you select an HTML report, click **Select Columns** and decide which columns to include:

Edit Columns Sets

Select the languages you wish to include in the report

Available languages
- Arabic
- Chinese
- Czech
- Danish
- Dutch
- Finnish
- Gaelic
- Greek
- Hungarian
- Irish

Selected languages
- English
- French
- German

Select concept fields you wish to include in the report

Concept ID is always included in report

Available fields
- Domain
- Source
- Definition note
- Product subset
- Illustration
- Habitat
- Yes_or_No
- Tools needed

Selected fields
- Definition
- Status

Select term fields you wish to include in the report

Term name is always included in report

Available fields
- Environment subset
- Part of speech
- Gender
- Source
- Sample sentence
- Usage by
- Plural form
- Term type
- Context
- Process status

Selected fields
- Usage status
- Usage note

Save   **Cancel**

9. Click **Save** to save the report column settings.
10. Click **Save**.

____CASE_C   ⑦

Task(s)	Create Term
Dictionary	Organisms, TermWeb info and more

Workflow Conditions

Defined conditions	Section is Suggestions ☐ Edit Conditions

Prefunctions

Defined prefunctions	There are no functions ☐ Add Function

Postfunctions

Defined postfunctions	Send Email to *terminologist@interverbumtech.com* Edit | Delete ☐ Add Function

Validations

Defined validations	There are no validations ☐ Edit Validations

Save   **Cancel**

11. Click **Save** again.

12. Activate the workflow function by clicking the text **Inactive** to toggle it to **Active.**

As an example, here a terminologist could get a list of term suggestions entered by other people in the organization on a regular basis. In that case, a condition that the term suggestion is entered in an "open" suggestion section should be added to the workflow. This way, the addition of new terms by terminologists in other, published, sections will not be signaled to the selected user or user group:

Resulting HTML report email when terms created in Suggestions section:

Subject: ____CASE_C - three terms added in Organisms, TermWeb info and more, Suggestions section

Please check new terms in the following term records

____

Updated Concepts

Concept ID	Section	Definition	Status	English	Usage status	Usage note	French	Usage status	Usage note	German	Usag status
643	Suggestions			round timber							
644	Suggestions	reddish heartwood of older pine logs		red wood							
645	Suggestions	tree, native to North America		redwood							

If the report has line breaks within words, a tip is, for Outlook 2007 and later, to open the mail, and then choose "View in browser".

D) Automatically set concept status to Approved if all terms have Process status Finalized
Simply create a workflow like this:
1. Click **Admin** (Admin view) > **Workflows**.
2. Click **Add Workflow**.
3. Name the workflow function, add a description, select "Edit concept" in the **Task** list and specify for which dictionary the workflow function should apply. Then click **Save**.
4. Click **Edit Details** for the workflow function.
5. To the right of **Defined conditions**, click **Edit Conditions** and specify under what condition the workflow function should be activated.

Defined conditions   ?

| Conditions | Process status | is | Finalized |
| | <No operator> | | |

Save   Cancel
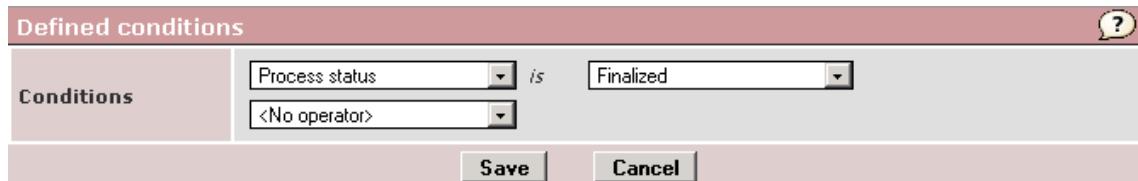
6. Click **Save**.
7. To the right of **Defined postfunctions**, click **Add Function**, select **Set Field Value** and click **Add**.

8. Select **Status** in the **Field** dropdown, and "Approved" in the **Set value to** field and click **Save**.

Edit Workflow Details

All terms final sets concept to Approved		?
Task	Edit Concept	
Dictionary	Animals, TermWeb info and more	
Workflow Conditions		
Defined conditions	Process status is Finalized ☐ **Edit Conditions**	
Prefunctions		
Defined prefunctions	There are no functions ☐ **Add Function**	
Postfunctions		
Defined postfunctions	Set value of **Status** to *Approved* ☐ **Add Function**	Edit | Delete
Validations		
Defined validations	There are no validations ☐ **Edit Validations**	
	Save Cancel	

9. Click **Save** again.
10. Activate the workflow function by clicking the text **Inactive** (in the Status column) to toggle it to **Active.**

E) Changing the sort order of terms in the result window

Normally, terms in the result window are displayed with the selected (source language) term first, followed by the possible source language synonym(s), then the terms in the other languages, in the language order of the current dictionary, grouped by language.

If you, as an example, want to sort the terms within the concept with all full-form terms first, followed by all short-form terms or acronyms, do as follows:

1. Create a workflow for the View Concept task and click **Save**:

Add New Workflow		?
Workflow Name	Sort terms differently in result window	
Description	For example sort by term status or term type. This means that all full-form terms in all languages can be sorted before all short-form terms in the result window.	
Task(s)	Create Concept Edit Concept Delete Concept Add Term Create Term Edit Term Update Term Delete Term View Term in List View Concept View Term Select Term when Editing Import Term Data	
Dictionary	Animals, TermWeb info and ▾	
Status	⦿ Active ◯ Inactive	
	Save Cancel	

2. Click Edit Details on the line of the workflow, and the following dialog will appear:

Edit Workflow Details

Sort terms differently in result window	
Task(s)	View Concept
Dictionary	Animals, TermWeb info and more
Workflow Conditions	
Defined conditions	There are no conditions ☐ **Edit Conditions**
Prefunctions	
Defined prefunctions	There are no functions ☐ **Add Function**
Postfunctions	
Defined postfunctions	There are no functions ☐ **Add Function**
Validations	
Defined validations	There are no validations ☐ **Edit Validations**

Save   Cancel

3. By **Defined postfunctions**, click **Add function**, and the following dialog will appear:

Add Postfunction for Sort terms differently in result window

New Function	
Select function type	○ Render Field ○ Style Field ○ Set Permission Scheme ○ Sort Terms

Add   Cancel

4. Select **Sort Terms** and click **Add**.

Add Postfunction for Sort terms differently in result window

Function: Sort Terms	
Term Field to Sort by	Term type ▼
Sort Order	⦿ Increasing ○ Decreasing
Sort Range	○ Sort within same language ⦿ Sort within concept

Save   Back   Cancel

5. Select the term field, for which the value will decide the sorting (Term type in the example), and e.g. **Increasing** and **Sort within concept** and click **Save** twice.
The terms within the concept will now be sorted first by Term type and then by language in the result window.

F) Make a change of any field on concept or term level trigger a workflow email

If you want any change of the contents of a certain field (also of a text field) trigger a workflow, proceed as follows:

1. Create a new workflow: Click **Admin** (Admin view) > **Workflows** and then **Add workflow**. Give the workflow a name and description, select the Edit Concept task and the desired dictionary and then click **Save**. Then click **Edit details** for the workflow.

2. Click **Edit Conditions** and select the **Field changed** condition:

3. Select the field that is to trigger the workflow after **is** and click **Save**:

4. Create a Send email postfunction:
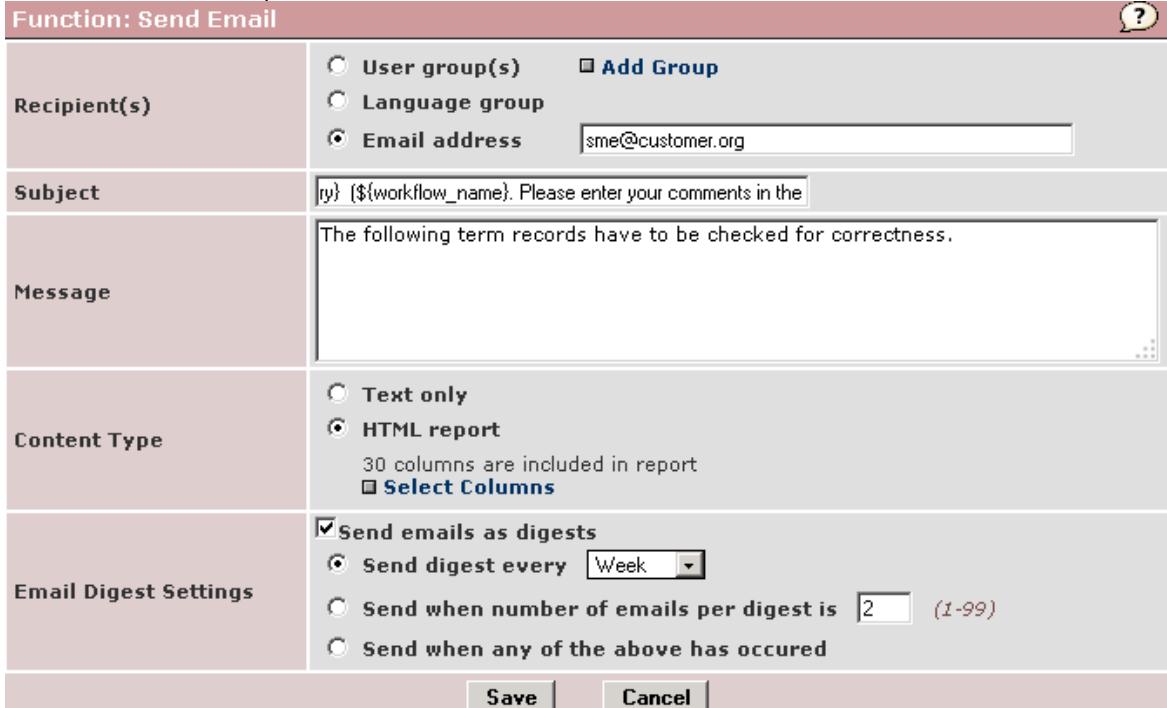
5. Click **Save** to save the Send email function.
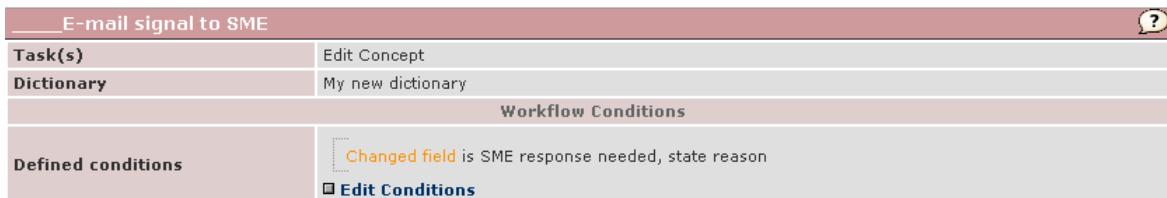
6. Click **Save** again to save the workflow.
7. Activate the workflow, if not already done in step 1 above.

Projects

Introduction to the Projects tool

With the Projects function in TermWeb you can define and automate certain project-related tasks.
A project may as an example be a batch of new term records to be worked on. You should define the project by a filter, e.g. a "batch number" field value, define a workflow for certain tasks, that can send a customizable email to a User or a User group, when the workflow conditions have been met and the task has been performed. The email can be sent at regular intervals, once the task has been performed or when the task has been performed a selected number of times, in the same way as for workflow emails initiated from Admin > Workflows.

Note: During the work (after clicking Save if you want to save your work), you can always revert to the Administration icons screen by clicking **« Back to Administration**.

Creating a new project

1. Click **Add** project.
2. Select the dictionary for which the project is to apply and click **Add Project**.
3. Fill in the desired data on the tabs displayed:
   A) The **General** tab:

An example:

termweb®

General | Filter | Workflow

Project Name	New term records June 2013
Description	
Status	⦿ Active ○ Inactive

Variables

Name	Value	
		Add

Define any variables you might need for emails.
Click **Add** and enter (short variable) name and (long) value.

Variables

Name	Value	
%terms	terms in the present batch	**Delete**
%homographs	Please take care to check for existing	**Add**

Click **Add** again to save the variable and then click **Save**.

B) The **Filter** tab:
Click **Edit Filter** and create a filter for the term records to be included in the project.
An example:

General | Filter | Workflow

Creation date	AFTER	2013-06-01 01:00
AND		
Creation date	BEFORE	2013-07-01 01:00
<No operator >		

Save   Cancel

After defining the filter, click **Save**.
Please note: Filters defined in the Project module will be selectable from the end of the dropdown in search view, preceded by [Project]:

Source	English
Filter	[Project] New term records Febr

Search

☐ **Domain search**

However, these filters are only editable in the Project module.
C: The **Workflow** tab:

Fill in the desired name of the workflow, select the task (out of the available tasks) to initiate the workflow and the condition(s) under which the workflow is to be initiated. An example:

An example where all concepts of the project (batch) are completed, i.e. have terms in all, or at least a few, of the available languages:
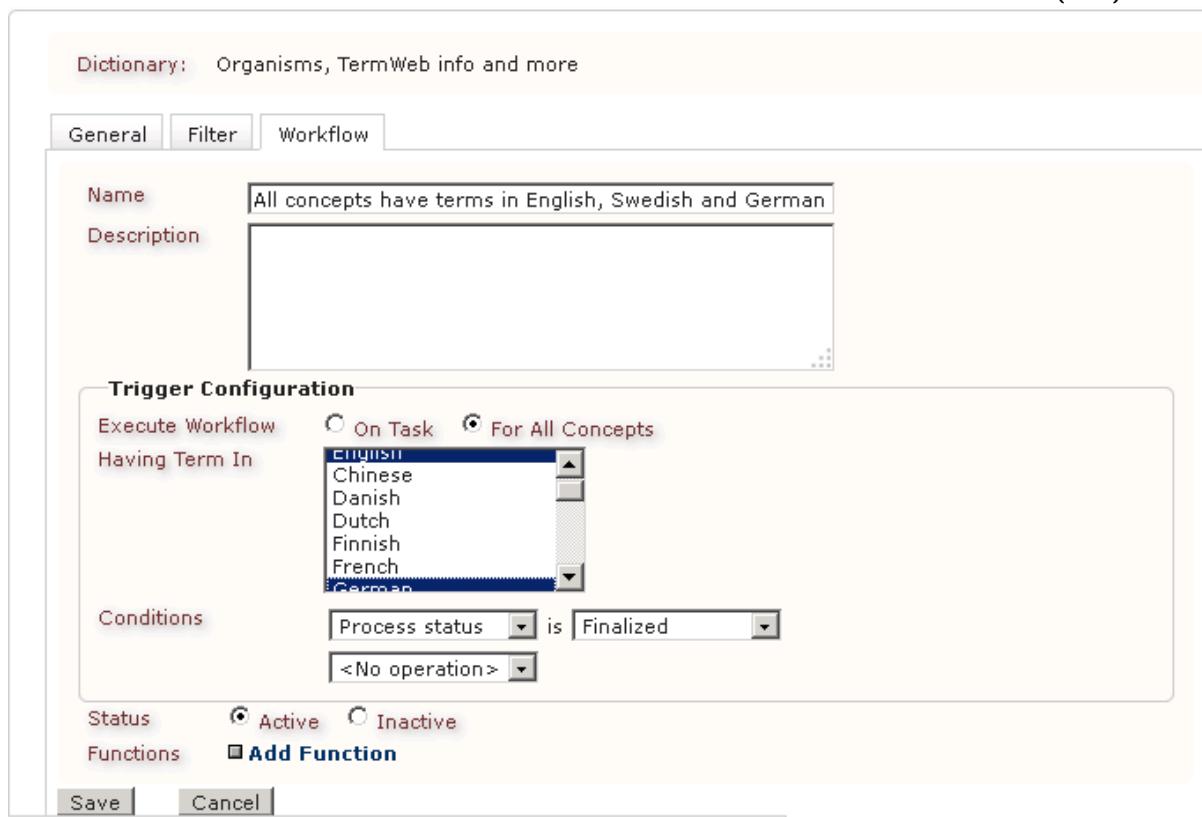
Click **Add Function**.

Fill in the email or reminder recipients and other conditions (see example below).

Please note: The For All Concepts workflow can only use the Send email and Send reminder functions.

Here, you can insert field names etc.

If you want to make use of an earlier defined variable in the email text, right-click to insert the desired variable:

4. Click **Save** to save the function. You may then add another function, e.g. a reminder email.
   Click **Save** to save the workflow.
5. Click **Save** to save the project.

Editing a project

Click the name of the desired project in the list of defined projects and edit as desired (see details above).

Defined Projects				
Name	**Description**	**Dictionary**	**Concepts**	**Status**
New term records July 2013		Organisms, TermWeb info and more	1	**Active**	**Delete**
New term records June 2013		Organisms, TermWeb info and more	0	**Inactive**	**Delete**

▣ **Add Project**

Here, you can also activate or deactivate a project (click **Inactive** or **Active** respectively in the Status column) or delete an obsolete project by clicking **Delete** on the line of the desired project.

Change Password: Change your password

Change your password. If you, as an administrator, want to change passwords for other users, click **Admin view** and choose **Users**. Please note that a password change may be required at certain intervals, this defined for your group by the administrator.

1. Click **Change Password**.
2. Enter the old password once and the new password twice.
3. Click **Save**.
4. Click **Search View** if you want to return to searching for terms (or **Log out**).

Administrator Tools: Reindex a dictionary

Manage dictionary			
Dictionary	TechniTerm and more ▾	**Reindex**	**Make term links dynamic**

Sometimes it can be helpful to reindex a dictionary in order to increase the speed of a search. To reindex:

1. Click **Administrator Tools**.
2. Select the dictionary you wish to reindex from the **Dictionary** field.
3. Click **Start Reindexing**.
4. Click **OK** when a message that the reindexing has been completed appears in the window.

Administrator Tools: Convert static cross-references to dynamic ones

Manage dictionary			
Dictionary	TechniTerm and more ▾	**Reindex**	**Make term links dynamic**

If you want any links referring to existing terms to change if the referred-to term name is changed, proceed as follows:

1. Click **Administrator Tools**.
2. Select the dictionary you wish to reindex from the **Dictionary** field.
3. Click **Make term links dynamic**.
4. Click **OK** when a message appears that the conversion is ready.

Administrator Tools: Message for error page

1. Click **Administrator Tools**.
2. Enter the desired message in the message field.
3. If desired, test how the message would look clicking **Preview**.
   If you want to reset the message to the standard (English) text, please click **Reset to default text** at any time.
4. Click **Save** when ready.

Message for error page

Message (HTML code allowed)	`<h2>Oväntat fel.</h2>`
	`<p>Vi är inte helt säkra på e're not exactly sure what happened, but the error has been logged and your system administrator has been notified.</p>`
	`<p>Sorry for the inconvenience. Please try again by <a href="{RESTART}" target="_top">restarting your session</a>.</p>`
	
	Reset to default text

Preview   Save

Administrator Tools: Password strength

1. Click **Administrator Tools**.
2. Select the desired password requirements in the **Predefined patterns** dropdown, or enter a custom-made regular expression.
3. In the **Validation message** field, enter a suitable error message to be displayed when a password not fulfilling the requirements is later entered.
4. If desired, test if a certain password fulfills the newly defined criteria by entering it in the **Test string** field and clicking **Test**.
5. When ready, click **Save password pattern**.

Password strength

Regular expression	Password should match pattern	Predefined patterns
	[(?=.*\d)(?=.*[A-Z])(?=.*[a-z]].{8,})	Contain a digit, upper and lo...
Validation message	Psw should have at least 8 chars, 1 digit, 1 upper-case and	
Test string	Enter test string for pattern	
	saferthanEver	Test Doesn't pass

Save password pattern

Usage Statistics

To display usage statistics over user visits, time spent, and user origin per day, month or year for your TermWeb installation, proceed as follows:

1. Click **Statistics**.
2. For usage details regarding a certain day, click **Details** on the corresponding line.

To show statistics for another month, click the name of month previous to or following the currently displayed month.

Entering License information

When you install TermWeb at your own server, you will have got a license key together with the installation package. After installation, open TermWeb, go to **Admin** > **License**, paste the license key into the **Enter new license** area and click **Apply.** Thereafter, you will be able to use the purchased number of user licenses for the specified period.

Using language groups

If you want to automatically give similar access rights to terminologists/editors for different languages, but only to terms in their respective language, you can use the language group function.

Proceed as follows:

1. Go to **Admin** > **Dictionaries** and click the desired (or any) dictionary. Then either
   a) click **Add** (by the Languages list) to add the language (if not already in the dictionary)
   or
   b) select the language and click **Edit**.
   Then select the **Create Language Group** checkbox:

Edit Language

Language settings	
Language Name	French
Code	fra
Direction	Language is written Left-to-right
Geographical Variants	**Variant name** **Code** **Direction** Canada CA Same as language France FR Same as language **Edit Geographical Variants**
Orthographical Variants	No orthographical variants **Edit Orthographical Variants**
Language Groups	☑ Create Language Group
	Save Cancel

2. Click **Save** and **Save Changes**.
3. Then, using the **Admin** > **Group Members** function, place the users in the correct language groups.

4. The group and all its users will now automatically, as default, be given the right to edit just the language in question for all dictionaries (all other languages being locked):

Locked Languages

Language Group [CES]
- English
- Swedish
- French
- Russian
- Danish
- Czech
- Catalan
- German
- Spanish
- Finnish

Language Group [FRA]
- English
- Swedish
- French
- Russian
- Danish
- Czech
- Catalan
- German
- Spanish
- Finnish

Language Group [ITA]
- Czech
- Catalan
- German
- Spanish
- Finnish
- Hungarian
- Italian
- Japanese
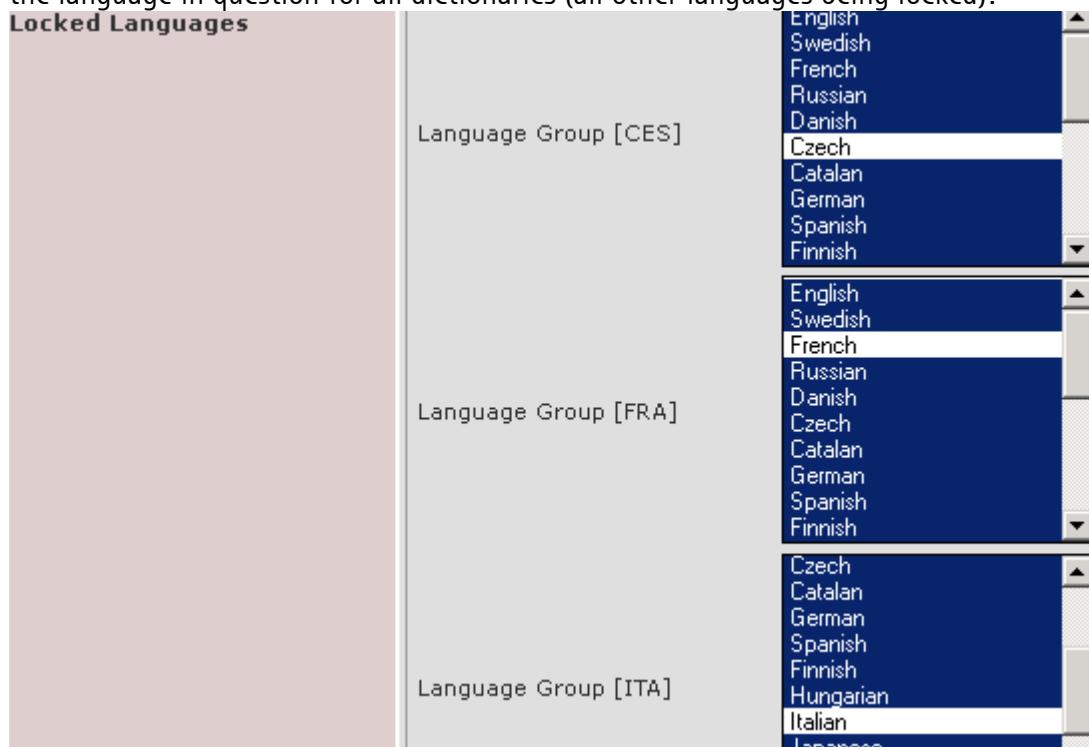
Please note: If new languages are later added to the dictionary, the Lock Languages settings will have to be adapted accordingly.

Please note that the language groups can be the target of workflow-originated emails:

Using language groups for emails

If you wish to use Language group as recipient, the workflow must be triggered by a <u>term-level event</u> (the supported tasks are Create Term, Update Term and Delete Term). Then, if a term in a specific language is created, updated or deleted, an email will be sent to the members of the corresponding language group.

So, create a term-related workflow and select the Language group radio button as shown below:

Please note that you <u>only</u> have to select the Language group radio button, <u>no</u> language groups will in this case have to be selected with the Add Group link.

Edit Postfunction for Affected term

Save the postfunction, and the Edit Workflow Details Screen will display the postfunction as follows:

Then save the workflow.

If you want an HTML concept summary report to be sent in the email, select the **HTML report** radio button, click **Select Columns** and select the languages, concept-level-fields and term-level fields to be included in the report.

Edit Columns Sets

Select the languages you wish to include in the report

Available languages
Chinese
Danish
Dutch
Finnish
German
Italian
Japanese
Latin
Norwegian
Spanish

Selected languages
English
French
Swedish

Select concept fields you wish to include in the report

Concept ID is always included in report

Available fields
Domain
Source
Product subset
Status
Image
Habitat

Selected fields
Definition

Select term fields you wish to include in the report

Term name is always included in report

Available fields
Term ID
Environment subset
Process status
Gender
Source
Usage status
Usage note
Sample sentence
Usage by

Selected fields
Part of speech

Save   Cancel

When you are ready, click **Save**, Then again **Save** (for the Send email function) and then **Save** again for the workflow.

When the workflow criteria are met, a report similar to the one below will be sent in an email to the relevant user(s):

Updated Concepts

Concept ID	Section	Definition	German	English	Spanish	Finnish	French	Swedish	Czech	Chinese
2	Min nya ordbok	Här är min definition	Hund	dog				hund		
3	Min nya ordbok		Sonne	sun			soleil	sol	slunce	太陽

Terms used in this document

Term record: A term record is the part of a structured terminological data omnibus that is applicable to a specific concept. (This concept is expressed normally by different term equivalents in various languages.)

Term equivalent: Term equivalent is used to refer to words or expressions that represent the same or a similar concept in different languages.

Procedural tips

Create a copy of an existing dictionary

If you want to create an identical copy of a dictionary within the same TermWeb client, proceed as follows. (In this case, there will be no exported dictionary definition file to save):

1. Click **Admin** > **Dictionaries** and click **Copy** on the line of the dictionary you want to copy.
2. Then choose if you want to create an empty identical dictionary (Structure Only) or create a full copy of the dictionary (Structure and Data). Then click **Copy Dictionary**.

Alternative step-by-step instruction for copying a dictionary between TermWeb clients:
Note: You export and import the dictionary STRUCTURE from the Admin > Dictionaries dialog, whereas you export and import the dictionary CONTENTS from the Admin > Export and Admin > Import dialogs respectively.

1. Click **Admin > Dictionaries** in client 1.
2. Click the **Export** link on the line of the desired dictionary (optionally including filter definitions and custom layout) and save the resulting dictionary definition file.
3. If you also want to fill the new dictionary with all or parts of the contents of the first dictionary: Still in client 1, click **Admin > Export**, create and/or just select an export settings file for the first dictionary, if desired with a filter, click **Export** and save the term data file at a convenient location.
4. In client 2, click **Import Dictionary**, browse for the dictionary definition file exported in step 2, click **Open** and then **Import Dictionary**. Then an empty "clone" of the first dictionary will be created (with the same sections, languages, and fields), that you can rename etc.
5. Still in client 2, click **Admin > Import**, create an import settings file for the new dictionary, select this settings file and click **Import**. Browse for and select the term data file exported in step 3 and then click **Next** etc. and the data will be imported into the new dictionary. Please note that the Concept IDs in the source and target dictionaries will normally differ. Note that the File repository can be copied (ZIP) in a similar way.

Create a filter for displaying only acceptable terms in the term list

Proceed as follows to make a filter that will only make terms with Usage status Preferred or Admitted display in the term list. This filter will thus exclude terms with Usage status Not recommended or Obsolete, as well as terms with no usage status marking, from the term list.
First select Term in the **Filtering out** dropdown box.
Then specify the filter as follows:

If applied, this filter makes only terms show up in the term list if they are neither classified as :
1) Not recommended
nor
2) Obsolete
nor are
3) unclassified

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An alternative giving the same results is of course to use a filter where terms with either of the two allowed status values are displayed:

Running two TermWeb sessions simultaneously from a computer

You should never run two TermWeb sessions from the same brand of web browser in the same computer. This is because the common cache is used to speed up operation.
It is however possible to use two different logins, e.g. admin and read-only user, from the same computer if different web browser brands are used for the two sessions.

Using date fields in filters

If you want to use the entered values in a filter, see the filter example below that will return all concepts with a value of the Batch date field being 1 January through 31 January 2014, inclusive:

See also filter example 4 for use of relative dates in the Use filters to search and export section.

Send Reminder Email workflow postfunction

To enable a reminder email to be sent to a user or group, do as follows:

1. Go to **Admin > Workflows** and click **Edit Details** on the line of the desired workflow.
2. Click **Add Function** in the Defined postfunctions section.
3. Select the **Send Reminder Email** radio button and click Add.

4. Select email recipient(s). conditions and delay before the reminder is sent. Also, add a message to be included in the email:

5. Click **Save** twice to save the workflow and then make sure it is activated.

TermWeb glossary

client	An entirely separate part of a TermWeb server installation with its own set of users, user groups, dictionaries etc.
dictionary	a term database with a certain structure, i.e. combination of languages as well as term-level and concept-level fields (including domain). A dictionary is thus a major part of the database with a given structure, e.g. a limited set of languages and fields.
main and additional dictionaries	The main dictionary is the user's first-choice dictionary. Additional dictionaries can be selected during term searches, and give more search hits as long as the additional dictionaries contain terms in the currently selected source language.
section	a physical part of a dictionary. Terminological entries in different sections of the same dictionary share the field, language and domain setup of the dictionary. Permissions to a section can be given per user group.
domain	subject area. A concept-level data category used for classification of full terminological entries. Domains and subdomains are organized in a multi-level tree structure (defined per dictionary by the TermWeb administrator). A concept can belong to more than one domain.
concept	unit of knowledge created by a unique combination of characteristics. For TermWeb, often used as a synonym to a *terminological entry*, e.g. including a definition and at least one term in one language.
concept-level fields	fields containing information referring to the whole [terminological] entry. Examples are Definition, Source of definition, Image.
term-level field	a field applicable to a term, i.e. than can be given a value to further specify a term. Examples are Context, Part of speech, Gender, Usage status. Just as concept-level fields, term-level fields can be defined as required, picklist, multivalued, text, etc.
user group	a collection of one or more users having the same roles and thus permissions to the dictionaries and their sections
user	a person normally having a unique login name, used by one person (or external software via API) at a time. (The exception is the guest user, if activated, where more than one read-only user can be logged in at the same time.) The permissions of a user is defined by what group(s) the user belongs to.
term list	the list (to the left in the search view) of all or a subset of terms (fulfilling the search string criteria, plus possible filter criteria and selected domain(s) in the selected source language in the presently selected dictionary section(s) and any additional dictionary or dictionaries
result window	the lower right part of the TermWeb search view, presenting concept and term-level data for the selected (clicked) term in the term list