Kaleidoscope®

EXPRESS YOUR BIZ

quickTerm 5.5

User Manual Desktop Client

quickTerm©

Words in record time by **Kaleidoscope**

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1 General Concepts

1.1 Our quickTerm Vision

quickTerm is a life cycle management system for terminology based on SDL MultiTerm or Acrolinx. The objective of quickTerm is to:

- Efficiently roll out terminology across an enterprise so that it reaches its target groups in an acceptable form
- Simplify terminology to the point where even a "layman" user has no problems in understanding it
- Provide direct access to terminology databases and other search providers from Windows applications as well as web browsers and smartphones
- Establish a solid foundation within an enterprise for the development and coordination of terminology
- Extend the scope of the terminology to all relevant languages with a global, collaborative workflow
- Raise awareness of and keep the termbase constantly in the minds of colleagues through regular light-hearted tactics such as recommended entries, entry of the week, term quiz, etc.

quickTerm achieves its objectives by:

- Providing terminology quickly from any Windows application by pressing a hotkey (only when the quickTerm Client is used).
- Enabling terminology to accessed easily via a web browser, from tablets (quickTerm Web) or smartphones (quickTerm Mobile)
- Allowing new terminology to be suggested, feedback on existing entries to be provided, change and translation requests to submitted
- Allowing the approval process to take place "virtually" and collaboratively online, on a smartphone, or in the quickTerm Client
- Allowing "edit tasks" to be managed by the relevant specialists
- Supporting translation processes, including reviewing and approval loops

Linguistic Note

To optimize space and text flow, this document will use the masculine form only.

References to individual user types, such as "Terminologist" or "Approver", will always mean the entire user group, as these roles may obviously by carried out by several different people.

1.2 Brief "Terminology of Terminology"

To make it easier for you to work with quickTerm, it would be helpful to briefly explain the entry structure concept used in MultiTerm. This is generally accepted in terminology theory and is referred to as being "concept-oriented and term-independent".

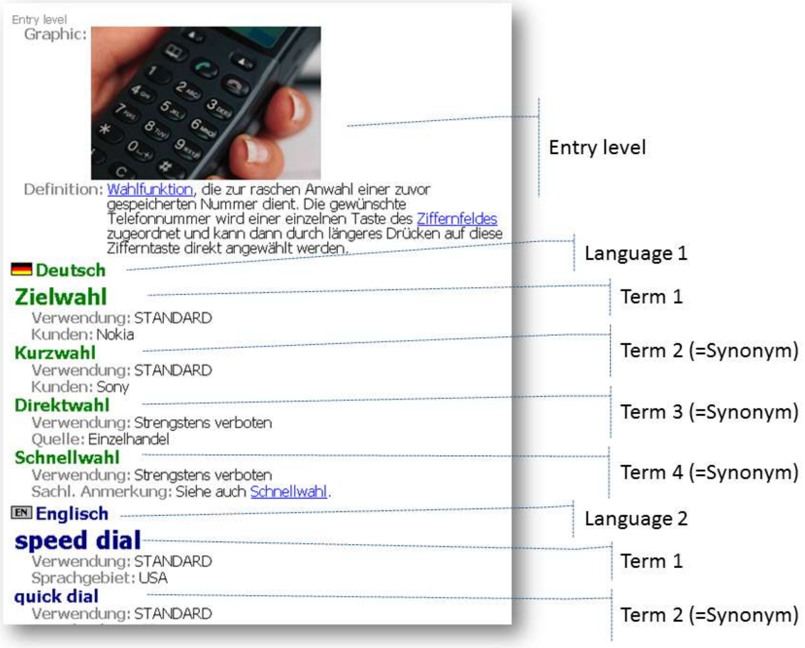
It is important to familiarize yourself with the notion of "concept", "language" and "term" if you want to be able to filter entries or terms and also understand approval and translation workflows.

Concept In the terminology, an entry always describes a specific "thing" or a "function". This can usually be described or "defined" in a language-neutral way. In the terminology, this abstract "thing" is referred to as a "concept".

Language Different designations can exist in different languages for each concept. Not all languages are not available all the time.

Term If the designations are in written form (i.e., they are "words"), they are referred to in the terminology as "terms". If there are multiple terms associated with a language in an entry, these are also referred to as synonyms. For example, chair and seat could be synonyms.

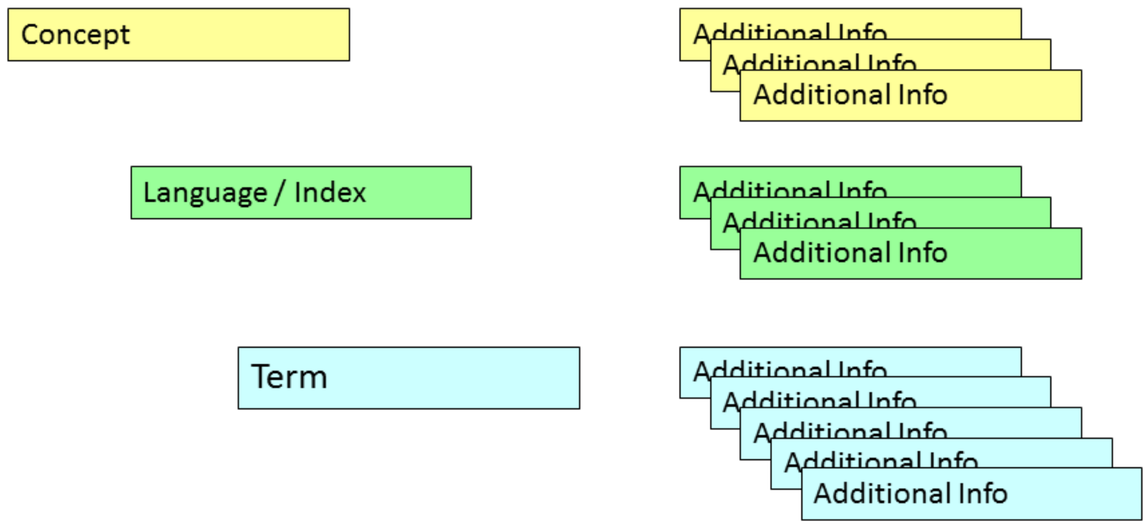
An example:



MultiTerm Entry Structure

As you can see, a MultiTerm entry has three levels:

- a concept level, on which can be found all the information that is always valid for the concept (=the "thing") in every language.
- one or more language levels in which
- one or more terms have been entered (term level). Additional information can be entered for each term, so as to be able to distinguish more clearly between the terms and, in particular, to clarify the differences in use.



Schematic Entry Structure

1.3 The quickTerm Workflows

quickTerm distinguishes between requests and tasks.

Requests

Requests can be submitted by all users of the termbase, provided that this option has been enabled in each case. The requests comprise:

- Term request: A completely new entry is desired
- Change request: An existing entry should be changed
- Translation request: An existing entry needs translating into an additional language
- Log terms: Not really a request, but a note to a user that a search was unsuccessful.

Tasks

Tasks are always initiated by the terminologist. Exceptions are foreign language approvals that were created automatically during the translation process, or tasks created fully automatically by quickTerm Tools. The tasks comprise:

- Edit Task (Change, Definition): The terminologist "orders" specific data from a certain user group for an existing entry or term request
- Approval task: The terminologist sends a prepared entry to the different user groups for approval. This may also take the form of a fully automated process via quickTerm Tools.
- Translation Task: The terminologist sends an entry for translation into certain languages only. This may also take the form of a fully automated process via quickTerm Tools.

Workflow Participants

Depending on how the system is configured, specific users can be involved in a workflow in one or several roles.

All users are divided into groups. These include approval and translation groups for the individual languages. It is also possible to define initial checkers for requests - this is a separate role.

In voting processes, the system can be configured so that only one group member has to cast a vote, a certain number of group members have to cast a vote, or a certain number of group members have to cast a positive vote before the vote from this group is accepted as complete.

Approval, edit tasks and, of course, translations run as separate workflows in each language. It is therefore entirely possible that an entry can be approved in German, awaiting approval in English, in progress in Italian and only just submitted for translation in Spanish all at the same time. This also means that specific approvers are defined for each language and can automatically only approve "their" language. Similarly, translators can only make suggestions or receive tasks for "their" language.

Furthermore, it is possible to display only those languages that have been approved for each term (status filter at language level) in quickTerm.

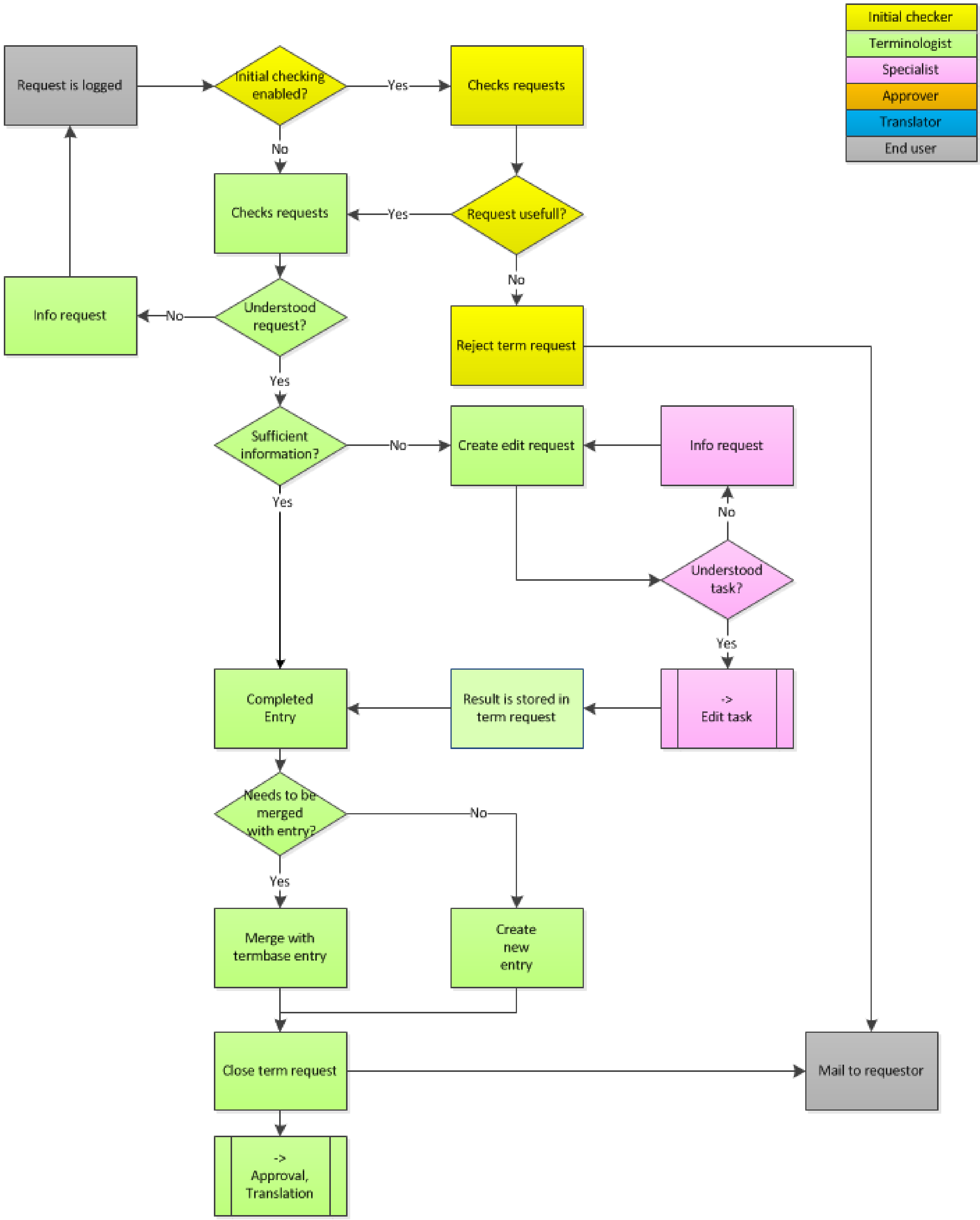
Importing status information into the termbase

The workflow status can also be optionally entered in MultiTerm or Acrolinx. For more details see MultiTerm Approval Documentation .

1.4 Requests

Requests can be submitted by all quickTerm users, provided that this option has been enabled for these users.

1.4.1 Term request



"Term request" workflow

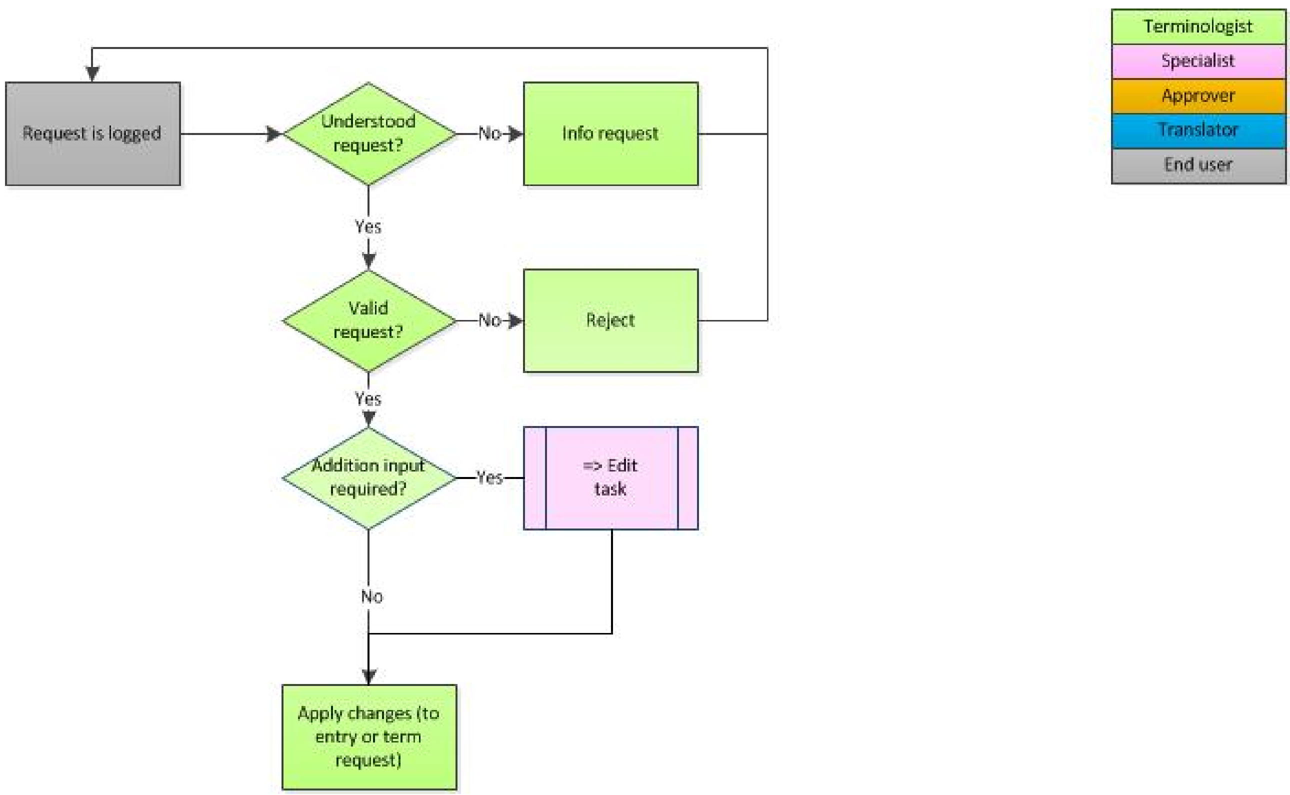
Every user who has had the option enabled may submit a term request in quickTerm. The information that the user can or must fill in when submitting a term request can be configured for each user group. Term requests may be monolingual or bilingual, depending on the user authorization.

Depending on the configuration, term requests are first sent to the initial checker (who if applicable forwards the term request to the terminologist), or are sent straight to the terminologist. The terminologist decides whether the request should, in principle, be added to the termbase. The terminologist can delegate the request to a specialist for actioning, or create the entry in the termbase and then send it for approval.

As soon as the term request is created, quickTerm checks whether this term already exists in the termbase or has been previously submitted as the subject of a term request (including requests that have been rejected!). This prevents duplicate term requests from being filed.

An e-mail is sent to the requestor to inform them of the outcome of the request.

1.4.2 Change request



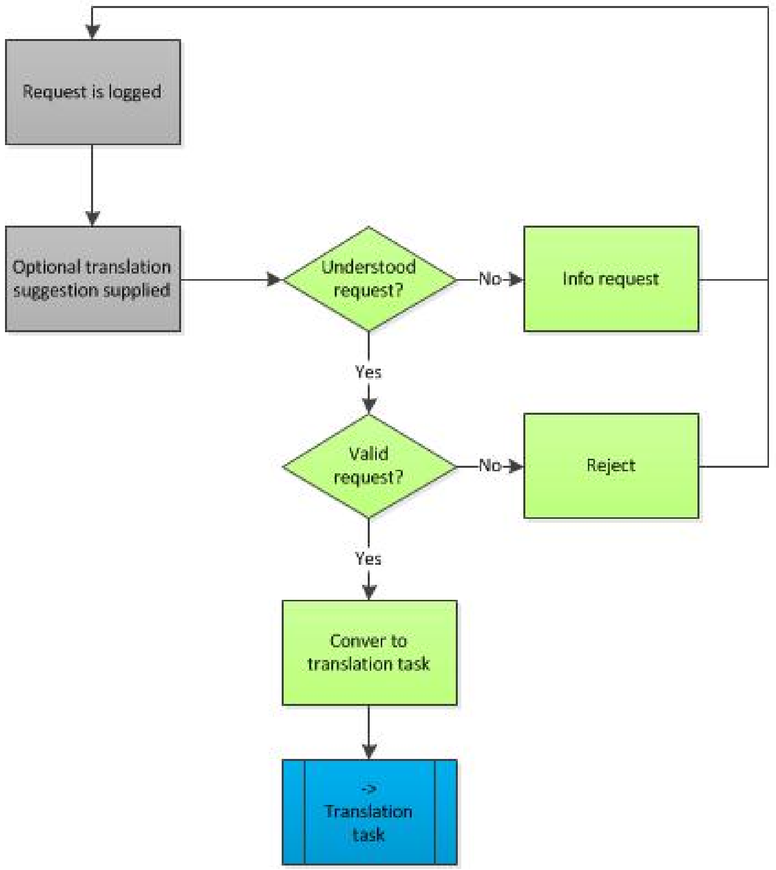
"Change request" workflow

Every user who has had the option enabled may submit a change request in quickTerm. In doing so the user is able to enter different values into the relevant fields of an input screen. The terminologist receives these requests with a clear overview showing the "change history" and decides what to do with the request:

- Reject change
- Accept change and update termbase immediately
- Forward the change as an edit task to the specialists for voting

Depending on the system configuration, the terminologist can also submit a change request to himself and accept it immediately. This is virtually the same as "documented" editing of an entry. It enables the terminologist to edit the termbase from devices on which the MultiTerm Client is not installed.

1.4.3 Translation request



"Translation request" workflow

Every user who has had the option enabled may submit a translation request in quickTerm. The user must specify the language in which the term is to be translated, but he may also propose a translation as well. The terminologist can then reject this request or forward it as a translation task to the relevant team.

1.4.4 Auto-Logging Unsuccessful Searches

quickTerm internally logs all unsuccessful searches. Since many unsuccessful searches are caused by errors such as typos or searching in the wrong source language, two threshold values may be set: one for the logging process itself and one for an automatic term request.

This allows on the one hand for a minimum number of unsuccessful searches to be specified before the search term appears in the list of logged terms.

On the other hand, an automatic term request can be configured. For example, the system can be configured so that once a term has been searched for 25 times without success, a term request is automatically submitted to the terminologist. The content of this automatic term request can also be defined (apart from the actual term itself).

1.5 Tasks

Requests are mostly submitted by terminologists. Exceptions are requests generated by the system:

Approval tasks that are created automatically as part of a translation process (if configured)

Fully automated requests created via quickTerm Tools

1.5.1 Approval task

quickTerm distinguishes between a source and target language approval workflow. The difference is that:

- in the source language workflow, the terminologist initiates the approval task and is also responsible for the final approval.
- in the target language workflow, it is the translator or lead translator who automatically or optionally starts the approval process. The master approver for the respective language can either grant final approval, edit the proposed translation, suggest an alternative translation, or request a

new translation suggestion. The terminologist is not involved in target language approvals, unless he has been appointed as the master approver for the target languages.

1.5.1.1 The Approval Concept

Approval at the Language Level

In the quickTerm philosophy, approval always occurs at the language level and not at the term or entry level. As we see it, the workflow only makes sense within the context of all terms of a given language: individual terms (synonyms) are thus evaluated by the terminologist and provided with usage information and other information. The total context of a specific language, including information on which terms are the preferred terms and on what occasions, will then be approved by the approvers responsible. Beyond this, the terminologist will probably not be involved in the workflows of the other languages as they are not likely to be proficient in these languages.

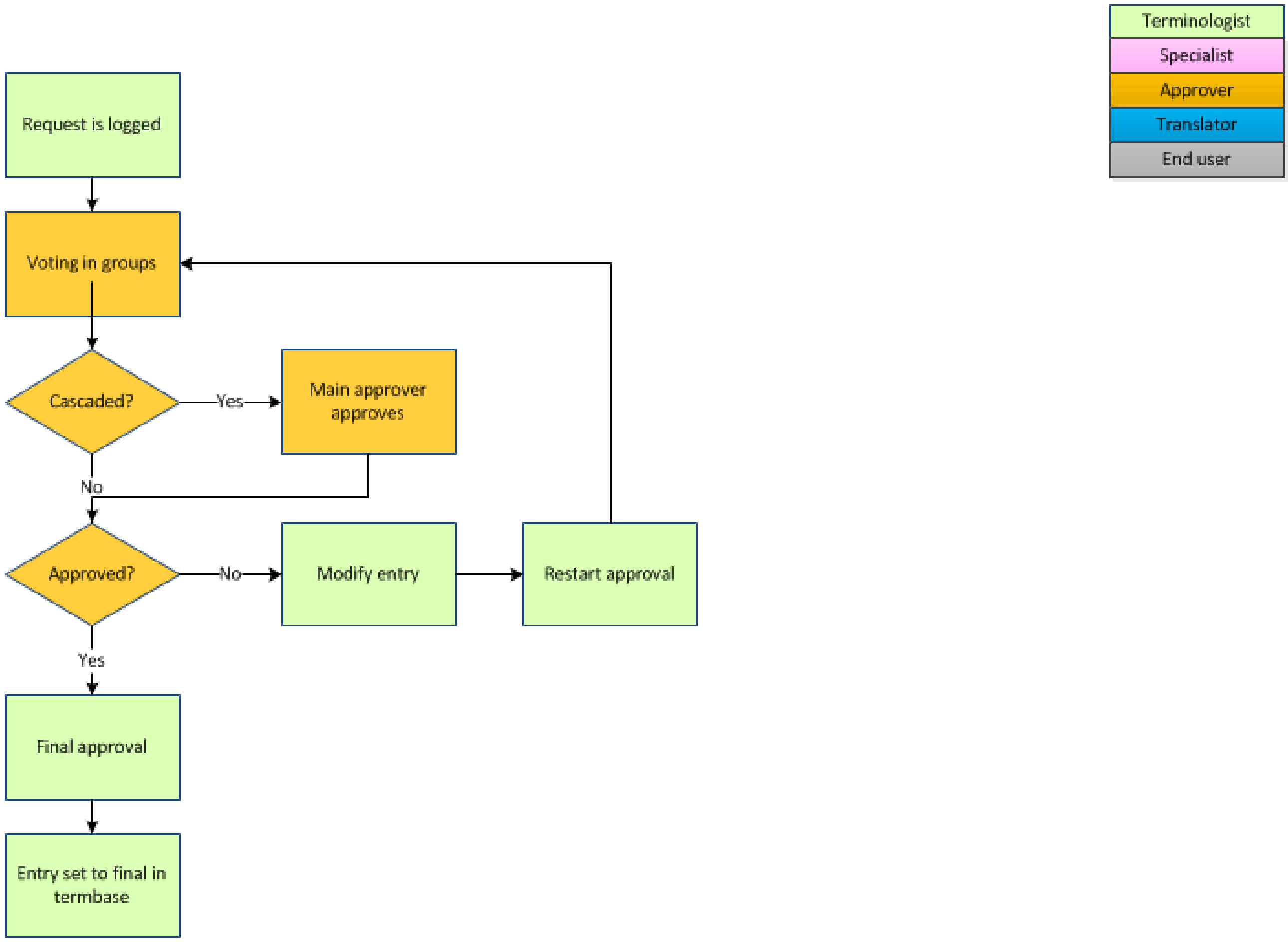
Renewed Approval for Changes

If a new term is added to an existing entry or an approved term is changed, an entry already approved in this language has to be approved again, as the total constellation of preferred terms, etc., may have changed. quickTerm also indicates that the target languages may also be affected.

Restarting Approvals

If desired, individual entries can be set to "Restart approval process". Once a specified period of time expires, quickTerm will then remind the terminologist that the validity of this entry may have to be checked.

1.5.1.2 Source Language Approval Workflow



"Source language approval task" workflow

The approval workflow for the "source language(s)" comprises a three or four-stage process:

1. An existing entry, which has not yet been approved, has the status "New". The terminologist can send such an entry for approval in each language at a click of the mouse. This step can also be automated using quickTerm Tools.

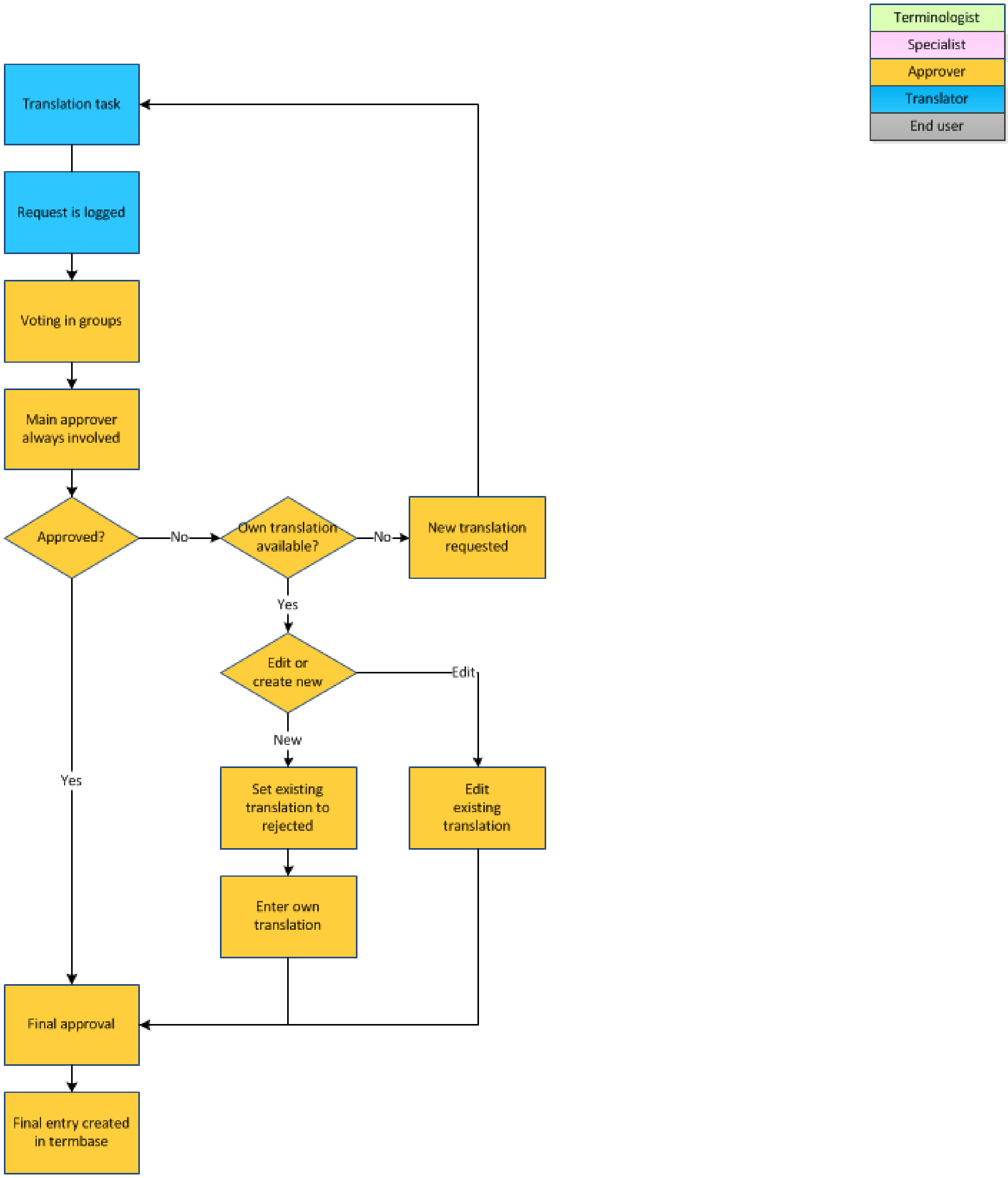
2. The approval task process runs as soon as the approval has started. The respective users receive a notification via e-mail and the approval tasks received appear in the task box (Request management screen) in the quickTerm Client.

   The approvers can then approve or reject the individual entries, or abstain from voting, by clicking on the respective buttons. They can also "chat" with each other using the notes function or send a question to the task initiator using the "Ask for information" function. It is particularly useful to enter a note when rejecting an entry or abstaining from voting.

If required, quickTerm can automatically document the voting process and manage the status information in the termbase. This means that the approvers do not have to be familiar with the specifics of the termbase. Neither is it necessary to install MultiTerm locally on the approver's PC. Nevertheless the exact approval processes can still be viewed in the termbase.

3. As soon as all the approvers for a language have approved an entry, a master approver can optionally grant final approval or reject the entry. The status is then "All approved".
4. If the master approver has also voted, the terminologist receives a notification via e-mail and can either correct the entry in the respective language and restart the approval loop, or give final approval to the entry directly in his quickTerm task box.

1.5.1.3 Target Language Approval Workflow



"Target language approval task" workflow

The approval workflow for the target language(s) comprises a three-stage process:

1. A translator makes a translation suggestion. This is either initiated by the translator or occurs as a result of a translation task. The translation process itself may be broken down into several stages with a translator, reviewer and main translator. It is possible to configure the approval process following translation (see Field Access Settings):
   - Optional

     When finalizing the translation task, the translator can decide whether to start an approval task.
   - Obligatory

     When the translator finalizes the translation task, quickTerm automatically starts an approval task.
   - Disabled

     If this option is set, it is not possible for an approval task to be assigned. In this case, you should configure the translation suggestion dialog so that the approval value is also written directly to the termbase.
2. The voting process is identical to that of the source language approval process.
3. As soon as all the approvers for a language have approved an entry, the master approver must either give his final approval, edit the translation and finally approve it, suggest an alternative translation and finally approve it, or request a new translation suggestion from the translator.

Approval for the translation is independently assigned by quickTerm as required, so, unlike approval tasks for terminologists, you cannot manually select which approver groups should be included. By default all approver groups that are assigned the relevant language are included. If you want to involve other approver groups for different types of entries, you can configure this so that it is "implicitly" linked to specific criteria, i.e., to a department or specialist area. For example, the system can be configured so that every entry allocated to department X can only be approved by approvers from that department.

1.5.1.4 Approval Methods

Approval can be carried out in three ways:

- In contrast to the two voting procedures, only one member of a group has to grant approval in the First-Wins procedure in order for the whole group's approval to have been given. It is also possible to specify whether other group members can disagree with a "colleague" and reject a previously approved request, or whether a vote that has been cast immediately finalizes the approval task and blocks all other group members (enforced First-Wins). In the event of a conflict, the original vote will be invalidated in quickTerm; however, all agreements or rejections will remain documented in the termbase.

- In contrast to the first wins procedure, the minimum agreement procedure requires a specific number of users in a group to approve an entry in order for the group's approval to have been given.
- The necessary votes procedure dictates that a certain number of total votes has to be cast for each term before a decision (agree or reject) can be reached. Abstentions are not counted. We recommend specifying an odd number of necessary total votes so that the number of votes for and against the proposed term are not identical, as the system would then be unable to reach a majority decision.

The Administrator specifies whether a group uses the First-Wins or voting procedure to approve entries under Approval settings in the group management.

1.5.1.5 Abstentions

As well as approving or rejecting an entry, it is also possible to abstain from voting. The meaning of an abstention is either "don't mind" or "don't know" and is a way of documenting the user's abstention and also of informing other users involved in the voting loop that he has abstained. Abstentions are ignored in the decision-making process. This applies for both approval tasks and edit tasks (changes, definitions). Ideally a reason for the abstention should be provided through the chat function (e.g., "Not my area of expertise").

1.5.1.6 MultiTerm Approval Documentation

quickTerm can document the entire voting process in MultiTerm. In order for it to do so, you must include the relevant workflow fields in the termbase definition at language level (for further details see Termbase Settings in the Configuration chapter).

Approval documentation in MultiTerm is optional!

Documenting approvals in MultiTerm is not essential from a quickTerm perspective. Its only purpose is to allow all users, not just the quickTerm terminologist, to see the approval status and history in MultiTerm.

1.5.1.7 Revoking an Approval

When an approval is initiated, quickTerm checks whether the entry has already been approved in the particular language or in another language. If that is the case, the approval process can also be optionally repeated for these approved languages. The reason for this is that a change made in one language can also bring about changes in other languages.

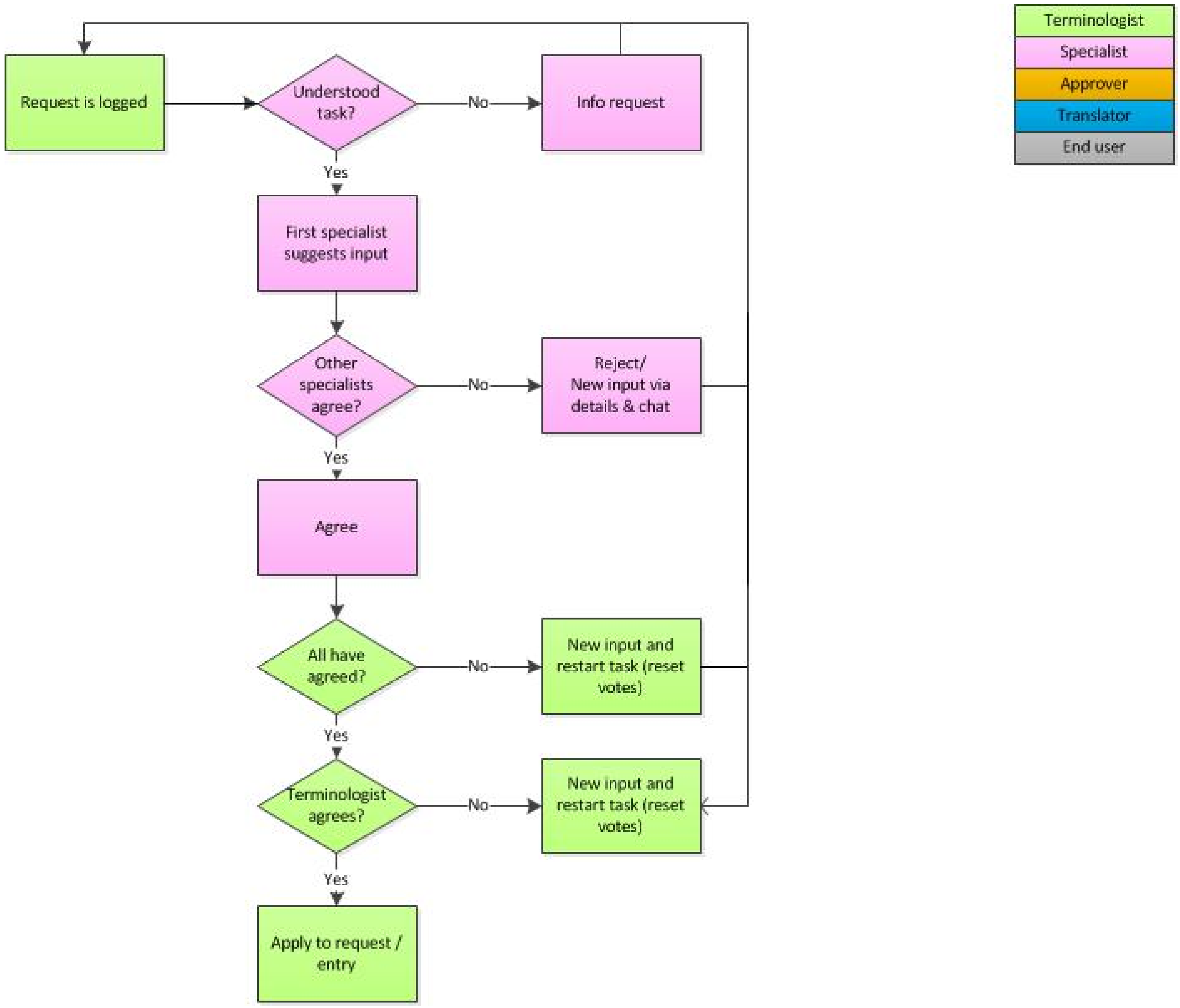
quickTerm checks the workflow status in quickTerm and in the termbase, as this information may differ.

Notification of New or Changed Approved Entries

When an approval process starts, all groups that have "subscribed" to these notifications automatically receive an e-mail informing them that an entry has been sent for approval, regardless of whether the entry is new or one that has already been approved.

Likewise, at the end of the approval process, all groups that have "subscribed" to these notifications will automatically receive an e-mail informing them that an entry has been approved.

1.5.2 Edit Task (Change, Definition)



"Edit task" workflow

There are two types of edit tasks in quickTerm:

- Definition

  The terminologist can send term requests or existing entries to specific user groups to fill any information gaps, e.g. to obtain a definition of a concept. It is for this reason that this type of task is also called a "Definition task", even though it is not always a definition that is required.

- Change

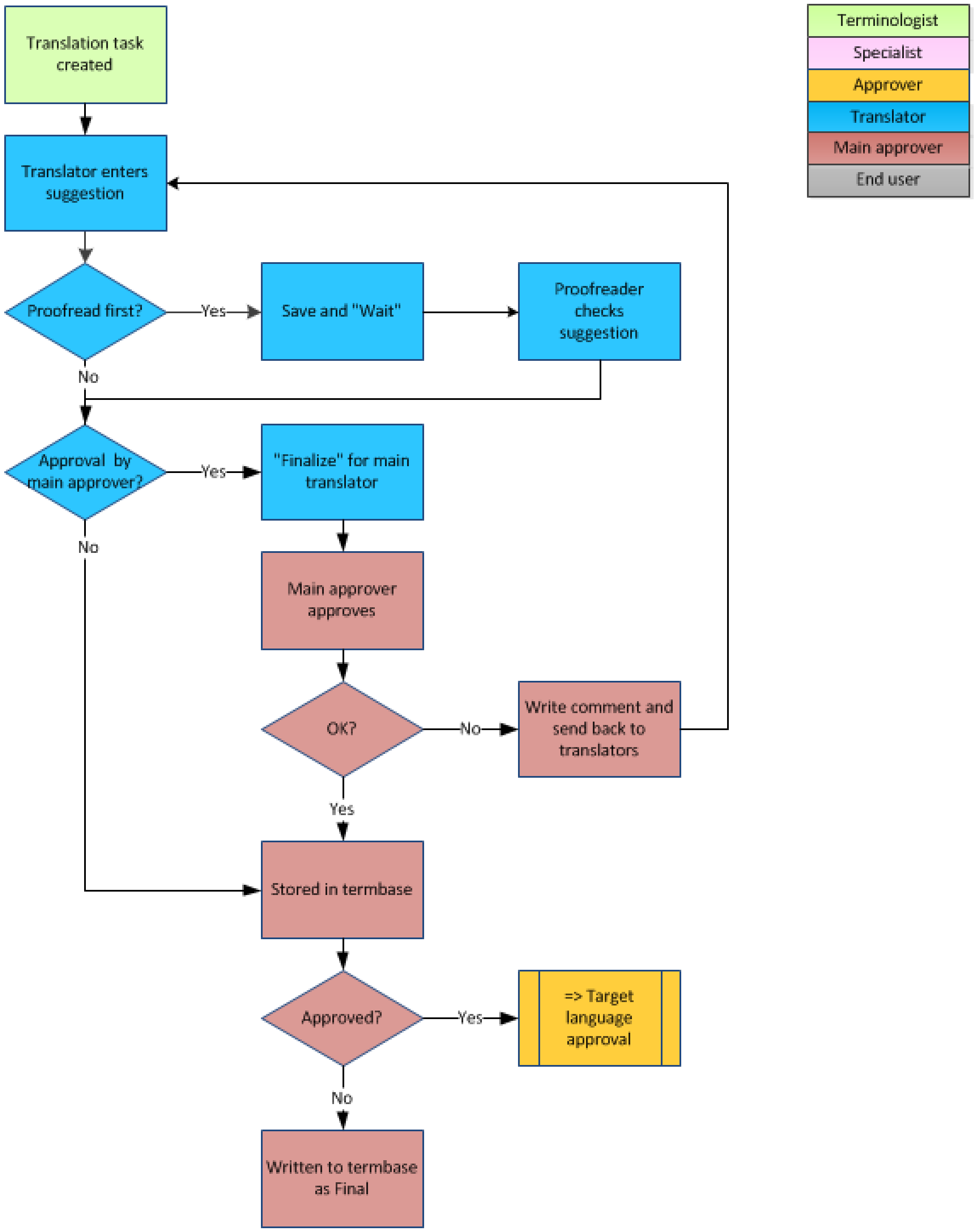
  The terminologist can, either of his own volition or in response to a change request, send existing entries to specific user groups to check the change and, where applicable, make their own suggestions.

The recipients of such tasks could be any of the user groups (e.g., the approver groups). All that needs to be configured is the option that allows the group to receive definition or change requests.

In both cases, the terminologist can select specific fields that the specialists must complete on a task-by-task basis. They then have to enter the data in an Editor window. If the task is sent to a group with several members, these may then follow the same voting procedures as used for the approvals workflow.

As soon as a decision has been made, the information is returned to the terminologist, who can then either update the term request or termbase entry, or reject the decision and request that the task be repeated.

1.5.3 Translation Task



"Translation task" workflow

There are different ways to add multilingual terms to a termbase. For linguistic reasons, the search for foreign-language equivalents in quickTerm is always referred to as "translation".

Multilingual Term Requests

In addition to monolingual term requests, translators can also submit multilingual term requests. These term requests are first processed by the terminologist, just like monolingual term requests. As soon as the terminologist has created the term request in the termbase, they can send it for approval (optional).

Translation Suggestions

If a translator comes across a monolingual entry in MultiTerm, for example in the terminology window of SDL Trados, they can look up the term in quickTerm and submit a translation suggestion. This will be created directly in MultiTerm and an approval request goes out to the approver of this language either automatically or at the request of the translator. At the end of the approval process, the translator can optionally be notified of the result.

Translation Tasks

As an alternative to the translation workflows that originate with the translator, the terminologist can also send specific entries for translation. In this case the translator receives a notification via e-mail and can process the requests in his task box (Request management) and submit a translation suggestion for each translation task.

Depending on the configuration, there can be a proofreading workflow before actually sending the translation suggestion off to the approver. An example scenario here would see a translator from the group making a suggestion that a second translator checks. The second translator then forwards this suggestion to the "main translator" for review. He then saves this entry in the termbase and, depending on the configuration, passes it on to the approver.

Translation Suggestions for Existing Entries

Depending on how the system is configured, translators can also submit translation suggestions for entries that have already been "translated" and approved. This automatically starts a new approval process.

1.5.4 Feedback

All authorized users can provide feedback on terms. This feedback is collated in the terminologist's task list.

1.5.5 Request Management

In the "Request management" area, the tasks concerning the user currently logged into quickTerm are divided into three areas:

1. *Assigned tasks*: Lists all the tasks currently assigned to this user for processing. For a terminologist, these may be term requests, feedback, final approvals, etc. A translator may see translation tasks, etc.
2. *All my tasks*: Lists all the tasks in which the user is involved, regardless of whether they are currently assigned to him. For example these could be all term requests (including those that the user himself has initiated), approval tasks (including already closed ones), etc.
3. *User-specific tasks*: After the first two standard tabs, a series of user-specific tabs list individual tasks by type, e.g., all term requests, all approval requests, etc. There may also be additional functions available that are applicable only to these task types.

1.5.5.1 User-Defined Task Category

quickTerm allows a user-specific field to be incorporated into every task. Possible uses of this function can be to filter tasks by specialism, or to select tasks by project number, etc.

This field can either be filled entirely at the user's discretion, or "hard-wired" to a specific termbase field, such as "Department".

1.6 Collaboration

quickTerm is a collaborative workflow system.

Chat (relating to tasks/requests)

To support collaboration, users are able to call on the following functions within a workflow:

- Information requests

  By selecting the "Question" option and choosing the recipient group, an information request can be sent. Doing so not only adds the question to the respective task, but also creates a task for the recipient group. The response, which is provided as part of the new task, is also noted in the original task/request.

- Comments

  By selecting the "Comment" option, a note is added to the respective task/request.

The information requests (and their responses) and comments can be seen by everyone involved in the workflow.

To send questions or comments, click on the "Send" button.

Live chat

The Live chat function can be used to discuss tasks and requests with other quickTerm users.

1.7 Social Terminology

Social terminology covers a range of functions that the terminologist can use to increase the attractiveness and hence the usage, distribution and acceptance of the termbase. As with websites, topicality and the "new" factor are critical to generating a lasting interest in the information in the termbase among the user community.

The social terminology features are only available in quickTerm Web and include:

- Recommended and liked entries
- Term of the week
- Term quiz
- Live chat

1.7.1 Recommended and liked entries

The terminologist is able to "recommend" individual entries. These are displayed as a separate list in quickTerm Web. Thus frequently misused entries or entries with a particular topicality can be actively promoted. Users can click on these entries and view them in the entry window. The terminologist can also remove recommendations from the recommended entries list.

Every user can "like" an entry. The "likes" are counted and the corresponding entries are shown in the liked entries list. While the terminologist has no direct access to individual entries in the likes list, he is able to completely reset the entire list. How far back in time the system looks to find "likes" can also be defined.

1.7.2 Term of the week

The terminologist can prepare a piece on special entries and publish them in quickTerm Web as "Term of the week". In quickTerm these are managed using special information fields, linked to an entry and can be published using different style sheets. There is only ever one term of the week active at a time, though users can scroll back through "old" terms of the week.

1.7.3 Term quiz

In a similar manner to the term of the week, the terminologist can also publish a term quiz on quickTerm Web. A term quiz is a set of questions asked in sequence. Each question has four possible answers, one of which is correct.

These questions are written in quickTerm and collated as "quizzes". The user is presented with a choice of four possible answers for each question. After he has selected an answer, he is told whether he was right or not. The quiz ends with a set of statistics showing how many questions the user got right and how many were wrong.

There is only ever one term quiz active at a time, though users can scroll back through "old" quizzes.

1.7.4 Searching in Other Sources

quickTerm also permits other search providers to be configured in addition to MultiTerm and Acrolinx. These are displayed in the results list alongside the actual MultiTerm or Acrolinx matches and can be selected just like the entries in the termbase.

While it is primarily search providers such as Leo, Linguee, Pons, IATE, Wikipedia, etc. that were considered for this function, company internal search engines like Sharepoint text search can also be configured as search providers. Naturally this can provide a significant boost to quickTerm's qualities as a reference program and therefore the usage of the termbase.

1.8 Administrative Functions

quickTerm can be configured to provide the terminologist with a range of administrative functions. These include version management of the termbase and the ability to compare versions. A task summary can also be viewed and even automated (using quickTerm Tools) in the "Reports" area of quickTerm.

1.8.1 Multi-Tenancy

quickTerm is a client-compatible system. This is of particular interest in hosting scenarios. quickTerm can be configured completely differently for each client, right down to a dedicated theme in quickTerm Web. Different termbases can of course be included on a client-specific basis and different users and groups created. The single restriction is that only one MultiTerm server can ever be accessed by each quickTerm server. It is perfectly feasible for any client with their own MultiTerm account to access the termbase to prevent entries in the termbase of client A appearing in the configuration of client B.

New clients are created by a "Global administrator". The "Client administrators" have no access to this function and can only configure their respective clients. It is therefore also possible in the hosting scenario to grant the customer administrator functions that are restricted to just their clients.

1.8.2 Dashboard (Change Management): Versions and History

Version comparison

Depending on the configuration on the server itself, quickTerm can record a "snapshot" of the current data in the termbase at regular intervals. In the quickTerm Dashboard the terminologist is able to compare the terminology in the individual snapshots against each other. This allows him, for example, to find changes over a certain period of time, or to find out when a specific change was made. quickTerm first lists all the entries that were changed within the selected period. The terminologist can then filter the results by language or change type. He will then be able to "drill down" in the "results list" until only the change he is interested in is displayed.

From this results view the terminologist can also send some or all of the entries for approval again, send them to the translators to check, or even reset a term, language, entry or the entire termbase back to a certain state.

Termbase Development

Alongside this precise change history feature, the terminologist is able to review the development of the termbase over time on a chart showing the total number of entries, entries per language, terms, etc. as trend graphs.

Entry statistics

This tab shows the development of entries, filtered by language and date, on a chart.

Access statistics

Precise access statistics can also be viewed via the Dashboard. Exact figures are recorded showing the number of successful and unsuccessful searches and how many entries were displayed for each termbase and language. The terminologist can choose whether the groups are taken into account or not.

These statistics can show the "total" figures since starting to work with quickTerm, or cover individual reporting periods (e.g., monthly statistics) and be distributed automatically by e-mail.

Term request statistics

This tab shows the development of term requests, filtered by language and date, as a chart.

Approval statistics

The Dashboard can also display statistics on the ongoing approval tasks by user, language, etc.

Translation Statistics

Finally, the Dashboard allows statistics on all ongoing translation tasks to be displayed by user, language, etc.

1.8.3 quickTerm Tools

quickTerm Tools is installed on the quickTerm server as part of the quickTerm server installation package. It performs the following three tasks:

- Automatically starts approval tasks
- Automatically starts translation tasks
- Imports term requests from XML or CSV files

1.8.3.1 Automatically start approval tasks

"Tasks", such as automatically starting approval tasks, can be defined in quickTerm Tools. These tasks can then be started automatically using Windows Scheduler, but can also be started manually.

Parameters can be defined that determine which conditions an entry has to meet before it can be sent for approval. For example, the system can be configured so that all entries with the workflow status "New" and that also contain at least one preferred term and at least one explanation or definition are sent for approval. The respective groups, etc. to which the approval task has to be sent can also be configured.

1.8.3.2 Automatically start translation tasks

"Tasks", such as automatically starting translation tasks, can be defined in quickTerm Tools. These tasks can then be started automatically using Windows Scheduler, but can also be started manually.

Parameters can be defined that determine which conditions an entry has to meet before it can be sent for translation. For example, the system can be configured so that all entries with the workflow status "Final" in the source language and that also contain at least one preferred term and at least one explanation or definition should be sent for translation. A threshold value can also be defined to specify the number of applicable entries that has to be reached before a translation project is started. The respective groups, etc. to which the translation task and subsequent approval task have to be sent can also be configured.

1.8.3.3 Import Term Requests

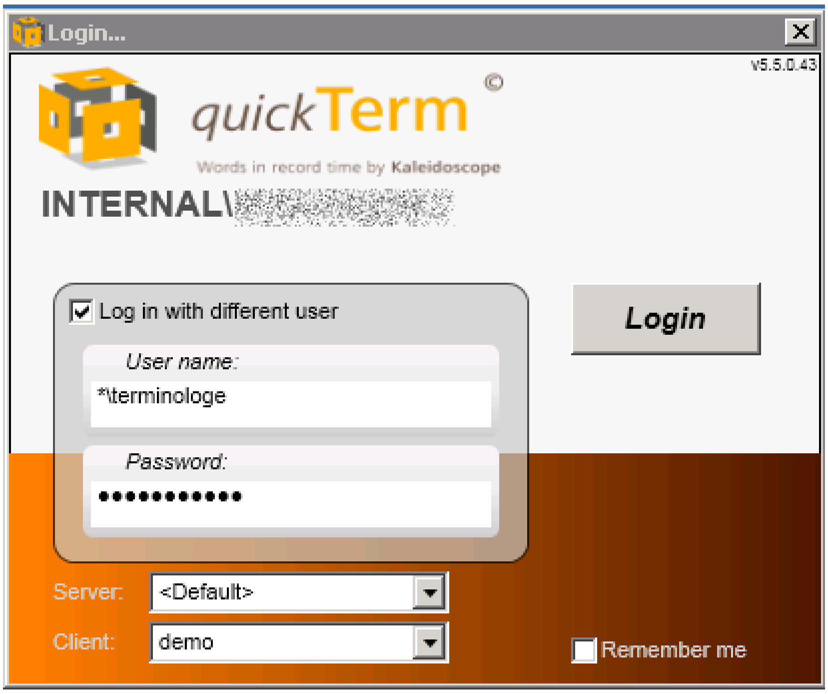
This option enables term requests from external systems to be imported into quickTerm. For example, terms suggested by the content quality checking system Acrolinx can be transferred to quickTerm. Instead of importing old data from Excel lists directly into MultiTerm, it is possible to import term requests into quickTerm; they can be systematically processed and will only appear in MultiTerm once they have been checked.

1.8.4 Automatic Client Update

quickTerm supports a server-based rollout of client updates. Not only is the client updated to a newer version, but customization updates (e.g., new icons, language flags, etc.) are also supported. The updates are released as a client package that is installed on the server. Once quickTerm is restarted, the new version is entered into the database. On every startup, each client compares its version number with the version number on the sever.

2 Login

When the client is first started, the login screen appears:



"Login..." screen

The number of the currently installed version of quickTerm is shown in the top right corner of the Login screen. By default quickTerm attempts to log in with the current Windows user. You can also choose to specify another user:

a) If you do not wish to log in with your Windows user name, click on "Log in with different user".

⇨ The dialog box expands so that you can enter another user name.

b) Enter the new user name and password.

c) If you use different servers, you can select these under "Server". Information on setting up additional servers can be found in the Setting-up Multiple Server Connections chapter in the Installation Manual.

d) In the "Client" field, select the client with which you want to start the Desktop Client. This dialog box only appears if the specified user is a member of more than one client (e.g. global administrator).
If you log in as the global administrator, you can select any client. You can then select the clients for whom you want to change settings in the individual screens.

e) If you tick the checkbox "Remember me", quickTerm automatically logs in the current user and is minimized to the system tray. You can disable auto-login by unchecking the box.

f) Click on "Login".

⇨ quickTerm will log you in.

It is also possible to start the quickTerm Client with the parameters for your login (e.g. via a shortcut on your desktop or via the Start menu). The syntax would be "quickterm.exe -user=USERNAME -password=PASSWORD -client=CLIENTNAME". quickTerm will then log in automatically as this user and you do not have to enter your user data each time you start the program. Please contact your IT department regarding the necessary steps for logging in this way.

First login

When you log in as an Active Directory user for the first time (this is a special type of user management in company networks), you will receive the following message:

"Welcome! You are logging in to quickTerm for the first time. Please agree to your user information being saved on the server."

a) Click on "Yes". You will then receive the following message: "Please check and update your personal settings!"

b) Click on "OK". You then have the option of making changes to your settings by clicking on the "Personal settings" icon.

- "User name", "Full name" and "E-mail address"

  This information is required for e-mail notifications accompanying term requests as well as to log the person initiating the request in the case of logged entries. If you have already been created as a user in the domain, this information is already loaded.

- "New password" and "New password again"

  These fields are only displayed to quickTerm users, not to Windows users. This option allows you to set a new password.

- "Reset password"

  This button is only displayed to quickTerm users. It allows you to automatically generate a new password and have it sent by e-mail.

- "Minimize on startup"

  This option specifies that the client should be automatically minimized after the user has logged in. The client will then be hidden but will still be running. To restore the screen press the hotkeys or right-click on the quickTerm symbol and choose "Show".

- "Minimize on closing the application window"

This option specifies that when the application is closed (not when the user logs out!) quickTerm is minimized and the user is not logged out. If this box is not checked, quickTerm will close and the user will be logged out automatically. If it is checked, the application will be minimized to the system tray and continue to run in the background; it can be reactivated by pressing one of the hotkeys. To then close the application, right-click on the symbol in the system tray and select "Exit".

- "Remember me on this computer"

  If you check the "Remember me" box at login, quickTerm automatically logs in the current user every time the client is started. You can disable auto-login by unchecking the box here. If you check the box, quickTerm automatically logs in the current user every time the client is started.

- "Save personal settings"

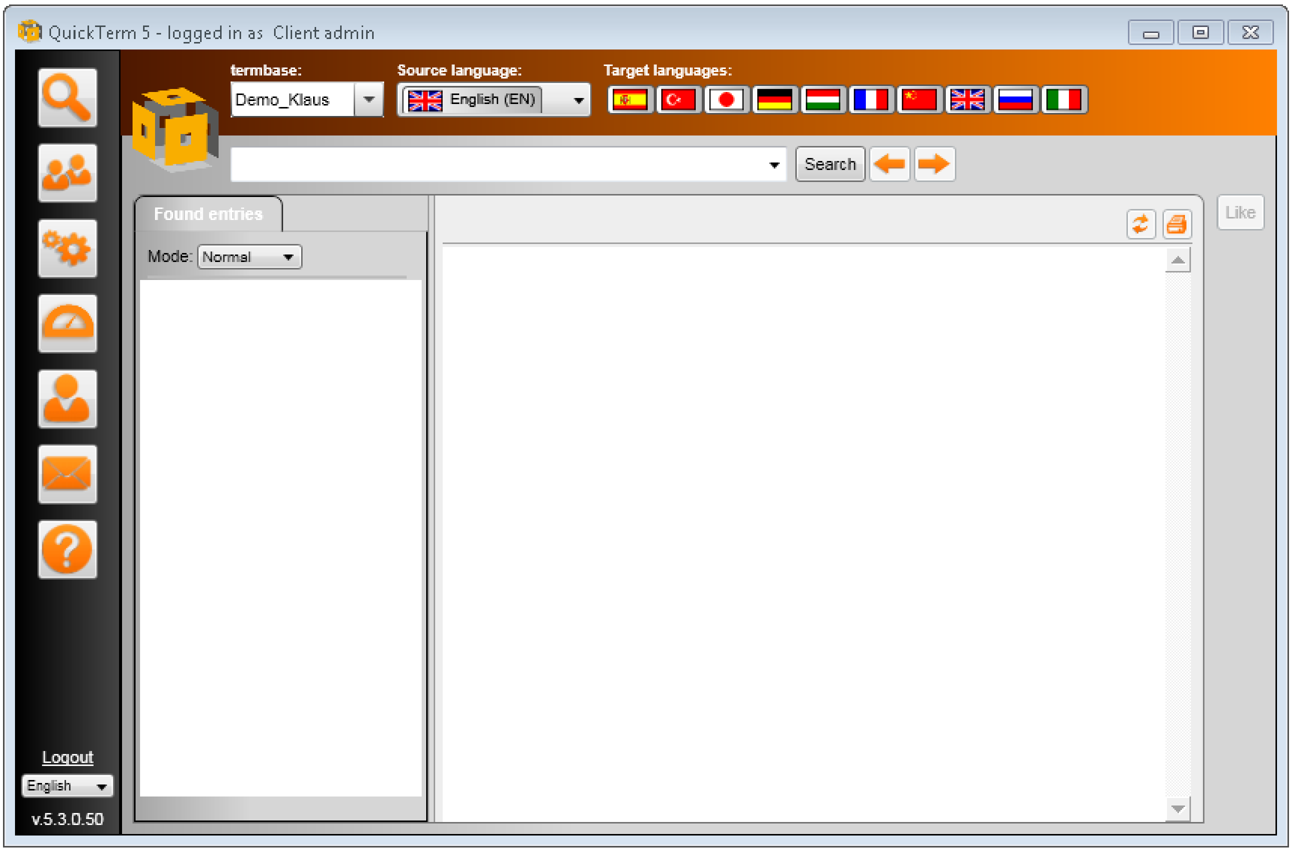
  By clicking this button, the settings are saved on the server and you are logged in.

Auto-update

When you start the application, your client automatically compares the client version with the version held centrally on the server. You may get a message that you are working with an old version of the client. In this case, quickTerm will attempt to perform an auto-update. Depending on the system, you may need administrator rights to do this. It is not possible to work with an older version of the client.

3 The quickTerm User Interface

The quickTerm user interface is intentionally kept simple so that it is easy for non-terminologists to work with too. As you can see, the roles of the logged-in users are shown in the header.



The quickTerm User Interface

The navigation is located on the left-hand side. Here you can select which quickTerm work area you would like to work in. The number of areas available depends on your user role.

Buttons

The buttons available on the right-hand side of the screen depend on the user's role, as well as on the settings made for that user role during the configuration process. Explanations of the buttons for each of the roles can be found in this manual.

Search

In the search area, you can search for terms and request new terms. For all users apart from the global administrator.

Personal Settings

Under personal settings, you can set specific options for quickTerm's operation. For all users.

Help

In the help area, the documentation is available as online help. For all users.

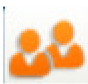
Request Management (Task box)

In Request management, end users can edit "Assigned tasks" and "All my tasks" in the respective tabs. Assigned tasks shows all tasks currently assigned to the logged-in user for processing. The "All my tasks" tab shows all tasks the user is or was involved in.

Approvers also have the "Approval tasks" tab where a number of additional functions are available.

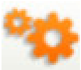
In addition to the "Assigned tasks" and "All my tasks" tabs, terminologists also have a detailed list of all task categories. They can also configure the quickTerm Web social media functions here (liked and recommended entries, Term of the week and Term quiz).

User Management



In this area, client and global administrators can control the access for specific users and user groups. For further information see the User Access Configuration chapter in quickTerm configuration.

Server Management

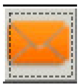


In this area, client and global administrators can specify server settings. For further information see the Server Settings chapter in quickTerm configuration.

Dashboard

In this area, client and global administrators as well as specifically authorized terminologists can create user-editable reports and compare versions of the termbase. For further information see User Access Configuration.

Send batch e-mails



In this area client administrators and terminologists can send batch e-mails to any group of recipients.

Logout, Switch Language and Version Number

This function allows you to log out of the quickTerm client. You will receive a prompt asking whether you really want to log out. A "blank" login screen is then displayed.

You can also switch the quickTerm client language here. The languages that are available will depend on the client localization. German and English are available as standard. As on the login screen, the number of the currently installed version of quickTerm is displayed.

Sending error reports

If an error occurs in the system, there is the option in quickTerm to notify the administrator by e-mail. To send the text of the error message together with an individual description directly to the administrator, click the "Send feedback to quickTerm administrator" button in the error message dialog.

4 Search

In quickTerm Client, there are two ways you can perform a terminology search:

1. From any application, just highlight the term you are looking for and press the designated hotkey (see Personal settings).
2. From within quickTerm itself just enter the search term in the search field. If the quickTerm client is hidden, you can display it again by right-clicking on the quickTerm icon in the system tray and selecting "Show", or simply pressing the hotkey.

Search from any application

➢ Requirement: You have already started the quickTerm client and logged in. You have specified the appropriate source language and selected the required search mode ("Normal", "Fuzzy" or "Full text") and optionally a filter. If you want to filter the search, the filter must be specified BEFORE doing the search.

a) Highlight the text you want to search for in your application.

b) Press the designated hotkey.

⇨ quickTerm performs the search and shows the results in the hitlist.

a) Click on the term you want in the hitlist on the left-hand side.

⇨ quickTerm shows the entry in the results window.

Search from within the client

➢ Requirement: You have already started the quickTerm client and logged in. You have specified the appropriate source language and selected the required search mode (if available, "Normal", "Fuzzy" or "Full text") and optionally a filter. If you want to filter the search, the filter must be specified BEFORE doing the search.

a) Enter the search term you want in the search field. If you only enter a number, quickTerm will search for the entry with this number.

b) Click on "Search" next to the text field or press the "Enter" key.

⇨ quickTerm performs the search and shows the results in the hitlist.

a) Click on the term you want in the hitlist on the left-hand side.

⇨ quickTerm shows the entry in the results window.

Search mode: Normal (=exact), fuzzy or full text search

Search mode

These options are only available when using a MultiTerm database.

If a *normal* (exact) search does not return any results, you can perform a *fuzzy* search. In contrast to a normal search, a fuzzy search finds all terms that are similar but not identical to the highlighted text.

To enable fuzzy searches, select the *Fuzzy* option under *Mode*. An additional checkbox *ABC* will then be displayed. If you check this box, the fuzzy search results will be sorted alphabetically, rather than in descending order by relevance (%). Exact search results are always sorted alphabetically.

If you search for less than three characters an *exact* search is performed automatically, otherwise too many similar results will be found.

Full text search: A full text search searches termbases for the specified search text wherever it appears in the entries (not just in the term field).

Filtered search

If filters have been defined for you, you can restrict the area of the search. For example, to search only within specific subject areas in the termbase.

Filters can be defined for each termbase in the drop-down list, since these may differ depending on the termbase. As a consequence, the format is slightly unusual with multiple radio buttons (one per termbase). If no filter has been selected for one of the termbases, quickTerm will perform an unfiltered search in this termbase. Remember to define filters for all termbases where they are required.

Filters must always be specified BEFORE performing a search.

The Search results

The search results displayed depend on the contents and structure of your termbase as well as on the selected stylesheet. Please refer to your terminologist for information about the meaning of the fields, contents, colors, hyperlinks, etc.

Depending on the configuration, there is the option to display the contents using multiple stylesheets. In this case, a drop-down box with the available stylesheets is shown at the top of the entry screen. (For more details see the Stylesheets chapter in quickTerm configuration).

Depending on the configuration, there is the option to restrict the content of an entry to specific terms. In this case, a drop-down box with the available term filters is shown at the top of the entry screen. This filter only applies to the display of entries that have already been found, and not to the search itself. (For more details see the Term Filters chapter in quickTerm configuration).

The Hitlist

The maximum number of terms to be displayed in a search and the maximum number of terms per screen in the hitlist can be defined in the Personal settings depending on the user authorization. If a search returns more results than can be displayed on a single page, the page number is displayed below the list. This allows you to switch between the results pages using the right (or left) arrow.

The hitlist order is set by the administrator in the server settings under *Search providers* and *Client settings*: Sort alphabetically/by relevance, then by termbase OR sort by termbase, then alphabetically/by relevance. For further information see Client Management.

This setting will now be applied in fuzzy search mode: it is sorted by relevance (%), or alphabetically if the *ABC* box is checked.

The hitlist order in the personal settings under search providers may differ from the order configured in the server settings and will then have priority when the results are displayed. For further information see Search Providers.

The fields, information and color codes shown in the hitlist may have already been defined for you by the administrator or you can define these yourself in the personal settings.

Update entry

You can update the display by clicking on the "Update entry" icon ( ) at the top of the entry screen.

Print entry

Any entry can be printed in the appropriate layout using the "Print current entry..." icon ( ) at the top of the entry screen.

The fields, information and color codes shown in the hitlist may have already been defined for you by the administrator or you can define these yourself in the personal settings.

See also

🗎 Search Providers [→ 132]

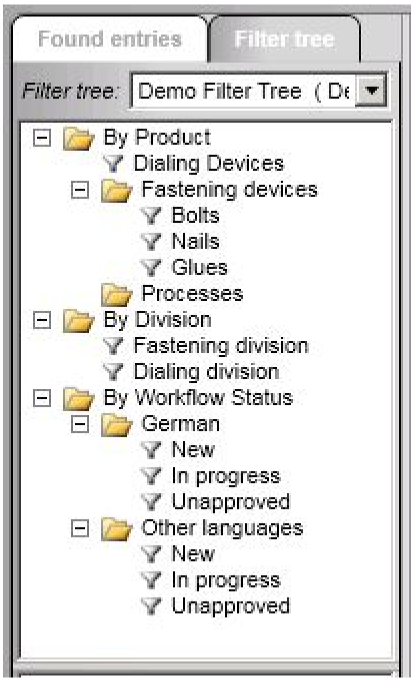
4.1 Navigating using the Filter Tree

As an alternative to carrying out a search for a specific term, you can also use the filter tree to navigate in the termbase using pre-defined filter criteria: A prerequisite for this is that a filter tree has been configured. (For more details see the Filter Trees chapter in quickTerm configuration).

Every branch selected in the filter tree first displays the number of hits. If there is a large number of hits, you can always refine the search within these hits even further in the search field. When you want to return to searching the entire termbase, go back to "Search".

a) Switch to the "Filter tree" view.

⇨ The filter tree is displayed through which you can navigate



Navigating through the filter tree

b) Expand the tree until you can see the desired filter.

c) Click on the filter you require.

⇨ The list of filtered entries is displayed below.

d) Click on the desired entry in the results list.

⇨ The entry is displayed on the right.

5 Request Management

The list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by selecting one or more options from a pre-defined list.

Hide already closed tasks

These tasks include approved and rejected tasks.

If you want to select more than one row in the task list, you can do this using the standard Windows functions: select a number of rows using the Shift or Control key, or all rows using "Ctrl A". Used in combination with the filter function, this makes it easy to edit the task list. For example, you can delete the selected rows using the Delete key.

Deleting rows

Individual rows will be deleted without prompting you to confirm that this is really what you want to do!

All tasks in the task list will originally be in status "unread". Two buttons on the bottom of the screen allow you to change the state manually: *Mark read* and *mark unread*. Depending on the current task read status, one of these buttons is always grayed out. Unread tasks are always displayed in bold, like in Outlook. By clicking on the respective button, you can manually change the read state.

Apart from that, the read state is automatically changed when you:

- Select a task
- Edit a task (except for adding a comment)
- *Open* a task, or
- Change the status of a task by completing a process step.

In addition, you can filter the task lists according to the read status by clicking on *Hide read tasks*. This allows you to better keep your to-dos within sight. Of course you can also deactivate the filter and see all tasks.

6 Feedback to Terminologists

If the search is not successful there are a number of options, depending on the user authorization, for communicating this to the internal terminology team. Depending on the configuration in your company, some of these functions may not be available:

Term request

By clicking on the *Request new term* button you can send the requested term straight to the terminology team and start a workflow. If this has been configured in Task Settings, the terminologist will receive an e-mail and your request will go to the terminologist's task box (Request management) for actioning.

Depending on the setup of the internal workflow, you will get prompt feedback about the term you need and you can incorporate it into your application and/or correct the term straightaway. For more information see The quickTerm Workflows.

Alternative term request

This button is only available to you if the administrator has enabled it in Group management. In this case, you can request that an alternative entry is added to an existing one. The workflow is identical to that of term requests, however reference is made to a specific entry. The alternative term can therefore only be merged with an existing entry by the terminologist; it is NOT possible to save the alternative term as a new entry.

Logging terms

quickTerm logs all unsuccessful searches. However, since there is also the possibility of a search being unsuccessful due to an error, you have the option to log the required term separately in a central search log by clicking on the *Log term* button. The terminology team will then work through these terms at regular intervals and, if necessary, add new terms to the database. In contrast to term requests, the log term feature does not start a workflow!

Feedback

By clicking on the *Send feedback* button you can send the terminology team feedback on a specific entry.

Change request

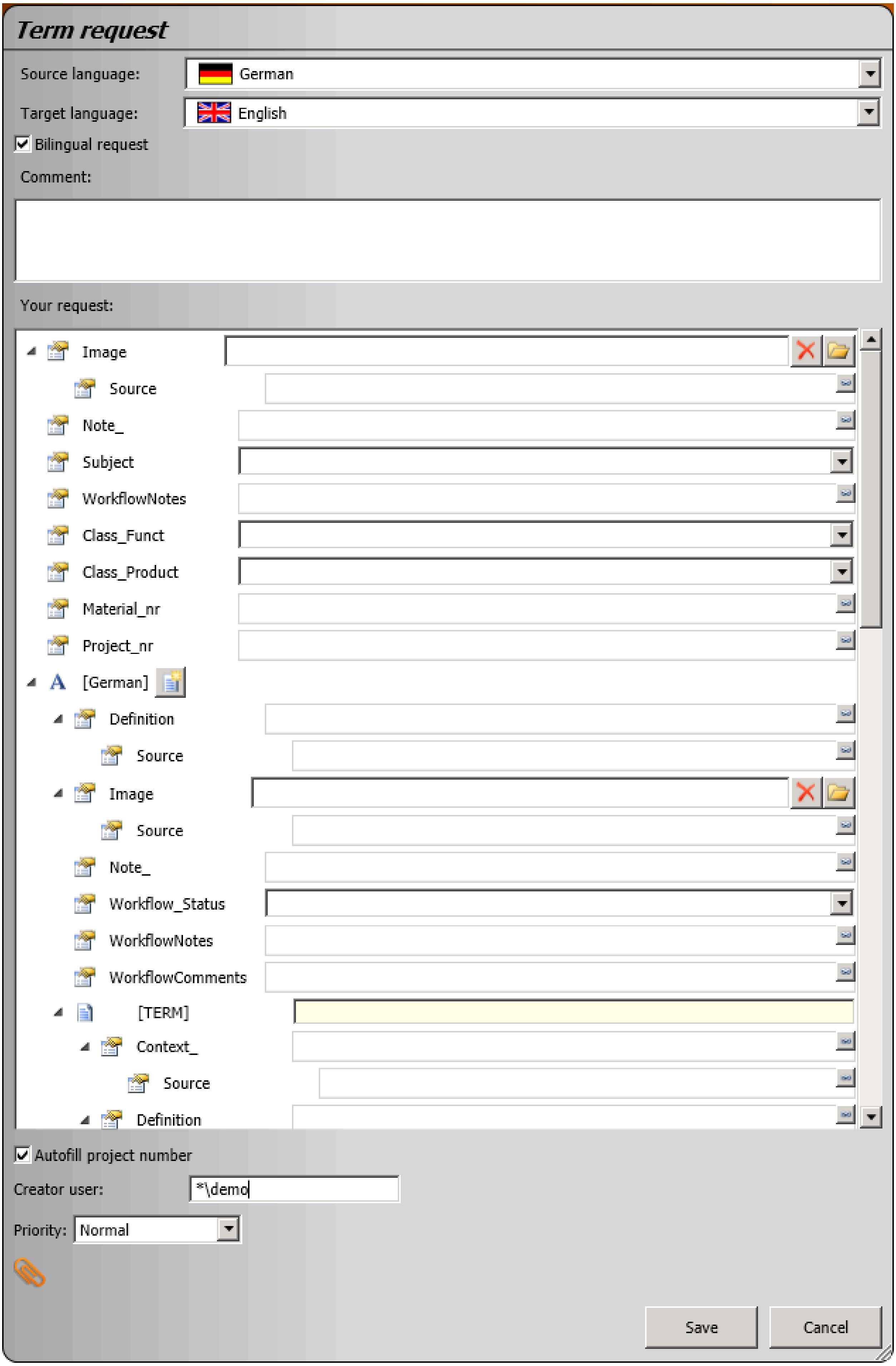
By clicking on the *Request change* button you can request changes to specific fields of an entry. The terminologist will then review the suggested changes, and either apply them to the termbase, refer them to a specialist team, or reject them.

Translation request

By clicking on the *Request translation* button, you can request the translation of a term in a specific language and also submit a translation suggestion if you wish. The terminologist will then review the suggested changes, and either apply them to the termbase, refer them to a specialist team, or reject them.

6.1 Term Request

The *Term request* dialog box may look different for different users, since the administrator can specify which information the individual users may or must enter. If you are adding a large amount of information for a term request and you want to expand the dialog box to get a clearer view, you can do this using the mouse pointer in the bottom right corner.


Term request
Source language:
German
Target language:
English
Bilingual request
Comment:
Your request:
Image
Source
Note_
Subject
WorkflowNotes
Class_Funct
Class_Product
Material_nr
Project_nr
[German]
Definition
Source
Image
Source
Note_
Workflow_Status
WorkflowNotes
WorkflowComments
[TERM]
Context_
Source
Definition
Autofill project number
Creator user:
*\demo
Priority:
Normal
Save
Cancel

"Term request" dialog

To request a term, proceed as follows:

a) Click on the "Request new term" button in the quickTerm search dialog.

⇨ The Term request dialog box opens.

b) If you have several termbases available, select the termbase for which the request is being made.

c) Select the desired source language.

d) If you are authorized to make multilingual term requests, you can switch to a bilingual term request by checking the *Bilingual request* box. In this case, you have the option to specify a source and target language.

e) Write a *Message to the terminologist*. This is not stored in the termbase but provides the terminologist with additional information when processing the request.

f) If the term request is in response to an unsuccessful search, the term is automatically entered here. However, this will only work if the search screen and term request source languages are identical.

g) Enter the required information in the available fields under *Your request*. Please contact your terminologist for information about the meaning of these fields.
Some fields are text fields in which you can enter your own text. However, other fields provide a drop-down list, because there are only a limited number of possible values. If the administrator has configured this, these values may be shown in a tree structure, in which case it is not possible only to select a heading.

Other fields may appear with a hyperlink icon, which means you can save links here. The hyperlink icons – as well as the *Add new term* and *Remove term* buttons – can be enabled or disabled by the client administrator for each user group using the *Enable advanced editor features* setting. When you click on the hyperlink icon, a separate screen *Edit cross-links* opens. In this screen you can insert the text for three types of hyperlinks: to another term, to another entry, and to an external object (with http://...).
Mandatory fields are highlighted in yellow, and read-only fields are highlighted in gray.
Finally, if you are working with Acrolinx as the terminology type, you have the option of saving images and attachments not only in quickTerm, but also in Acrolinx. This is only possible for fields defined as

"Multimedia". Click on the "Browse" icon next to a field of this type and select a PDF document. This is then shown as an attachment next to a disk icon  at the bottom and can only be removed from the relevant field, if required, using the delete icon. An example of this is shown in the above "Term request dialog box" screenshot.

h) *Name, E-mail and Custom notification phone*: These three fields are optional and help to identify anonymous end users so they can be sent notifications (by e-mail or telephone). They can be defined as mandatory fields in the General Group Settings for end users (*Custom notification fields*).

i) *Autofill*: A *Customization field* can be defined in server management in the Termbase Settings. Check this box if you want this field to be autofilled in the term request; otherwise you can add this information manually. These details can be obtained from your terminologist.

j) *Creator user:* Depending on how your internal processes are defined, you have the option to enter your name here so that the terminologist will know who the term request came from, and so that you can continue to use the MultiTerm entry as "Creator". This can also be disabled in Administration.

k) *Priority:* Three levels can be defined: low, normal, high. These symbols are shown in the term request lists in the left-hand column. The priority is linked to internal processes and can also be linked to e-mail notifications.

l) Click on the orange paper clip to attach a file to the term request.

⇨ The file is added. To attach further files click on the paper clip again. To remove files that have been added, click on the minus symbol that appears in front of each file.

a) Click *Send*.

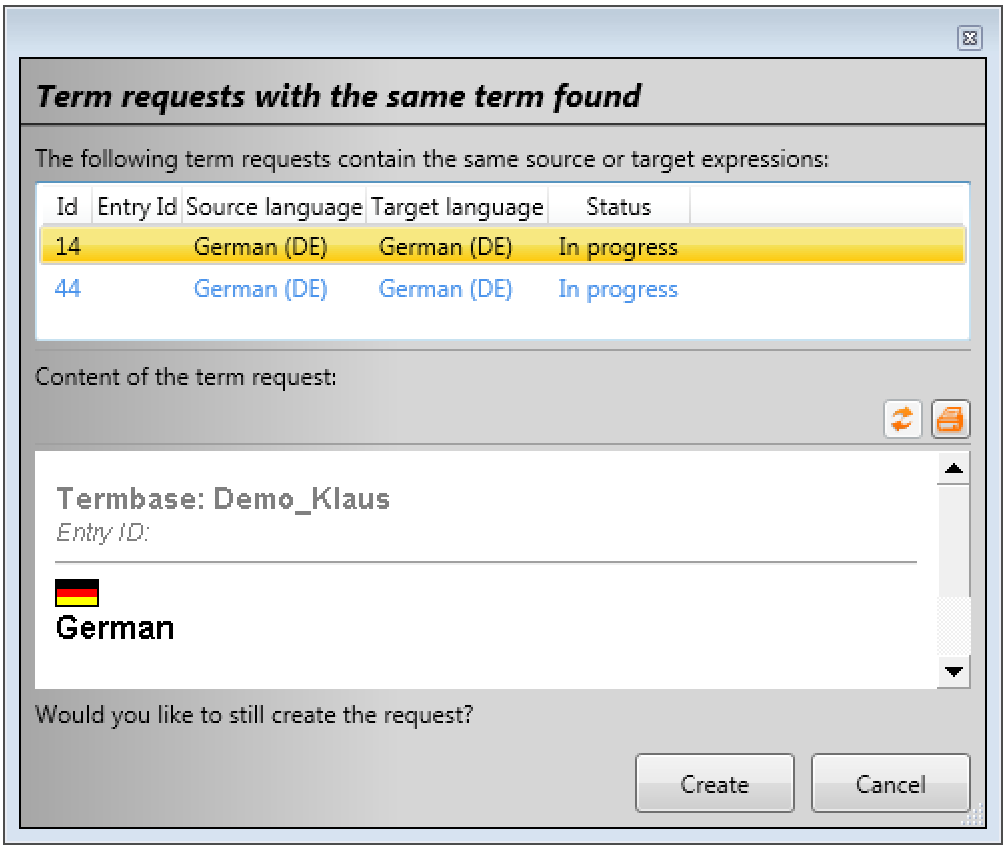
⇨ The terminologist will receive an e-mail and can process the request in his/her task box (Request management). When the terminologist closes the request, you are notified by e-mail with an explanation of what happened to your request.

Multiple requests warning

When a new term request is submitted, quickTerm checks whether this term request:

- Already exists as an entry in the termbase
- Already exists as a currently pending term request

- Already exists as a rejected term request

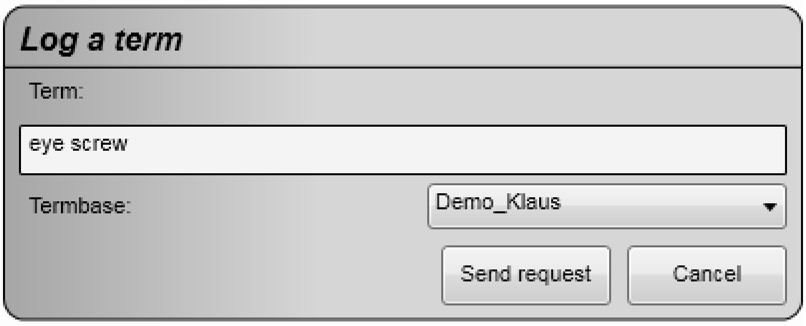


"Term requests with the same term found" dialog

This information is passed to the user, who can still create the request again.

6.2 Logging Terms

This is how you log and centrally store a term without initiating immediate term processing:



"Log term" dialog

a) Click on "Log term".

⇨ A window opens in which the term not found has already been entered.

a) If several termbases are available, you can select the termbase for which you want to log the term.

b) Click on "Send request".

⇨ Your term will now be stored in the server's central log. Depending on the definition of the terminology workflow, the terminology team will regularly review this pool to look for potential new terms.

For automatic logging, see Task Settings.

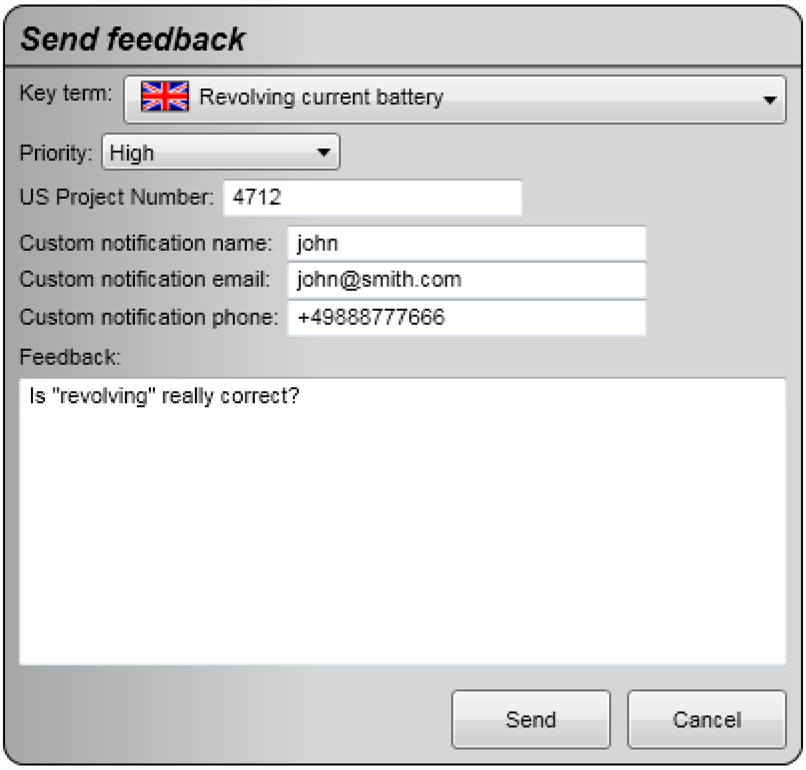
6.3 Feedback on a Term

If you are authorized to do so, you can also provide direct feedback to the terminologist.

➢ The desired entry is displayed in quickTerm.

a) Click on "Send feedback".

⇨ The "Send feedback" dialog opens.



"Send feedback" dialog

b) Select the term in the entry for which you want to provide feedback and/ or a *Key term* for your feedback.

c) Select one of the three priority levels.

d) If a customization field has been defined, you have the option of entering further information in this field. In the current example this is the "Project number" field.

e) If you are an anonymous end user, there is the option of entering your details in the three custom notification fields ("Name", "E-mail", "Telephone number").

f) Enter the text of your feedback.

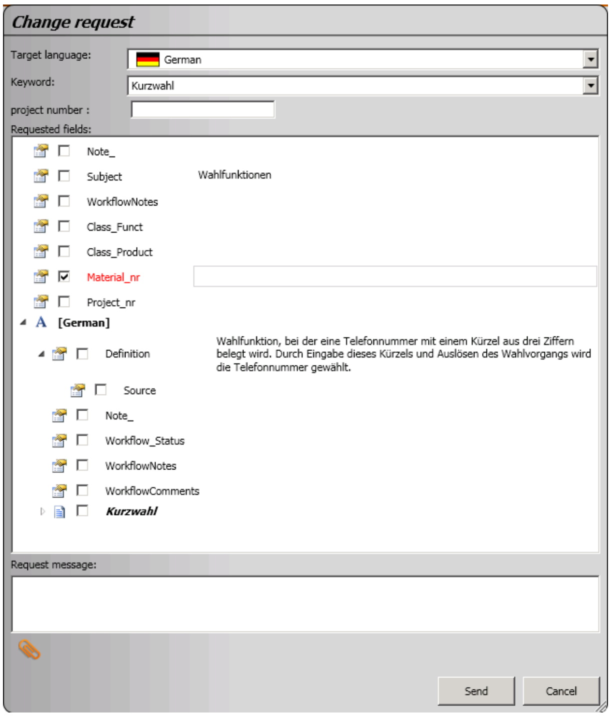
g) Click on "Send".

⇨ Your feedback will be sent to the terminology team who will then check it. quickTerm does not provide confirmation of receipt of terminology feedback.

A chat feature ("Ask for information" and "Answer info request") is available within Request management. This feature is described there.

6.4 Change Request

By clicking on the "Request change" button you can request changes to specific fields for the term.



"Change request" dialog

a) Select the *Target language* in which you want to request a change.

b) Below this select one of the terms in this entry as the *Keyword*.

c) Specify whether the custom field should be *autofilled*, or enter the corresponding value ("Project" in the screenshot).

d) In the tree structure select the fields that need to be completed for this change request.

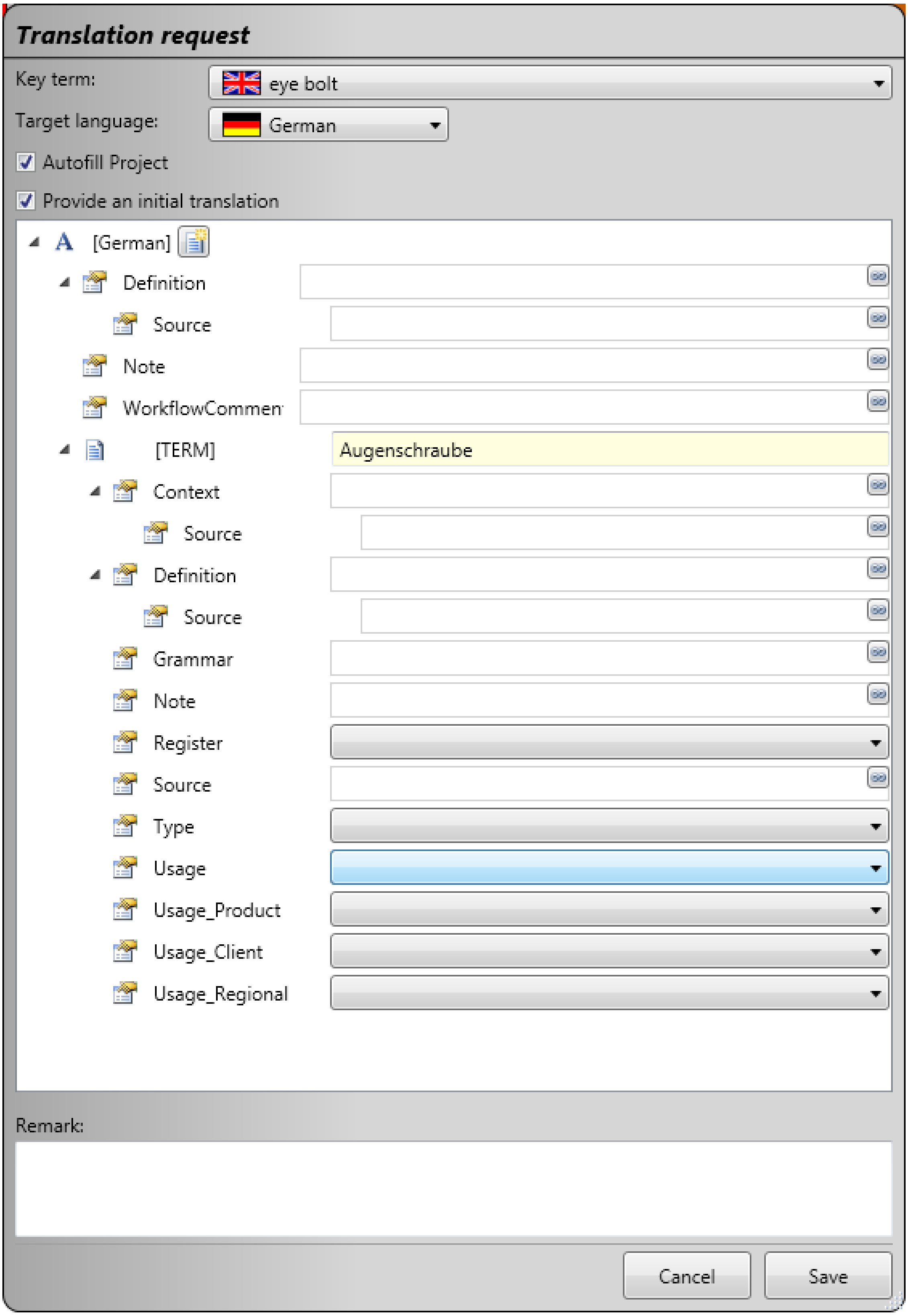
e) You can also enter your own text in *Request message*.

f) Then click on *Send*.

⇨ The change request is created. The terminologist will action the request.

6.5 Translation Request

By clicking on the *Request translation* button, you can request the translation of a term in a specific language and also submit a translation suggestion if you wish.



"Translation request" dialog

a) Select the desired term for this entry that you want translated under *Key term*.

b) Select the *Target language* into which it is to be translated.

c) Specify whether the custom field should be *autofilled*, or enter the corresponding value ("Project" in the screenshot).

d) If you want to *Provide an initial translation*, the tree structure for the fields will open, where you can complete the appropriate fields for your suggestion.

e) You can also enter your own text in *Remark*.

f) Then click on *Save*.

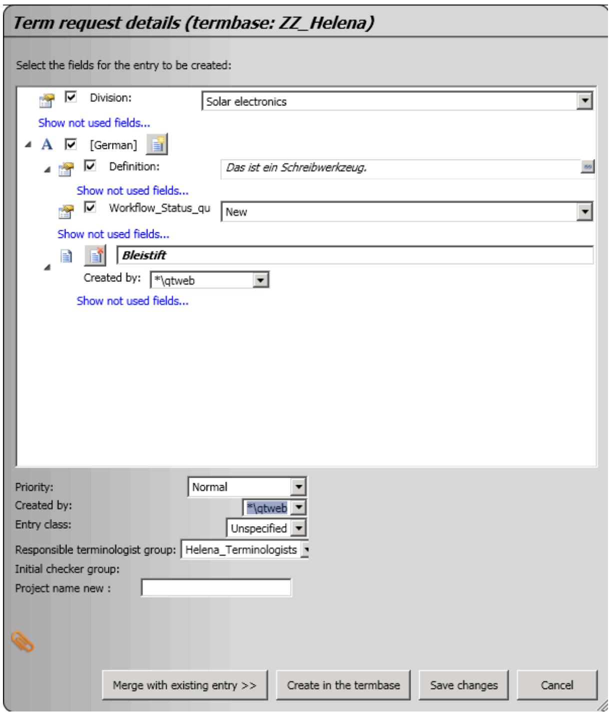
⇨ The translation request is created. The terminologist will action the request.

7 Initial Checker: Special Functions

The initial checker has the right to check submitted requests (term suggestions, as well as edit and translation tasks), which may also be filtered, from a linguistic point of view before they are assigned to the (master) terminologists responsible (sometimes this role is also referred to as "linguist"). He checks the completed fields for errors (spelling, syntax, correct use of hyphens, etc.). All term suggestions are therefore first added to the initial checker's task list, provided a checker has been configured.
In the task list the initial checker can

- *Open* requests/tasks to check, edit, merge, and (afterwards) forward them to the (master) terminologist
- *Reject* requests/tasks
- *Delete* requests/tasks, or
- *Mark as unread* for editing later.

He can therefore choose not to add entries to a termbase, but forward them on to the (master) terminologist instead.
If an initial checker has NOT been configured, the request is sent straight to the (master) terminologist responsible.

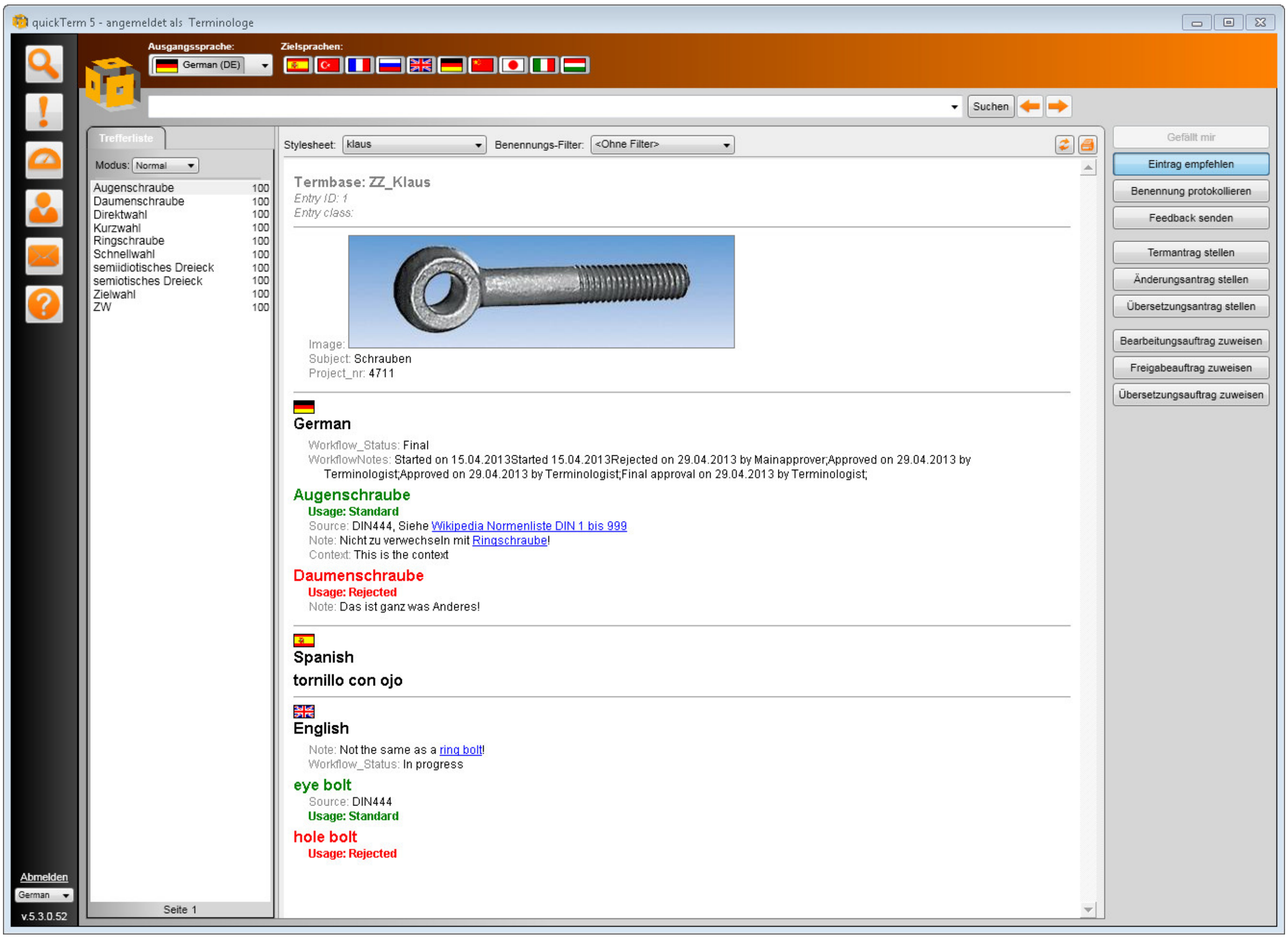


Initial checker's check

When the initial checker has completed the check, he sends the request/task to the terminologist responsible by clicking the *Send to terminologist* button. The relevant request/task is removed from the initial checker's task list.

8 Terminologists: Special Functions

As the central authority for the terminology workflow, the terminologist has some additional functions. For this reason, the quickTerm search window contains some extra buttons.



Main window for the terminologist

8.1 Request Management

Clicking on the exclamation mark icon on the left opens Request management. What you are able to see and do in this area depends on your role. If you are an end user, you can view and edit your *Assigned tasks* and *All my tasks*.

If you are an approver, the Approval tasks tab is also available where you can view more detailed information about approval tasks. You can expand individual tasks to check how your colleagues have voted.

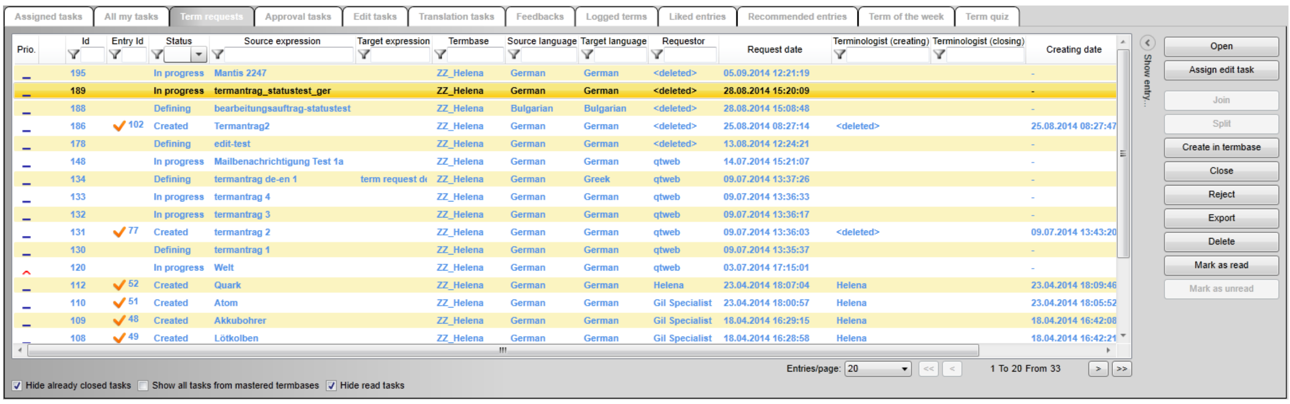
Terminologists are also able to do the following:

- Manage and confirm received term requests (mono or multilingual) and create the terms in the termbase.

- Track the approval process and perform final approvals.
- Manage edit tasks (change and definition requests).
- Manage translation tasks.
- Manage feedback on terms.
- Export logged terms for statistical processing or create term entries from logged terms.
- Manage the social media functions for quickTerm Web:
  - Delete liked entries
  - Revoke recommended entries
  - Term of the week
  - Term quiz

8.2 Workflow for Term Requests

Switch to the Request management screen. In Assigned tasks you can filter by term request, or you can go straight to the Term requests tab. In this list you can see the currently pending term requests.



Overview of term requests

Buttons and functions

The buttons and functions available depend on the options chosen during configuration and can differ from those shown in this screenshot.

The columns are more or less self-explanatory. The administrator can customize the order of the columns for each user group on the "UI setup" tab. The custom field is also used for this purpose. ID is the consecutive number of the quickTerm term request, the Entry ID is the number in the termbase, assuming the entry already exists in the termbase. This can also be seen from the red checkmark.

Terminologist (creating) is the user who transferred the term request to the termbase. Terminologist (closing) is the user who gave final approval in the context of the approval process.

Possible statuses for term requests and what they mean

- In progress: The request has been assigned to the terminologist and a decision is pending.
- Defining: The terminologist has assigned the request to a specialist for actioning.
- Created: The request has been created in the termbase, but is not yet closed.
- Exported: The request has been exported (and transferred to another system).
- Closed: The request has been closed.
- Terminologist waiting for requestor: The terminologist has asked the requestor for information.
- Initial checking: The request is at the initial checking stage (before allocation to the terminologist).
- Initial checker waiting for requestor: The initial checker has asked the requestor for information.
- Terminologist waiting for initial checker: The terminologist has asked the initial checker for information.
- Transferring: The terminologist has allocated the request to another (master) terminologist, who has not yet accepted the request.
- Rejected: The terminologist or initial checker has refused the request.

8.2.1 Rejecting a Term Request

To reject a submitted term request proceed as follows:

a) Highlight the relevant term request/s in the list.

b) Click on "Reject".

⇨ A comments area will open.

c) You have the option of entering a message for the requestor here. This is sent by e-mail to the requestor and added to the term request as a note.

d) If you are using Acrolinx as the terminology type, an additional checkbox with the text "Export terms as non-term" is displayed under the message field. If you check this box, this term is exported to Acrolinx as a non-term. In contrast to the MultiTerm workflow, in which rejected terms are only saved in quickTerm, with Acrolinx rejected term requests can be (do not have to be!) saved as non-terms in Acrolinx. This should prevent rejected terms being extracted again as potential new terms at the checking stage. This decision must be made for each individual rejection of a term request.

e) Click on "OK".

⇨ The request is now rejected and the requestor informed.

8.2.2 Creating a Term Request in the Termbase

To add a submitted term request to the termbase proceed as follows:

a) Highlight the relevant term request in the list.

b) Click "Create in termbase" to add the term request to the termbase immediately, or click "Open" to check the term request.

  ⇨ The term request is shown together with the information entered by the requestor.

c) In the fields list deselect those fields you do not want to add to the termbase.

d) Edit the contents of the completed fields as required.

e) Click "Show not used fields" to show all fields you have access to in the termbase.

  ⇨ All the fields you have access to in quickTerm are now shown in the dialog box. You can now enter further information here. When adding further information, the box to the left of the relevant field is checked, so that it is taken into consideration when saving.

f) You can also hide these "not used fields" at any time ("Hide fields not used by the requestor").

g) For example, you can expand synonyms for a term request using the "Add new term" button next to the language, or remove terms using the "Remove term" button next to the term.

h) Specify the priority of the term request.

i) "Initial checker group"
   This field shows you which initial checker group the term request has been assigned to.

j) "Created by:"
   You can replace the original requestor with your user name here.

k) Select the entry class for the termbase (if you use entry classes).

l) "Responsible terminologist group:"
   If you use the master terminologist concept and so have set up several terminologist groups, you can delegate the term request to another group here.
   In Group management, the administrator can use the *Specialization settings* for *Subject area* (values for the filtering field, managed languages) to permanently delegate or assign requests to other terminologist groups. This creates an automatic link in the term request between the terminologist group and subject area. If you change the *terminologist group*, then the value for the filtering field will be changed automatically when saving; if the link is unclear, you must make a selection in a separate popup window. If you change the *value* of the *filtering field*, the terminologist group responsible will be automatically included in the term request. The term request is then given the status *Transferring* until the terminologist responsible accepts the term request, whereupon the status reverts to *In progress* again. If the notification *e-mail types* is enabled, the relevant terminologists receive the message *Term request transferred*.

m) "Custom field:"
   Here you can enter a relevant value.

n) Check that attachments were also sent. These cannot be created directly in the termbase from quickTerm. However, the attachments can be downloaded and then uploaded manually to the termbase.

o) Click "Create in termbase".

   ⇨ The entry is created in the termbase and the entry ID is displayed.

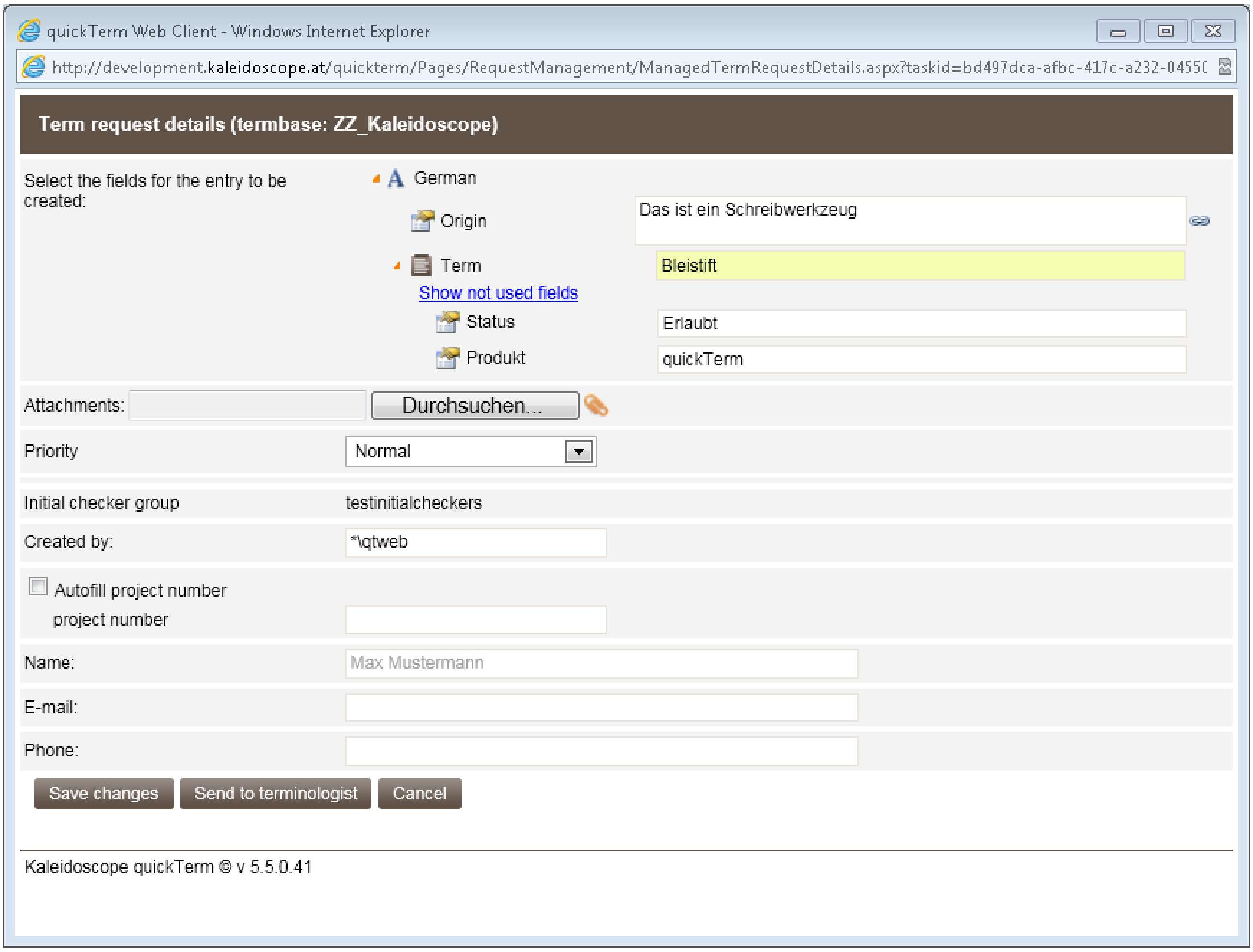
⇨ The entry ID for this entry is now shown in the list of term requests next to a red checkmark.

Contact information for anonymous requests from quickTerm Web

If the term request originates from an anonymous user in quickTerm Web, the user may also have included their contact information. This information is shown in the center below the term request itself, giving you the option to contact the requestor if you wish.

Term request details: Unchecking checkboxes

If you uncheck checkboxes in a term request, then not only is the checkmark removed, this also affects the corresponding content!



"Term request details" dialog

Merging with an Existing Termbase Entry

If you want to merge the term request with an existing entry, click on "Merge with existing entry". This will open a window where you can log the target entry ID and perform a search. This target entry – if available – is then shown at the bottom of the window.

You can now define what should happen with any fields that are already available (at entry and language level) in the target entry:

- "Overwrite existing"

  Overwrites existing fields in the termbase with the contents of the term request. Non-multiple picklist fields (this means that only one value in the list can be selected) are always overwritten, i.e., the new field value always "wins".

- "Keep existing"

  Retains the existing fields in the termbase. The fields in the term request that are already available are rejected.

- "Merge with existing"

  For picklist fields the sum of all values is written to the field. For text fields both sets of contents are written to their own field (i.e., two fields are created).

You can also use the "Add new fields" checkbox to specify whether additional fields (i.e., fields that exist in the term request, but do not yet exist in the termbase entry) should or should not be added. For non-multiple text fields, the text is always attached to the original contents separated by a semicolon.

When you click on "Merge" the option you selected is implemented.

Saving an entry

If you have finished editing an entry, but do not yet want to create it in the termbase, simply click on "Save changes". This saves the changes to the term request without creating an entry in the termbase.

8.2.3 Merging Multiple Term Requests

Sometimes several users send term requests that need to be merged in a single entry. This is often the case where there are several translators working in different languages.

If at least one term is identical in multiple requests, quickTerm will automatically merge these in a single entry anyway.

To merge several entries manually, proceed as follows:

a) Highlight the relevant entries. You can select several entries at once by holding down the Ctrl key.

b) Click *Join*.

⇨ The entries are now merged. This can be seen in the list by the fact that the entries are highlighted in color, and that they are indented. The indented entries are child entries rather than main entries (these are the two internal task types in *Assigned tasks* and *All my tasks*).

To split entries that have been merged by mistake, proceed as follows:

a) Highlight the indented entries.

b) Click *Split*.

⇨ The selected entry is separated from the group and reinstated.

8.2.4 Permanently Assigning Term Requests

The permanent delegation is carried out as follows from the perspective of the terminologist receiving the request:

- The term request that was assigned appears in the *Assigned tasks* tab with the status *Transferring*.
- When the term request is opened, it is displayed as usual. However, a popup window appears over it with the text: *The following request(s) are being permanently assigned to you* (with the number of the task). *Do you accept them?*
  – *Yes*: You can now edit the term request details as usual.
  – *No*: Give a reason for your rejection in the text field.
  – *Cancel*: You do not want to make a decision about accepting the term request just yet.

8.2.5 Other Features in the Term Requests Dialog Box

- "Assign edit task"

  When you click on *Assign edit task*, a dialog box opens in which you can define requested fields from specialists and choose which specialist group to assign the task to. You can also specify here whether or not the custom field should be autofilled, set a deadline and the priority, and include a message. For further information see Research.

- "Assign approval task"

If the request was created in the termbase, you can go straight to the "Assign approval task" dialog box and complete the required entries there.

- "Assign translation task"

  If you require a translation, click this button to open the "Assign a translation task" dialog box in which you can select the relevant languages, translator and, if applicable, the master translator, as well as a deadline and priority. You can also specify whether or not the custom field should be autofilled and add a remark.

- By clicking on *Export*, you can export the requested entries in CSV format, e.g. for MS Excel.
- By clicking on *Delete*, you can permanently delete a term request from the list of open and closed term requests. You can only edit or delete your own term requests if the administrator has enabled this for you in User management.
- The *Hide already closed tasks* checkbox allows you to specify whether to display only open tasks or all tasks, including the closed ones.
- The *Show all tasks from mastered termbases* checkbox allows you as the master terminologist to specify whether you want to see the tasks of all terminologists for your client, or only your own tasks.

Delete closed requests

Closed requests are not deleted from the list, they are just hidden. One of the benefits of this is that you can retrieve reports on term requests and how they have been processed from the database at a later time.

Moreover, quickTerm can only check new requests against requests that are already available if these still exist in the database.

You can also only physically remove closed requests from the list using *Delete*.

8.2.6 Workflow for Specialists

There is the option to send a term request to a specialist as an edit task, and to apply the changes that result from this process at a later time. For more information see Workflow for Edit Tasks.

8.2.7 Closing Term Requests

To close a submitted term request proceed as follows:

a) Highlight the relevant term request/s in the list.

b) Click on "Close".

⇨ A comments area will open.

c) You have the option of entering a message for the requestor here. This is sent by e-mail to the requestor and added to the term request as a note.

d) Click on "OK".

⇨ The request is now closed and the requestor informed.

8.3 Workflow for Logged Terms

In this screen, you can find the list of logged terms.

Two attributes are available in the "Type" column:

- "Manual"

  If logging has been requested manually

- "Automatic"

  After an unsuccessful search, in accordance with the setting configured for this

Depending on the server settings, identical search requests are added together (i.e., the number is logged), or alternatively the date of each individual search request is shown (for more details see Termbase Settings chapter in quickTerm configuration).

You can export this list in CVS format by clicking on "Export". The list can then be opened in Excel for further processing, etc. Once this is done, clicking on "Delete all" clears the list again. Individual logged search requests can also be deleted by clicking on "Delete". The list can also be sorted by clicking on the relevant column header (e.g., frequency of the request).

Convert to term request

Highlight the logged term for which you want to create a term request. (You can also do this for several logged terms at once, however they must relate to the same termbase and source language). The term request window that has been autofilled with the term entry will then open. Normally, this is only useful for terms for which a term request has not yet been created. Note that as the administrator you can define a threshold such that a term request is created completely automatically after a specified number of unsuccessful searches.

For further information see Task Settings.

8.4 Workflow for Approvals

As the terminologist you can send an entry that you have completed work on to pre-configured approver groups for approval. This will result in either approval or rejection. If the approver agrees with your suggestion, you can issue final approval for the entry in the termbase. If the approver rejects the entry, you can edit it in the termbase or in quickTerm using the change workflow, and resubmit it for approval.

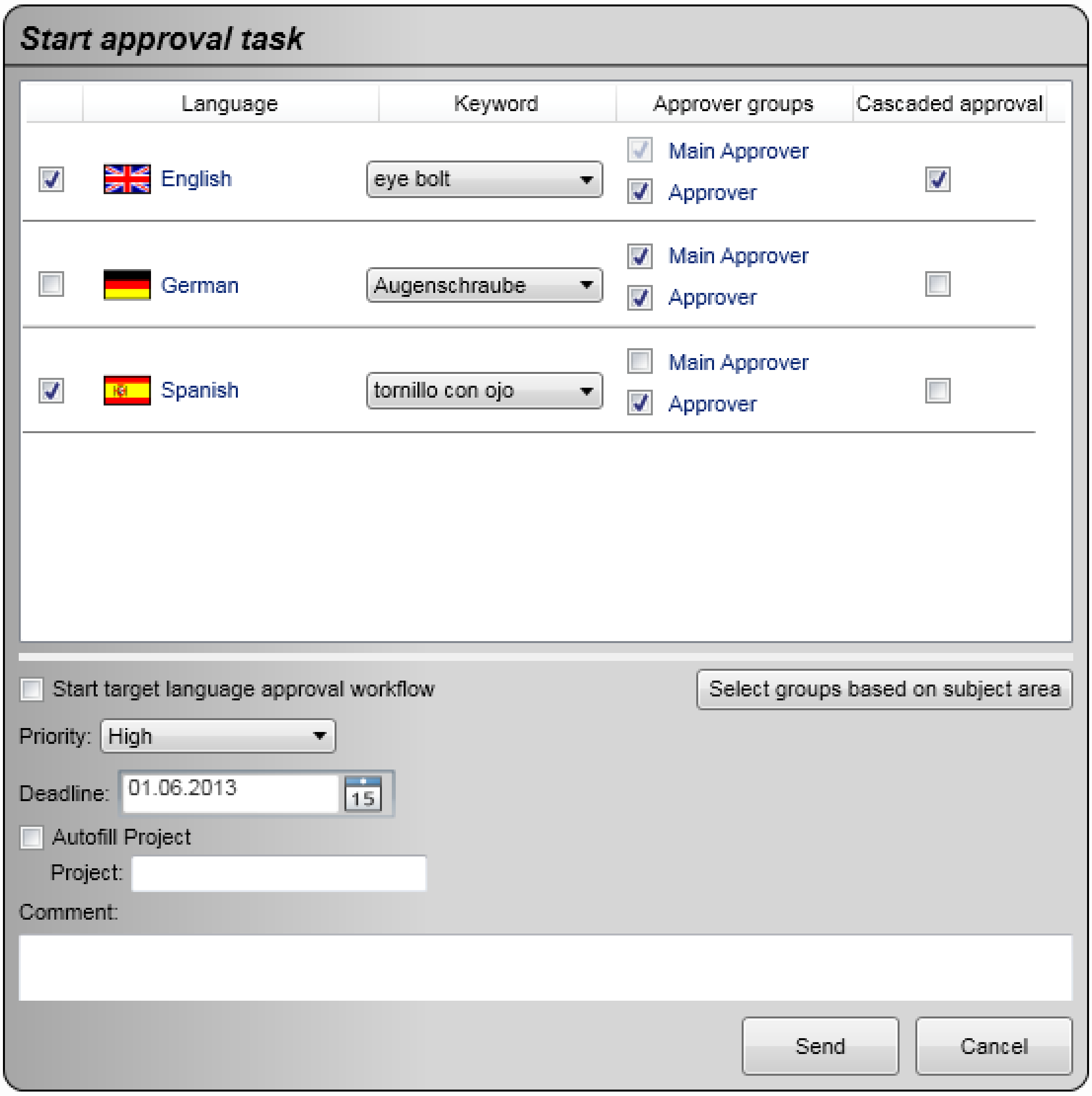
In the context of approval, terminologists are responsible for the following activities:

- Submitting entries for approval (approval tasks)
- Managing and monitoring the approval process
- Issuing final approval for approved entries

8.4.1 Assigning Approval Tasks

You can send a new or not yet approved term for approval from the search window itself, in other words assign an approval task. You can also resubmit an approved entry for approval if it has been changed.

Information about the quickTerm workflows can be found under quickTerm Workflows.



"Assign approval task" dialog

To assign an approval task:

a) Search in quickTerm for the entry you want to have approved.

b) Click on "Assign approval task".

⇨ The "Assign approval task" dialog box appears.

c) Select the languages in which approval is to take place and the relevant keywords to be used as the *keyword* for the approval task for each language.

d) Select the *groups* that need to give *approval*. The available groups have been defined by the administrator for each language. For cascaded approvals the master approver cannot be deselected, since the master approver has to have the final say.

⇨ The approvers receive an e-mail and can log in to process the approval in their task box.

⇨ Groups that have subscribed to receive notification of the start of an approval process in one of the selected languages will be notified.

⇨ quickTerm sets the status "In progress" in the termbase.

a) *Cascaded approval* checkbox: Every approval process is a cascaded process by default. This means that initially all "normal" approvers are involved and then the master approver for each language signs off final approval by the terminologist. You can uncheck the *Cascaded approval* box. In this case, the master approver is viewed as a "normal" approver and all groups can vote on an entry at the same time. This checkbox is available for each language and can be selected or deselected as required.

b) *Start target language approval workflow* checkbox: Check this option if you are submitting an entry to the approval process in a target language and as the terminologist do not wish to be the final approver, but instead you want to use the target language final approver.

c) *Select groups based on subject area* button: For further details see *Automatic assignment based on entry information* in Configuration of Approvers and Master Approvers. When you click on this button, assignment of approver groups takes place automatically.
For example: If you have an entry with the subject area = screws and two approver groups, one for the subject area = screws and one for the subject area = telephones, clicking on this button means only the FIRST group will be assigned the task.
If there is a third approver group WITHOUT explicit filtering, this group will ALWAYS be assigned the task irrespective of which subject area appears in the termbase.

d) *Priority*: You can choose between *Low*, *Normal* and *High*. This will have an effect on when digest e-mails are sent, if these have been configured differently.

e) *Deadline*: Select a deadline. If this deadline is passed, the approval task is highlighted in red in the list.

f) *Autofill*: You can set the content of the custom field to be autofilled by checking this box or enter the information manually here. Using the screenshot as an example: Project. Please check how this has been configured with your terminologist.

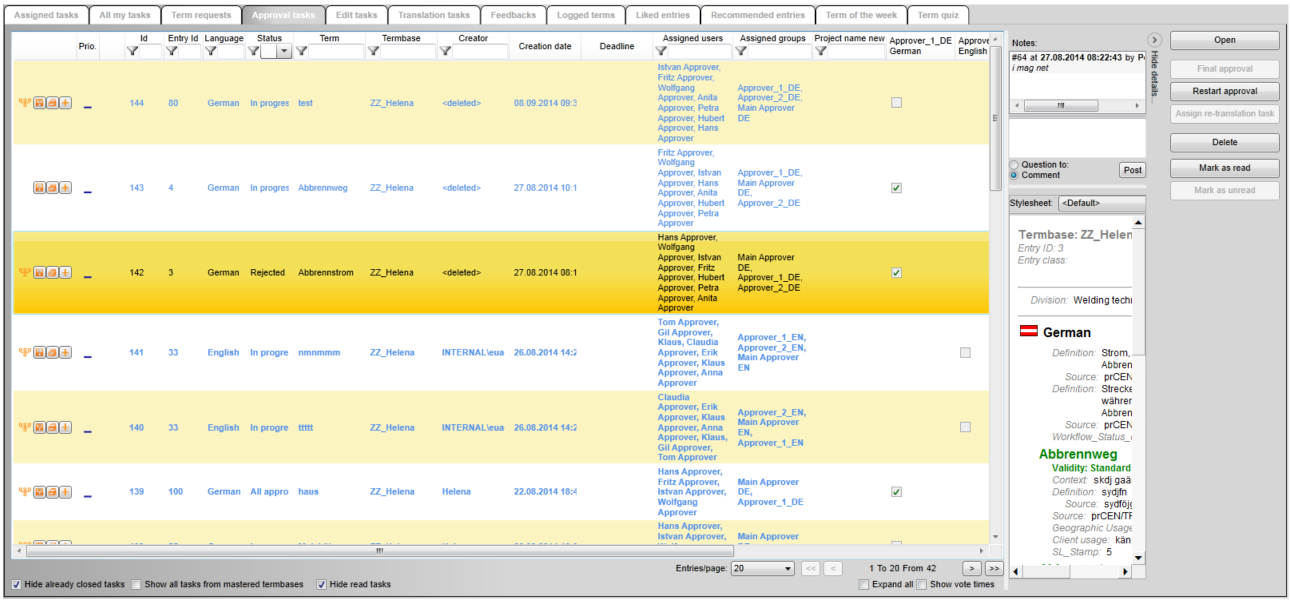
g) *Comment*: You can enter a comment here that will then appear as the first comment in the comments list.

8.4.2 Overview of Ongoing Approval Tasks

Switch to Request management to see an overview of ongoing approval tasks. In Assigned tasks you can filter by approval task, or you can go straight to the *Approval tasks* tab.

Only terminologists have access to this area.

The dialog box lists all current approval processes.



Overview of approval tasks

In this dialog box, you can do the following:

- Restrict the approval process display: To do so use the checkboxes at the bottom left, *Hide already closed tasks* and *Show all tasks from mastered termbases*. If you are configured as the master terminologist with responsibility for several termbases, you can control how the approval processes are displayed here.
- Color codes: If the deadline for an approval task has passed, the task is highlighted in red; closed approval tasks are highlighted in gray. Approval tasks where you can assign a re-translation task are highlighted in orange.
- *Status* column: This allows you to sort the display by status, with various options that can be selected:
  - *Rejected:* Approval tasks for which the terminologist cannot issue final approval because they have been rejected by one of the assigned approver groups.

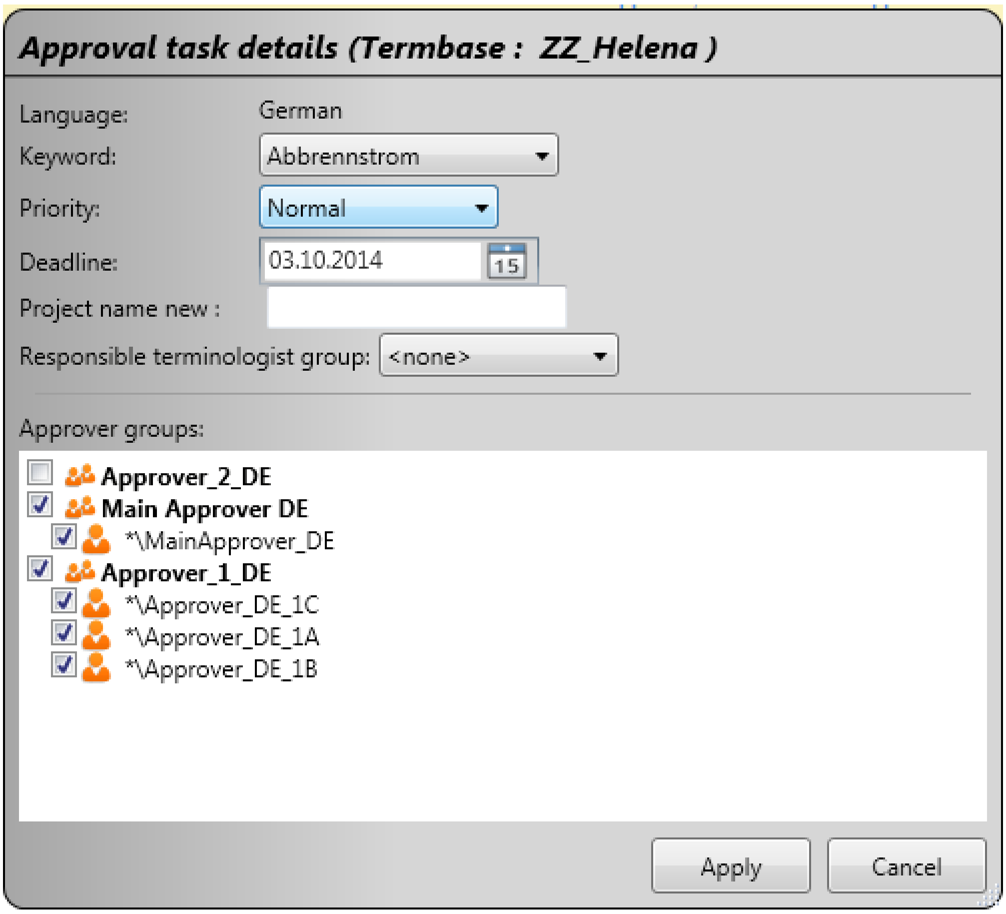
– *Closed:* Approval tasks for which final approval has already been issued or has already closed.

– *All approved*: Approval tasks for which the voting process has already been completed (all approver groups have voted to approve the term) and the terminologist can issue final approval.

– *In progress:* Approval tasks on which no one has as yet voted, or whose voting process has started but is not yet complete.

- Monitor current approval processes. A checkmark or cross shows you which groups have already approved (green checkmark) or rejected (red crossed out box) which entries. Abstentions are indicated by a – in the box.
- With cascaded (icon) and non-cascaded approval processes you can click on the *plus symbol* ("Show/Hide details") to expand the approval process. You will then see the individual votes for groups involved in voting procedures. The first checkbox in an expanded group, or the only checkbox in a collapsed group shows you the status of the entire group. For instance, if a set number of voters in a voting approval group have voted on or approved an entry, a green checkmark automatically appears in the box.
- You can also print out approval tasks (icon). When you click on this icon, the *Select target languages* dialog box opens where you can select the target languages and the printing order. The stylesheet for printouts is described elsewhere.
- *Expand all* option at the bottom right: When you select this option the *plus symbol* for all approval processes is automatically enabled, expanding all the processes. When you remove the checkmark, all approval processes are collapsed.
- By clicking on *Show vote times* at the bottom right, you can display the actual time and date when each approver cast their vote. You can always enlarge a column by dragging or double clicking on the right-hand side of the column heading.
- You can also directly click on the various boxes and thus "override" the approvals of the respective group, i.e., cancel or perform the approvals yourself. To avoid accidental changes, you must still click on the small floppy disk icon (, "Save changes") on the far left to save the change.

- Click on *Open* to process the approval task, by adding or removing approver groups (using the checkmarks), and where applicable changing the keyword, the priority, deadline, the content of the custom field and the assigned terminologist group for the approval task.



"Approval task details" dialog

Actions

- "Final approval"

  If an entry has been approved by all groups, you can issue your final approval after a final check. See Giving Final Approval.

- "Restart approval"

  You can enter a special message here, and change the priority and deadline (e.g. for overdue approval tasks). When you click on this button, the existing approval process is deleted and recreated.

- "Assign retranslation task"

  You can redefine the usage status here.

- By clicking on *Delete*, you can delete an approval process. You will then no longer be able to issue final approval via quickTerm.

- By clicking on *Show details*, you can display the current entry in this dialog box. You can see comments from your colleagues at the bottom.

You can add new comments or make subsequent changes to your own comments. The terminologist can also see these comments and, if applicable, respond to information requests. You can also send targeted questions to individual groups.

You can copy the comment text in quickTerm Client (place the cursor in the comments area and right-click).

8.4.3 Giving Final Approval

Once all approvers for a language have approved an entry, the terminologist is notified by e-mail. The terminologist can always see the progress of approvals in the approval list. By selecting the "All approved" filter option in the *Status* column, the list will only show those entries that have received final approval.

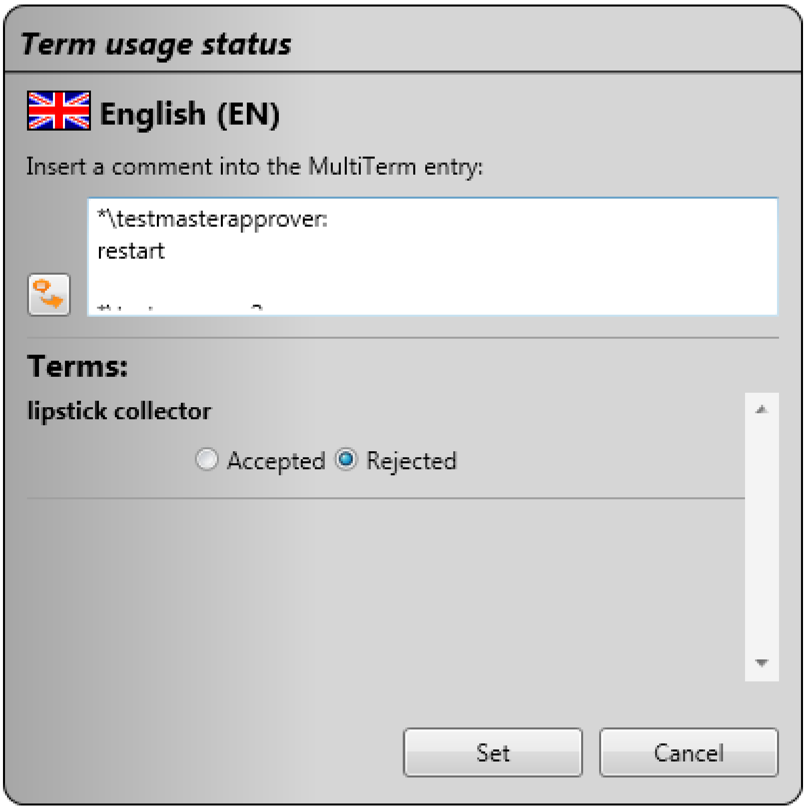
To give final approval for an entry:

a) Highlight the relevant entry in the list of currently pending approvals.

b) Click on *Open* and check the approvals.

c) Click on *Final approval* to give final approval.

   ⇨ A "term usage status" comments area will open.



Giving Final Approval

d) You have the option of entering a comment in the field or copying the entire comments trail using the small icon on the left and then editing this if necessary.

e) Define the usage status for each term.

⇨ The entry is given final approval. quickTerm sets the appropriate status in the termbase and quickTerm.

⇨ Participants in the process and all groups that have "subscribed" to notifications about approvals are notified.

8.4.4 Answering an Info Request

If the "?" symbol appears in a row this indicates that an info request is pending.

8.5 Workflow for Edit Tasks

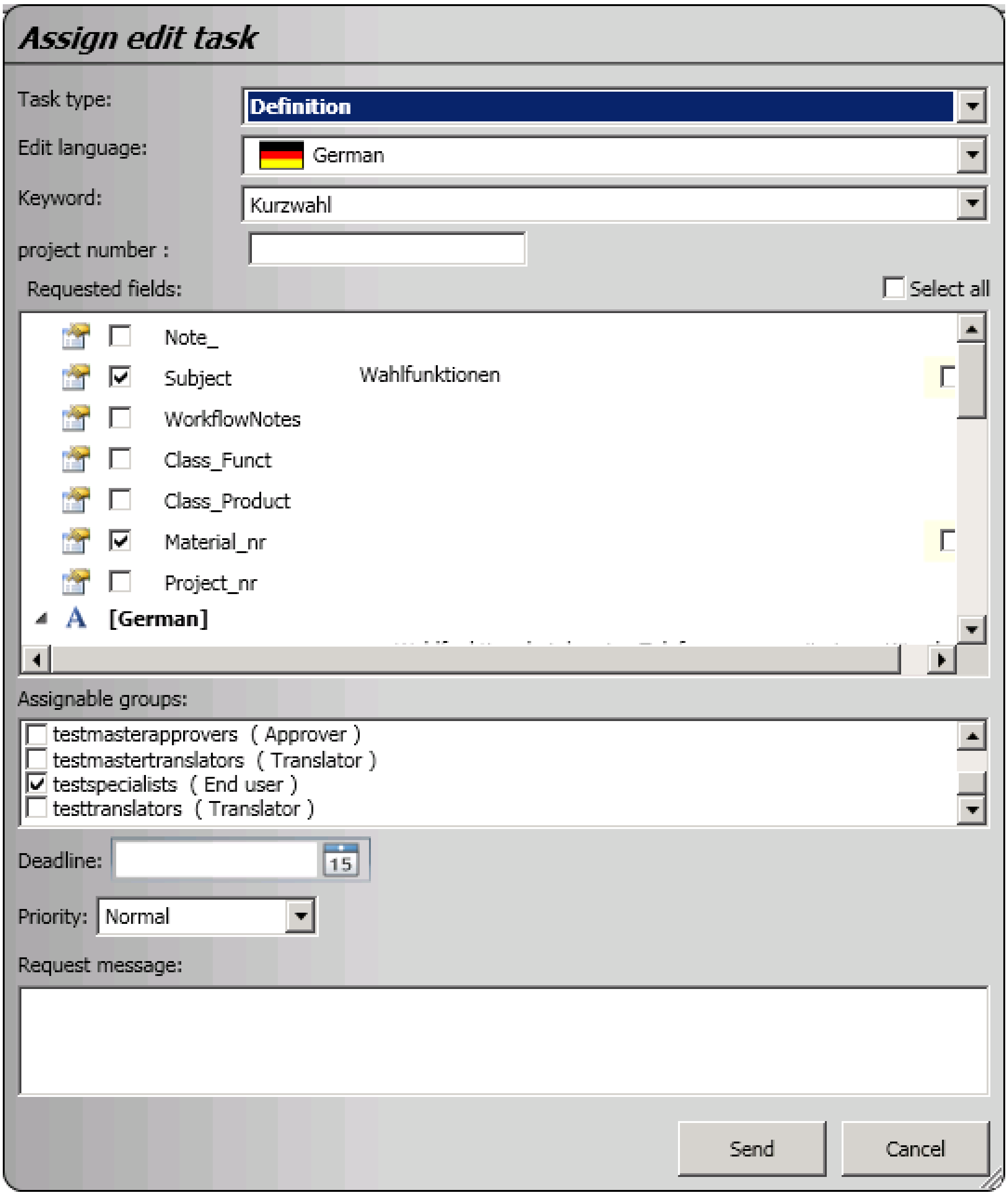
Terminologists can use edit tasks (definition or change) to retrieve additional information from one or several configured specialist groups. Edit tasks can be started both for term requests and for termbase entries. During the process you specify which fields specialists need to complete.

The specialists then vote on the content of the selected fields and eventually approve them. As the terminologist you can then apply the information directly to the termbase and/or the term request.

Alternatively, edit tasks can be assigned to just one terminologist group. This process is also known as temporary delegation.

8.5.1 Assigning an Edit Task

As the terminologist you can assign an edit task both for an existing termbase entry and for a term request.



"Assign edit task" dialog

For an existing entry

➢ You have opened the relevant entry in the termbase search window.

a) Click on "Assign edit task".

⇨ The "Assign edit task" dialog opens.

Here you can choose between the "Definition" and "Change" task types.

For a term request

➢ You have highlighted the relevant term request (Status: "In progress" or "Created") in the list of term requests.

a) Click on "Assign edit task".

⇨ The "Assign edit task" dialog opens.

Here the "Definition" task type is specified by default.

a) At the top select the language in which the additional information will be provided.

b) Below this select one of the terms in this entry as the "keyword" for this definition task.

c) Specify whether the custom field should be autofilled, or enter the corresponding value ("Project number" in the screenshot).

d) In the tree structure select the fields that need to be completed for this task. Checking *Select all* makes field selection easier. The checkbox on the far right specifies whether or not this is designated as a mandatory field.

e) Below this select at least one of the specialist groups, or one terminologist group for temporary delegation.

f) If required select a deadline.

g) Set one of the three available priorities.

h) You can also enter your own text in "Request message".

i) Click on "Send".

⇨ The edit task is created. The specialists will now vote and at the end of the process provide an agreed suggestion.

Check for multiple edit tasks

If you want to assign a further edit task for one and the same field in an entry, you will receive an error message informing you of this.

Edit tasks for sub-fields

You can only assign edit tasks for sub-fields in an entry if the relevant main field is available in the entry. Otherwise, you will get an error message and/or the checked sub-field will be ignored.

8.5.2 Overview of Ongoing Edit Tasks

To switch to the overview of ongoing edit tasks in Request management, click on the "Edit tasks" tab.

Only terminologists have access to this area.

The dialog box lists all current edit tasks. By clicking on the display options at the bottom of the screen you can select the following views (several options can be selected):

- Show definition tasks
- Show change tasks
- Hide already closed tasks
- Hide read tasks
- Show all tasks from mastered termbases

  This option is only present if you are the master terminologist responsible for all termbases.
- Click on *Expand all* to show all the individual voting results in the full list. If you remove the checkmark, all edit tasks are collapsed with each displayed on just one row.

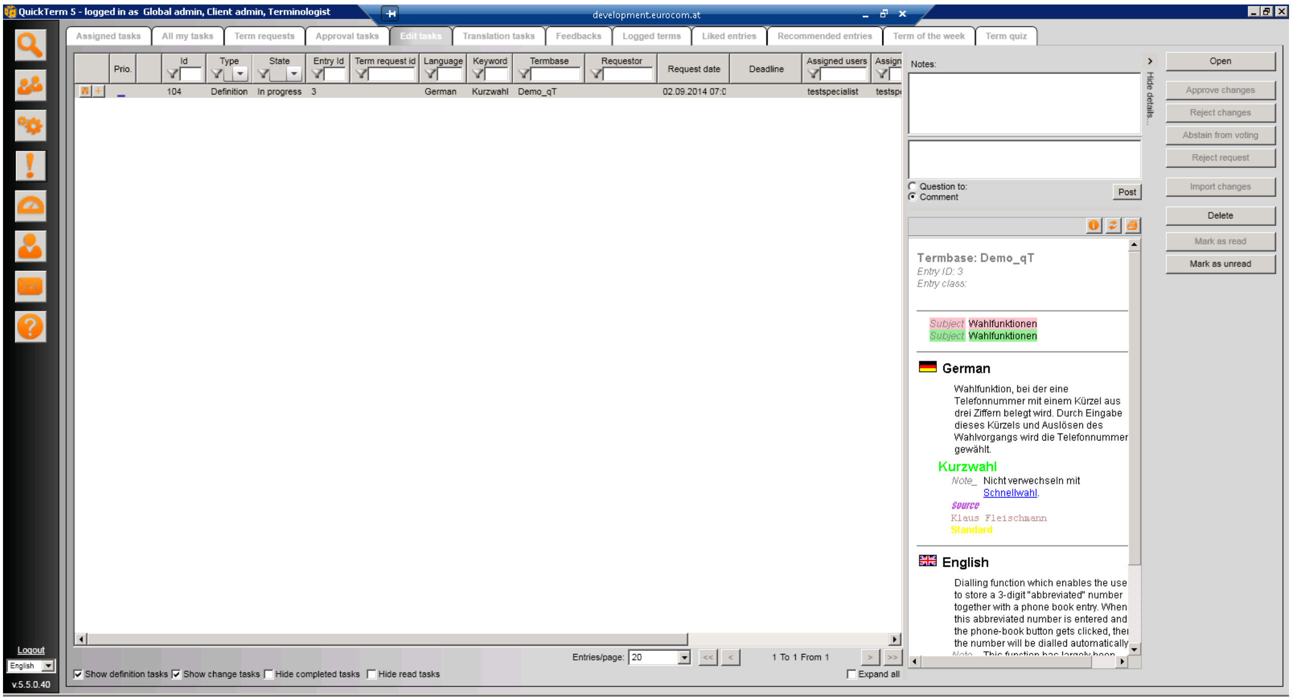
You can also make the following selections in the list heading

- By *Type*: Definition or Change
- By *Status*:

Possible statuses for edit tasks and what they mean

- Initial checking: When an end user requests a change, it is assigned to the initial checker.
- Request: If an end user requests a change and an initial checker has not been defined OR if the initial checker has completed his check, the change request is assigned to the terminologist.
- Rejected request: When a terminologist or initial checker rejects the request submitted by an end user, i.e., the request is not converted into a task.

- Terminologist waiting for requestor: When a terminologist asks the requestor for information before converting the request into a task.
- Terminologist waiting for initial checker: When a terminologist asks the initial checker for information before converting the request into a task.
- Initial checker waiting for requestor: When the initial checker asks the requestor for information.
- In progress: When the terminologist creates a new edit task – either a completely new task, or by converting a request into a task.
- Closed: As soon as the terminologist uses an edit task, i.e., the changes are written to the entry or term request.



Overview of edit tasks

In this dialog box, you can do the following:

- Monitor current edit tasks. A checkmark, cross or minus symbol shows you which groups have already approved (green checkmark) or rejected (red crossed out box) which entries, and those that have abstained from voting (minus symbol). The *Temporarily delegated* icon shows you that a task has been temporarily delegated by a terminologist to another terminologist group.
- You can also click directly in the various boxes and thus "override" the edit tasks for the respective group, i.e., cancel or perform the approvals yourself. To avoid accidental changes, you must still click on the small floppy disk icon (, "Save changes") on the far left to save the change.

- Click on *Show details...* to see work that has already been carried out for this task and any comments from the editor. Old field values in the entry are highlighted in red and new values are highlighted in green.

You can add new comments or make subsequent changes to your own comments. The terminologist can also see these comments and, if applicable, respond to information requests. You can also send targeted questions to individual groups.

You can copy the comment text in quickTerm Client (place the cursor in the comments area and right-click).

- When an edit task has been approved by all groups, you can apply it to the details view in the termbase entry or the term request. For more details see Applying Completed Additional Information.
- You can also *reject* a *task*.
- In addition, depending on the status, you can *ask for information* (only enabled if the requestor is not an anonymous end user) or *answer* a received *information request*.
- By clicking on *Delete*, you can delete an edit task.

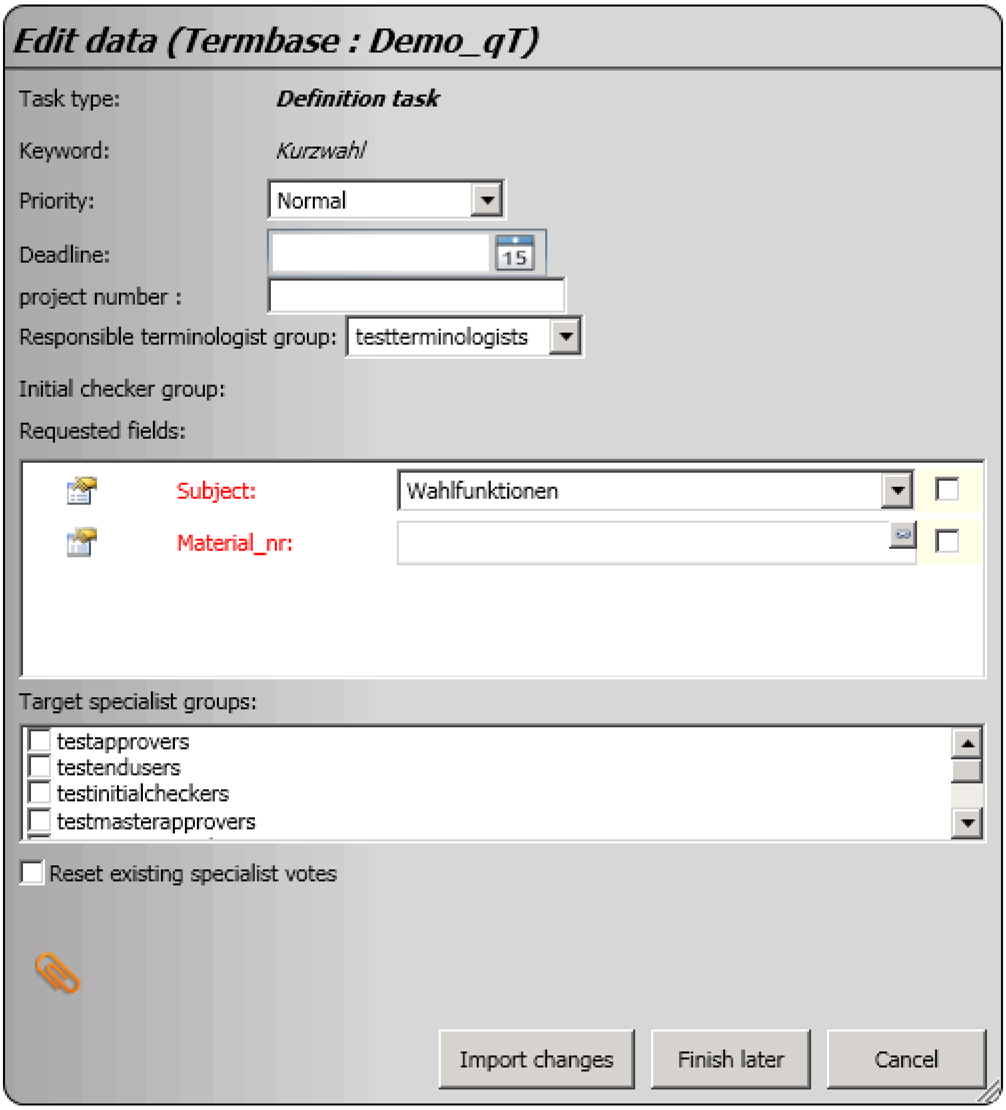
8.5.3 Applying Completed Additional Information

Once all groups have approved an edit task, you can apply the information provided to the termbase entry or the term request.

➢ You have selected the desired edit task in the list.

a) Click on "Open".

⇨ The "Edit task" dialog box opens:



"Edit task" dialog

b) If the edit task has already been approved, click on *Import changes* to apply the additional information shown in red to the termbase or the term request.

⇨ The information is incorporated directly into the termbase or applied to the term request.

Alternatively, you have the option of changing or deleting the entered values, and resetting all votes cast to date. This will restart the task.

Applying the changes

It is possible to apply the changes directly from the list, without opening the edit task dialog. To do so, click on "Import changes" in the list of buttons next to the details view.

8.5.4 Applying a Change Task

Terminologists also have the option of immediately accepting an edit task, without having assigned it to a specialist beforehand. This is for situations where the change task is so obvious that it can simply be applied without further processing. To do so, click on "Import changes".

8.6 Workflow for Translation

"Translating" a term into different languages can be initiated at various places:

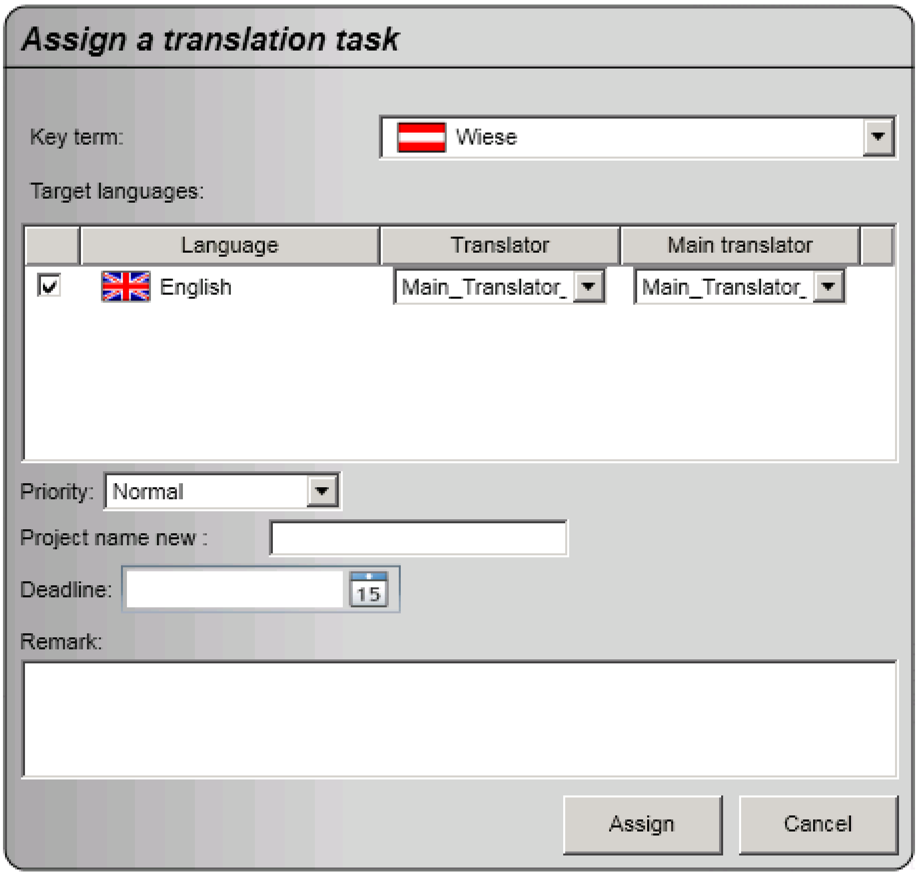
- The terminologist can submit existing terms to the translation workflow. The terminologist can *Request a translation* and *Provide an initial translation* at the same time.
- The translator can provide a translation suggestion for an existing entry.
- The translator can submit multilingual term requests. These are submitted to the terminologist as a bilingual request for editing. They will not yet be visible in the translation processes area, but are shown in the term requests area.
- Translation tasks can also be created automatically using quickTerm Tools.

8.6.1 Initiating Translation

To initiate the translation of an existing entry into a new language:

a) Click on "Assign translation task" in the search screen.

⇨ The "Assign translation task" dialog box appears.



"Assign translation task" dialog

b) Select a key term. This will then become the "Key term" for the translation task. Ideally, this should be the preferred term.

c) Select the required target languages and the translator group and, if possible, the master translator group to which you want to assign the task.

⇨ The translator receives an e-mail about the submitted translation task and can process this in their task box (Request management).

Once the translator supplies a translation suggestion, depending on the configuration and if applicable, it is sent to the master translator (in the case of a cascaded translation process) and then automatically or optionally sent for approval, or it is entered in the termbase as "final". Translation suggestions are given final approval by the master approver, not the terminologist.

8.6.2 Overview of Ongoing Translation Processes

Switch to Request management to see an overview of ongoing translation processes. In "Assigned tasks" you can filter by translation task, or you can go straight to the "Translation tasks" tab.

Only terminologists have access to this area. In the *Type* and *Status* columns you can apply the following filters (several options can be selected):

- *Type*: Request, Suggestion, Assignment.
- *Status*: This column has up to 16 attributes; see below for details.

In these areas you can:

- Review the status of translation processes.
- Edit the translation data depending on status by clicking on *Open*.
- *Reject a translation request*.
- *Export entry IDs* that appear in this overview as a .txt file. This supports translation outside quickTerm (e.g., using Excelling MultiTerm in Studio).
- Click on *Delete* to delete a specific task. This also removes the task for the translators.
- Click on *View entry* to display the selected entry in the dialog box.

Possible statuses for translation tasks and what they mean

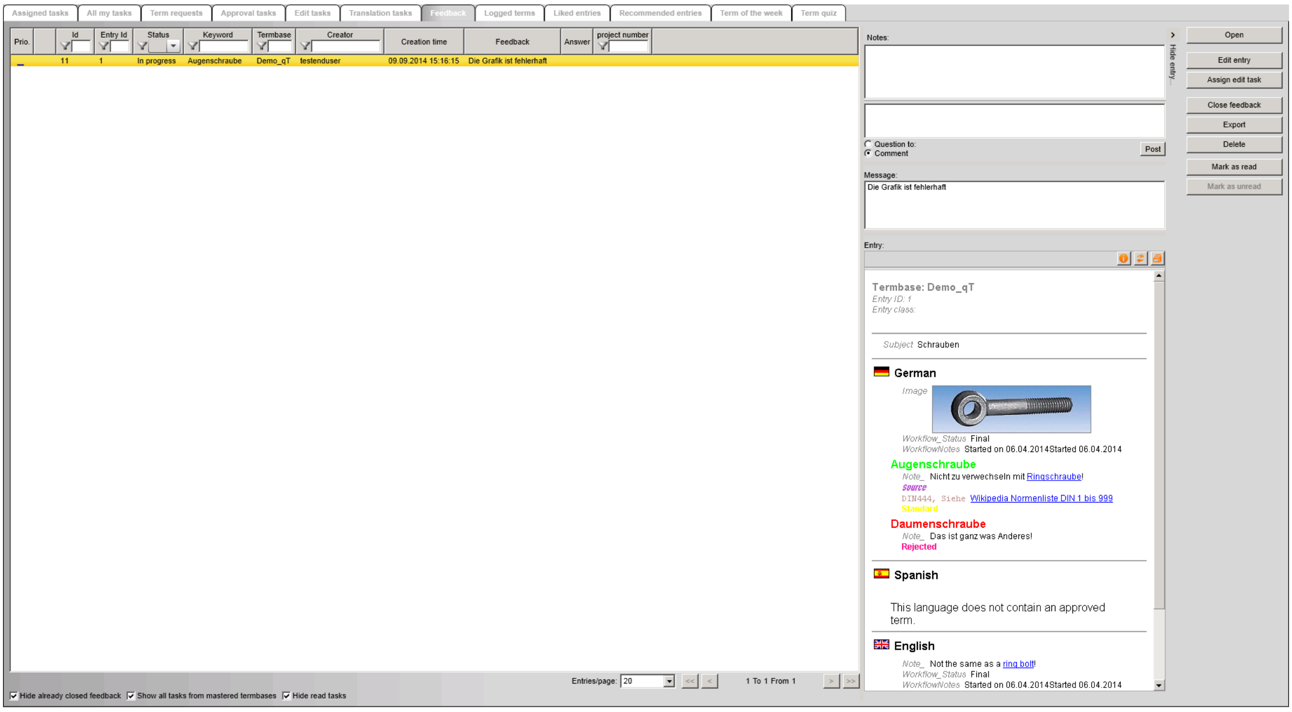
- Initial checking: A new translation request has been created and assigned to the initial checker.
- Initial checker waiting for requestor: Initial checker has asked the requestor for information.
- Request: The request is assigned to the terminologist, if an initial checker is not involved, or if the initial check has been completed.
- Rejected request: The initial checker or terminologist has refused the request.
- Terminologist waiting for requestor: The terminologist has asked the requestor for information (about a request).
- Terminologist waiting for initial checker: The terminologist has asked the initial checker for information (about a request).
- Assigned to translator: The terminologist has converted the request into a task and assigned it to the translator.
- Rejected by translator: The translator has rejected the task for some reason.
- Initial translation provided: The translator has processed the task and provided a translation.
- Waiting for terminologist: The translator has asked the terminologist for information.

- Translator waiting for check: The translator has assigned the task to the master translator to check.
- Master waiting for terminologist: The master translator has asked the terminologist for information.
- Approving: The translation task has been written to the termbase and the approval process has been initiated.
- Approved: The translation has been approved.
- Rejected by approver: The translation has been rejected.
- Closed: The task has been closed.

8.7 Workflow for Terminology Feedback

As the terminologist, in Request management you are able to view feedback from users on existing entries.

Switch to the Request management screen. In Assigned tasks you can filter by feedback, or you can go straight to the *Feedback* tab. Only terminologists have access to this area.



Feedback overview

The dialog box lists all feedback. The following filters can be applied:

- *Hide already closed feedback*, *Hide read tasks*, *Show all tasks from mastered termbases* checkboxes.
- Filter by *Status*.

Possible statuses for feedback and what they mean

- In progress: Assigned to the terminologist, waiting for his assessment.
- Waiting for information: The terminologist has asked the requestor for information.
- Closed: The terminologist has dealt with the feedback and it is now closed.

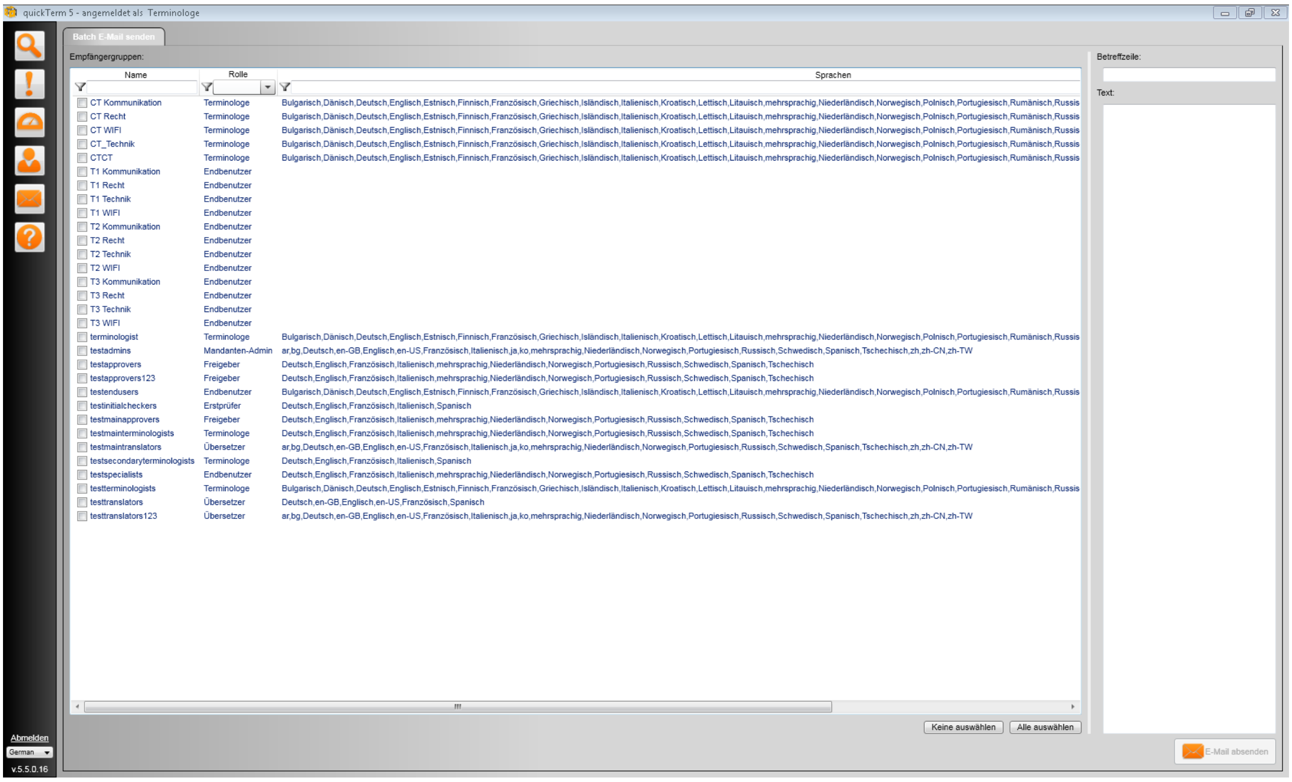
In this dialog box, you can do the following:

- Read feedback by viewing the comments in the feedback column, or by clicking on *Open* to view the whole text. You can also see the text at the top right in the entry view under *Message*.
- *Ask for information* (only enabled if the requestor is not an anonymous end user), or *respond* by clicking on the relevant button.
- *Close feedback* and add a message that will then appear next to the closed feedback in the *Note* column.
- *Export* all currently selected feedback in the list as a .csv file.
- Delete feedback by clicking on *Delete.*
- Mark the feedback as *read* or *unread*.

The feedback function in quickTerm is a "one-way street". This means you can either receive, collate and implement feedback, or not. Either way this will take place directly in the termbase. However, you are able to send queries to the person who submitted the feedback via quickTerm.

8.8 Sending Batch E-mails

This function allows terminologists that use quickTerm groups as mailing lists to send individual e-mails (e.g., on new entries) to specific users.



Sending batch e-mails

In the Batch e-mail dialog box all quickTerm groups are shown on the left. You can filter and sort this list by name, role and language to select the precise group you want to send the e-mail to.

To send a batch e-mail:

a) Select the group of recipients on the left. The *Deselect all* and *Select all* buttons at the bottom may be useful at times.

b) On the right, specify the subject and enter the text of the e-mail.

c) Click on *Send e-mail*.

⇨ The e-mail is sent.

Sending an entry as a link

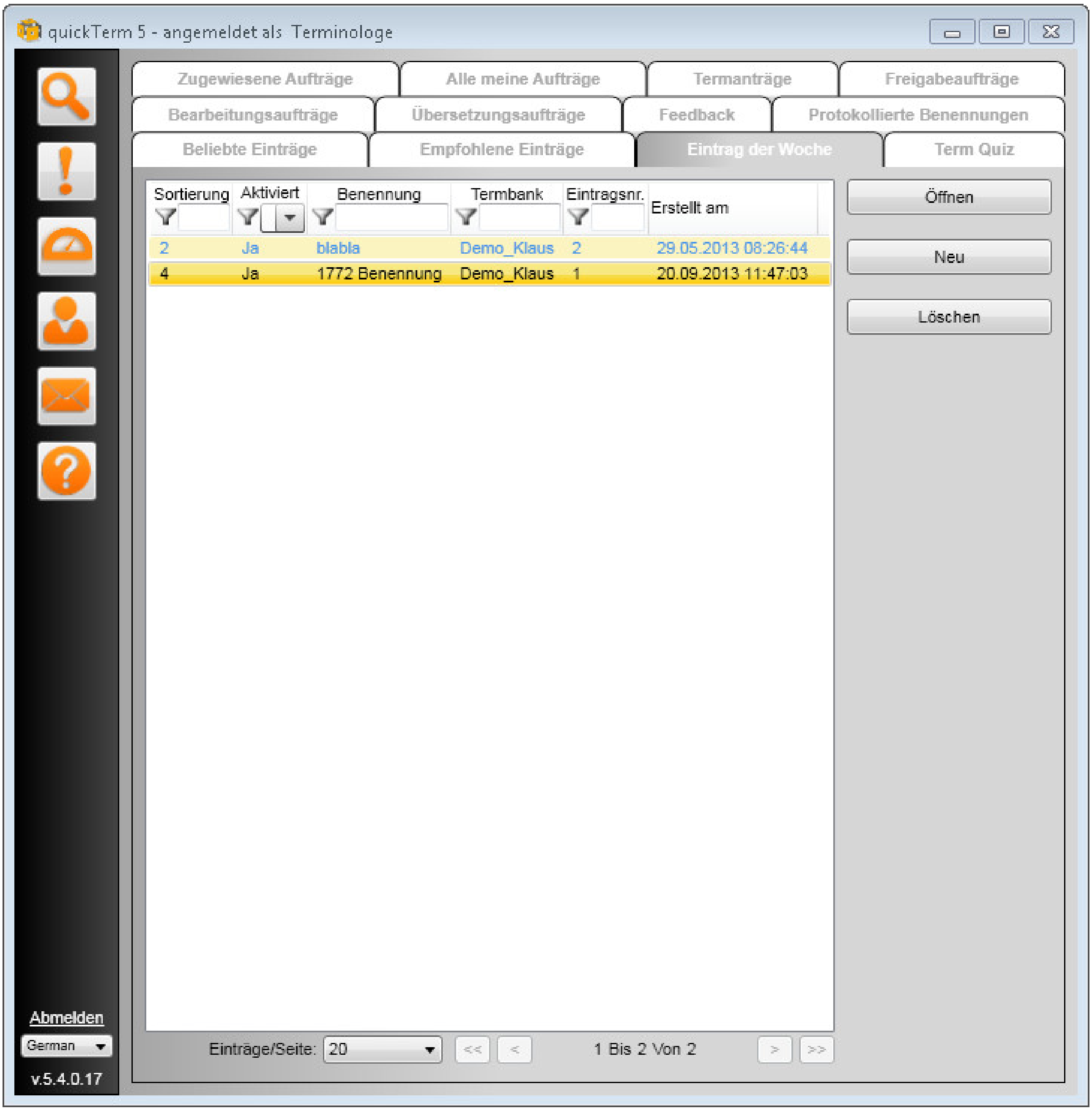
This screen opens when you *Send an entry by e-mail*.

A prerequisite for this is that the web or server URL has been set up in the server config file (in quickTerm Web this requirement is fulfilled automatically).

In the entry click on the *Send entry link in e-mail* icon () at the top. The *Batch e-mail* screen then opens where you can highlight the recipient group(s) and enter a subject in the subject line. The link has already been entered in the text automatically. Finalize your action by clicking on *Send e-mail*.

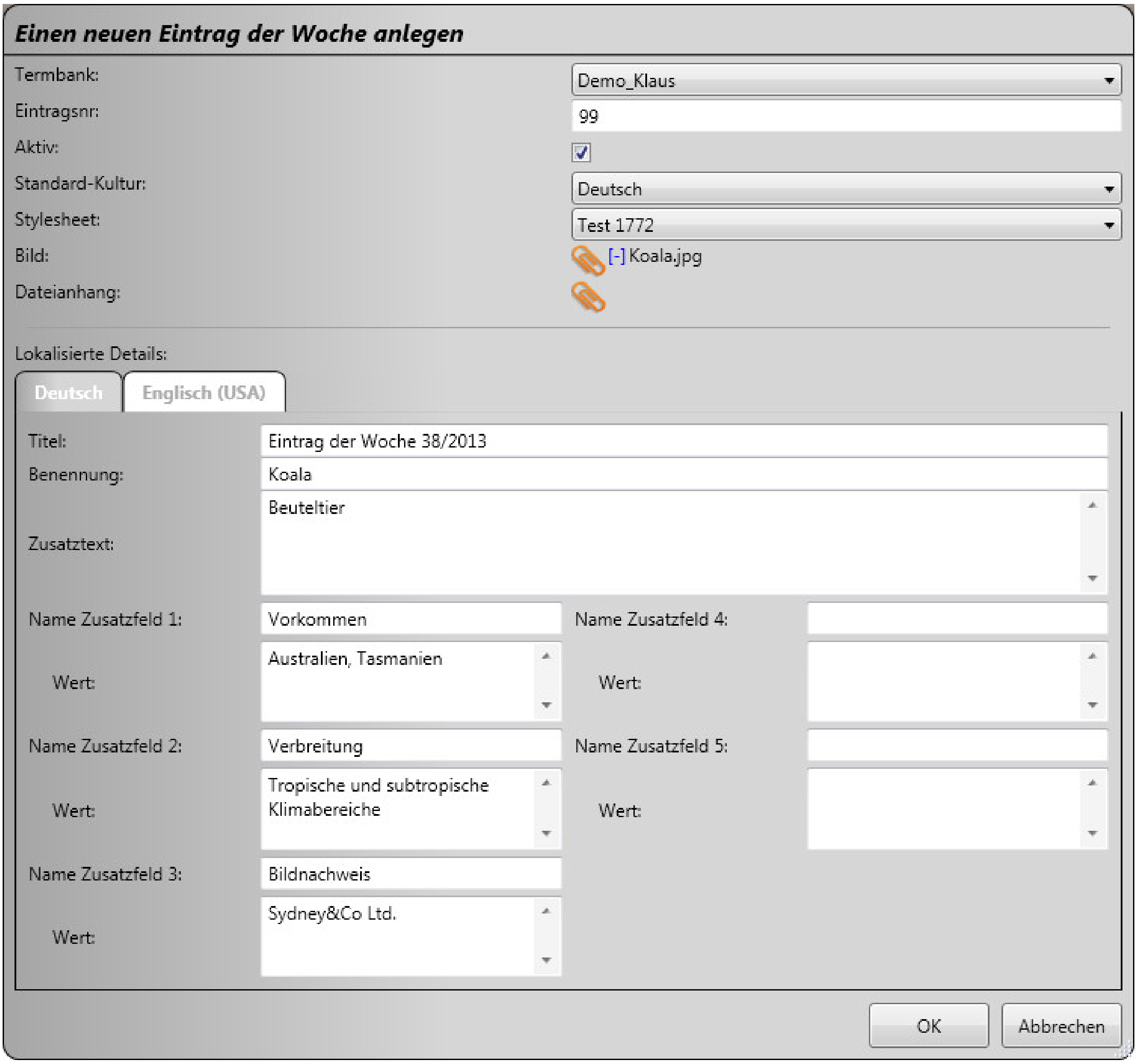
8.9 Term of the Week

A separate tab is available in Request management for terminologists to create the term of the week.



Term of the week

You can edit existing terms of the week by clicking on *Open* or *Delete*, as well as *Create* new terms of the week.



"Create new term of the week" dialog

To create a new term of the week specify the following information:

- *Termbase*: Select one of the available termbases.
- *Entry ID*: ID of the new term of the week.
- *Enabled*: The term of the week is displayed. If several terms are active at the same time, the user can switch between the individual terms using *Previous term of the week* and *Next term of the week*.
- *Default culture*: If the GUI is available in several languages, you can specify here which culture should be used if a localized version is not available in one of the cultures.
- *Stylesheet*: Here you can select one of the stylesheets that the (client) administrator has configured in the server settings under Configuration of quickTerm Web.

- *Image*: Select an image to be displayed in the term of the week.
- *Attachment*: This allows you to attach a document to the term of the week.
- *Localized details*: Here you can specify a *Title, Term, Term 2* and *Note* for each default culture. A further five *additional fields* with *values* are available where you can enter your own text. All these details will then appear in the term of the week in the layout for each selected stylesheet.

Click on *OK* to close the newly created term of the week.

An existing term of the week can be edited in the same way by clicking on *Open*.

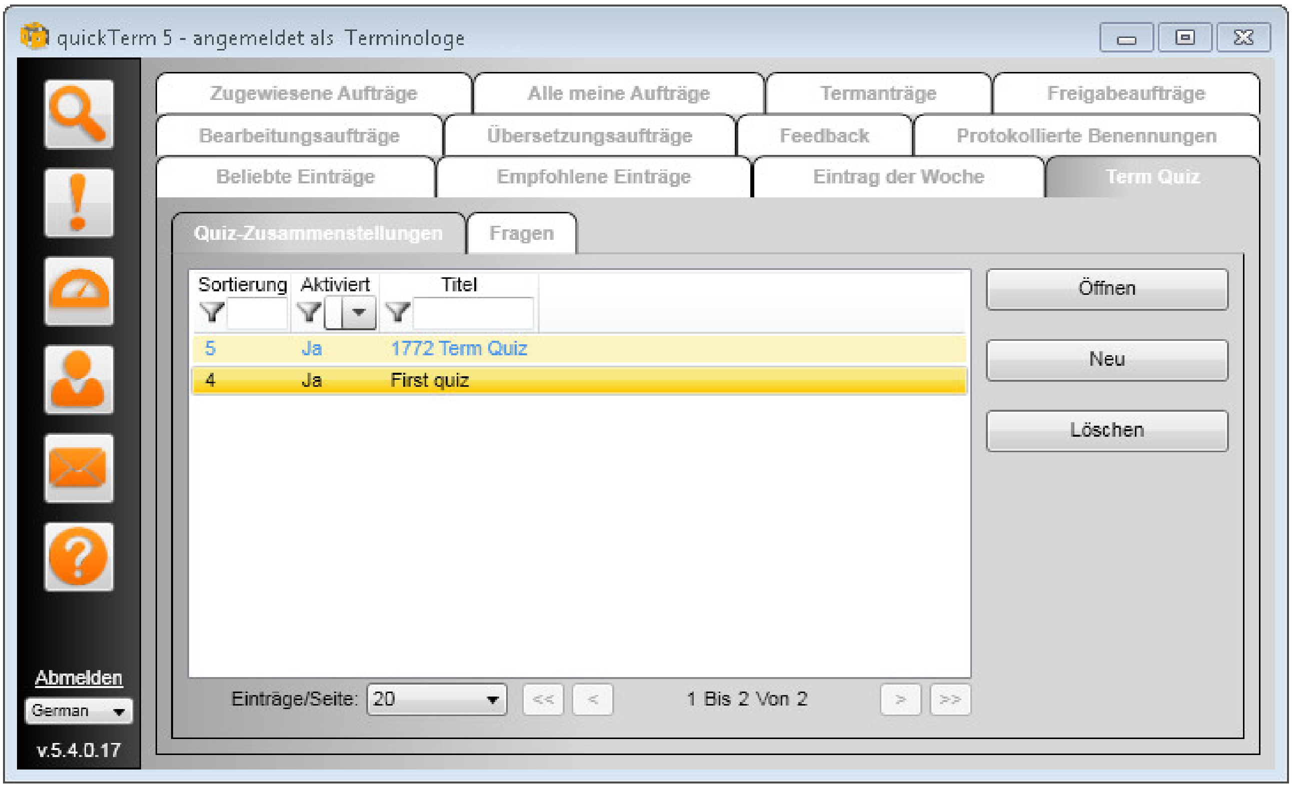
8.10 Term Quiz

A separate tab is available in Request management for terminologists to create term quizzes.

You can add questions and their correct answers and put together several questions to create a quiz.

Two tabs are available for this purpose: *Quizzes* and *Questions*.

Quizzes

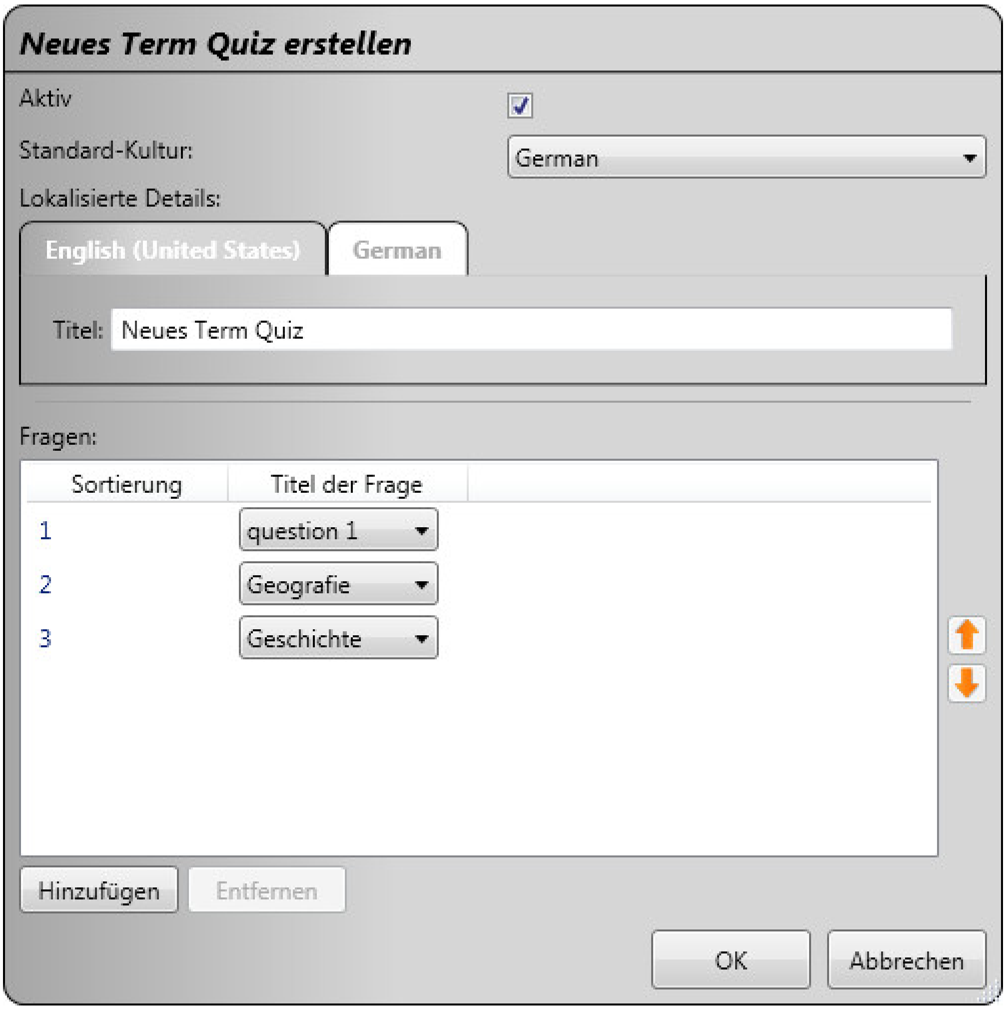


Quizzes

Each quiz has its own *Title*; the quiz can be *enabled* or not, and the order in which web users see quizzes can be *sorted*.

You can *Open* quizzes for editing or *Delete* them. You can also *Create* a new quiz.

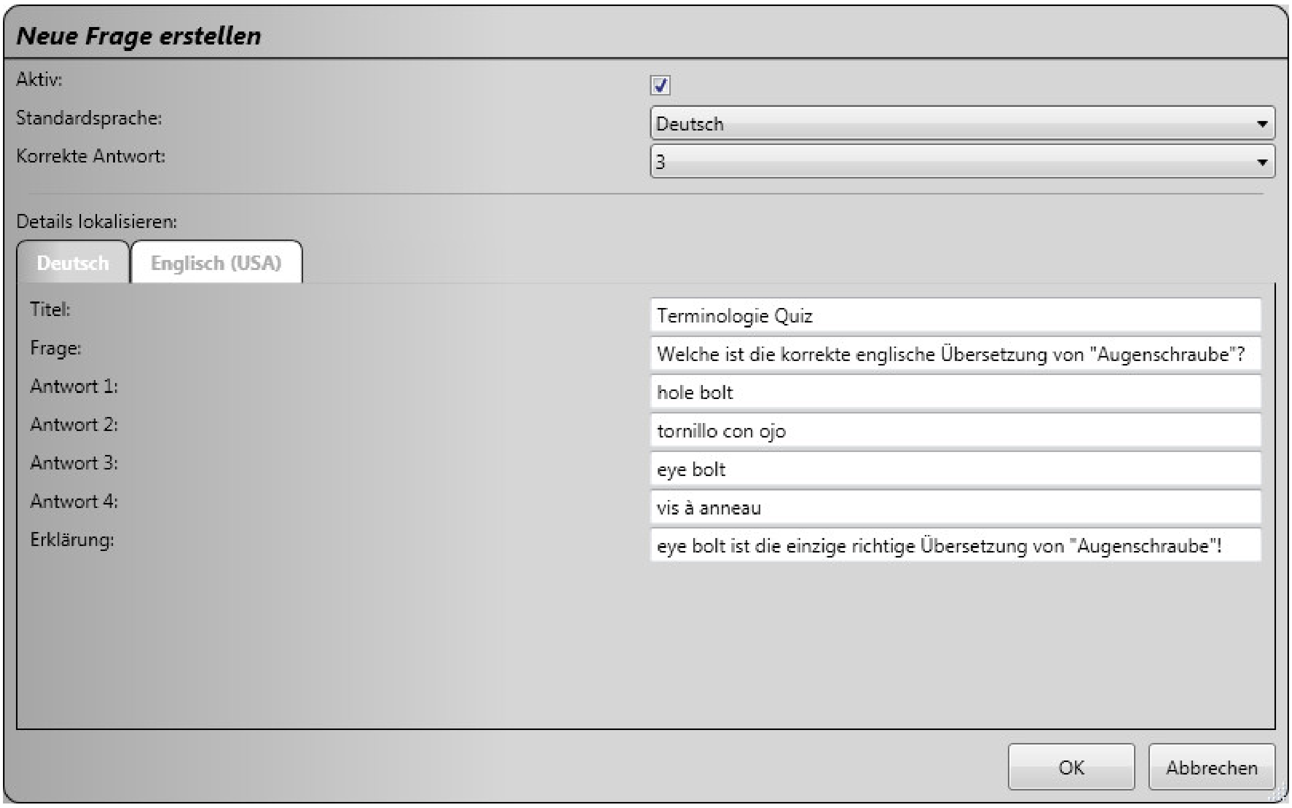
If several quizzes are active at the same time, the user can switch between the *Previous quiz* and the *Next quiz*.



"Create new term quiz" dialog

A new quiz consists of one or more questions that must already have been defined (see below). You can add or remove questions here. You can also change the order of questions in the quiz using the arrows on the right by first highlighting the relevant row.

Questions



"Create new question" dialog

If you want to create a new quiz question, the following information is required:

- *Enabled*:
- *Default language*:
- *Right answer*: The term quiz is designed such that four possible answers are displayed, but only one of them is correct ("Who Wants to be a Millionaire" principle). You also specify here which answer (1, 2, 3 or 4) to the question is the right one.
- *Localized details*: Here you can specify for each default culture the *Title* for the question, the *Question* itself, the four suggested *Answers* and an *Explanation* of the correct solution. The explanation is shown instead of the question immediately after the web user selects the answer.

Click on *OK* to close the newly created question.

An existing question can be edited in the same way by clicking on *Open*.

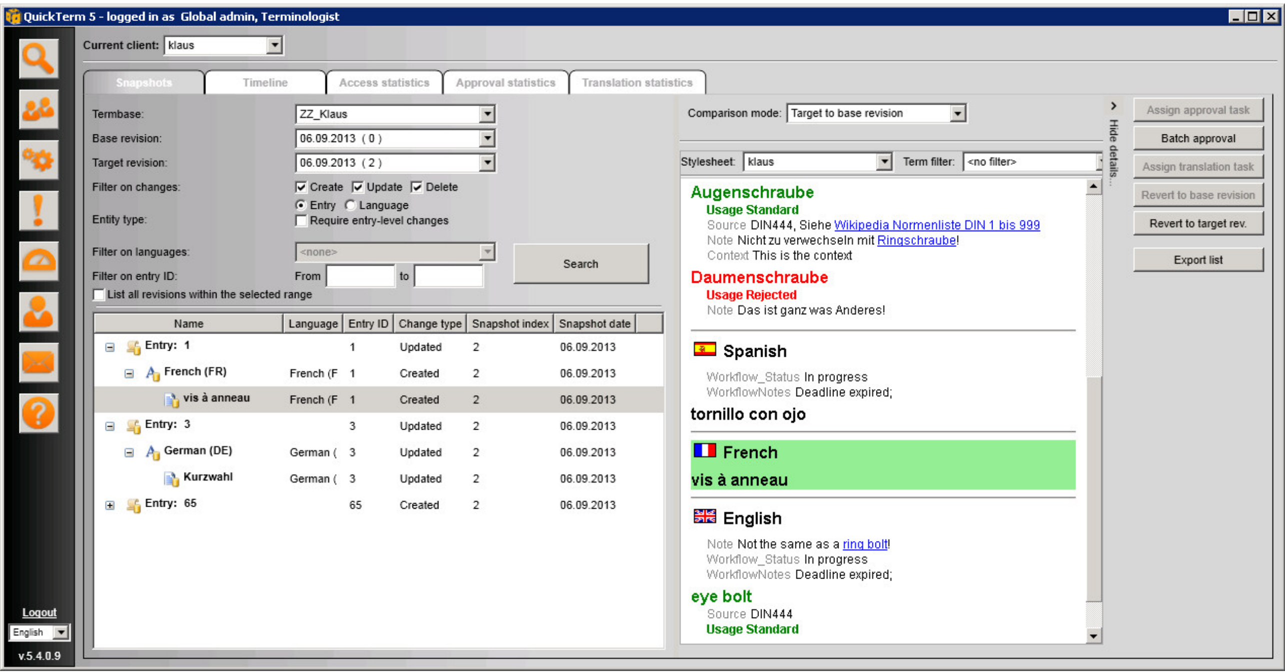
8.11 Dashboard

Depending on the configuration on the server itself, quickTerm can record a "snapshot" of the current data in the termbase at regular intervals. In the quickTerm Dashboard, the administrator and the terminologist (if authorized) can compare the individual snapshots against each other. This allows them to find changes over a certain period of time or to find out when a specific change was made, etc.

In order to use the snapshot and timeline functions, you must regularly create snapshots on the server via Windows Task Scheduler. See Setting-up the Snapshot Function.

8.11.1 Snapshots

Here you can directly compare different snapshots (=versions) of the termbase against each other or with the current version, and focus on changes by "drilling down".



Dashboard, Snapshots

From this results view the terminologist can also send some or all of the entries for approval again, send them to the translators to check, or even reset a term, language, entry or the entire termbase back to a certain state.

Where terminologists are concerned, access statistics are only available for those termbases that the administrator has assigned to him in the group configuration.

To compare two snapshots against each other:

Setting the options

a) Select the desired termbase.

b) Select the base revision and target revision for the snapshot comparison.

c) Define which types of changes you want to take into account:
- Newly created entries or terms and/or
- Changed entries or terms and/or
- Deleted entries or terms.

d) Define whether you want the results list to be sorted by entry ID (and then by language for each entry), or by language (and then by entry ID for each language).

e) "Require entry-level changes" means that the comparison also includes changes at entry level that apply to all languages.

f) If you wish you can set a filter for only one language or restrict the search by entry ID.

g) "List all revisions within the selected range" lists each individual revision in the selected range, not just the ranges selected above.

h) Then click on *Search*.

⇨ quickTerm now lists the changes in the results window sorted by the option you have selected - either by language and then entry ID, or by entry ID and then language.

Displaying changes

a) Now click on one of the entries, or expand the results list at the desired position by clicking on "+" in order to focus on an even more precise list of changes.

   ⇨ The entry is shown on the right in the preview window and the changes are highlighted.

b) Select the desired comparison mode:
- Target to base revision: Shows the difference between the target and base revisions set on the left.
- Live to base revision: Shows the difference between the base revision set on the left and the current data.
- Live to target revision: Shows the difference between the target revision set on the left and the current data.

Performing actions

You can perform different actions on the selected set of entries:

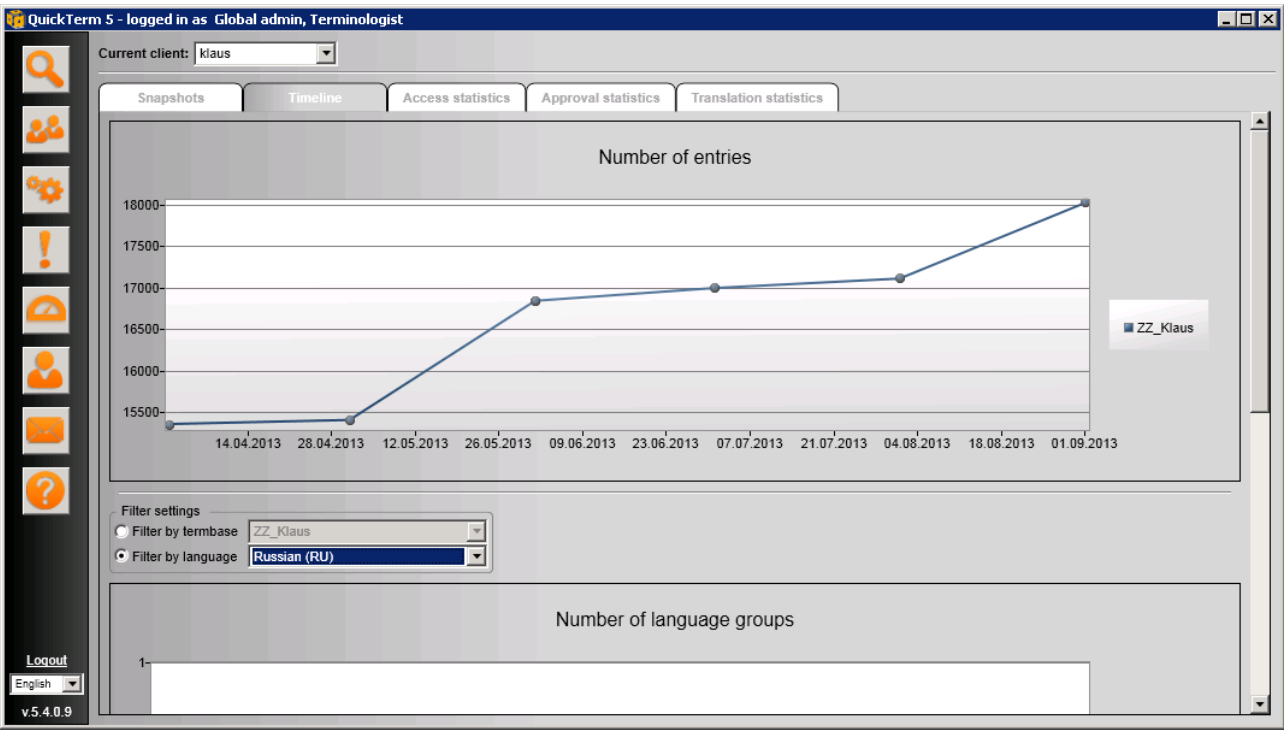
a) Select the desired entry(ies) from the results list.

b) You can:

- Use *Assign approval task* to send the selected entry for approval
- Use *Batch approval* to send all the selected entries for approval
- Use *Assign translation task* to send the entries for retranslation to check the status of the translation
- Use *Revert to base revision* to revert the selected entry to the state of the selected base revision
- Use *Revert to target rev.* to revert the selected entry to the state of the selected target revision

c) You can also export the list of all the changed entries, e.g., so that you can export it using Kaleidoscope's Excelling MultiTerm and edit it in Excel, or keep it for your records.

8.11.2 Timeline

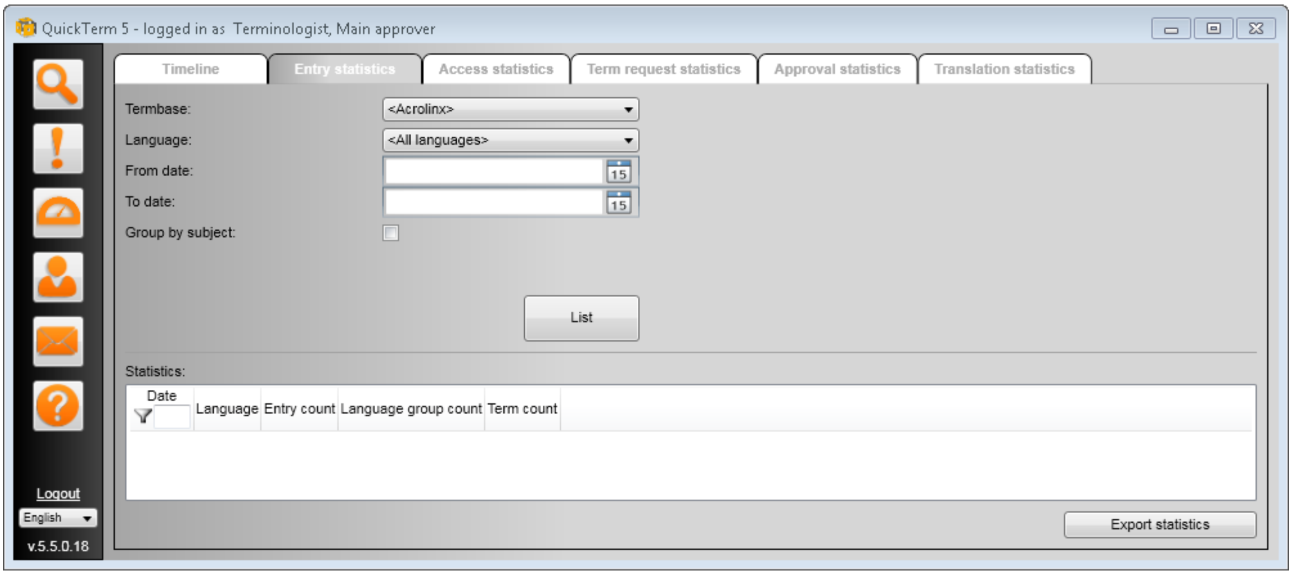


Dashboard, Timeline

Under this tab you can see the number of entries (with the option to filter either by termbase or language), as well as the number of language groups and the number of terms in chronological order.

This view is particularly useful for tracking activity in the termbase and also for internal marketing purposes. The graph is scaled automatically to cover the range over which the snapshots were taken. If there are no snapshots, the graph will be blank.

8.11.3 Entry Statistics



Dashboard, Entry statistics

In the Entry statistics area you can examine how the termbase has grown over various report periods. It shows the number of new entries per date range. If there are no snapshots, no figures will be shown.

The entry statistics can only be retrieved for each termbase individually.

Language: Here you can select *Individual languages, All languages* or *All languages (aggregated)*. The latter means that the "*Language*" column is omitted from the list.

From date: – To date: For restricting the time period under consideration.

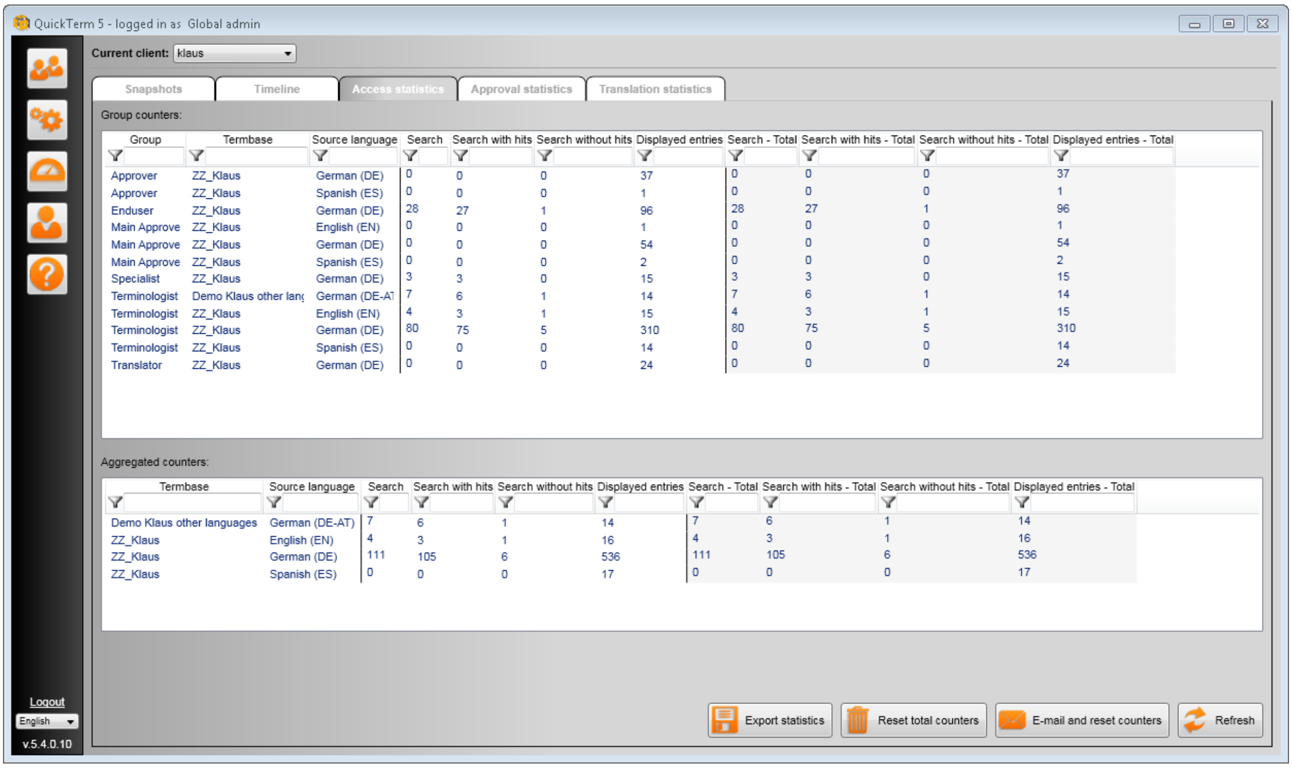
Group by subject: If checked, the *Custom field* will also be listed.

List: The corresponding list will only be created after clicking this button.

Statistics (list): The *Language*, *Custom field, Entry count, Language group count and Term count* columns are populated.

Export statistics: The *Export statistics* button enables you to export the entry statistics to a .csv file so that you can process the data separately (e.g., in Excel).

8.11.4 Access Statistics



Dashboard, Access statistics

In the access statistics area you can view access data for the termbase as recorded by quickTerm.

The access statistics are broken down into two horizontal lists. The upper part, *Group counters*, contains the user group/termbase/source language. The lower part, *Aggregated counters*, contains termbase/source language only. User-level access statistics are not available due to data privacy law.

There are two vertical areas: The first four columns before the divider show the access statistics for the most recent report period. The report period is always reset when the statistics are automatically or manually reset. The last four columns comprise the cumulative total access statistics.

The list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by selecting one or more options from a pre-defined list.

Hide already closed tasks

These tasks include approved and rejected tasks.

A report can be created in two ways:

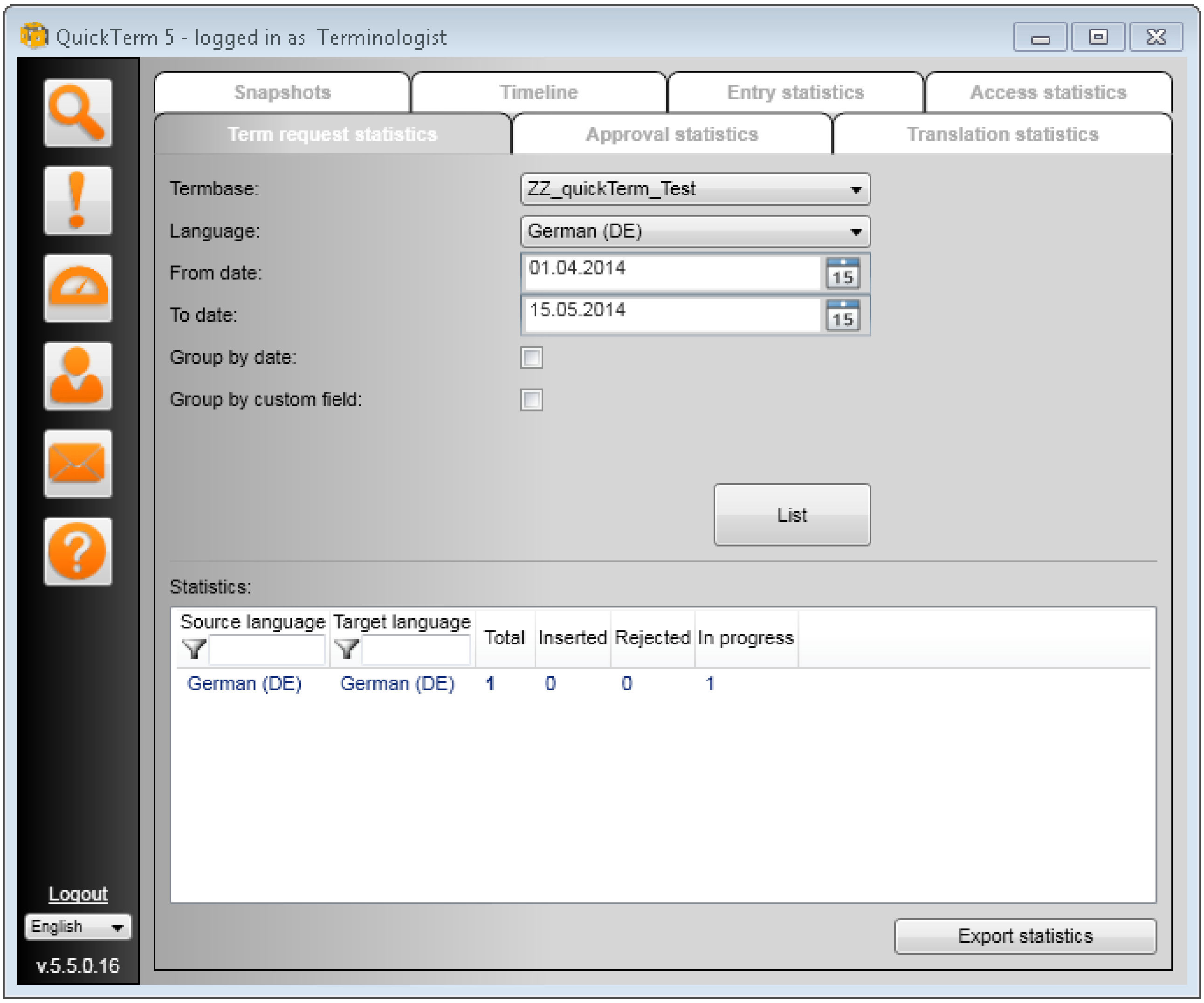
- "manually" via the *E-mail and reset counters* button.
- "automatically" via the relevant settings on the Server settings / E-mail screen. Here you can enter how often you want to automatically receive the access statistics by e-mail: on the first of the month, on the last of the month, or on one or more week days (by selecting *Every*) and at what time. The e-mail address for the access statistics recipient can also be defined here.

Once the report has been sent – regardless of whether it has been initiated manually or automatically – the counters for the individual statistics will be reset to zero. The total counters can be set to zero using the *Reset total counters* button. As this applies to the entire access statistics data, you will receive a warning before the counters are reset.

The *Export statistics* button enables you to export the access statistics to a .csv file so that you can process the data separately (e.g., in Excel). In this case the data is not reset.

The *Refresh* button enables the administrator to update the data if the Access statistics screen is opened for a prolonged period of time.

8.11.5 Term Request Statistics



Dashboard, Term request statistics

This area shows how many term requests have been submitted within a certain time period, how many of them have become entries, how many have been rejected, and how many are still in progress.

The term request statistics can only be retrieved for each termbase individually.

Language: Here you can select *Individual languages, All languages* or *All languages (aggregated)*. The latter means that the *Source language* and *Target language* columns are omitted from the list.

From date: – To date: For restricting the time period under consideration.

Group by date: If checked, the *Date* column will also be listed.

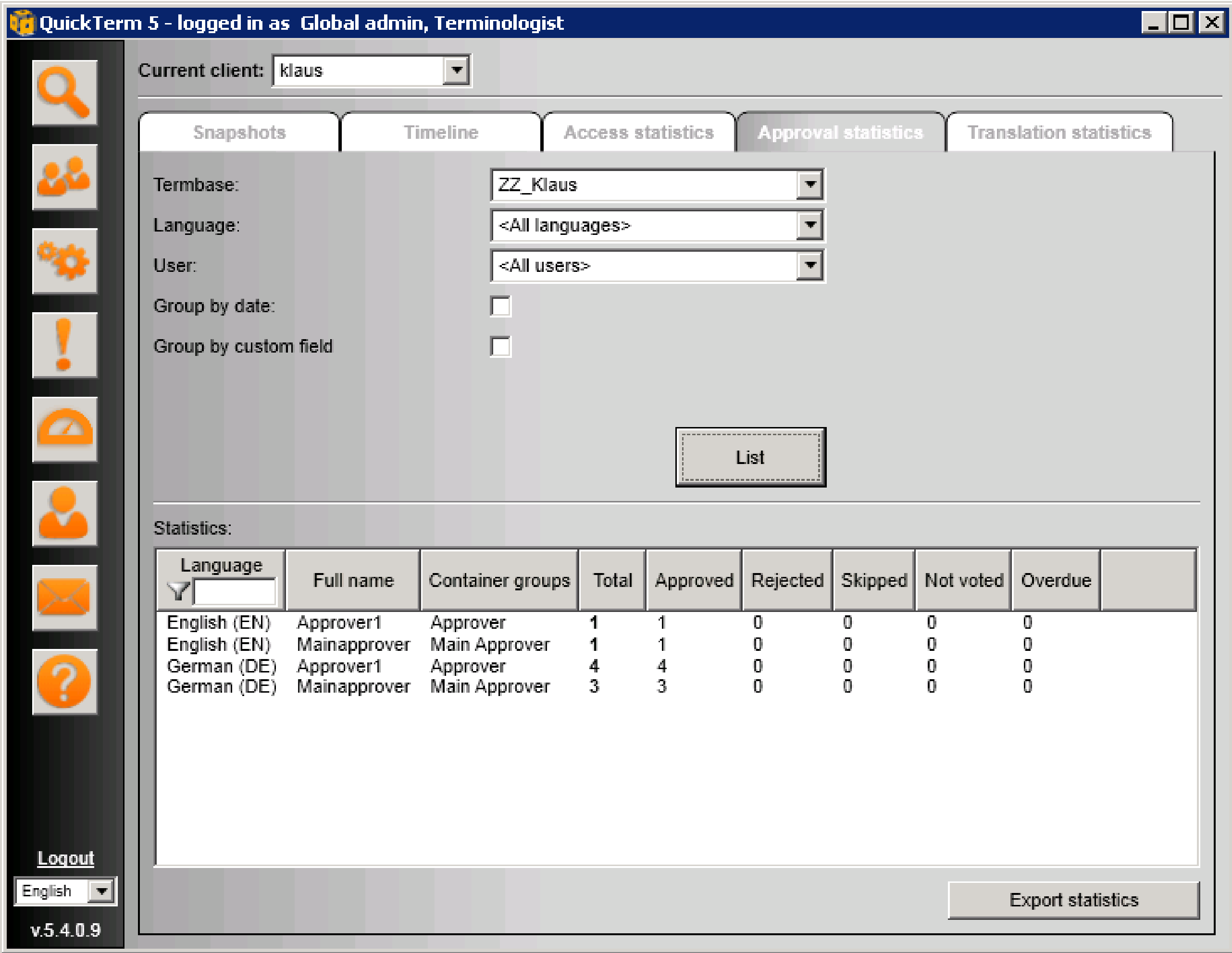
Group by custom field: If checked, the *Custom field* will also be listed.

List: The corresponding list will only be created after clicking this button.

Statistics (list): The *Source language, Target language*, *Total*, *Inserted, Rejected, and In progress* columns are populated.

Export statistics: The *Export statistics* button enables you to export the term request statistics to a .csv file so that you can process the data separately (e.g., in Excel).

8.11.6 Approval Statistics



Dashboard, Approval statistics

This is a comprehensive analysis tool relating to the approval process. The approval statistics can only be retrieved for each *termbase* individually.

- *Language*: Here you can select *Individual languages, All languages* or *All languages (aggregated)*. The latter means that the "*Language*" column is omitted from the list.

- *User*: The same as language, so *Individual users, All Users and All users (aggregated)* can be selected. The latter means that the "*Full name*" column is omitted from the list.
- *Group by date*: If checked, the *Date* column will also be listed.
- *Group by custom field*: If checked, the *Custom field* will also be listed.
- *List*: The corresponding list will only be created after clicking this button.
- *Statistics* (list): The columns *Language*, *Date, Custom field, Full name* (depending on the applied selection) and *Groups* are populated, together with the numerical values for *Total, Approved, Rejected, Skipped, Not voted* and *Overdue*.

The list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

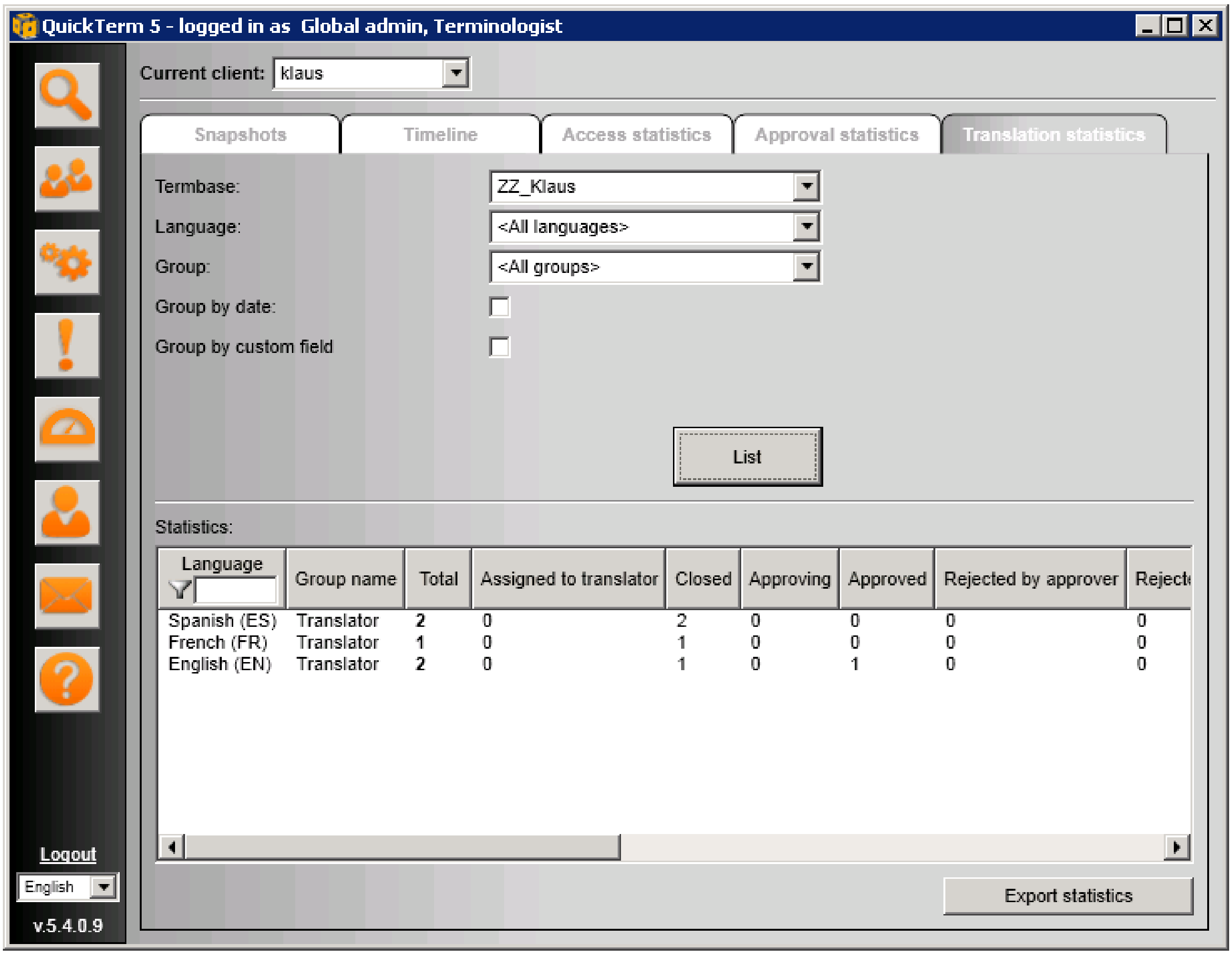
A second filter option is available for columns containing default content (e.g., status) by selecting one or more options from a pre-defined list.

Hide already closed tasks

These tasks include approved and rejected tasks.

- *Export statistics:* The *Export statistics* button enables you to export the approval statistics to a .csv file so that you can process the data separately (e.g., in Excel).

8.11.7 Translation Statistics



Dashboard, Translation statistics

This is a comprehensive analysis tool relating to the translation processes. The translation statistics can only be retrieved for each *termbase* individually.

- *Language*: Here you can select *Individual languages, All languages* or *All languages (aggregated)*. The latter means that the "*Language*" column is omitted from the list.
- *Group*: The same as language, so *Individual groups, All groups* and *All groups (aggregated)* can be selected. (*Groups* refers here to translator and/or master translator groups.) "All groups (aggregated)" means that the "*Group*" column is omitted from the list.
  Selecting *<none>* means that the translation tasks listed here will be those that have not yet been assigned to a group.
- *Group by date*: If checked, the *Date* column will also be listed.

- *Group by custom field*: If checked, the *Custom field* will also be listed.
- *List*: The corresponding list will only be created after clicking this button.
- *Statistics* (list): The columns *Language*, *Date, Custom field, Group* (depending on the applied selection) are populated, together with the numerical values for *Total, Assigned to translator, Closed, Approving, Approved, Rejected by approver, Rejected by translator, Rejected request, Waiting for requestor, Request, Waiting for terminologist, Translator waiting for check* and *Master waiting for terminologist*.
- *Export statistics:* The *Export statistics* button enables you to export the translation statistics to a .csv file so that you can process the data separately (e.g., in Excel).

9 Approver: Special Functions

As the approver, new or changed terms are assigned to you to approve in the quickTerm Workflow by the terminologist. You are responsible for voting for or rejecting these entries.

Approvers are always members of an approval group, which means they have to decide on the new entries jointly with their colleagues. There are two types of approval groups:

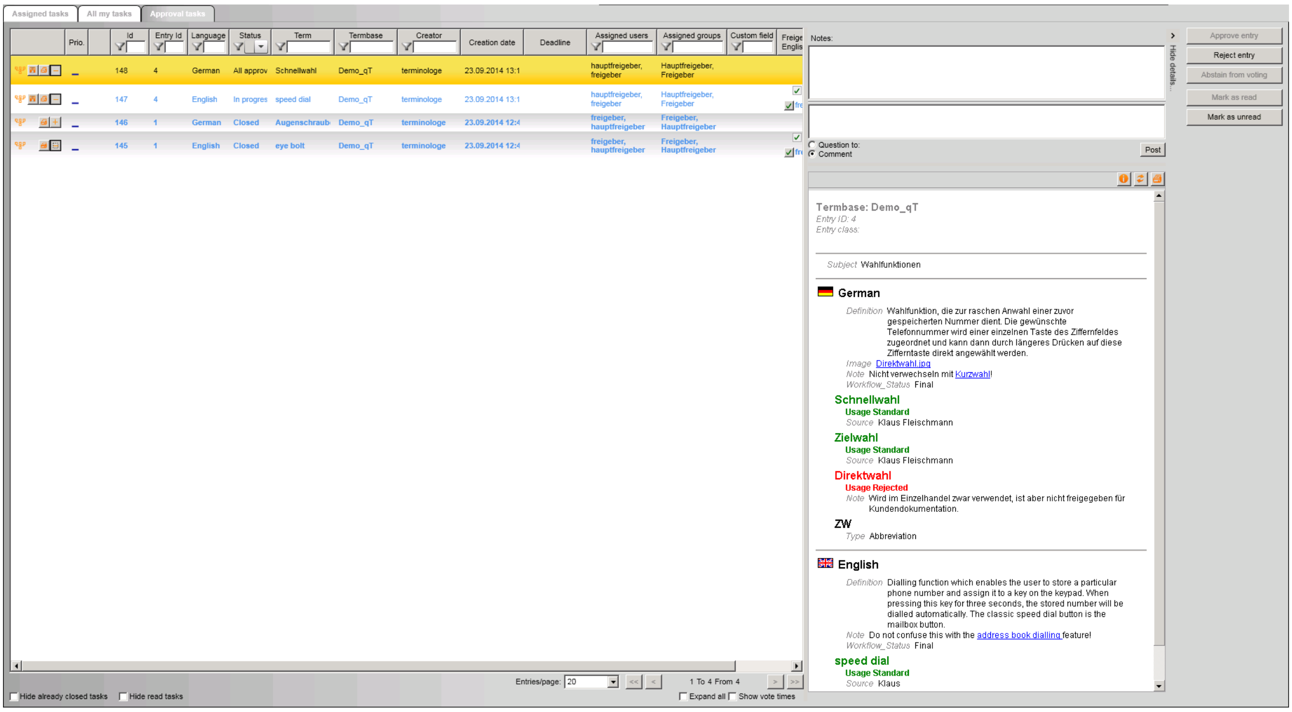
- In a First wins group only one member of the group has to vote. Their vote is cast for the group as a whole.
- In a Voting group there are two possibilities:
  - In contrast to the first win procedure, the minimum approvals procedure requires a specific number of users in a group to approve an entry in order for the group's approval to be granted.
  - The minimum votes procedure dictates that a certain number of total votes has to be cast for each term before a decision (agree or reject) can be reached. Abstentions are not counted.

The administrator specifies whether an approval group is to use the first wins or voting procedure to approve entries under Approval settings in User management.

Approvers may also have edit tasks assigned to them in the role of specialist. If an action is required from approvers, they can find this information on the "Assigned tasks" tab. The "All my tasks" tab shows all tasks for the approver, including those in which they are involved but do not yet need to action. This includes their own feedback, edit and translation tasks, and term requests.

9.1 Giving Approval

Switch to your task box (Request management screen). Here you will see all tasks that are currently assigned to you. You can find a detailed list of approval tasks on the "Approval tasks" tab. These are the same tasks, but shown in more detail.



Approver task box

All tasks in the task list will originally be in status "unread". Two buttons on the bottom of the screen allow you to change the state manually: *Mark read* and *mark unread*. Depending on the current task read status, one of these buttons is always grayed out. Unread tasks are always displayed in bold, like in Outlook. By clicking on the respective button, you can manually change the read state.

Apart from that, the read state is automatically changed when you:

- Select a task
- Edit a task (except for adding a comment)
- *Open* a task, or
- Change the status of a task by completing a process step.

In addition, you can filter the task lists according to the read status by clicking on *Hide read tasks*. This allows you to better keep your to-dos within sight. Of course you can also deactivate the filter and see all tasks.

The list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by selecting one or more options from a pre-defined list.

Hide already closed tasks

These tasks include approved and rejected tasks.

You can also see the following information on the *Approval tasks* tab:

- A checkmark, cross or minus symbol shows you which groups have already approved (green checkmark) or rejected (red crossed out box) which entries, and those that have abstained from voting.
- You can "expand" an approval request by clicking on the *plus symbol*. This shows you all other colleagues in the approval group and their votes. You can thus check what your colleagues voted and who voted for or against the entry. The first checkbox in an expanded group, or the only checkbox in a collapsed group shows you the status of the entire group. For instance, if a set number of voters in a voting approval group have approved or rejected an entry, it will get a green or a red checkmark.
- When you select the *Expand all* option at the bottom of the screen this is equivalent to checking every plus symbol for every approval task. When you remove the checkmark, all the approval processes will be collapsed.
- By clicking on *Show vote times* at the bottom, you can display the actual time and date when each approver cast their vote. You can always enlarge a column by dragging or double clicking on the right-hand side of the column heading.
- You can also click directly in the various checkboxes next to your own approver user in order to approve an entry. To avoid accidental changes, you must still click on the small floppy disk icon () on the far left to save the change.

Approving an entry

By clicking on *Show details* in the right-hand pane you can show the current entry to see which information you need to approve. You can also see comments from your colleagues at the bottom.

You can add new comments or make subsequent changes to your own comments. The terminologist can also see these comments and, if applicable, respond to information requests. You can also send targeted questions to individual groups.

You can copy the comment text in quickTerm Client (place the cursor in the comments area and right-click).

This is how you approve or reject an entry:

a) Select the entry from the list on the left.

b) Click on *Open* to check the entry and view the notes entered by your colleagues.

c) Click on *Approve entry* to approve an entry
- OR -
Click on *Reject entry* to reject it. Particularly in the latter case, you also need to indicate the reason for rejecting the entry, so your colleagues or the terminologist can adapt it accordingly.
- OR -
Click on *Abstain from voting* if you want to register "do not mind" or "do not know".

⇨ The entry is now approved, not approved or edited. If you have not approved the entry and your colleagues are in agreement with you, the terminologist will revise the entry and resubmit it to you for approval.

Additional buttons

Depending on what *type* of task you received (*Approval tasks*, your own or assigned edit tasks and your own feedback, term requests and translation tasks) and the *task type* (change, request, definition, main task, subtask, suggestion, assignment), some or all of the following buttons may also be available:

"Details"

"Delete"

You can also filter by these types in the list.

10 Master Approver: Special Functions

In quickTerm one master approver is assigned for each language. This user has two additional functions:

Master approver for source-language approvals

In the case of source-language approvals, the terminologist responsible can initiate a cascaded approval process. This means that firstly all "normal" approvers must cast their votes, then the master approver consolidates the votes and sends a summary to the terminologist.

For this reason, the master approver must always wait until all his colleagues have cast their votes where the cascaded approval process is concerned. For flat approvals, the master approver is a "normal" approver, just like the other approvers.

The functionalities available are identical to those involved in normal approval. For more details, see Approver: Special Functions [→ 106]

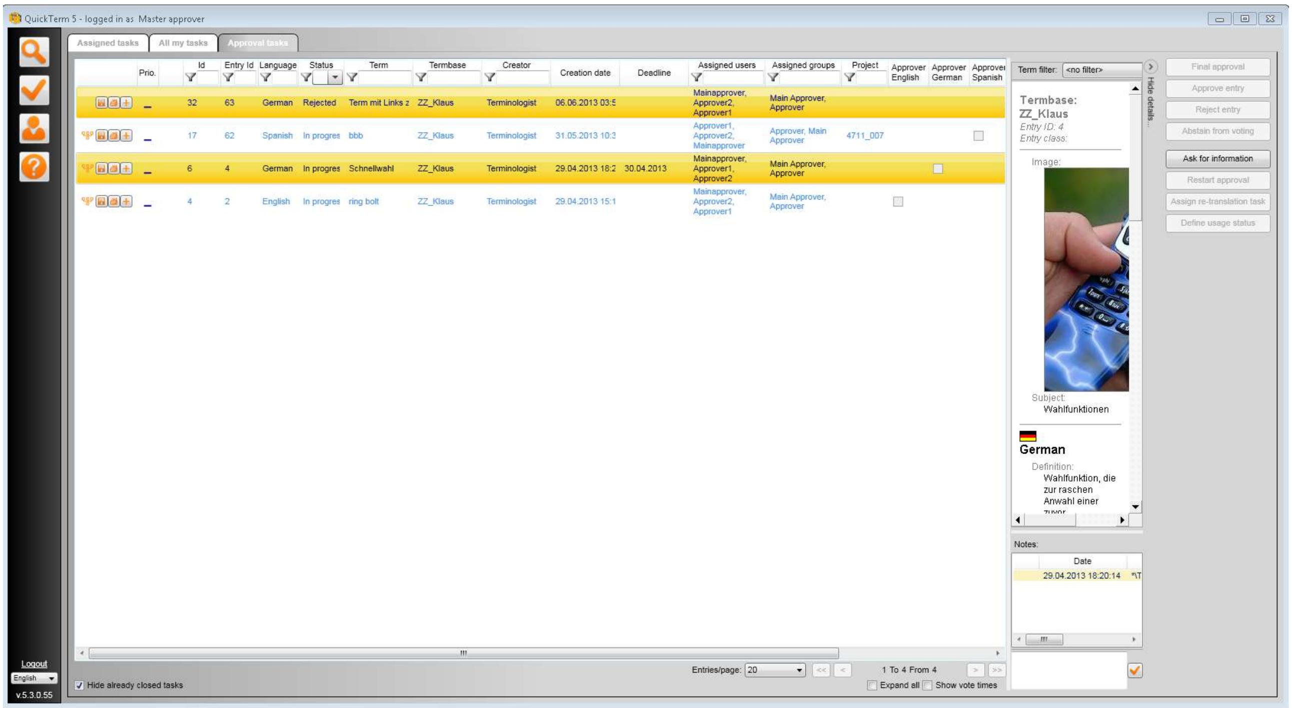
Master approver for target-language approvals

The terminologist is not involved in target-language approvals initiated by the translator, as in most cases he does not know the language. As the master approver you therefore have the final say. You can do the following with a translation suggestion:

- Accept
- Edit and then accept
- Reject and request a new suggestion from the translator
- Reject and provide the correct translation yourself

10.1 Master Approval for Translation Suggestions

Switch to your Request management screen.



Master approver overview

You can limit the scope of the approval tasks list as follows:

- By checking the "Hide already closed tasks" option
- By filtering; if filtering according to status, it is also possible to select multiple values from "Rejected", "Closed", "All approved", "In progress" and "None".

10.2 Granting Final Approval for an Entry

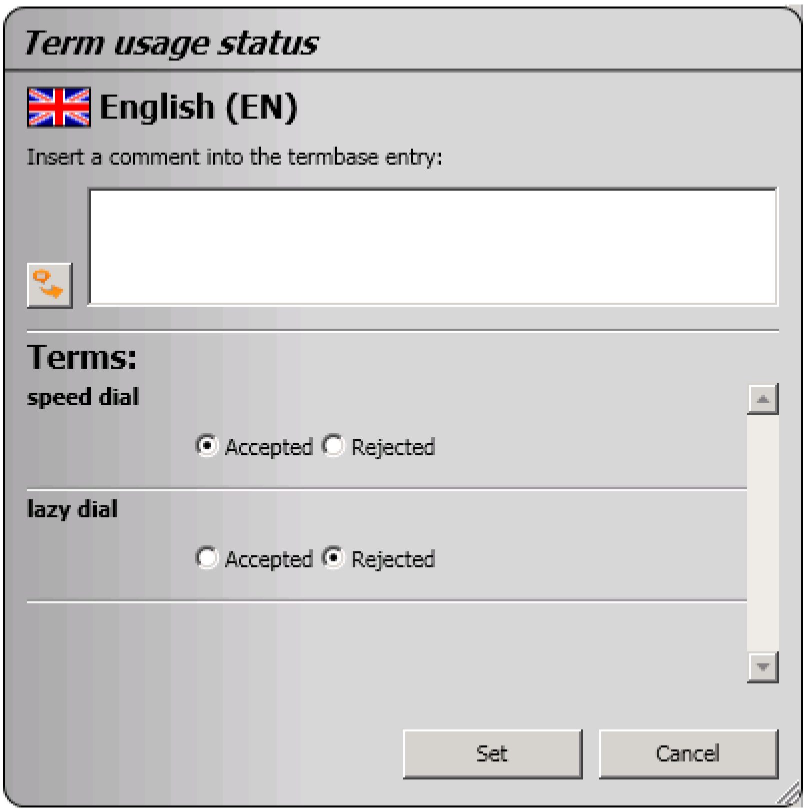
To grant final approval for an entry:

a) Select the entry from the list on the left.

b) Click on "View entry" to check the entry and view the notes entered by your colleagues.

c) Click on "Final approval" to approve the entry.

⇨ The "Term usage status" dialog box appears.



"Term usage status" dialog

d) If you wish, you can enter a comment to be stored in the termbase. By clicking on the small icon, you can also copy the comments made during the approval process to the field before editing them.

e) Select under each term whether they are accepted or rejected terms.

⇨ This information is entered in the termbase.

f) Click on "Set".

⇨ The entry is granted final approval and closed in your task box.

10.3 Assigning a Re-translation Task

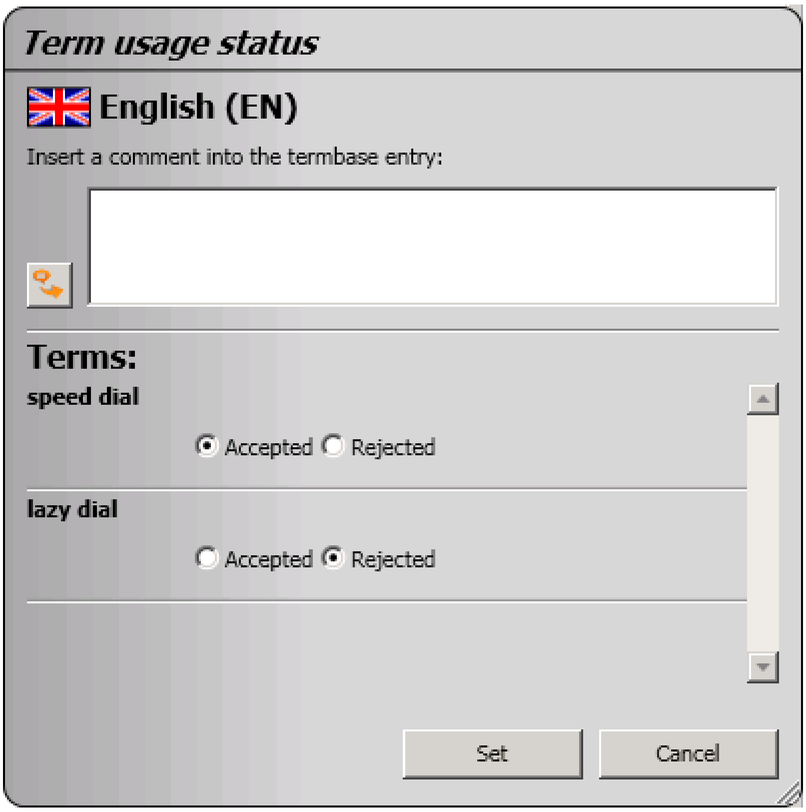
To reject a translation suggestion and request a new suggestion:

a) Select the entry from the list on the left.

b) Click on "View entry" to check the entry and view the notes entered by your colleagues.

c) Click on "Assign retranslation task".

⇨ The "Term usage status" dialog appears so you can set the usage status of the existing translation.



"Term usage status" dialog

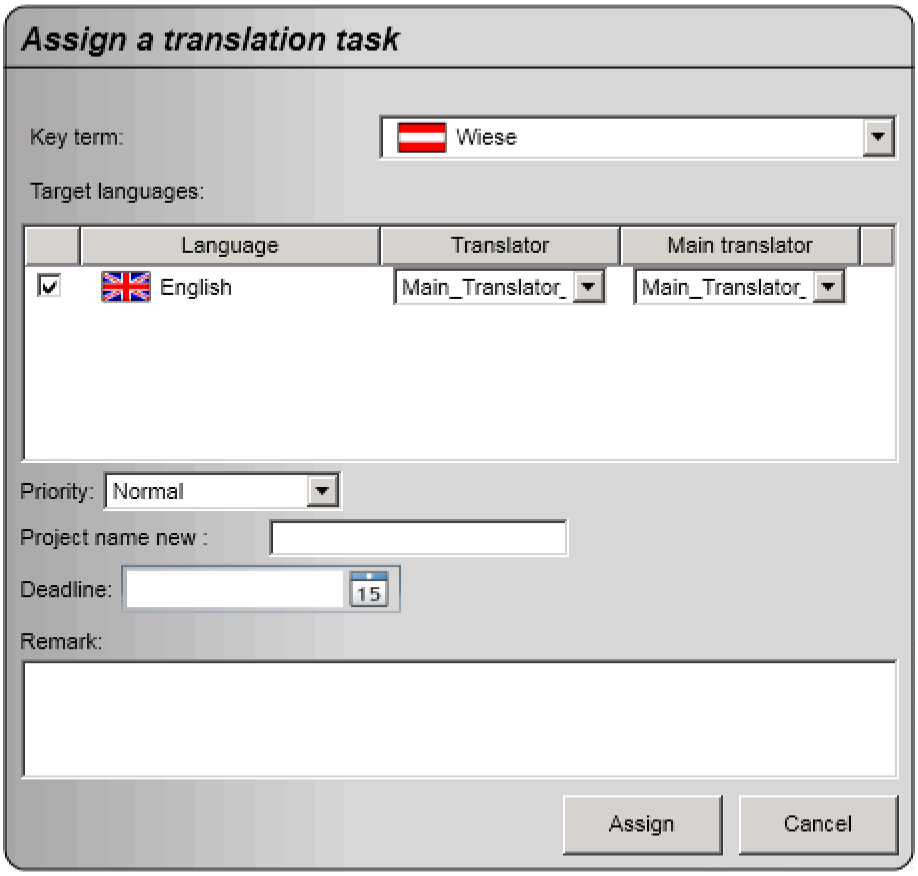
d) If you wish, you can enter a comment to be stored in the termbase. By clicking on the small icon, you can also copy the comments made during the approval process to the field before editing them.

e) Mark the rejected term as "Rejected".

⇨ This information is entered in the termbase. Terms that have been rejected are not deleted but are flagged as "Rejected" in the termbase. This makes it possible to check that the correct terminology is being used.

⇨ Click on "Set".

⇨ The "Assign translation task" dialog box appears.



"Assign translation task" dialog

f) Select the relevant key term.

g) Select the relevant target languages.

h) Select a translator group for each language, and also a master translator group if required.

i) Edit the priority, the custom field (Project in the screenshot) and the deadline, if required.

j) Add a remark for the translator.

k) Click on "Assign".

⇨ The translator will now receive a new translation task. The current approval task will be closed. As soon as the translator has made a new suggestion, you will receive a new approval task.

10.4 Providing Your Own Translation

Caution

This function is only available if it is enabled in the user group configuration (see General Group Settings chapter in quickTerm configuration).

To reject a translation suggestion and enter your own translation in the termbase:

a) Select the entry from the list on the left.

b) Click "Provide own translation" to enter your own translation.

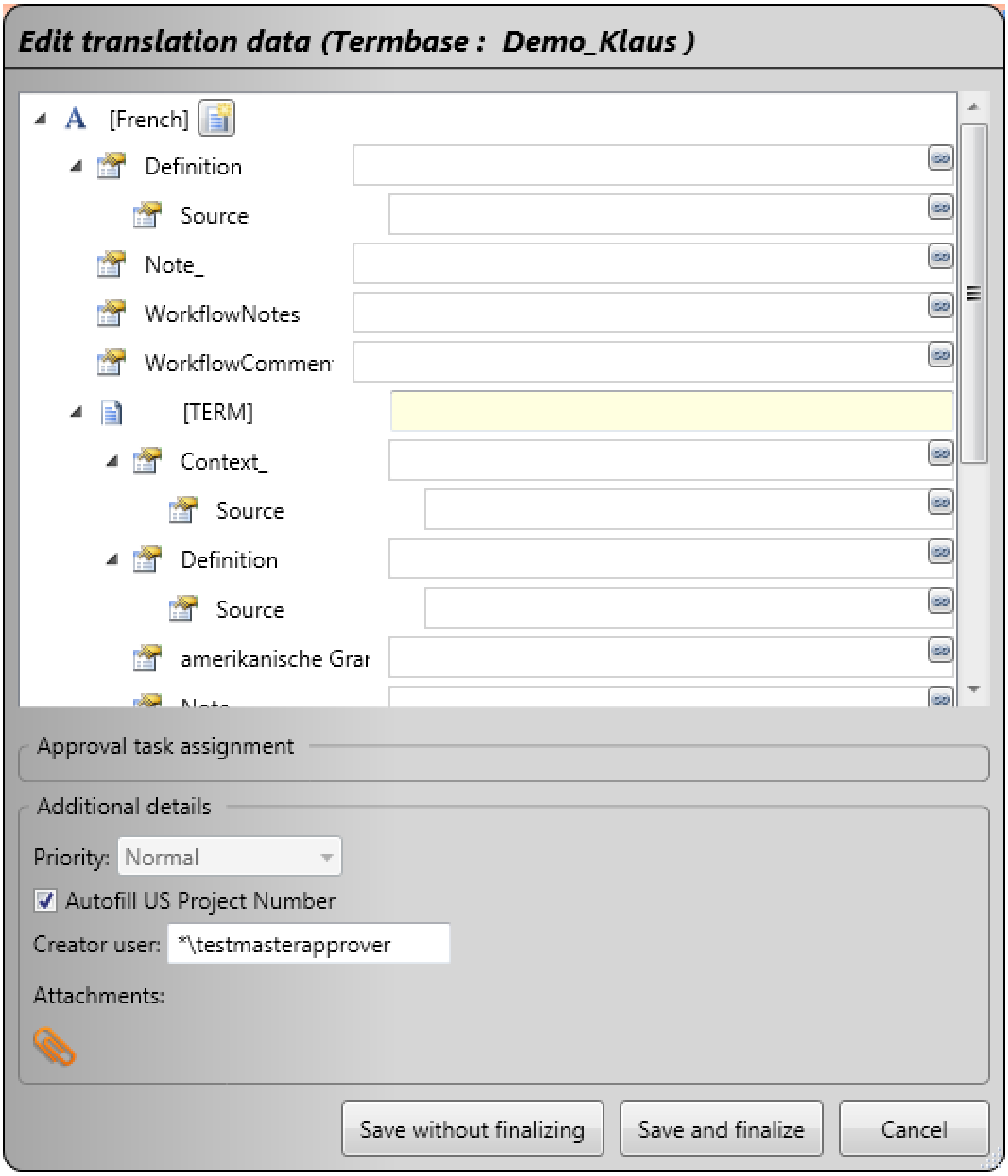
   ⇨ The "Edit translation data" dialog box appears.

c) Enter the desired translation for the entry, including as much of the additional information as you wish.

d) Click on "Save without finalizing" if you do not want to approve your own translation yet for some reason (this means that apart from the key term, neither the relevant approval task nor the term usage status will be changed), or "Save and finalize". If you click the latter, final approval is granted and the "Term usage status" dialog box will then appear.

⇨ The correct translation will be automatically entered into the termbase by default.

The current approval task will be closed.



"Edit translation data" dialog

10.5 Editing (and Approving) a Translation

This is performed in the same way as "Provide own translation". The only difference is that here you can edit a translation that already exists instead of rejecting it and entering a new translation. Apart from that, the dialog box and buttons are identical.

10.6 Restarting Approval

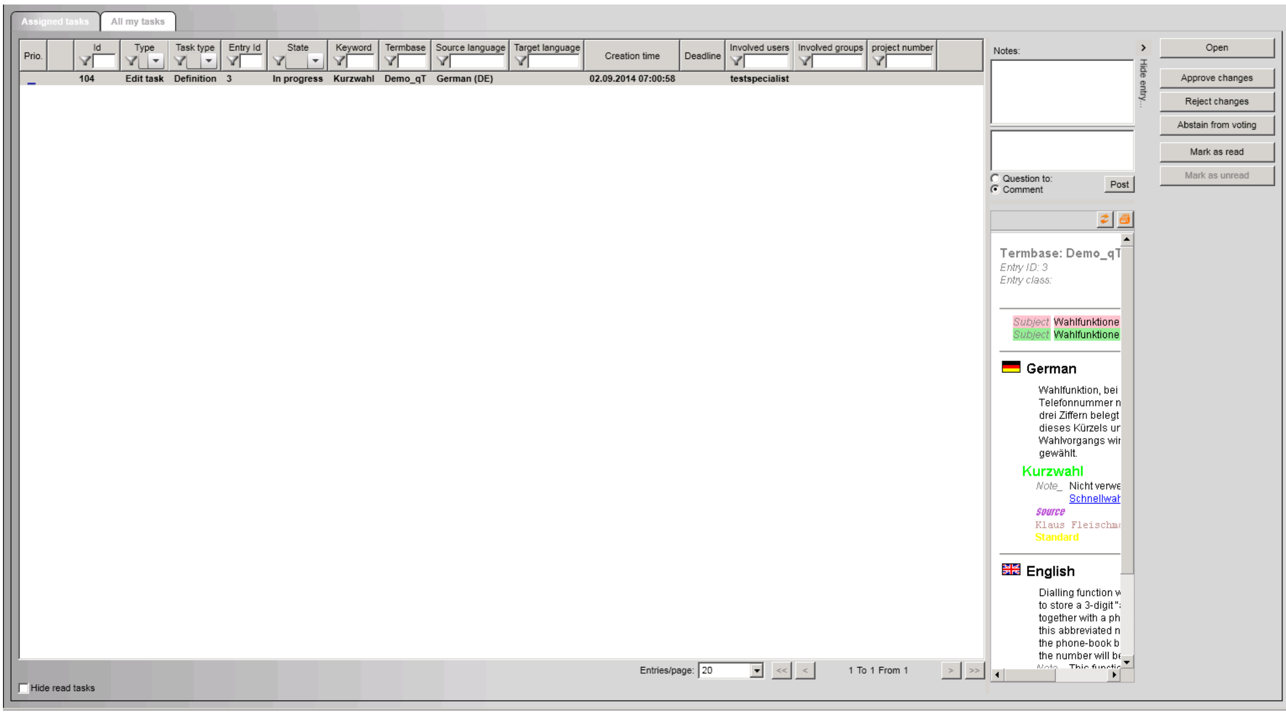
With this function the terminologist or master approver can restart an approval task from the beginning. All votes that had already been cast are discarded and the voting process is restarted. In addition to a message to the approver, you can also enter the priority and the (new) deadline here in the same way as for other approval tasks.

11 Specialist: Special Functions

As a specialist, an entry or a term request can be assigned to you by the terminologist in the quickTerm Workflow in order for you to provide further information about the term. The terminologist selects the additional fields you should complete on assignment.

You can collaborate with the other specialists via the comments function, enter information and then approve your suggestion.

11.1 Editing a Task



List of assigned tasks

Switch to the Request management screen. In the list of assigned tasks, you can filter by edit tasks.

The list shows the open edit tasks. These tasks and any of the tasks you have already completed are shown in the "All my tasks" tab.

On the right-hand side of the screen, you will see the details relating to the highlighted entry. The fields that you need to edit are highlighted in green and red in this area. Red signifies the data before editing, in case you have the task of editing content. Green signifies the current status of your edit. If there is no content in the red fields, then these are currently blank in the termbase or term request. If there is no content in the green fields, then you (or your colleagues) have not yet entered any information.

All tasks in the task list will originally be in status "unread". Two buttons on the bottom of the screen allow you to change the state manually: *Mark read* and *mark unread*. Depending on the current task read status, one of these buttons is always grayed out. Unread tasks are always displayed in bold, like in Outlook. By clicking on the respective button, you can manually change the read state.

Apart from that, the read state is automatically changed when you:

- Select a task
- Edit a task (except for adding a comment)
- *Open* a task, or
- Change the status of a task by completing a process step.

In addition, you can filter the task lists according to the read status by clicking on *Hide read tasks*. This allows you to better keep your to-dos within sight. Of course you can also deactivate the filter and see all tasks.

The list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by selecting one or more options from a pre-defined list.

Hide already closed tasks

These tasks include approved and rejected tasks.

Editing a task

To edit the task proceed as follows:

a) Select the desired task from the list.

b) Click on "Open" to open the details about the edit task.

⇨ The "Edit task" dialog box appears.

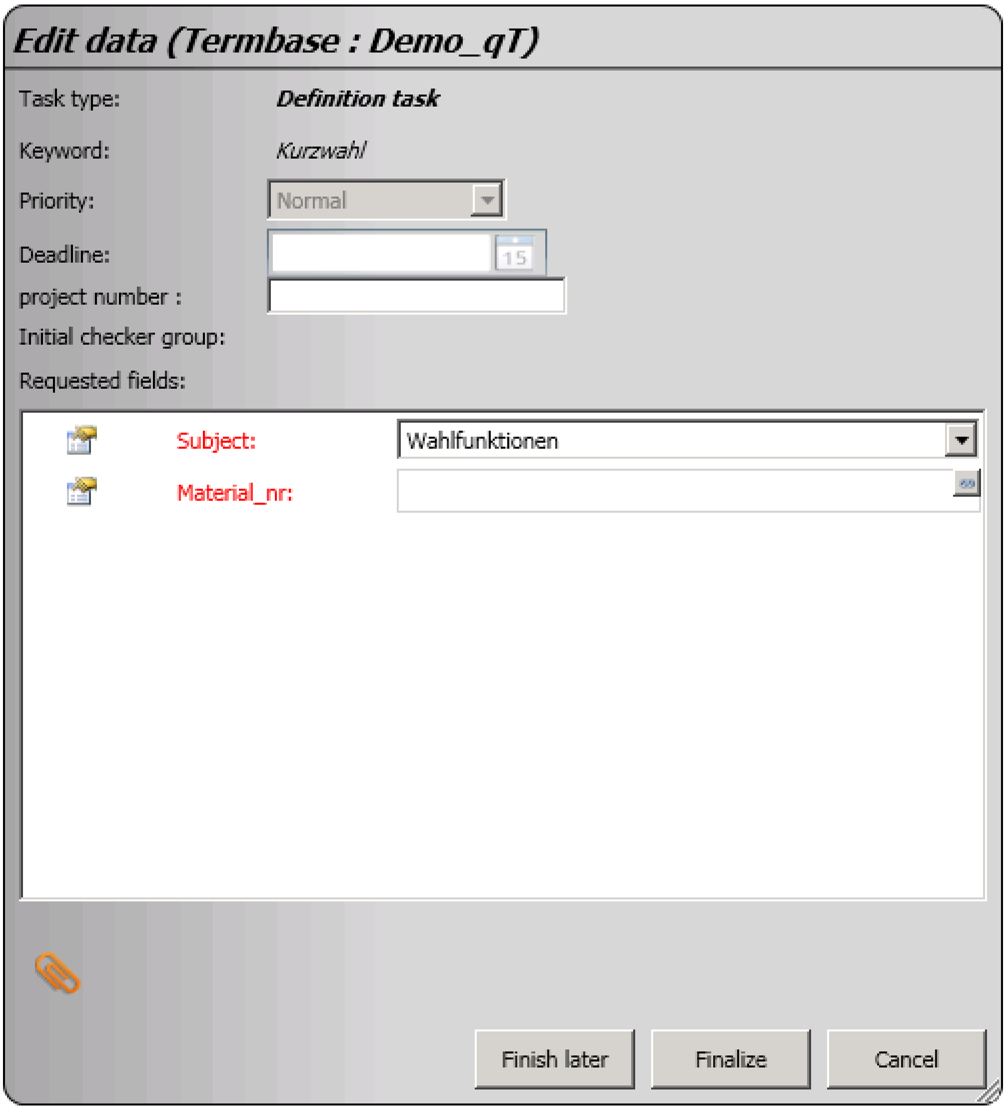
c) Enter additional information in the fields displayed in red. The other fields contain information that either the terminologist has already added to the termbase or the requestor has entered in the term request. If you want to close the task later, you can do so by clicking "Finish later".

d) If you want to close the task later, you can do so by clicking "Finish later". Otherwise, click on "Finalize".

⇨ The information you have entered is saved and shown in the overview. Your approval is automatically granted for this entry.

Changing edit tasks that have already been approved

If the edit task should be assigned to several groups and some groups have already voted, these votes are deleted and the edit task is presented again for approval.



"Edit task" dialog

Voting on changes made by other users

Voting procedure

The voting procedure to be used within a group (e.g., First win) is defined for the individual groups during configuration. If a voting procedure is not defined, the buttons described here will not be available.

To approve or reject the additional information provided by your colleagues: Select the relevant entry from the list and then click the desired button:

- "Approve changes"

  By clicking this button you are accepting the changes.

- "Reject change"

  By clicking this button you are rejecting the changes. In this case you should also enter a comment or provide additional information.

- "Abstain from voting"

  If you "do not mind", you can register this by clicking this button.

Your approval, rejection or abstention from voting will be saved, and the task will be hidden from the "Assigned tasks" list.

12 Translator: Special Functions

As a translator, you are responsible for the linguistic development of the termbase together with the target-language approvers. You can perform this function in three ways using quickTerm:

- In the quickTerm search dialog, you can request multilingual terms. As this is the standard term request function, it is not explained in detail here. For more details see Term Request.
- In the quickTerm search dialog, you can suggest a first or additional translation for existing entries.
- In your task box (Request management) you can process the translation tasks assigned to you.

12.1 Providing Translation Suggestions

As a translator, you can suggest one or more (new) foreign-language equivalent(s) for an existing entry. In quickTerm this is known as a Translation suggestion.

To provide a translation suggestion:

a) Search for the entry in quickTerm for which you want to provide a translation suggestion.

b) Click on "Suggest translation".

⇨ The "Suggest translation" dialog box appears.

c) Select the desired target language from the list. The list only contains the languages to which you have access rights and for which there is not a foreign-language equivalent. Depending on the configuration, it is either permitted or forbidden for you to provide translation suggestions for entries that already have a translation. In this case a warning message appears if the foreign-language equivalent has already been approved. Select "OK"; you will then receive a message confirming that the approval process has been restarted.

d) Enter the details of the translation suggestion. If you want to suggest more than one term, use the "Add new term" button (e.g., for synonyms).

e) Define the priority and edit the custom field (autofill or enter manually), where applicable.

f) If you want to initiate the approval process for the relevant approver, check the "Start approval task" checkbox. This option is not available if your language is defined as one that absolutely must be approved or does not need approval. In the event of the former, your suggestion will be automatically sent for approval, or for the latter, it will be granted approval immediately. Translation suggestions that are sent for approval are always cascaded, as the master approver is also the final approver.

g) Click on the paper clip icon if you want to attach a file.

h) Under the "task assignment", define the master translator group. If you choose "<none>" here, you can then finalize the translation suggestion by clicking "Save and finalize". If you select a master translator group, the "Send to masters" button appears instead of the "Save and finalize" button. By clicking on it, the translation suggestion is forwarded to the master translator group. The buttons "Cancel" and "Save without finalizing" are also available for you to select in either case.

i) Clicking on "Save and finalize" does the following:

⇨ quickTerm enters your translation suggestion in the termbase.

⇨ quickTerm starts the approval process, if required.

If you enter a translation suggestion for an entry that was also a translation request from the terminologist, you will be notified of this and can thus close the translation request at the same time.

Approvers for target languages

Target-language approval only works if at least one approver group is defined for each language. quickTerm will therefore notify you of an error, both in group configuration and when sending an approval task, if an approver group has not been assigned. You can forward this error to the administrator.

12.2 Editing Translation Tasks

The terminologist can assign individual entries to you for "translation". You will be notified by e-mail and have an overview of these tasks in your task box where you can also process them.

Switch to your task box (Request management screen).

This screen contains two tabs:

- "Assigned tasks"

This tab contains all the translation tasks assigned to you and the translation suggestions that you can process. Other possible task types are: Edit task, Feedback, Approval task, Term request. Task type: Assignment, Change, Definition, Request, Suggestion.

- "All my tasks"

  This tab contains the tasks assigned to you and any other tasks that are relevant to you, even if there is no action required of you at the moment; for example, the term requests you have submitted as a translator. You can track the status of approvals here.

All tasks in the task list will originally be in status "unread". Two buttons on the bottom of the screen allow you to change the state manually: *Mark read* and *mark unread*. Depending on the current task read status, one of these buttons is always grayed out. Unread tasks are always displayed in bold, like in Outlook. By clicking on the respective button, you can manually change the read state.

Apart from that, the read state is automatically changed when you:

- Select a task
- Edit a task (except for adding a comment)
- *Open* a task, or
- Change the status of a task by completing a process step.

In addition, you can filter the task lists according to the read status by clicking on *Hide read tasks*. This allows you to better keep your to-dos within sight. Of course you can also deactivate the filter and see all tasks.

The list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by selecting one or more options from a pre-defined list.

Hide already closed tasks

These tasks include approved and rejected tasks.

Editing a translation task

To edit a translation task:

a) Highlight the desired translation task in the list.

b) On the right you will see the entry to be translated.

c) If you do not want to *Reject* the *task*, *Ask for information* (only enabled if the requestor is not an anonymous end user), or *respond*, click on *Open*.

⇨ The "Edit translation data" dialog box appears.

d) Enter the corresponding details for the translation.

e) Click on the paper clip icon if you want to attach a file.

f) Edit the custom field (autofill or enter manually), where applicable.

You now have several options to branch into other workflows:

Assign to reviewer

a) If you are working with a colleague who is going to review your translation suggestions, click on "Save without finalizing". The status is then "Initial translation provided". The task is also marked as "read". This enables the first translator to hide the task using both the "read" view and the status filter. The second translator can set up a status filter so that only the entries with the status "Initial translation provided" are shown.

⇨ Your colleague can now log in, edit your data and then also click on "Save without finalizing".

Assign to master translator

a) If you have defined a master translator and you would like to delegate the translation suggestion to a master translator before approval, click on "Send to masters".

⇨ The master translator can now log in and edit, then save the translation.

Assign to approver

a) If you would like to have the translation approved, click on the *Assign approval task* checkbox. This option is not available if your language is defined as one that absolutely must be approved or does not need approval. In the event of the former, your suggestion will be automatically sent for approval, or for the latter, it will be granted approval immediately. Translation suggestions that are sent for approval are always cascaded, as the master approver is also the final approver.

b) Click on "Save and Finalize".

⇨ quickTerm enters your translation suggestion in the termbase.

⇨ quickTerm starts the approval process, if required.

⇨ quickTerm closes the translation task.

Approvers for target languages

Target-language approval only works if at least one approver group is defined for each language. quickTerm will therefore notify you of an error, both in group configuration and when sending an approval task, if an approver group has not been assigned. You can forward this error to the administrator.

Subsequently edited translation suggestions

Do not edit a translation suggestion after closing it. You can no longer add these changes to the termbase. If you want to make changes, submit a change request.

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13 Master Translator: Special Functions

The master translator has two additional functions that distinguish him from the translator:

- If the translator has already sent translation data to the master translator ("Translator waiting for check" status), the translator cannot reject the entry. It is only possible to do so for requests or suggestions that the translator has not yet forwarded.
- During review, if the master translator does not grant approval to the translator for his entry, he can send the translation data back to the translator by clicking on the *Assign to translators* button. The status will be reset to "Assigned to translator".

14 Personal Settings

In Personal settings, you can configure the basic settings for quickTerm Client. These settings are saved on the server.

If the user does not have permission to save changes (this is configured by the administrator in the user group settings), the changes will only be valid for the session in progress. As soon as the user logs out and then back in again, the previous values will be active. They will therefore NOT be saved on the server.

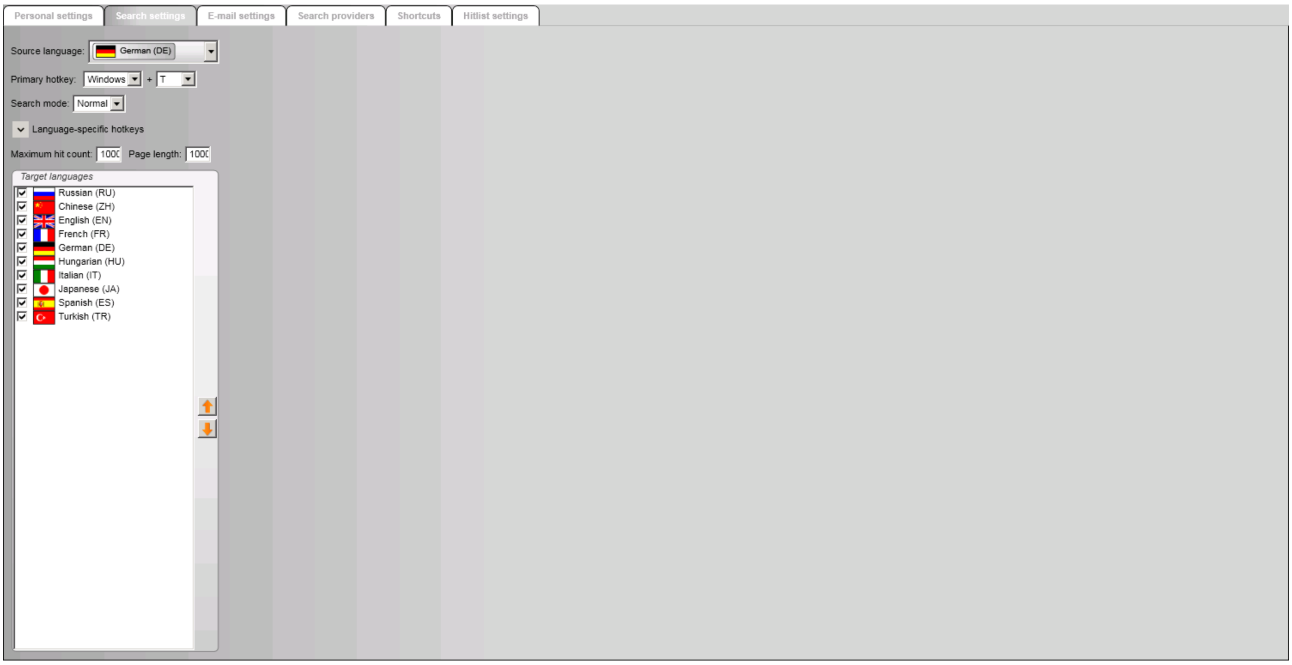
This screen must also be selected the first time you log in to quickTerm Client.

Personal settings

The screen is divided into several areas, depending on the users' authorization level (which user group they belong to):

- Personal settings
- Search settings
- E-mail settings
- Search providers (not for global administrators)
- Shortcuts (not for global administrators)
- Hitlist settings (only if you are authorized to set your own hitlist settings; not for global administrators)

14.1 Search Settings



Personal settings, Search settings

You can define the following settings here:

- "Source language"

  This setting defines the language in which you normally search a termbase. The search results will also be shown in this language first, and then in the target languages. The languages available are the languages contained in the termbases and approved by the administrator. You can also change the source language at any time within quickTerm Client. If you are unable to select all the languages, then the administrator has limited the number of available source languages.

- "Primary hotkey"

  This setting defines which key combination is used to launch quickTerm. To call up quickTerm, highlight text in any application and enter the key combination. This launches quickTerm and automatically starts searching in the currently set source language. If no text is highlighted, quickTerm starts without performing a search and you can enter a search term in the search field.

  The hotkey can consist of any letter in combination with the Windows key or the ALT key. Please note that fixed combinations, such as "WINDOWS+E" or "WINDOWS+D", are defined in the system and that most applications already use ALT combinations. quickTerm checks this when a hotkey is selected and a message appears if you enter a hotkey that is already in use. We recommend the default settings "WINDOWS +T" (for terminology) or "WINDOWS+Q" (for quickTerm).

- "Search mode"

  This setting defines the default search mode to be used in quickTerm Client.

  - "Normal"

    The terms are searched.

  - "Full text"

    All fields in the terminology database are searched.

  - "Fuzzy"

    The terms are searched and similar terms are also found. The advantage of this option is that similarly spelled terms (e.g., due to typing errors) are also found.

- "Language-specific hotkeys"

  Here you can enter additional hotkeys so that the search is not performed in the currently selected source language, but in a source language you have defined yourself. For example, you can set a hotkey for searching in German and another hotkey for searching in English.

- "Maximum hit count"

  Here you can define the maximum number of terms that are retrieved during a search. The default value is 100.

  If you set the maximum hit count significantly higher than the page length count, this can impair the search performance for fuzzy searches.

- "Page length:"

  Here you can define the number of terms that are shown per screen in the hitlist (scroll through using the arrow button at the end of the list).

  The default value is 25.

- "Target languages"

  This setting defines the language or languages that are also displayed in the results window in addition to the source language. The languages available are the languages contained in the termbases and approved by the administrator. You can manage the order of the target languages using the arrow buttons. This function is also available on the "Search" screen by clicking on the Target languages. If you cannot make a selection here, the administrator has already done this for you.

Buttons

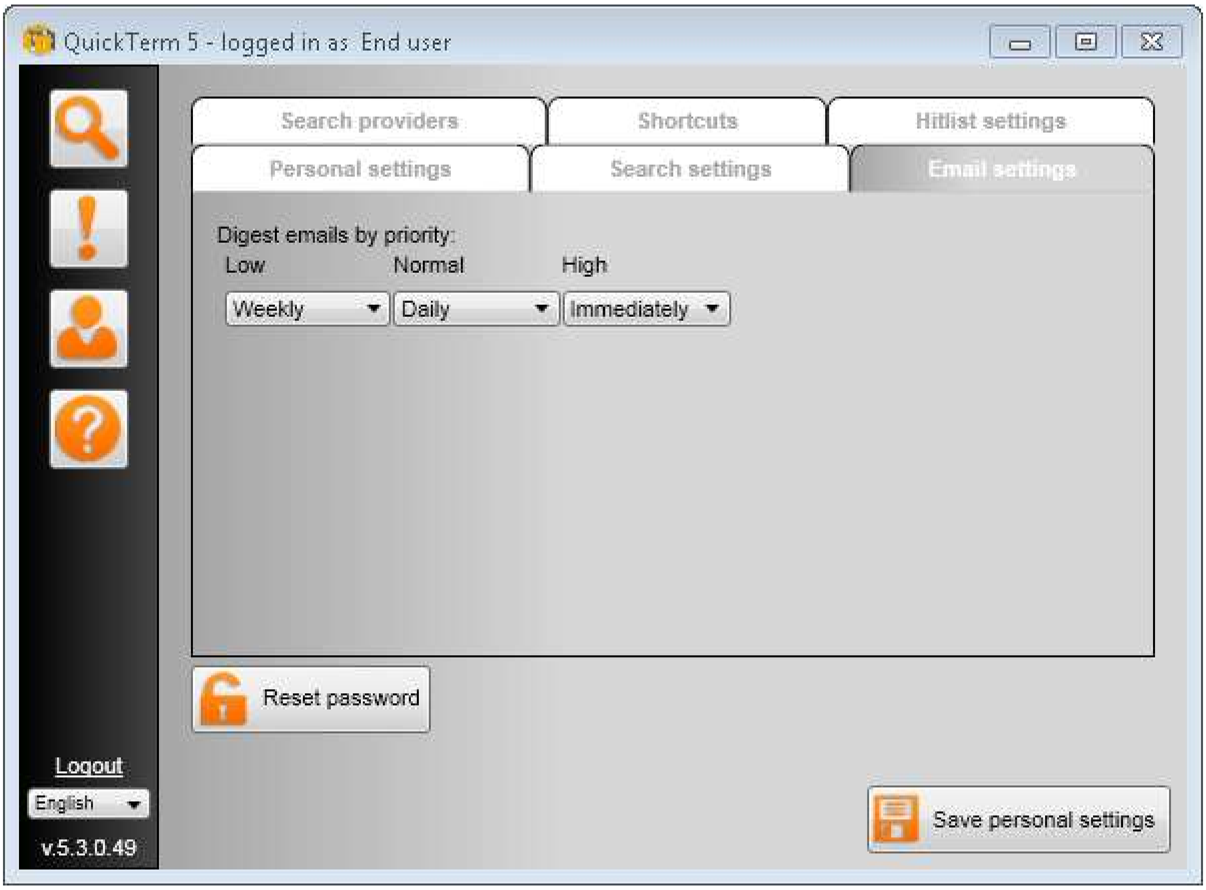
- "Reset password"

  This button is only displayed to quickTerm users. It allows you to automatically generate a new password and have it sent by e-mail.

- "Save personal settings"

  By clicking this button, the settings are saved on the server.

14.2 E-mail Settings



Personal e-mail settings

Here you can determine the delivery interval for digest e-mails. Depending on the priority, the following options are available:

- "Immediately"
- "Daily"
- "Weekly"

- "<Default>"

  This option applies the e-mail settings defined for the relevant group.

Caution

The user-level settings override the group settings.

Additional buttons

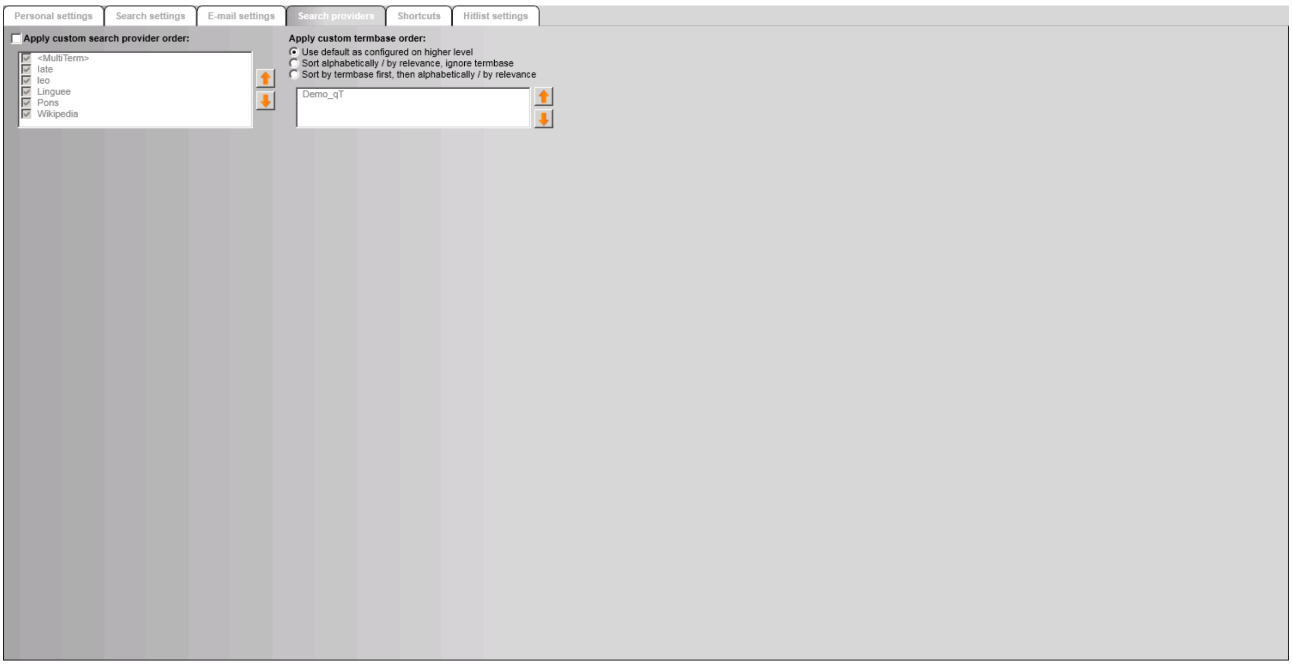
- "Reset password"

  By clicking on this button, a new password is generated by the system for the user and sent to him by e-mail. This button is only displayed to quickTerm users. It allows you to automatically generate a new password and have it sent by e-mail.

- "Save personal settings"

  By clicking this button, the settings are saved on the server and you are logged in.

14.3 Search Providers



Personal settings, "Search providers" tab

In this tab you can define your personal search provider settings. A description of how to configure these settings can be found under Search providers Client Management.

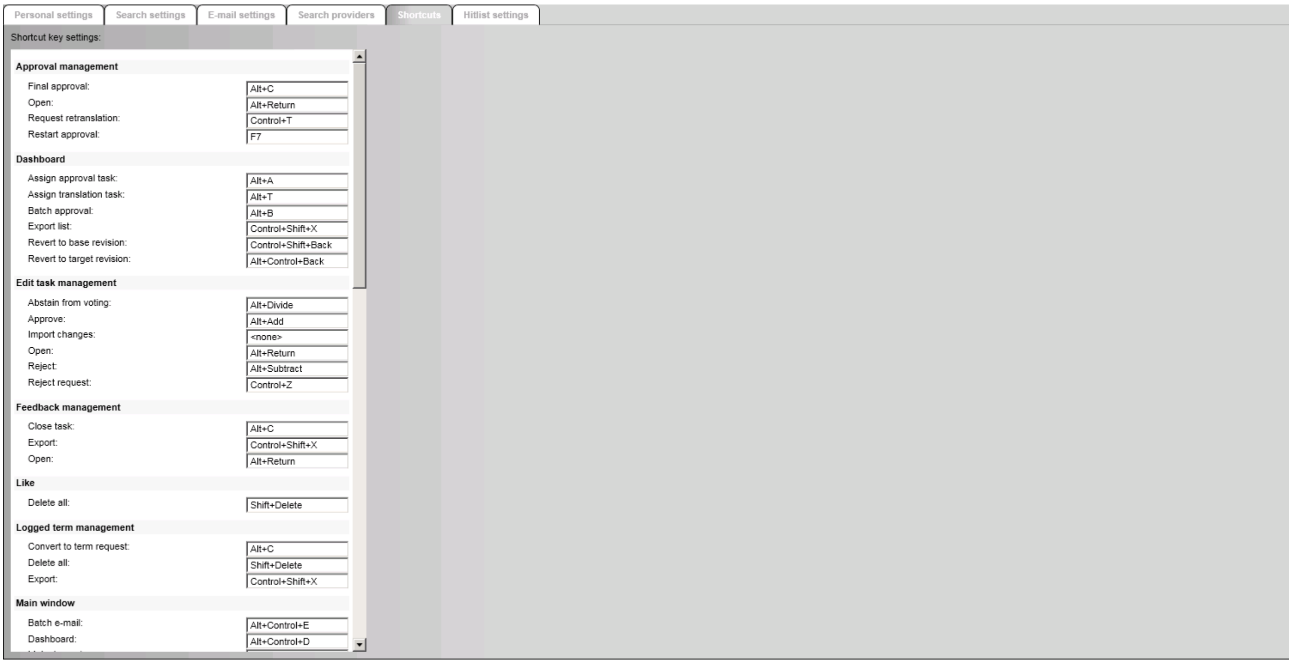
Apply custom search provider order

This setting overrides the client settings for external search providers.

Apply custom termbase order

These settings override the client settings for the termbase order.

14.4 Shortcuts



Personal settings, Shortcuts

In this tab you can define your personal shortcut settings. A description of how to configure these settings can be found under Shortcuts Settings.

14.5 Hitlist Settings

If you have the right to do so, you can change the way the hits in the termbare are shown in the hitlist. A description of how to configure these settings can be found under Hitlist Settings.

Glossary

Approval

In quickTerm, approval is the process that a term must pass through before it is accepted by all decision makers. In the final stage, the term is subjected to a last check and final approval from the terminologist. After this, the entry is considered to be approved.

Approval task

The terminologist or translator can send an entry to approvers for a particular language who can then approve or reject it. This process is called Approval.

First-Wins Procedure

Granting approval via the First-Wins procedure means only one member of a group has to cast a vote. This vote will set the entire group vote status.

Minimum Agreement Procedure

In contrast to the First-Wins and necessary votes procedures, the minimum agreement procedure requires a specific number of users in a group to approve an entry in order for the group's approval to be granted. A group's approval is only deemed valid once the number of votes in agreement has been reached. Negative votes are not counted.

Necessary Votes Procedure

In contrast to the First-Wins or minimum agreement procedure, a number of total votes is defined that has to be cast before the group's decision is deemed valid. The decision does not have to be unanimous.

Requests

In quickTerm, requests are assignments that may be sent to the terminologist by any user, depending on the user authorization. Requests are either term requests, change requests or translation requests. The terminologist can then reject, implement or convert these requests into a task.

Tasks

In quickTerm, tasks are requirements set by the terminologist to be completed by his staff. They comprise edit tasks, approval tasks and translation tasks.

Term request

A term request is generated when a user searches for a term that does not exist in the termbase and would like the term to be added to the termbase. Term requests go to the central terminology team that decides which terms are to be created in MultiTerm and how they are to be created. This is followed by the approval of the entry.

Translation Suggestion

A translator can suggest a (new) foreign-language equivalent for an existing entry. This is referred to as a translation suggestion.

Translation task

A terminologist can assign a new entry to a translator so that the foreign-language equivalent to the source-language term can be researched. This is referred to as a translation task.

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