interverbum Tech
Making Terms Matter

termweb® 4

User & Administrator Guide

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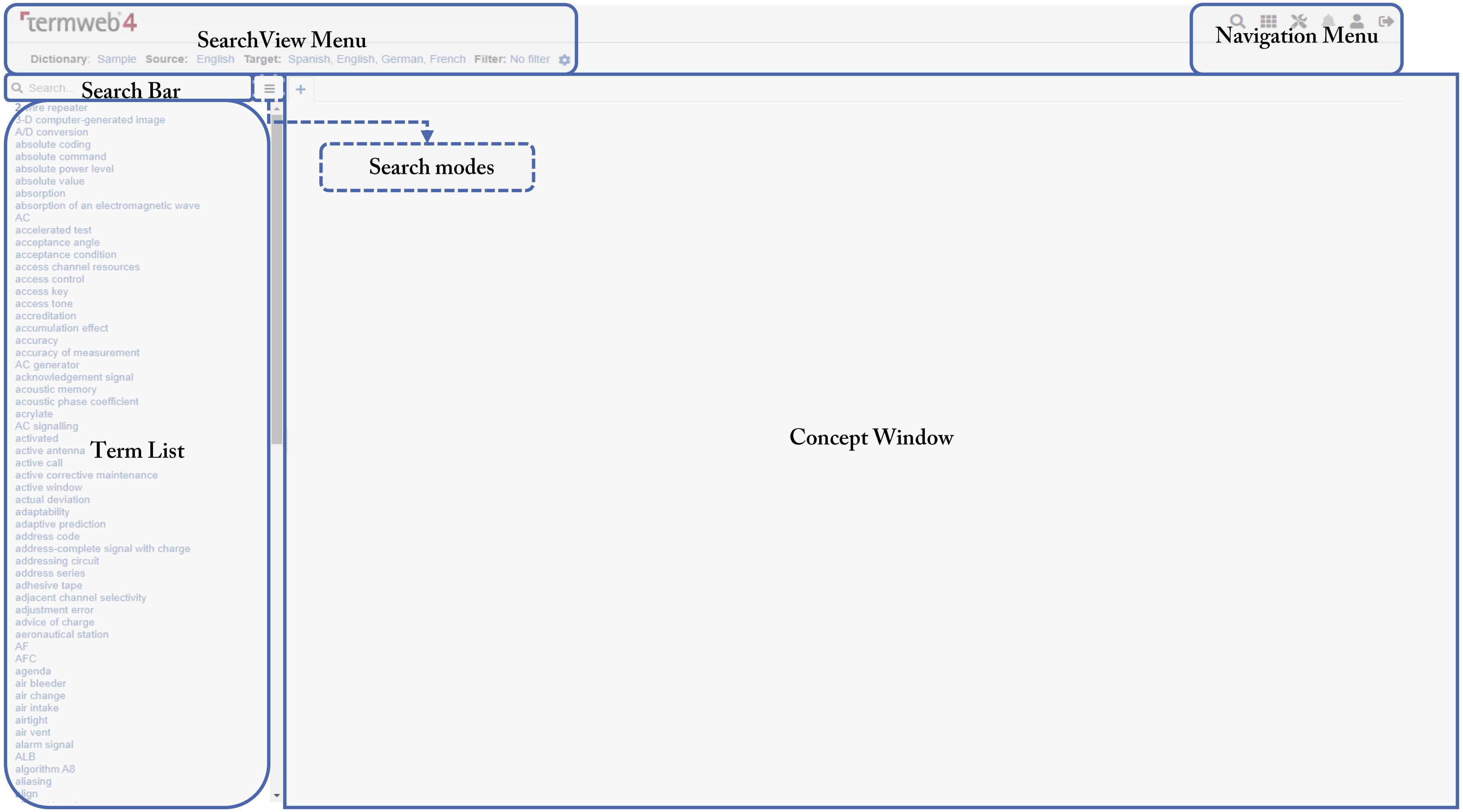
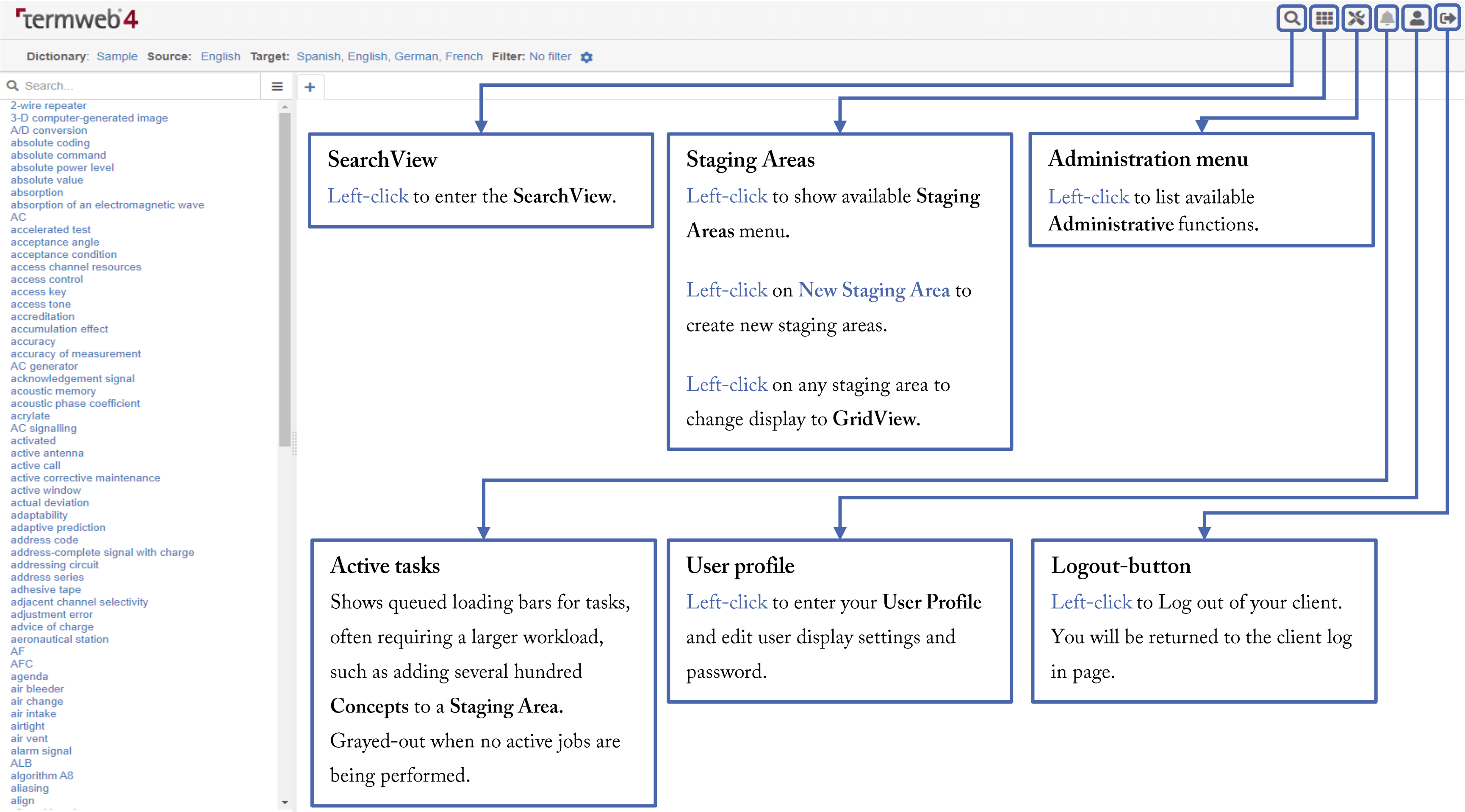
SearchView Overview

The SearchView allows you to view, search, edit terms and concepts. You can also add terms to your **Staging Areas**.

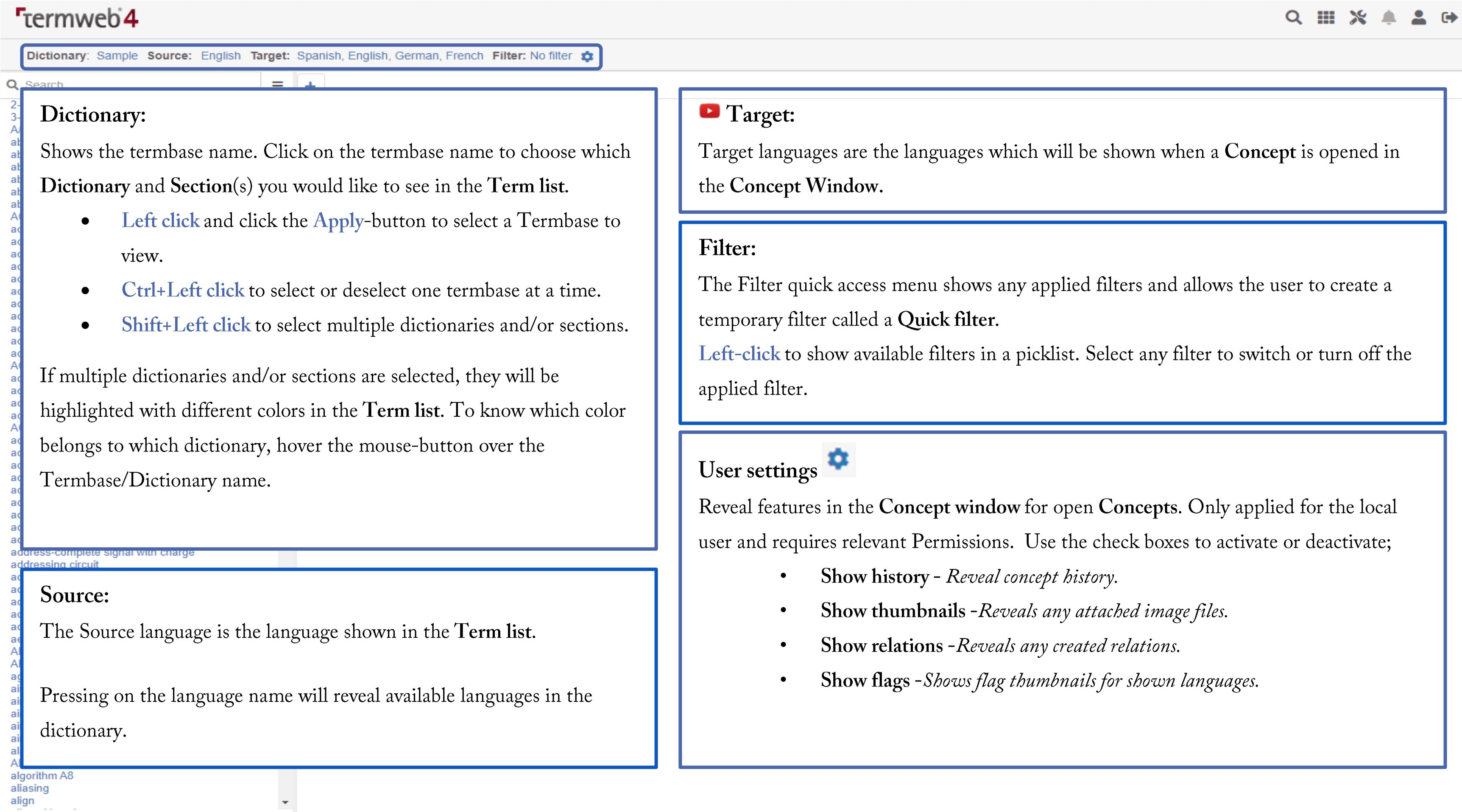


Navigation Menu

Use the Navigation menu to navigate through TermWeb's different user interfaces; the SearchView, GridView and Administration menu.



SearchView Menu



Dictionary:

Shows the termbase name. Click on the termbase name to choose which **Dictionary** and **Section**(s) you would like to see in the **Term list**.

- Left click and click the Apply-button to select a Termbase to view.
- Ctrl+Left click to select or deselect one termbase at a time.
- Shift+Left click to select multiple dictionaries and/or sections.

If multiple dictionaries and/or sections are selected, they will be highlighted with different colors in the **Term list**. To know which color belongs to which dictionary, hover the mouse-button over the Termbase/Dictionary name.

Source:

The Source language is the language shown in the **Term list**.

Pressing on the language name will reveal available languages in the dictionary.

Target:

Target languages are the languages which will be shown when a **Concept** is opened in the **Concept Window**.

Filter:

The Filter quick access menu shows any applied filters and allows the user to create a temporary filter called a **Quick filter**.

Left-click to show available filters in a picklist. Select any filter to switch or turn off the applied filter.

User settings

Reveal features in the **Concept window** for open **Concepts**. Only applied for the local user and requires relevant Permissions. Use the check boxes to activate or deactivate;

- **Show history** - *Reveal concept history.*
- **Show thumbnails** -*Reveals any attached image files.*
- **Show relations** -*Reveals any created relations.*
- **Show flags** -*Shows flag thumbnails for shown languages.*

Search bar and using Wildcards

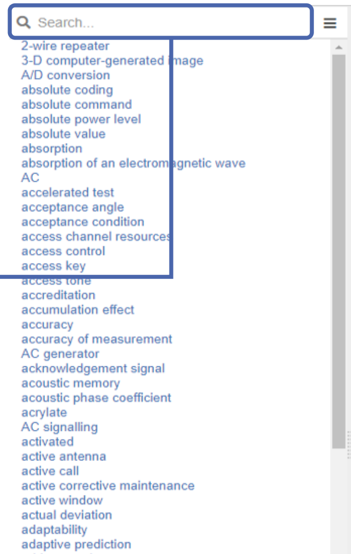
Using the Search bar to search for Terms in your Term list.

Search bar

Left-click on the Search bar, type the term you wish to find, and press Enter to complete the search. Results of your search will appear in the Term list.

Autocomplete will try and complete any terms you type in the Search bar.
Left-click to select any term.

Use asterisks (*) or question marks (?) to perform **wildcard** searches.



Wildcard searches

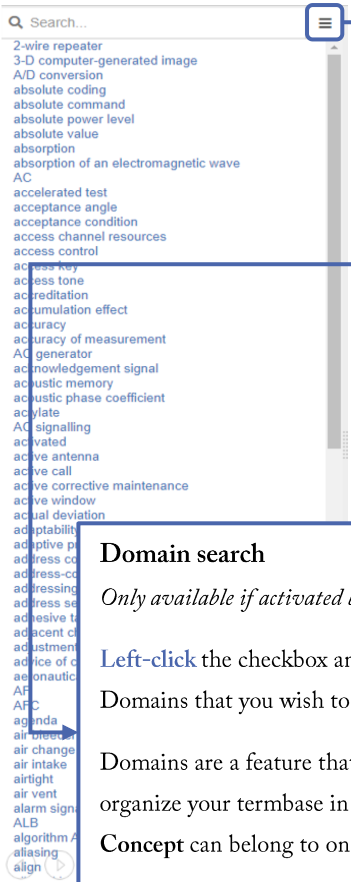
Use **asterisks** (*) to find terms starting and/or beginning with the search.

- Ex 1) *s will find terms ending with “s”.
- Ex 2) te* will find terms beginning with “te”.
- Ex 3) t*st will find terms beginning with “t” and ending with “st”.

Use question marks (?) to replace a single unknown letter or symbol in a term.

Search modes features

The Search Mode menu reveals advanced search options; such as searching within Domains, applying Filters, search in specific fields and more.



Search modes

Left-click on Search modes-button to open the Search modes menu.

Domain search

Only available if activated by the Administrator.

Left-click the checkbox and select which Domains that you wish to search within.

Domains are a feature that allow you to organize your termbase in ontology trees. A **Concept** can belong to one or more domains.

Filters

Left-click on the checkbox to open the Filters menu.

You can create, apply or Share your Filters in the Filters menu.

Filters allow you customize and save specific Search criteria using logical operators.

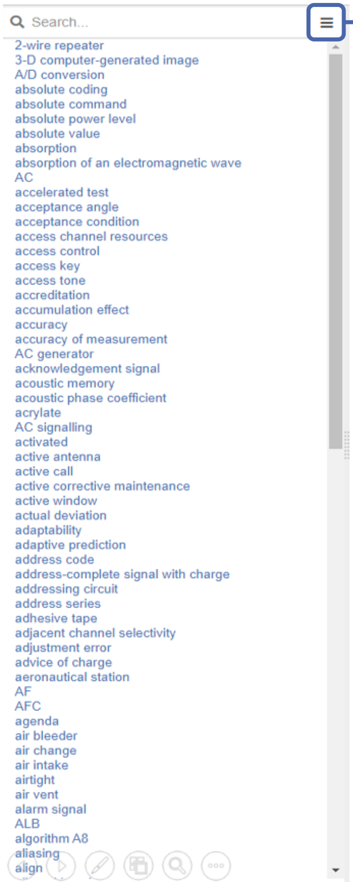
Multifield search

Left-click on the checkbox to open the Multi-field search menu.

You can select specific **Concept-** or **Term-level fields** to search within.

Left-click on checkboxes next to one or more fields and use to the Search bar to search through those specific fields.

Clear search on language change, Normalized search, Fuzzy Search



Search modes

Left-click on Search modes-button to open the Search modes menu.

Clear search on language change

Enabling this option will clear the search bar of any results when switching languages.

Normalized search

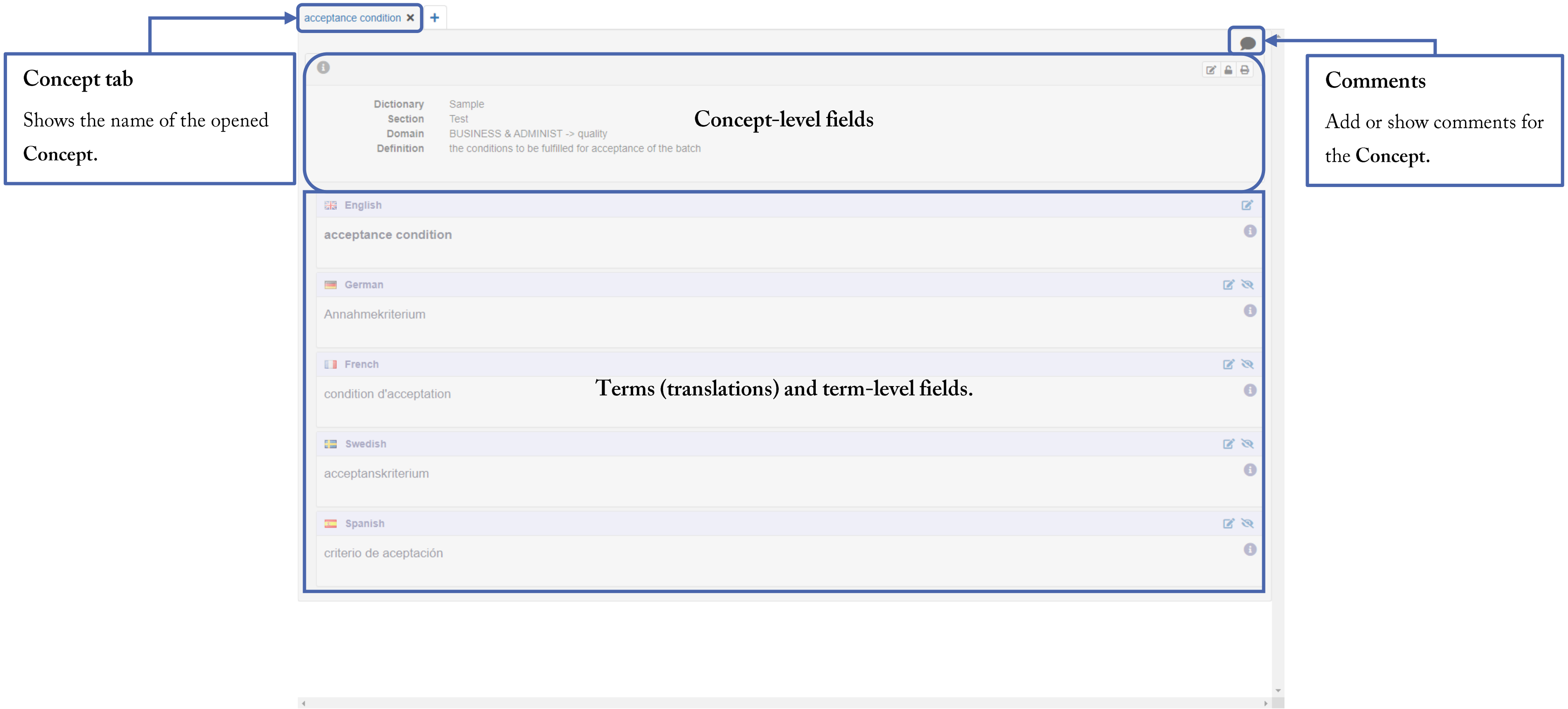
Accepts single- and double-byte characters.

Fuzzy search

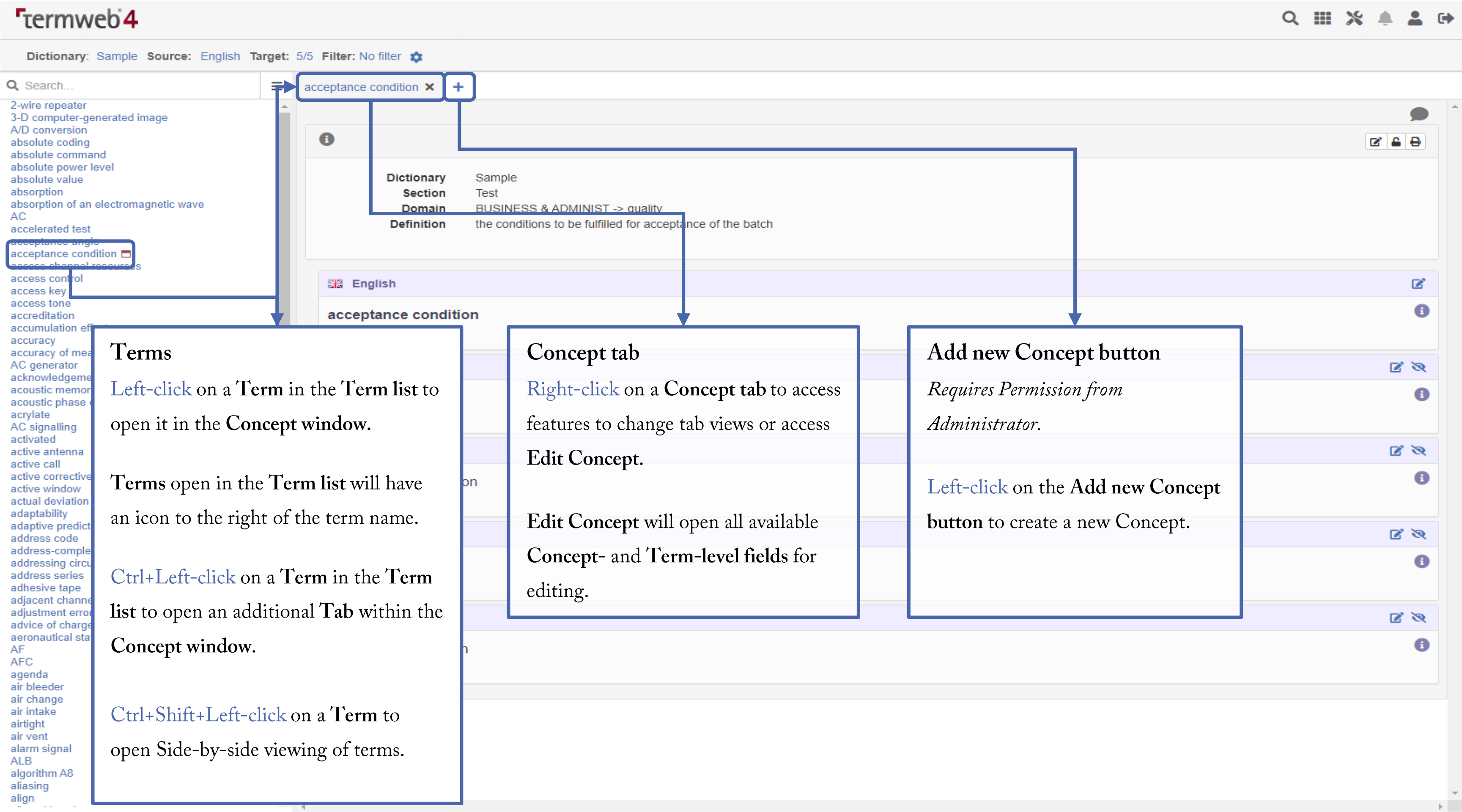
If you're unsure of the spelling of the terms you're searching for, fuzzy search will list terms that are close to what you are searching for.

Concept Window Overview

The Concept window is where you can view and edit your Concepts in the Search View.



Opening Concepts in the Concept Window



Terms

Left-click on a **Term** in the **Term list** to open it in the **Concept window.**

Terms open in the **Term list** will have an icon to the right of the term name.

Ctrl+Left-click on a **Term** in the **Term list** to open an additional **Tab** within the **Concept window.**

Ctrl+Shift+Left-click on a **Term** to open Side-by-side viewing of terms.

Concept tab

Right-click on a **Concept tab** to access features to change tab views or access **Edit Concept.**

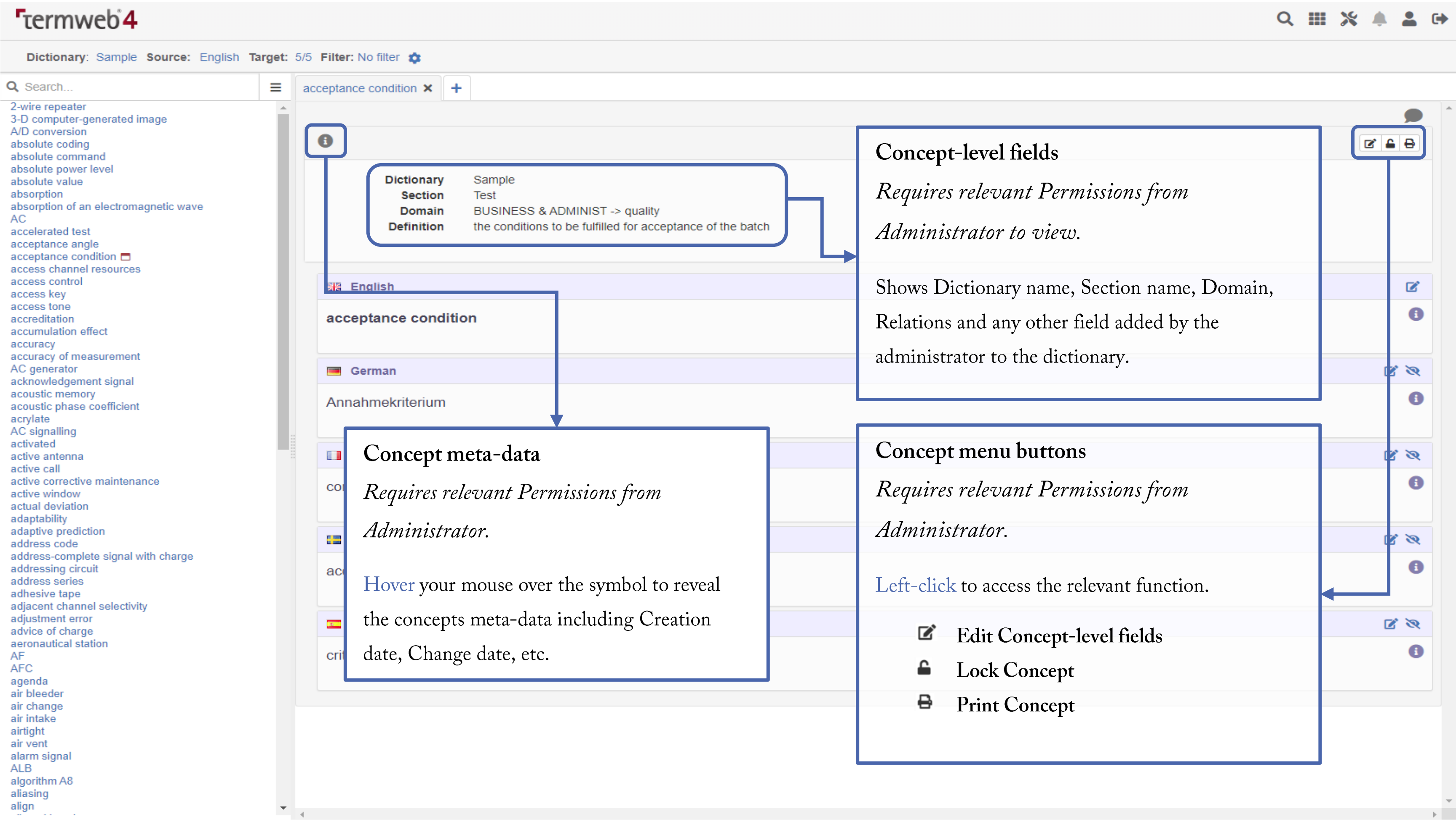
Edit Concept will open all available **Concept-** and **Term-level fields** for editing.

Add new Concept button

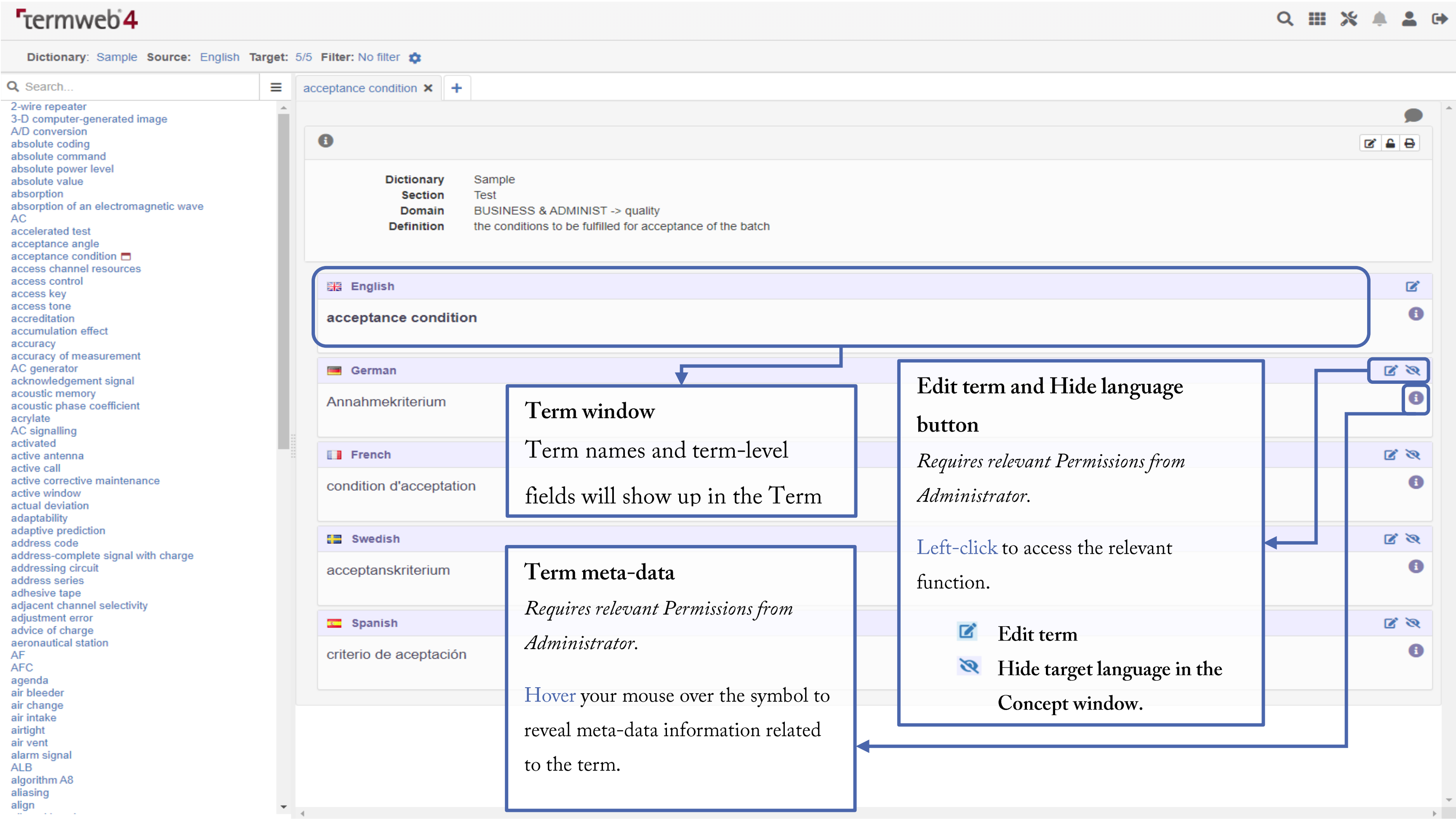
Requires Permission from Administrator.

Left-click on the **Add new Concept button** to create a new Concept.

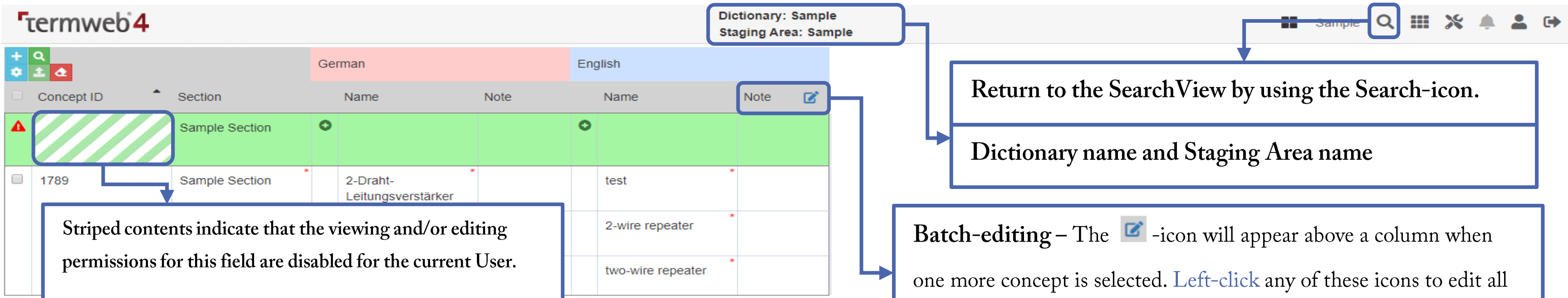
Concept-level menus and fields



Term-level menus and fields



Staging Areas Overview (formerly GridView)



Striped contents indicate that the viewing and/or editing permissions for this field are disabled for the current User.

Return to the SearchView by using the Search-icon.

Dictionary name and Staging Area name

Batch-editing – The -icon will appear above a column when one more concept is selected. Left-click any of these icons to edit all terms in the selected column.

Staging Area

The Staging Areas is a drafting area for concepts. Any changes made to a concept or term will only be applied when the concept is selected or **Published.**

To edit any field, double-click on the field, make the change and press TAB.

To add a new term, press the -icon under each respective language.

New concepts will be highlighted in green.

Edited concepts will be highlighted in blue.

To **Select** one concept, click the checkbox in the farthest left column. To **Select all concepts**, click the checkbox above the farthest left column.

Menu

- **Create new Concept** – Adds blank concept at top of list of concepts.
- **Search** – Opens search bar in Staging Area.
- **Display settings** – Choose which columns (languages, fields) to display.
- **Clear all** – Removes all concepts from Staging Area

Note: The following functionality is only available when you've selected concepts by clicking the checkbox in the leftmost column.

- **Publish** – Concepts are published and removed from the Staging Area.
- **Delete selected concepts** – **Mark** the concept for deletion from the termbase.

TermWeb Integrator application

The TermWeb Integrator is an application that is used to create an Trados Multiterm database on your local computer that can be used in Trados Studio Projects.

All documentation concerning the TermWeb Integrator application has been moved to our online documentation website:

[TermWeb Integrator App]

TermWeb Integrator application

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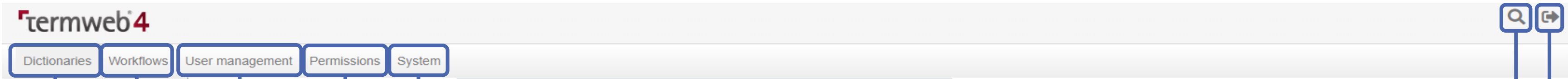
All documentation concerning the TermWeb Integrator application has been moved to our online documentation website:

[TermWeb Integrator App]

Admin Guide – Video tutorials & FAQ

- Introduction to Workflows
- Introduction to Permission Schemes and Locked Languages

Administration menu and features



System

- System administrative functionality. Includes API templates, Statistics and Scheduled Jobs.

Permissions

- Manage Permission Schemes and Locked Languages.

User management

- Manage clients, users, and user groups.

Workflows

- Create and manage your workflows, projects and staging areas.

Dictionaries

- Edit and define the structure of your dictionaries.
- Includes functionality related to your dictionaries such as; Import, Export, History and File Repository.

SearchView

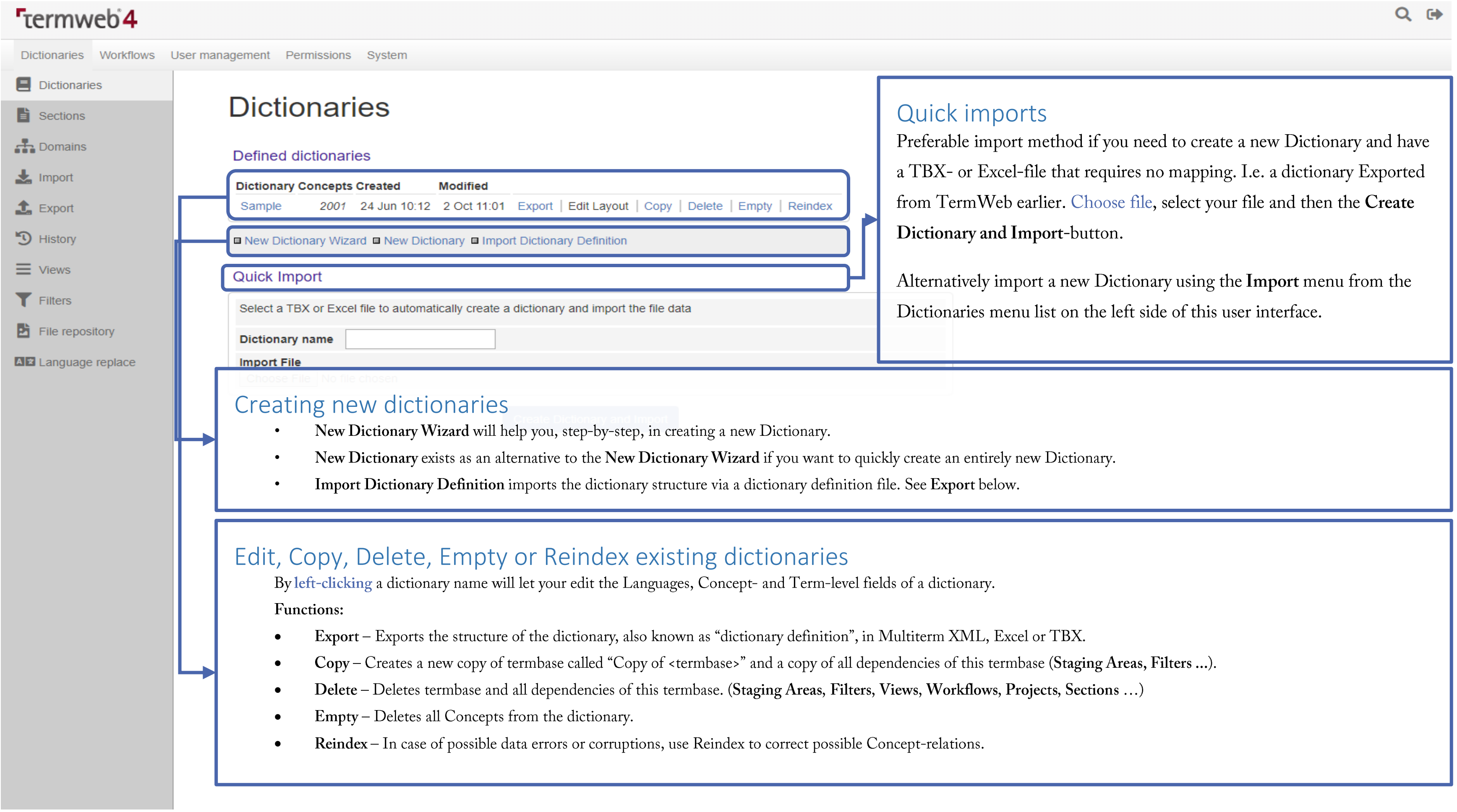
- Left-click to enter the **SearchView**.

Logout-button

- Left-click to Log out of your client. You will be returned to the client log in page.

Dictionaries

The Dictionaries page lets you manage your dictionary structure including languages, Concept- and Term-level fields.



Quick imports

Preferable import method if you need to create a new Dictionary and have a TBX- or Excel-file that requires no mapping. I.e. a dictionary Exported from TermWeb earlier. Choose file, select your file and then the **Create Dictionary and Import**-button.

Alternatively import a new Dictionary using the **Import** menu from the Dictionaries menu list on the left side of this user interface.

Creating new dictionaries

- **New Dictionary Wizard** will help you, step-by-step, in creating a new Dictionary.
- **New Dictionary** exists as an alternative to the **New Dictionary Wizard** if you want to quickly create an entirely new Dictionary.
- **Import Dictionary Definition** imports the dictionary structure via a dictionary definition file. See **Export** below.

Edit, Copy, Delete, Empty or Reindex existing dictionaries

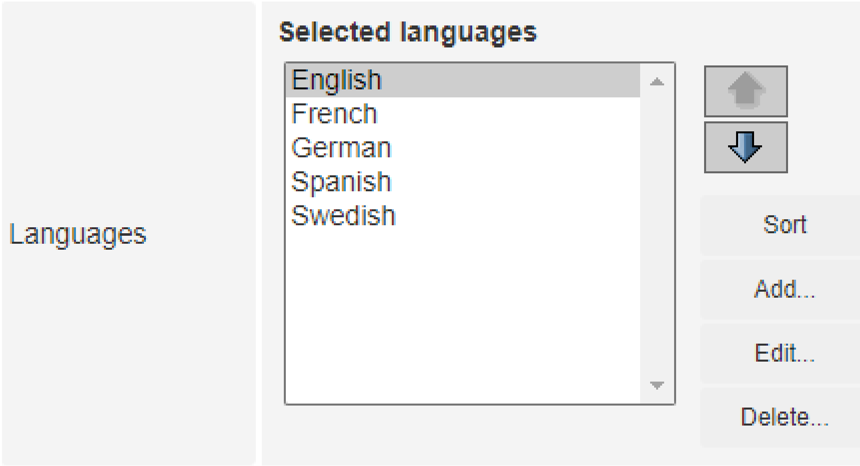
By left-clicking a dictionary name will let your edit the Languages, Concept- and Term-level fields of a dictionary.

Functions:

- **Export** – Exports the structure of the dictionary, also known as “dictionary definition”, in Multiterm XML, Excel or TBX.
- **Copy** – Creates a new copy of termbase called “Copy of <termbase>” and a copy of all dependencies of this termbase (**Staging Areas, Filters …**).
- **Delete** – Deletes termbase and all dependencies of this termbase. (**Staging Areas, Filters, Views, Workflows, Projects, Sections** …)
- **Empty** – Deletes all Concepts from the dictionary.
- **Reindex** – In case of possible data errors or corruptions, use Reindex to correct possible Concept-relations.

Languages

Languages can be edited in the dictionary structure click the Dictionary name on the **Dictionaries** page.



Sorting languages

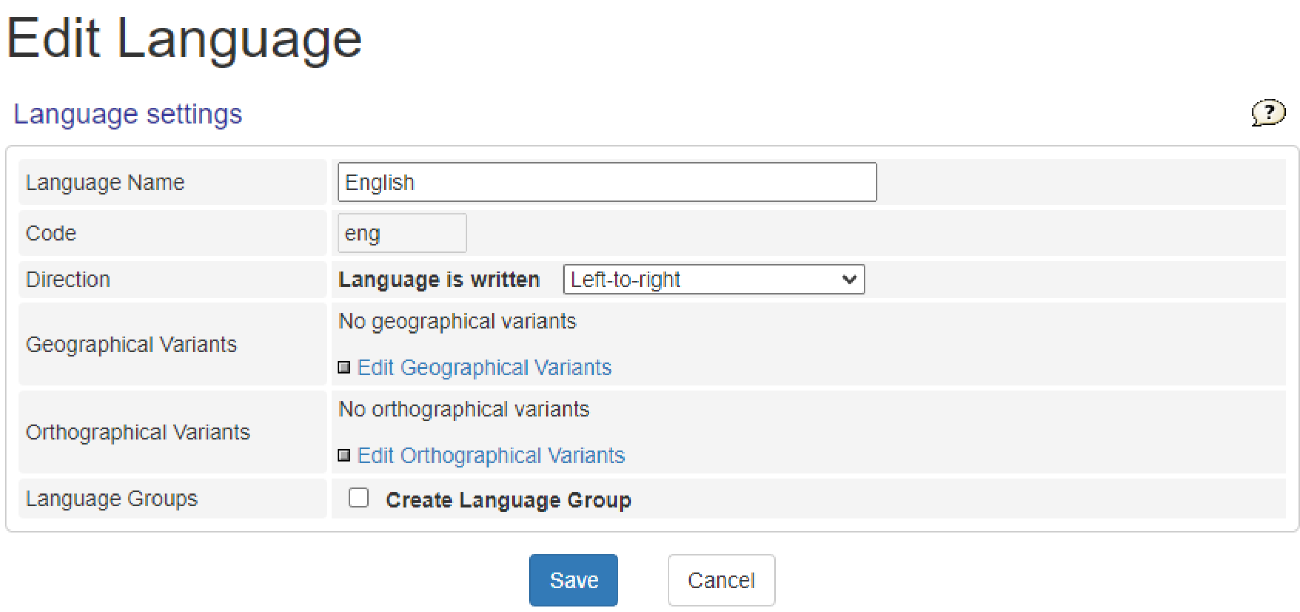
Administrators can decide the order the languages appear in a dictionary by selecting Dictionaries, and either use the arrow keys to manually move languages or the Sort button to sort languages alphabetically.

Add languages

Administrators can add languages to the Dictionary but clicking the **Add…** button and following the menu steps.

Edit languages

Administrators can add languages to the Dictionary but clicking the **Edit…** button to enter the **Edit Language menu**.



Adding geographical or orthographical variants

Geographical and orthographical variants can be added in the **Edit Language menu** and clicking Edit Geographical Variants or Edit Orthographical Variants respectively.

Left-to-right (LTR) or Right-to-left (RTO) languages

Reading from left to right or vice versa can be defined with the **Edit Language menu**.

Language groups

Language groups are an administrative feature in TermWeb 4. Enabling language groups for a specific language creates a User group for that language. Language groups are sent Email notifications through Workflows with the Email Post-function by detecting which language is triggered in the workflow. In this way an administrator does not need to create a separate workflow notification for each individual language.

The default name of Language groups is “Language Group [???]” where ??? represents the top-level language code.

Ex) If a Workflow has the **Create Term** task and sends an Email to "**Language group**", creating an English term that triggers the Workflow will send the Email notification to the User group "Language Group [ENG]".

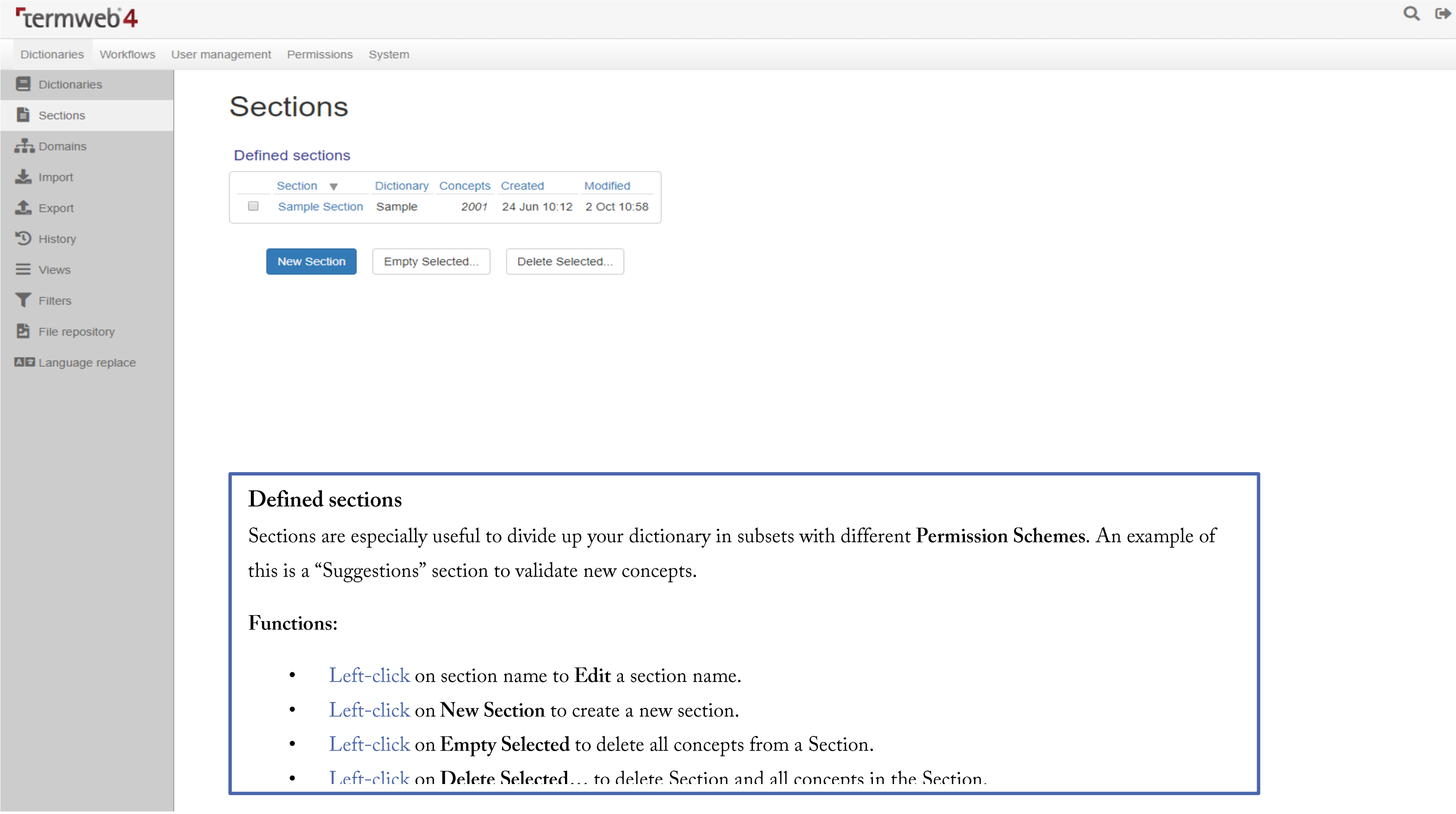
Language codes

TermWeb 4 uses ISO-693-2 language codes for their languages. Every language code consists of three base characters, with language variants define by two or more characters. A language code must be defined on creation. If you wish to change language codes.

TermWeb 4 supports two different ways of representing geographical and orthographical language variants, either within a top-level language (see above) or as a top-level language. A custom top-level language code can be set by entering a valid top-level language code and a custom variant code after a hyphen. Ex) "eng-us".

Sections

Sections are subsets of Dictionaries. Each Section can be assigned a different **Permission Scheme** and is therefore especially useful in conjunction with **Workflows**.



Defined sections

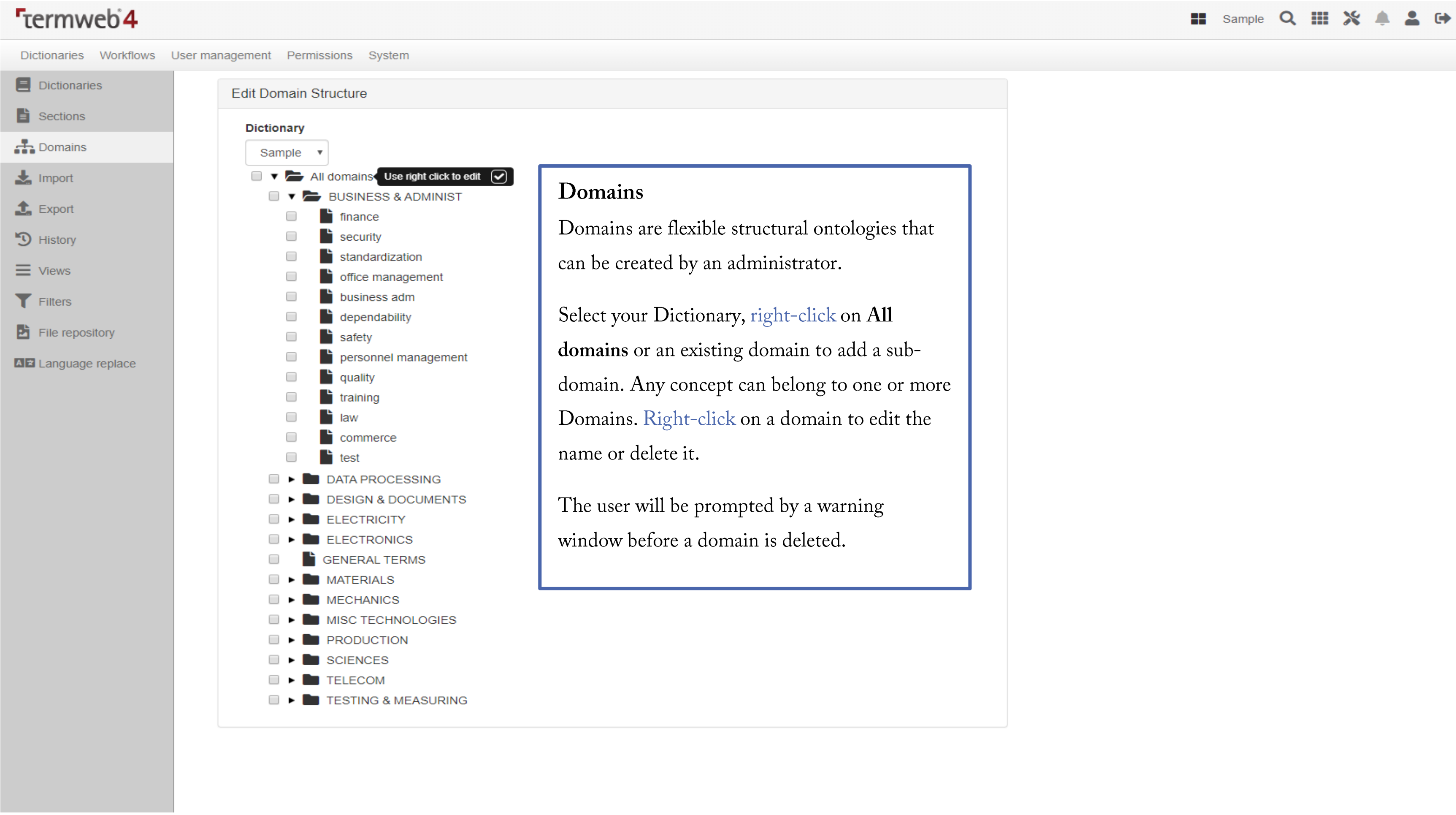
Sections are especially useful to divide up your dictionary in subsets with different **Permission Schemes**. An example of this is a "Suggestions" section to validate new concepts.

Functions:

- Left-click on section name to **Edit** a section name.
- Left-click on **New Section** to create a new section.
- Left-click on **Empty Selected** to delete all concepts from a Section.
- Left-click on **Delete Selected…** to delete Section and all concepts in the Section.

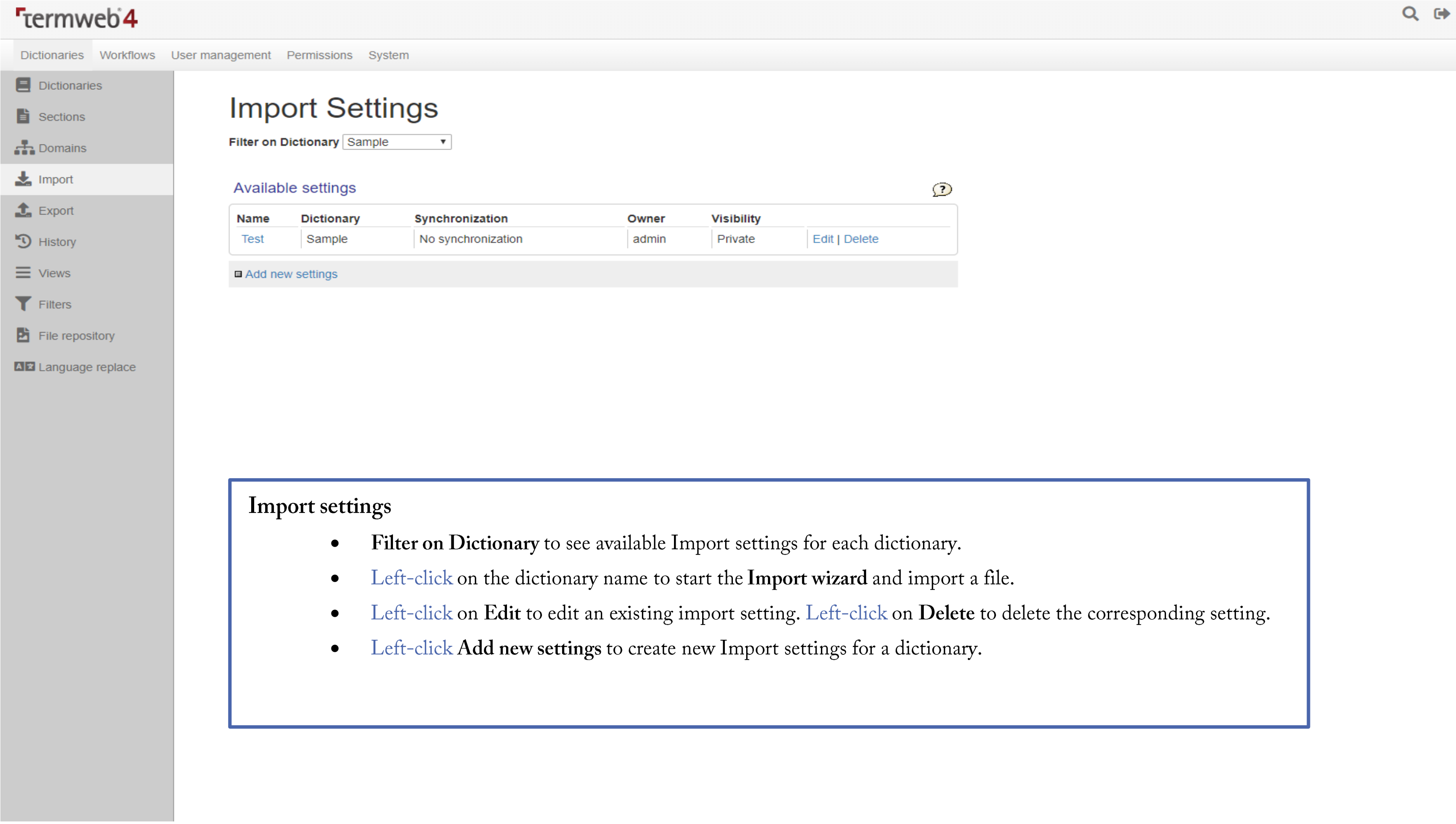
Domains

Domains can be used to organize your dictionaries into ontology trees. A Concept can be belong to one or more domains or subdomains.



Import

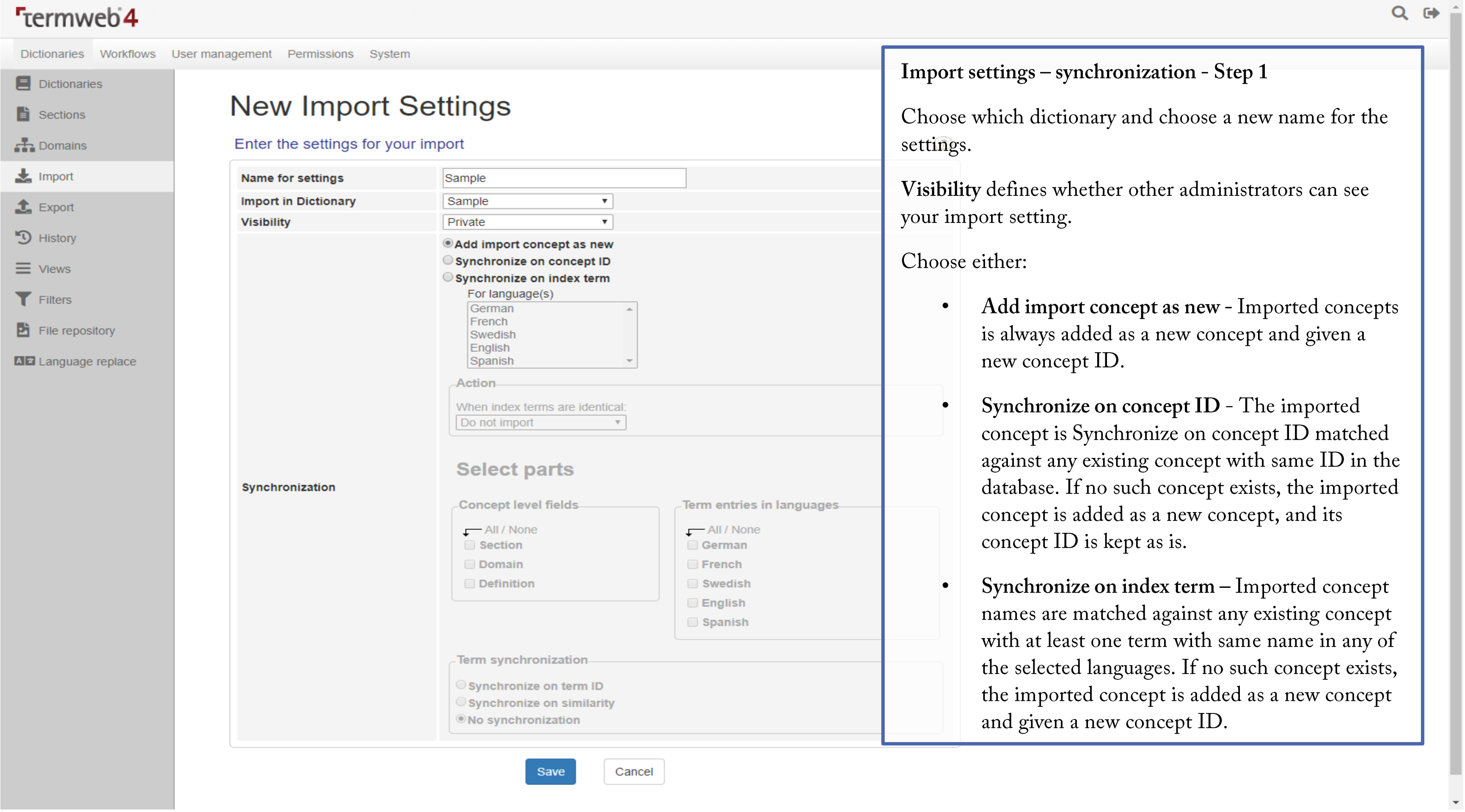
Import settings are a list of user specific imports. Import settings can be customized include only relevant languages and fields.



Import settings

- **Filter on Dictionary** to see available Import settings for each dictionary.
- Left-click on the dictionary name to start the **Import wizard** and import a file.
- Left-click on **Edit** to edit an existing import setting. Left-click on **Delete** to delete the corresponding setting.
- Left-click **Add new settings** to create new Import settings for a dictionary.

New import settings – Step 1



Import settings – synchronization - Step 1

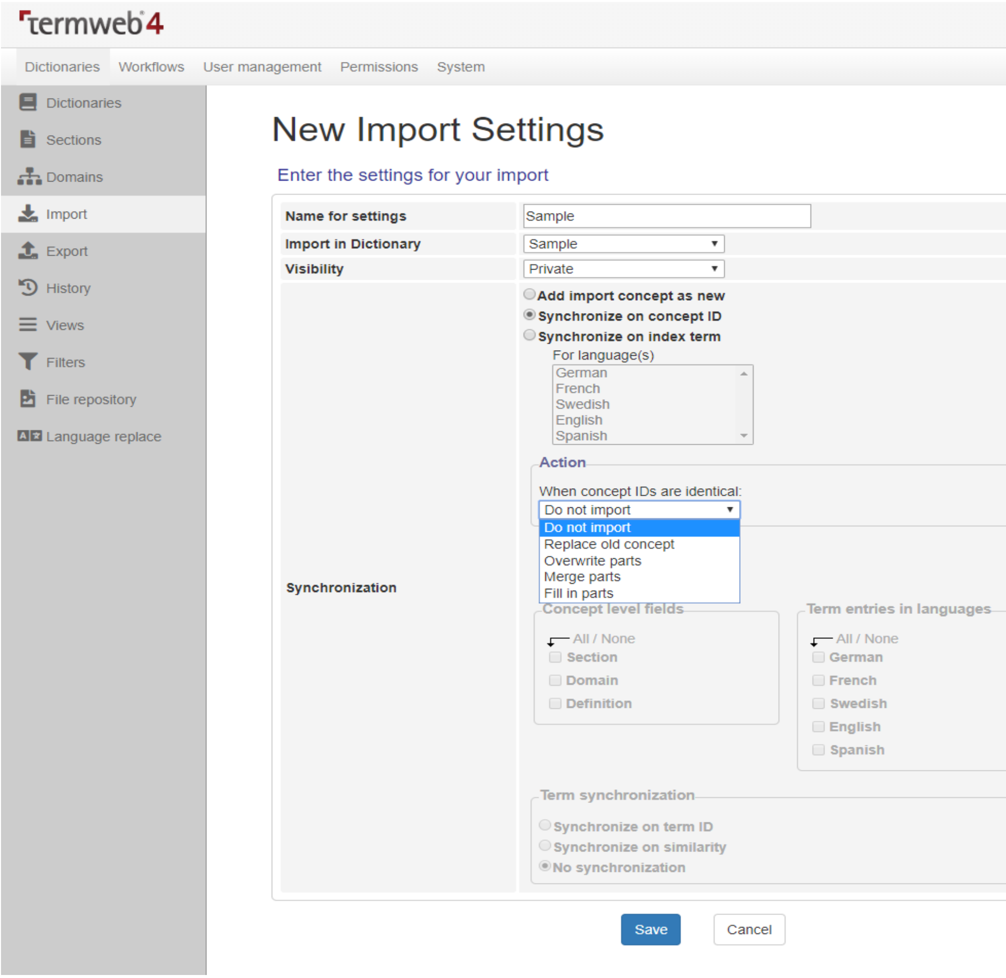
Choose which dictionary and choose a new name for the settings.

Visibility defines whether other administrators can see your import setting.

Choose either:

- **Add import concept as new** - Imported concepts is always added as a new concept and given a new concept ID.
- **Synchronize on concept ID** - The imported concept is Synchronize on concept ID matched against any existing concept with same ID in the database. If no such concept exists, the imported concept is added as a new concept, and its concept ID is kept as is.
- **Synchronize on index term** – Imported concept names are matched against any existing concept with at least one term with same name in any of the selected languages. If no such concept exists, the imported concept is added as a new concept and given a new concept ID.

New Import settings – Step 2

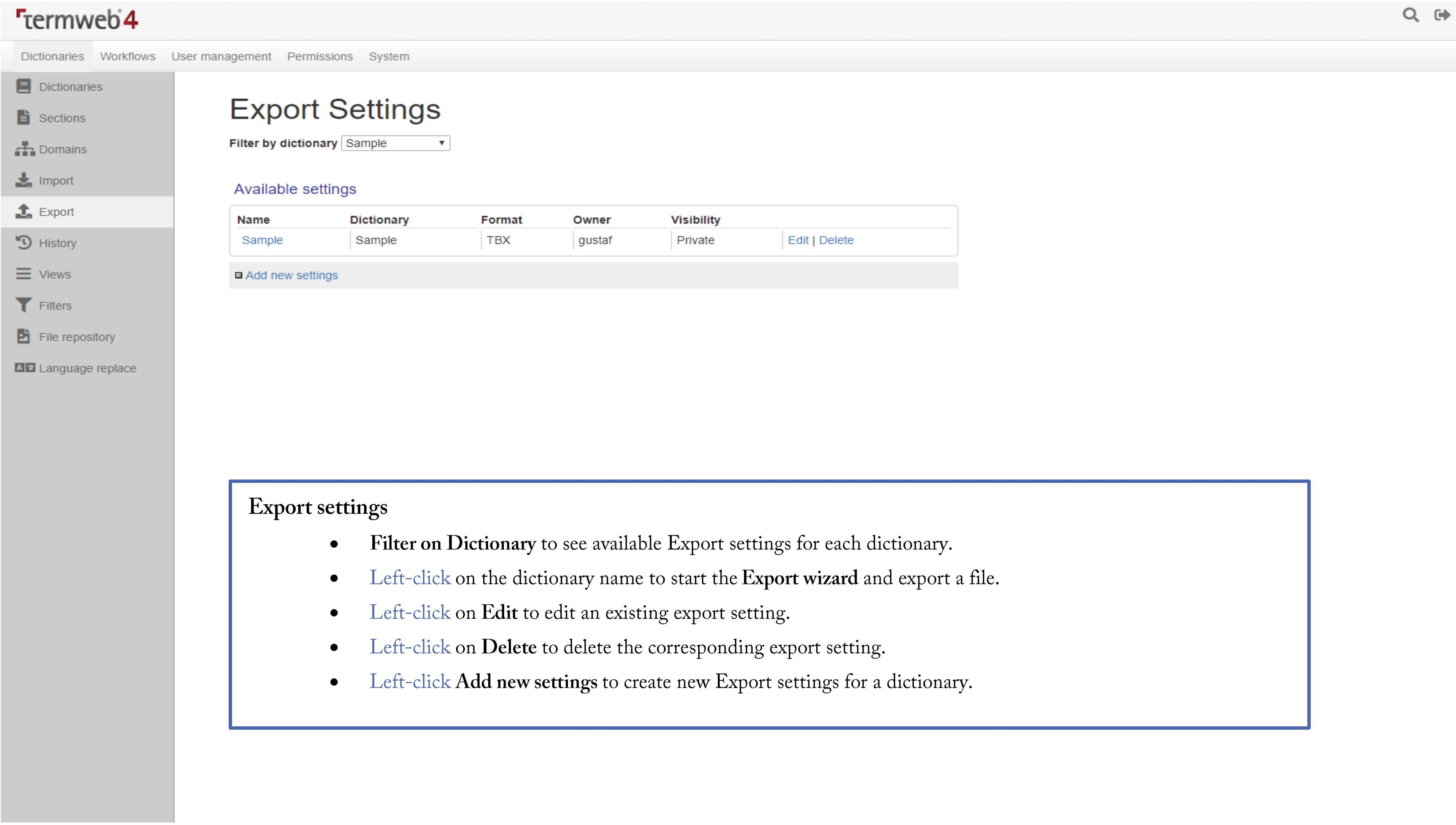


Import settings – synchronization part 2

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

- **Do not import** - No changes are done to the existing and no new concept is added.
- **Replace old concept –** The imported concept replaces the existing concept if they synchronize. If no matching concept is found, the imported concept is created as a new concept.
- **Overwrite parts** - Fields from the imported concept overwrite all parts of the existing concept, including fields with no values from the imported concept.
- **Merge parts –** Fields from the imported concept overwrite all parts of the existing concept, excluding empty fields from the imported concept.
- **Fill in parts** - Fields from the imported concept do not overwrite parts of the existing concept, except when the existing concept has an empty field.

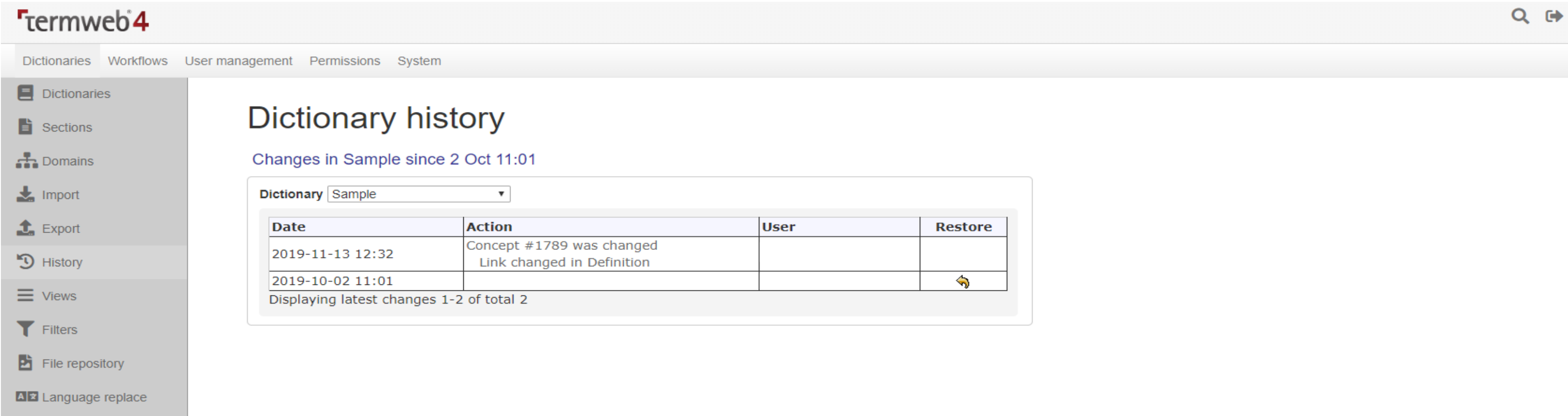
Export



Export settings

- **Filter on Dictionary** to see available Export settings for each dictionary.
- Left-click on the dictionary name to start the **Export wizard** and export a file.
- Left-click on **Edit** to edit an existing export setting.
- Left-click on **Delete** to delete the corresponding export setting.
- Left-click **Add new settings** to create new Export settings for a dictionary.

History

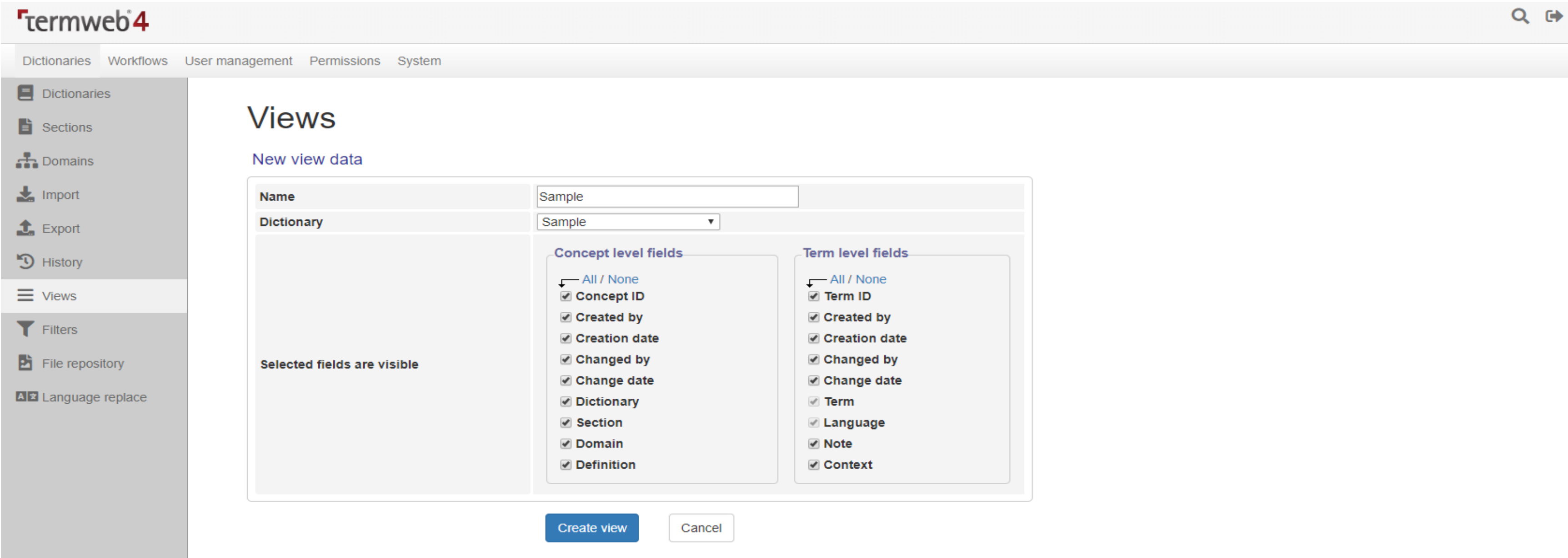


History

Shows any changes made to Concepts since last structural change of dictionary.

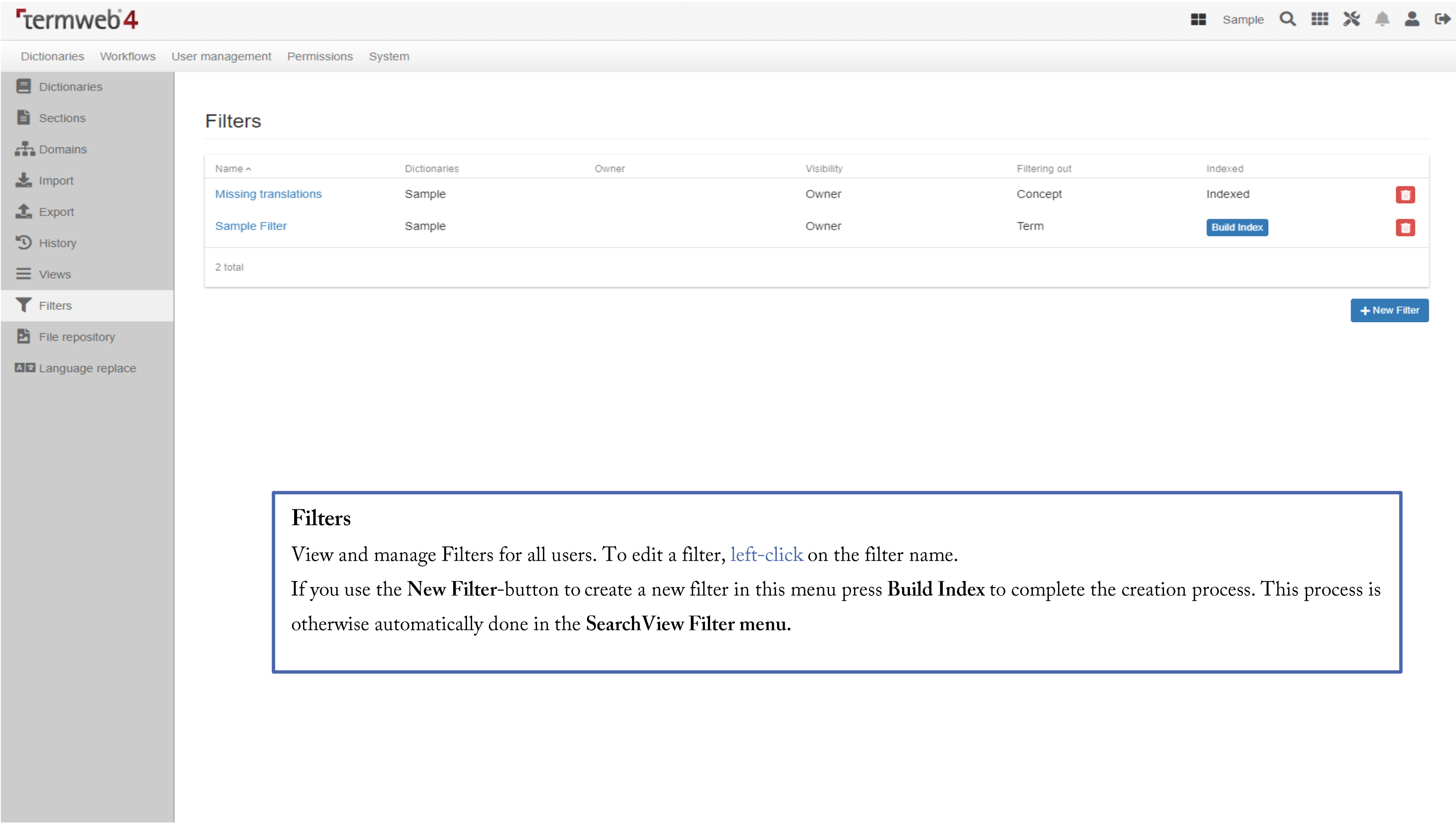
Pressing the -icon will **Restore** the dictionary to its former state. Any changes made after this restore point will be reverted to their state at this point.

Views



> **Views**
>
> Views can be applied to any **User Group** for a specified **Dictionary** to restrict access to certain **Concept-** and **Term-level fields.**
>
> After creating a new View, apply it by entering **User Management > Groups** and left-clicking on the relevant group. You will find the View listed under the corresponding Dictionary.

Filters

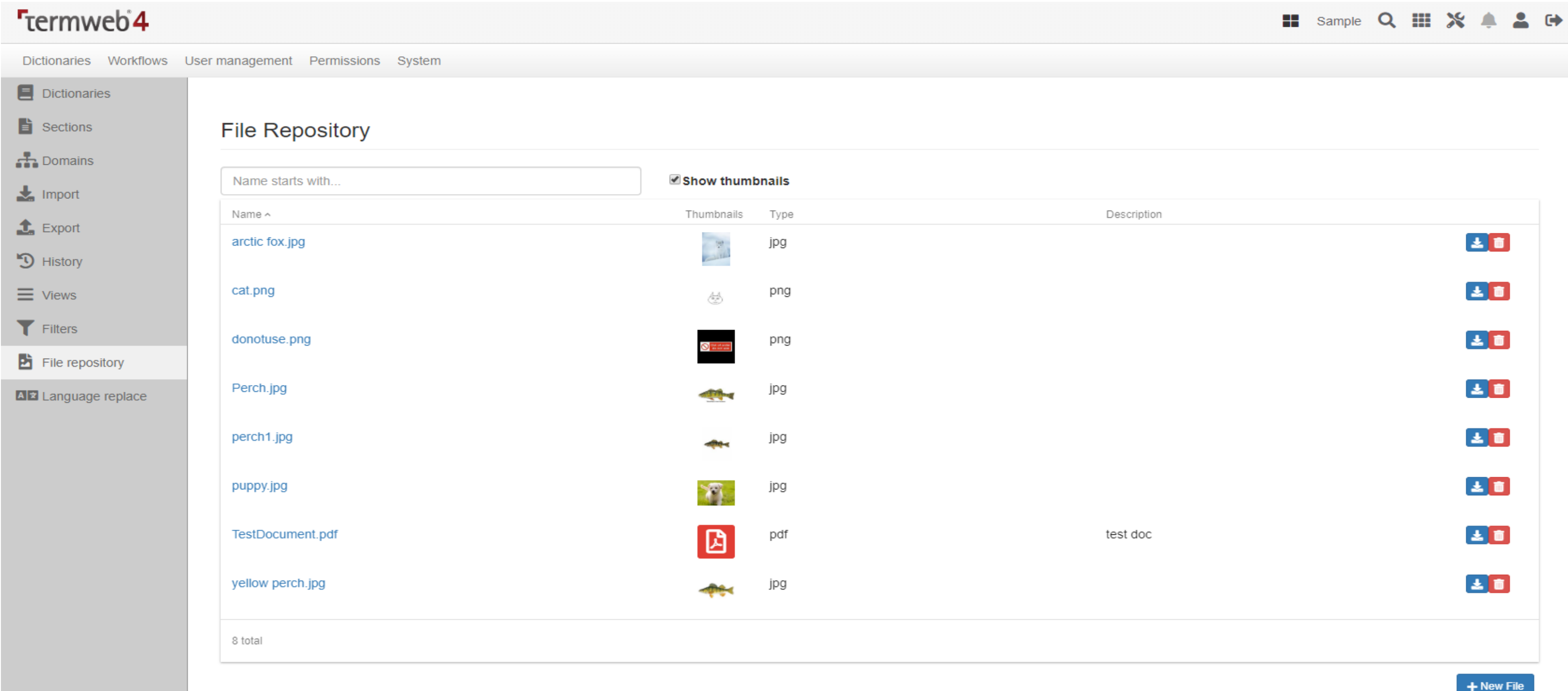


Filters

View and manage Filters for all users. To edit a filter, left-click on the filter name.

If you use the **New Filter**-button to create a new filter in this menu press **Build Index** to complete the creation process. This process is otherwise automatically done in the **SearchView Filter menu.**

File repository

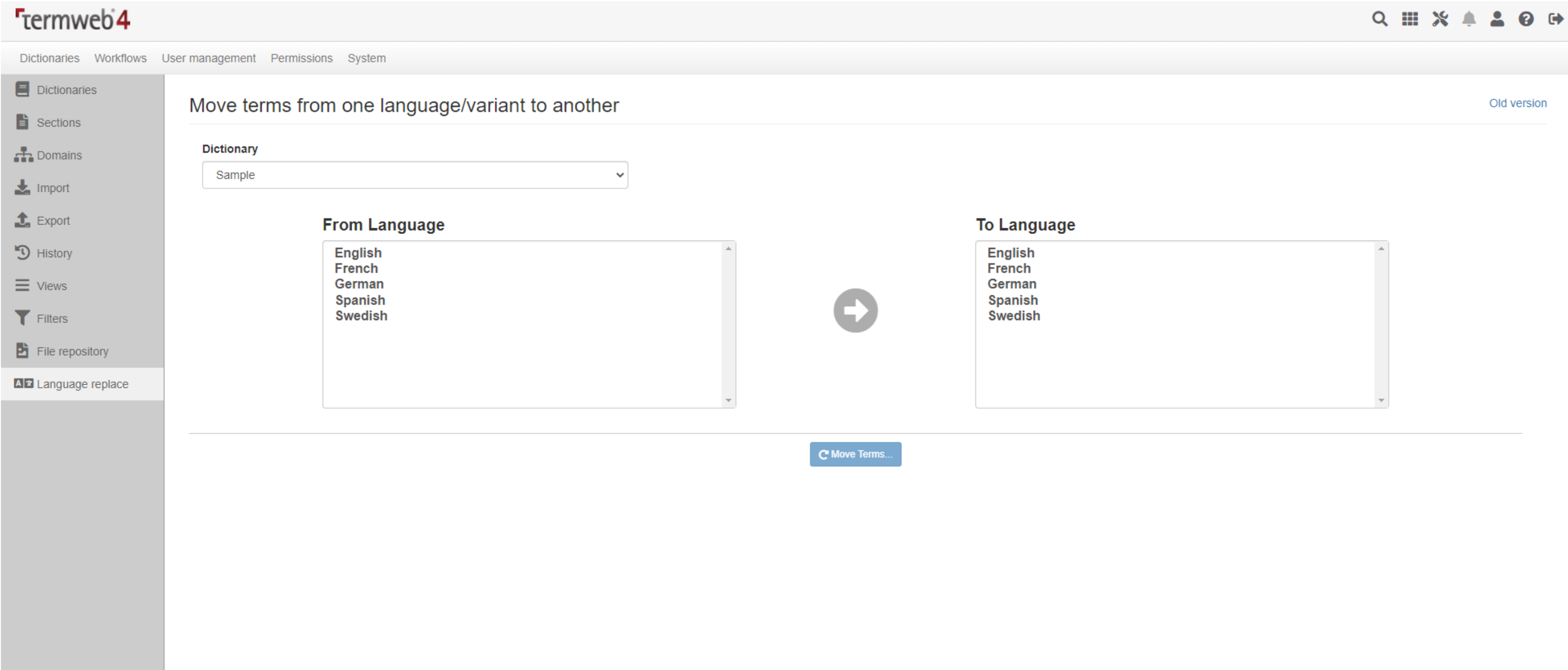


File repository

Lists all files that have been uploaded by users and attached to concepts.

Deleting a file will remove the file attachment from all **Concepts** that contain the file.

Language replace



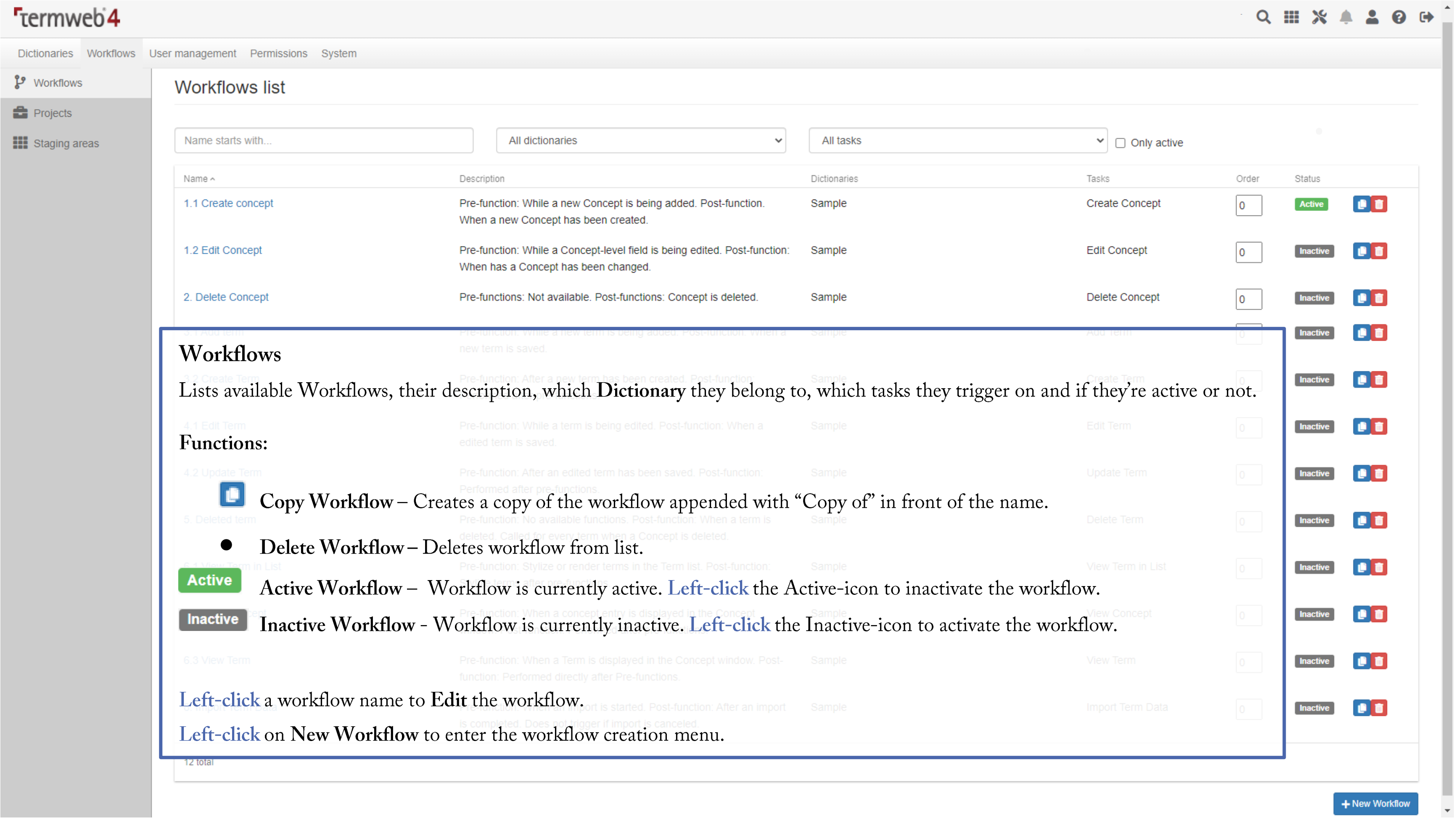
Language Replace

Moves all terms in the first selected language or language variant to the second selected language or language variant.

Useful in in instances where, for example, you wish to change the language code for a language (such as when a language code becomes deprecated).

Workflows

Workflows are automated functions that perform certain pre- and post-functions when the **Conditions** for a **Task** are triggered in a dictionary.



Workflows

Lists available Workflows, their description, which **Dictionary** they belong to, which tasks they trigger on and if they're active or not.

Functions:

- **Copy Workflow** – Creates a copy of the workflow appended with "Copy of" in front of the name.
- **Delete Workflow** – Deletes workflow from list.
- Active **Active Workflow** – Workflow is currently active. Left-click the Active-icon to inactivate the workflow.
- Inactive **Inactive Workflow** - Workflow is currently inactive. Left-click the Inactive-icon to activate the workflow.

Left-click a workflow name to **Edit** the workflow.

Left-click on **New Workflow** to enter the workflow creation menu.

Workflow tasks and Conditions

Workflow tasks are functions that can be triggered given a specific event and condition. One or more Workflow tasks can be selected for a selected Workflow. Every task can may have available Pre-functions and Post-functions that triggered before or after a specific event.

Workflow tasks

The following table lists the available workflow tasks and when pre- and post-functions are executed:

Task	Pre-/Post-function description	Available functionality
Create Concept	**Pre-function: While a new Concept is being added.** After the Create Concept button have been pressed. **Note:** Edit Concept also affects Create Concept. A tip is to use Conditional formatting if you don't want Edit Concept to affect the creation of new Concepts.	• **Set field value** Set a suggested value for a picklist or multi-valued field. • **Render field** Render a Concept-level field Read-only or Hidden. • **Set Permission Scheme** Change Permission Scheme used while Creating a Concept. Ex) Restrict or enable Permission Scheme functionality for a specific user group using Conditions.
	Post-function: When a new Concept has been created. After the Save button has been pressed.	• **Set field value** Sets a field value after the Concept has been saved. • **Send email** Sends an e-mail after Concept creation. Variables on the Term-level will not be included in the text. **Create Term** includes term-level message variables. • **Reminder email** Sends a new e-mail after Workflow trigger and specified Conditions.
Edit Concept	**Pre-function: While a Concept-level field is being edited.**	• **Set field value** Suggest a field value for the user.

	After the Create Concept, Edit Concept or Edit Concept-level fields buttons have been pressed.	• **Render field** Render a Concept-level field Read-only or Hidden. • **Set Permission Scheme** Change Permissions for specific use cases. Ex) User group should be able to Edit Concept-level fields except for Concepts meeting a specific Condition.
	Post-function: When has a Concept has been changed. After the Save button has been pressed.	• **Set field value** Sets a value for a Concept-level field value after the Concept has been saved. • **Send email** Sends an e-mail after a Concept update. Variables on the Term-level will not be included in the text. **Update Term** includes term-level message variables. • **Reminder email**
Delete Concept	**Pre-function:** ***None available.***	
	Post-functions: Whenever a concept is deleted.	• **Send email**
Add Term	**Pre-function: While a new term is being added.** After the Create Term button has been pressed.	• **Set field value** • **Render field** • **Set Permission Scheme**
	Post-function: When has a Concept has been changed. After the Save button has been pressed.	• **Set field value** • **Send email** • **Reminder email**
Create Term	**Pre-function: After a new term has been created.**	• **Set field value**

	After a new Term has been saved.	
	Post-function: When has a Concept has been changed. Performed immediately after pre-functions.	• **Set field value** • **Send email** • **Reminder email**
Edit Term	**Pre-function: While a new term is being added.** After the Edit Term button has been pressed.	• **Set field value** • **Render field**
	Post-function: When an Edited Term is saved. After the Save button has been pressed.	• **Set field value**
Update Term	**Pre-function: After a new term has been created.** After an existing Term has changes applied to it.	• **Set field value**
	Post-function: When has a Concept has been changed. Performed immediately after pre-functions.	• **Set field value** • **Send email** • **Reminder email**
Delete Term	**Pre-function:** ***None available.***	
	Post-functions: Whenever a term is deleted. After a Term is deleted. Called once for every deleted term when a Concept is deleted.	• **Send email**
View Term in List	**Pre-function: When a Term is shown in the Term List** Stylize or Render field Term name in the Term list.	• **Render field** • **Style field**
	Post-function: Performed after pre-functions. Performed immediate after Pre-functions.	• **Style field** Only useful in conjunction with Render field.

		Ex) Render field "Visible" as a Pre-function. Stylize it after.
View Concept	**Pre-function: When a Concept is shown in the Concept window** Style or Render Concept-level fields or all Terms.	• **Render field** • **Style field** • **Set permission scheme** • **Sort Terms**
	Post-function: Performed after pre-functions. Performed immediate after Pre-functions.	• **Style field** • **Sort Terms**
View Term	**Pre-function: When a Term is shown in the Term List** Style or Render Concept-level fields or all Terms.	• **Render field** • **Style field**
	Post-function: Performed after pre-functions. Performed immediate after Pre-functions.	• **Style field**
Select Term when Editing	**Pre-function:** *None available.* Deprecated functionality. Superseded by Edit term.	• **Set permission scheme**
	Post-functions: *None available.*	
Import Term Data	**Pre-function:** *None available.*	
	Post-function: After an import is completed. Does not trigger if import is canceled.	• Send email

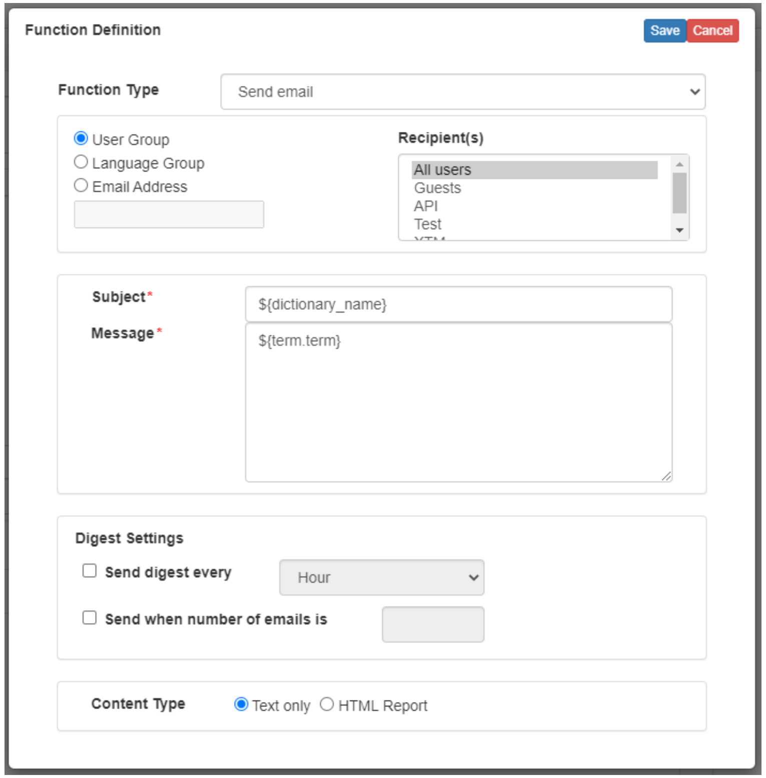
E-mail notifications

E-mail notifications are a Post-function available for many Workflow tasks. A triggered Workflow can send an e-mail to one or more User Groups, Language Groups or to a specified e-mail address. Messages include a text message and, by choice, an HTML-report.

Digest settings define when an e-mail notification is sent, either in a digest defined by a time interval and/or when the Workflow has been triggered a specified number of times.

Ex 1) Digests sent every Week will include all a digest of all times the Workflow was triggered. If the Workflow was not triggered then no digest will be sent.

Ex 2) A digest set to: "Send when number of emails is: 10" will only send an e-mail notification when the Workflow has been fulfilled 10 times.



Workflow Conditions

Workflow Conditions are conditional criteria for a workflow to trigger. Conditions must be met before Pre-functions. Below is a table with Conditions and their operators.

Condition	Logical operator	Availability
User Group	• Equals • Not equals	Always available.

		Requires User group exists.
Field Change	• Equals • Not equals	Always available.
Concept ID **Term ID**	• Equals • Not equals	Always available.
Created by **Changed by**	• Equals • Not equals	Always available.
Creation date **Changed by**	• Equals • Not equals • Contains • Not contains	Always available.
Section	• Equals • Not equals	Always available.
Domain	• Contains • Not contains • Empty • Not empty	Always available.

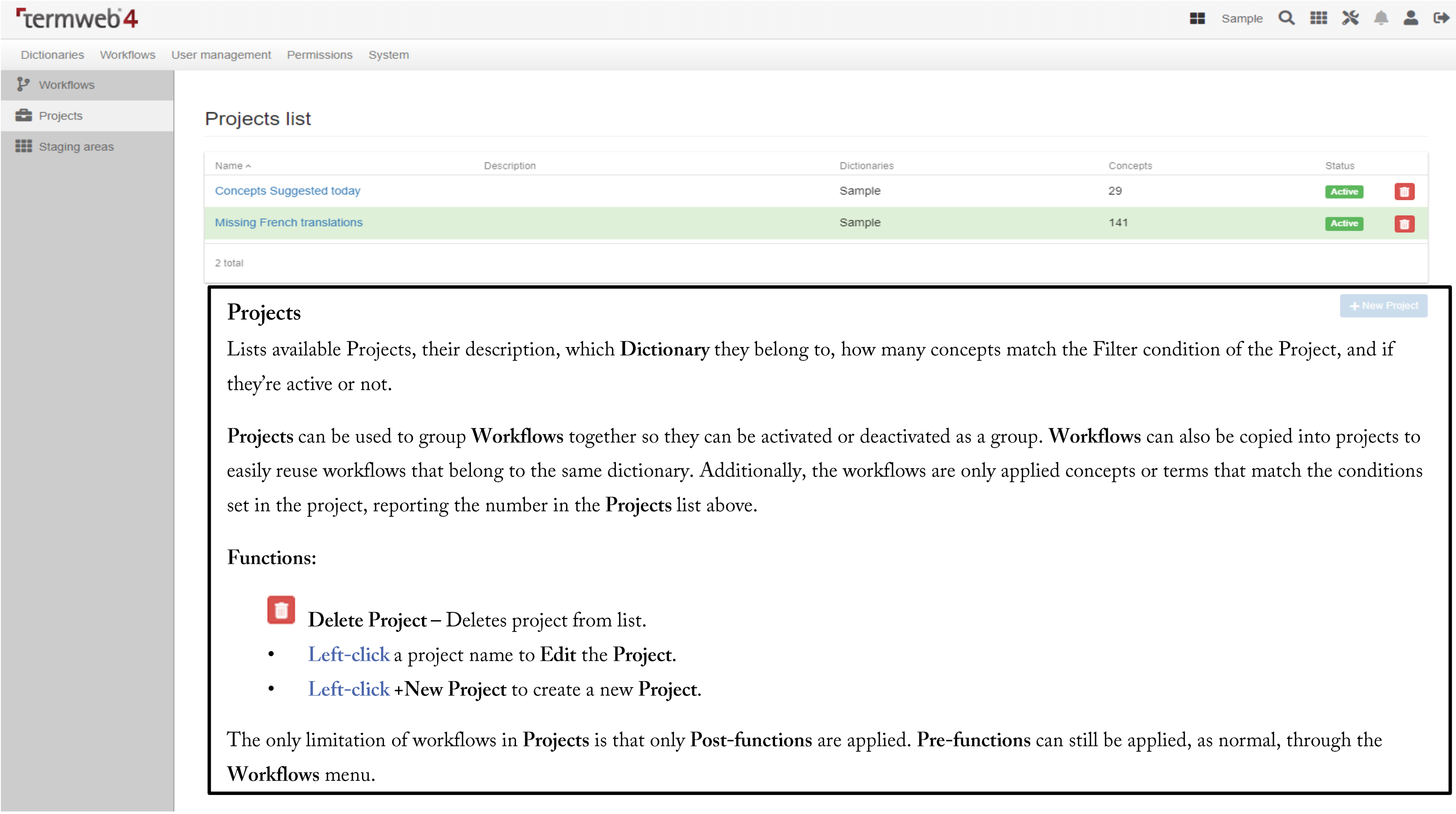
Language	• Equals • Not equals	Always available. Requires Language exists in termbase.
Region	• Equals • Not equals • Empty • Not empty	Requires that a Geographical variant exists. See Dictionaries about adding variants.
Script	• Equals • Not equals • Empty • Not empty	Requires that a Orthographical variant exists. See Dictionaries about adding variants.
Picklist field *Multi-value fields*	• Equals • Not equals • Empty • Not empty	
Date field *Text field* *Incremental field*	• Equals • Not equals • Contains • Not contains • Empty • Not empty	

Defined validations

Defined validations allows the administrator to set one or more fields as required fields for the specific workflow tasks. Setting a Defined Validation for Create Concept, Add term and/or Edit term will require the user to fill in the field before being able to save.

Ex) Setting "Definition" as a required field for "Create Concept" will block the user from saving the new Concept until the Definition field is not empty.

Projects



Projects

Lists available Projects, their description, which **Dictionary** they belong to, how many concepts match the Filter condition of the Project, and if they're active or not.

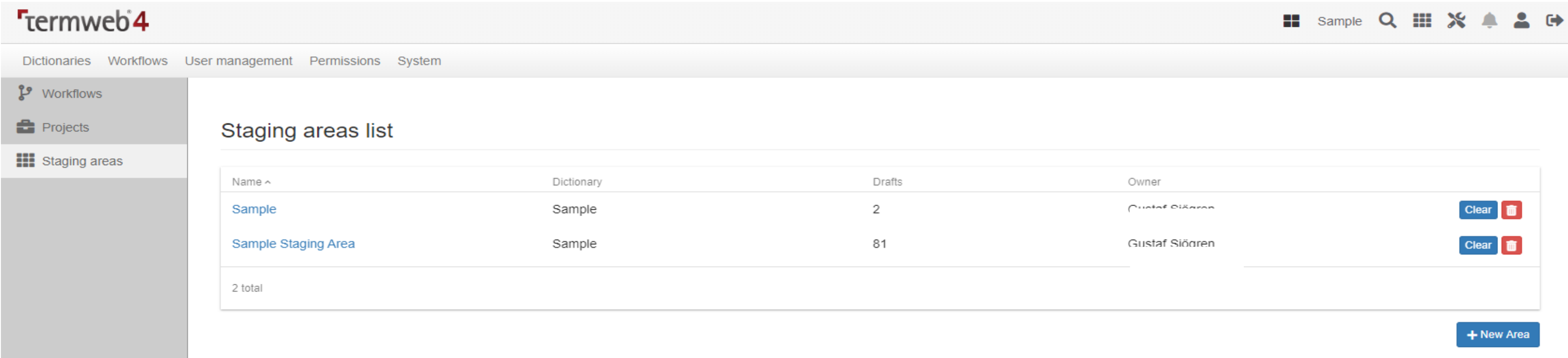
Projects can be used to group **Workflows** together so they can be activated or deactivated as a group. **Workflows** can also be copied into projects to easily reuse workflows that belong to the same dictionary. Additionally, the workflows are only applied concepts or terms that match the conditions set in the project, reporting the number in the **Projects** list above.

Functions:

- **Delete Project** – Deletes project from list.
- Left-click a project name to **Edit** the **Project**.
- Left-click +**New Project** to create a new **Project**.

The only limitation of workflows in **Projects** is that only **Post-functions** are applied. **Pre-functions** can still be applied, as normal, through the **Workflows** menu.

Staging areas



Staging areas

View and manage **Staging Areas** for all users. The number of Concept drafts currently in a **Staging Area** is listed under the column Drafts.

Functions:

- **Delete Staging Area** – Deletes **Staging Area.**
- Left-click on a **Staging area** name to edit the name or **Visibility** of the **Staging Area.**
- Left-click **+New Area** to create a new **Staging Area.**

User Management

List and manage all users in the current client.

To give access to other clients in a multi-tenant environment, an administrator must give client access privileges to another user.

User settings

Clicking on a username or on +New User-button will open the user settings page. Fields marked with an asterisk are required.

- **Full name** – Displayed in User list and User profile. Only viewable by users with access to the Users list and user owner.
- **Username** – Login name. Displayed in metadata.
- **E-mail** – Used for resetting password and sending notifications through workflows.
- **Send password reset link in email** – Send a link to let user decide on password on user creation. *Only available for new users.*
- **User must change password at next logon** – Upon login, user will be redirected to change password screen.

User roles

- **System administrator** – Server administrator. System administrators can access all clients in a multitenant environment and have full permissions for all actions. This role can only be provided by, and users with this role can only be edited by, System Administrators.
- **Administrator** – Client administrator. Administrators have full permission access to a single client installation. This role can only be provided by, and users with this role can only be edited by, Administrators or System Administrators.
- **User editor** – Can administrate non-administrator users in a single client.
- **Administrator for 'Dictionary name'** – Dictionary administrator. Can change structure and settings for a specific dictionary on a single client.

Warning: Creating or having users with fake or deprecated e-mail addresses can cause mail services to be blocked. Please be sure remove inactivated users from **Groups** receiving e-mail notifications.

Groups

List and manage all Groups in the current client.

API Access is granted in the settings for a User Group.

Views and Filters can restrict access to terms for the User group.

If a User belongs to multiple groups, the User will have access to terms and concepts available to all User Groups they're a member of.

Language groups are created by accessing the **Edit Language Menu** in Dictionaries.

Group members

Manage the membership of Users in User Groups. A User can belong to any number of available User Groups.

Functions:

- Left-click on a User Group name to add Users to the User Group.
- Left-click on a Username to add the user to any available User Groups.

Guest Account

Guests

Activate or deactivate Concurrent read-only users for the client.

Functions:

- **Normal** – Client has a single Guest username and password as specified in this menu.
- **Automatic (when client is specified in URL)** – Visitors using the TermWeb-client specific URL will be automatically logged into the client. This will always be a combination of the server url and client **Login name** (see Client settings).

  Guest login url: https://<server name>/client/<login name>
- **Automatic (Always)** – All visitors visiting the client login page will be automatically redirected and logged into the client. **Note:** Should only be activated for customers in single tenant environments. If you're unsure, please refrain from activating.

Client info

Requires the user to have the Administrator user role.

Lists client and license information, as well as API key.

Note: The API is confidential information. Sharing your API key can result in a data breach. It is possible for a System administrator to change API key. See **Clients**.

Clients

Requires the user to have the System administrator user role.

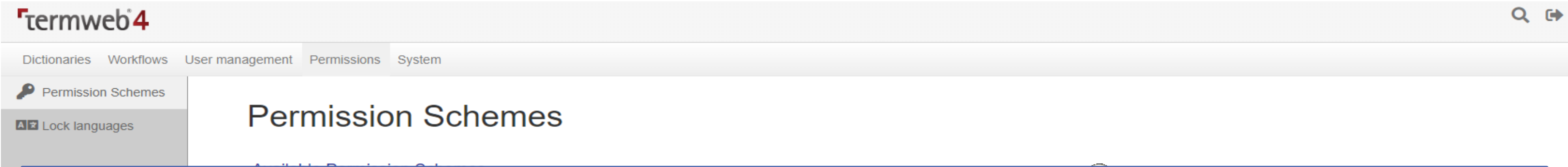
For customers running multi-tenant clients, you can view and manage any sub-clients on the server. Left-click on a client name to view and/or edit current client settings.

Client settings

- **Created –** Date client was created.
- **Last modified –** Date Client settings were last modified by a System administrator or Administrator.
- **Name –** Listed name of client in the **Client selector.**
- **Login name –** Login name of client for login screen and Guest account URL-login. Shown in **Client selector** for System administrators.
- **Status –** Shows whether client is active or inactive. Clients can only inactivate a client while logged onto a different client.
- **API key** – Shows current API key. Confidential information. Only share with authorized personal within your own organization. If you suspect a data leak of your API key, we warmly recommend you generate a new API key using the Generate new API key. This may cause interruptions in all integrations that use the API key for identification.
- **Max concurrent users –** Maximum number of users and guests concurrently allowed to be accessing the client. Should typically be the sum of Max **concurrent guests** and **Max user accounts** or greater. Setting any license value to 0 will allow unlimited sessions of this type. This will be still be restrained by the maximum license cap.
- **Max concurrent guests** – Maximum number of concurrent guests allowed to access the system.
- **Max user accounts** – Maximum number of named users allowed to be created.

Any user caps (Max concurrent users, Max concurrent guests, Max user accounts) in a sub-client are counted against the License cap of the server in total.

Permission Schemes



Permission Schemes

Permissions schemes are used to manage and restrict functionality for User Groups for your Dictionaries and/or Sections.

Sections and Dictionaries Permission Schemes are assigned individually using **Edit Scheme Assignments**. If no Permission Scheme is assigned to a Dictionary or Section, they will revert to using the ***Default Permission Scheme***. Newly imported dictionaries will therefore always use ***Default Permission Scheme*** before another Permission Scheme is assigned. A Permission Scheme assigned to a Section will supersede any Permission Scheme assigned to the same Dictionary that the Section belongs to.

Tip: If you're familiarizing yourself with a client for the first time, it is a good idea to check which functionality is allowed in *Default Permission Scheme*. You don't want to be exposing dictionaries to the wrong users. Also check which dependencies exist (see table below). A user, for example, cannot **Create Concept** if they can't **View Concept**. Users belonging to multiple **User Groups** will have access to the union of functions available to their User **Groups**.

Note: If a user does not belong to a User group with the View Concept permission assigned to them, they will not be able to log onto TermWeb unless they have an **Administrator role**. Administrators have access to all permissions no matter what Permission Schemes that are assigned them.

Functions:

- **Left-click** on **Edit** name to edit the selected Permission Scheme.
- **Left-click** on **Copy** to create a copy of the Permission Scheme with any assigned Dictionaries or Sections.
- **Left-click** on **Delete** the Permission Scheme. Any assigned Dictionaries or Sections will revert to using the *Default Permission Scheme*.

Permission Scheme tasks and dependencies

Permission schemes are task-based Permissions that User groups can be assigned to. Certain tasks have dependencies, such as; you need to be able to View Concept to be able to Edit Concept. Below is a list of Permissions and their dependencies. Users assigned to multiple User Groups with different assigned Permission Schemes will use the union of their allowed Permission Schemes.

<table>
<tr><th>Permission</th><th>Description</th><th>Dependencies</th></tr>
<tr><td>View Concept</td><td>Users can view concepts</td><td rowspan="11">In the tree below, Permissions are categorized under their dependencies.

View Concept

Edit Concept

Create Concept

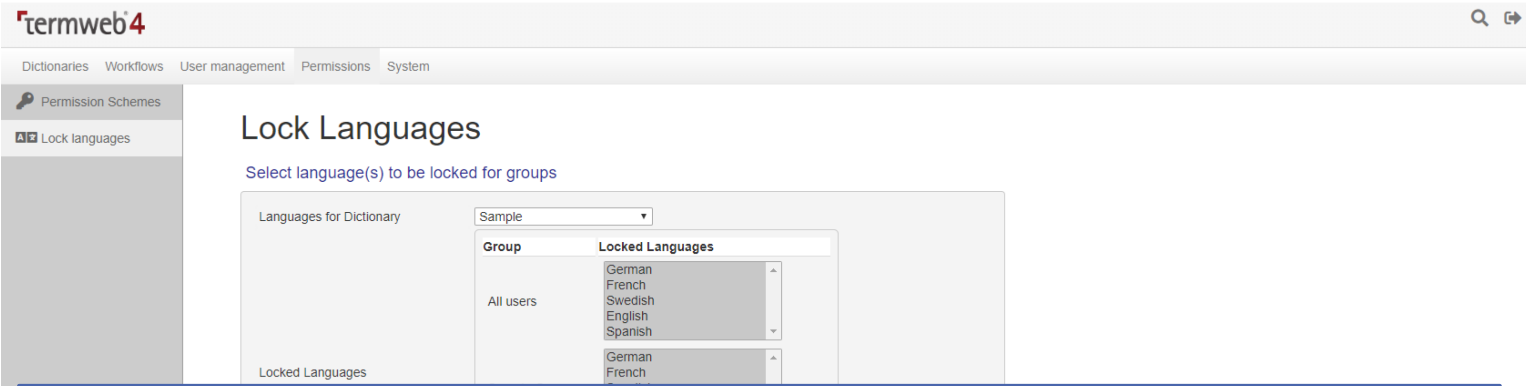
Import Concepts
Export Concepts

Edit Concept Level Fields
Create Term
Edit Term
Delete Term

Delete Concept
View Concept History

Ex) For a User group to be able to Edit Terms, they need to be able to View Concept and Edit Concept.</td></tr>
<tr><td>Create Concept</td><td>Users can create new concepts</td></tr>
<tr><td>Edit Concept</td><td>Users can edit concepts</td></tr>
<tr><td>Delete Concept</td><td>Users can delete concepts</td></tr>
<tr><td>Edit Concept Level Fields</td><td>Users can edit fields on the concept level in a concept</td></tr>
<tr><td>Create Term</td><td>Users can create a new term in a concept</td></tr>
<tr><td>Edit Term</td><td>Users can edit an existing term in a concept</td></tr>
<tr><td>Delete Term</td><td>Users can delete an existing term in a concept</td></tr>
<tr><td>View Concept History</td><td>Users can view the history for a concept.</td></tr>
<tr><td>Import Concepts</td><td>Users have access to the Export menu in the Administration menu</td></tr>
<tr><td>Export Concepts</td><td>Users have access to the Export menu in the Administration menu</td></tr>
</table>

Locked languages



Lock Languages

Locked Languages are used to manage and restrict the editing rights of specified languages for User Groups for a specific Dictionary.

By default, all users with editing rights, such as **Create Term** from **Permissions Schemes**, can add terms in all languages. By marking languages in user groups and applying them, only the available languages will be shown to the user.

Note: To being restricting access to **User Groups**, you must first begin by restricting access to all languages for the **All users** group.

Functions:

- Ctrl+Left-click on a language enable or disable it.
- Left-click on one language and then Shift+Left-click on a second language to select all languages between the two languages.
- Left-click on **Apply Changes** to apply the current set-up.

System

The **System** menu contains several different functionalities related to the administration of the TermWeb server and its integrations.

Licenses

Licenses

Requires user be a Systems Administrator

Shows License details. License key sent by Interverbum Technology should be pasted into the **License** area and applied.

API Templates

API Templates

Administrators can create **API Templates** for certain integrations, such as XTM. Each template specifies which **Dictionary** or **Section** should be available to **User Group** with **API Access.**

Note: API Access needs to be enabled for the **User Group** in the user group settings.

API Synch Settings

API Synch Settings

Administrators can create **API Synch Settings** to determine which Concepts and Terms, based on a Filter, should be available through the **TermWeb Integrator** application. Each Synch Setting specifies which **Languages** a **Filter** is applied to. The available Terms or Concepts will synched to a User that belongs to the selected **User Group** with **API Access**. A User Group that's included in multiple Synch Settings will have the union of terms and concepts available to them.

Note: API Access needs to be enabled for the **User Group** in the user group settings.

Statistics

Statistics

View all online users and any visits made to the client.

Functions:

- Left-click **to disconnect a user from the client.**

Scheduled Jobs

Scheduled Jobs

Requires permissions for external data storage.

View and manage scheduled exports from the client. Administrators choose which **Dictionary**, **Export setting**, and how regularly the export is made.

Batch Search

Batch Search Tool

Used for comparing possible duplicates in a file or text to terms in a **Dictionary**.

Administrator Tools

Administrator tools

Manage miscellaneous administrative tools, such as **Password strength** requirement and **Message for error page**.

User & Admin Guide Version update log

- Version 1.7.2
  - Updated Workflow Conditions for Language.
- Version 1.7.1
  - Fixed all broken links.
- Version 1.7
  - TermWeb Integrator information updated.
  - Updated User Editor role information.
- Version 1.6.1
  - Updated text.
- Version 1.6
  - Updated Headings. Included PDF-bookmarks.
- Version 1.5
  - Updated User settings and roles.
  - Updated icons for Workflows list.
  - Updated Clients and Client info section.
- Version 1.4
  - Update Workflow processes tasks.
  - Added new FAQ videos to User Guide and Admin Guide.
  - Updated textual information.
- Version 1.3
  - Updated Permission dependencies.
  - Added API Synch Settings introduction.
  - Added TermWeb Integrator page
  - Changed bullet point icons.

- Version 1.2
    - Made text searchable.
    - Updated Import settings text.
    - Re-arranged icons.