EPA Terminology Services Glossary Management Guide

November 2011 (Revised June 12, 2012)

Purpose of this Guidance Document How Glossaries are Managed in Synaptica Roles and Permissions Related Resources Logging into and out of Synaptica Viewing All the Terms in a Glossary Adding Terms and Definitions to an Existing Glossary Editing an Existing Term Deleting a Term Adding and Deleting AB/AF Relationships Setting up a New Glossary

Purpose of this Guidance Document

Terminology Services is a web-based system and suite of services for creating, maintaining, searching and publishing glossaries and taxonomies. Terminology Services is backed by an enterprise terminology management tool called Synaptica. The purpose of this guidance is to give glossary owners the information needed to access and use Terminology Services' Synaptica to update glossaries as required by the EPA Web Glossary Standard to support the display of their glossary through Terminology Service: an efficient way to create, maintain, and house your program glossary in one location, then link to it from wherever you would like.

How Glossaries are Managed in Synaptica

All glossaries currently being displayed from Terminology Services are maintained in the Active Vocabularies Taskview within Synaptica. Each glossary, called an object class in Synaptica, is described in the *Vocabulary of Vocabularies (VoV)*, maintained by the Terminology Services Coordinators. The VoV contains metadata for each vocabulary such as publishing organization, the editor's contact information, and more.

Roles and Permissions

Your profile within the system dictates which object classes (i.e., glossaries) you can edit. Your profile is created by one of the Terminology Services Coordinators. In the Editor role, you can add and delete terms, and change associated content such as definitions and relationships between terms and acronyms. The vocabularies, roles, and permissions are controlled by your Taskview, a pre-filtered selection of vocabularies related to a specific task.

Related Resources

For further details about using Synaptica, see the *Editors' Training Manual;* for guidance on glossary development, see *Best Practices in Terminology Development and Management*. Both are available at:

https://ofmext.epa.gov/sor_extranet/registry/termreg/outreachandeducation/educationalresources/manuals/ Select "Outreach and Education", "Educational Resources", then "Manuals".

For more information, contact the Terminology Services Coordinators:Angelina HurstMichael Pendletonhurst.angelina@epa.govpendleton.michael@epa.gov(202) 566-0701(202) 566-1658

1. Logging Into and Out of Synaptica

Enter Terminology Services – Synaptica KMS by going to Terminology Services extranet <<u>https://ofmext.epa.gov/sor_extranet/registry/termreg/manageterminology/accessterminologytool/</u>>. Click "Launch Terminology Services Tool". *Note that the system works best if you use Internet Explorer.*

Your User ID and Password are the same as your EPA Portal Login/Password. If you do not have EPA Portal access, go to <u>http://portal.epa.gov</u> and request access using one of the Terminology Services Coordinators as the EPA contact. If you have EPA Portal access and do not have access to Synaptica KMS, contact the Terminology Services Coordinators.

If the User ID and Password are accepted, the Taskview selection page is displayed. This page presents all the Taskviews available under your account.

To log out of Synaptica, click LOG OUT in the upper right corner of the page.

2. Viewing All the Terms in a Glossary



Select a Taskview. Your glossary can be found in the Active Vocabularies Taskview.

Click SEARCH.

Select your glossary from the Object Class scroll menu. If you do not find your glossary, contact a Terminology Services Coordinator.

/naptica®							
askviews Se	arch Tree Browse	A-Z Browse	Add	Reports	Tools	Admin	
Search							
Search Type			Searc	h Results			
Search Phrase:							
Smart	Begins Ocontains	Exact					
	or						
Range - Begin	n:a						
Specific UID:							Figure 2: Search pa
Use advanced	or d filters only						
Object Class:							
Accessibility Glos ACE Glossary of Acid Rain Glossa	Terms						
Star	rt Search Reset Searc	h					
± Sub-Element F	Filters						
± Date Filters							
Status Filters							
Formatting Op	otions						
Star	rt Search Reset Searc	:h					

Click START SEARCH.

All the terms in your glossary are displayed.

Synaptica®								
Taskviews	Search Tree Browse	A-Z Browse	Add Report	s Tools	Admin			
Search								
Search Typ	e		Search Results					
Search Phra	se:							
0.5	mart 🦳 Begins 🦳 Contains 🏾	Exact	Abbreviation (Te	rminology Ser	vices Glossary)			
			Acronym (Termin	ology Service	s Glossary)			
	use wildcards		American Nation	al Standards	s Institute (Terminolo	gy Services G	Blossary)	
	or		NSI (Terminology	Services Glo	ssary)			
🔘 Range -	Begin: a 👻 End: z 👻		PI (Terminology	Services Glos	sary)			
	or				<u>e</u> (Terminology Servic	ces Glossary)		
Specific	UID:				rvices Glossary)			
· ·	or		<u>ST</u> (Terminology S					
Ilse adv	anced filters only		Category (Termin					
0 030 001	anoca mero only		Classification (T					
Object Class					inology Services Glos	ssary)		
-	Reforms (2010)		Concept (Termine					
	S & T Glossary		<u>)ata</u> (Terminology)esignation (Ter					
	Services Glossary		ictionary (Termi				Figure 3: Se	earch Results Displa
			ownload (Termi				i iguie 5. Ot	caren results Display
ſ	Start Search Reset Search		ditor (Terminolo					
l	Start Search Keset Search				Services Glossary)			
+ Sub-Elem	ent Filters				e (Terminology Service	es Glossarv)		
+ Date Filte			acet (Terminolog					
			Glossary (Termin					
Status Fil	ters		lierarchy (Termin	ology Service	s Glossary)			
Formattin	ng Options		TML (Terminolog	y Services Gl	ossary)			
					(Terminology Service			
	Start Search Reset Search				gy Services Glossary	()		
(<u>nitialism</u> (Termin					
			nterface (Termin					
		1	nternational Or	anization fo	r Standardization (T	Ferminology Se	ervices Glossary)	

3. Adding Terms and Definitions to an Existing Glossary

Click ADD from the top menu bar. Select your Glossary from the pick list.

Synaptica [®]	_	_	-	_	_	_	
Taskviews Sear	ch Tree Browse	A-Z Browse	Add	Reports	Tools	Admin	
Add Items							
Add Item Form							
Object Class	Select Object Class	s 💌					
Synaptica Software Cop	Regulations.gov Gloss Reusable Vocabulary ReVA Program Gloss; Risk Assessment Glo yr Runoff Control Econ E Safe Drinking Water C Safe Drinking Water C Super Control Econ E State & Local Climate State & Regional Defir State Authorization Te STORET Legacy Glos Superfund S & T Glos Terms of Env (2009) TMDLs (303d) Glossa Top Green Home Term Toxic Trest & Risk Ass	Iry ssary en (1995) lossary 1999) & Energy titons rms sary ssary 0010) E Glossary Iry S	Reserved			Figure 4:	Add Item - Selection of Object Class

The page will refresh with an Add Items display.

Enter the term in the Descriptor field. For this example, we entered <u>Terminology</u>.

skviews Sea	rch Tree Browse A-Z Browse Add	Reports Tools	Admin	
d Items				
Add Item Form			Recently Added Items	
Object Class	Terminology Services Glossary 👻			
	Add Item			
Sub-Elements				
Descriptor:	Terminology	\sim	Enter term here	
Def1:	Set of designations belonging to one special language 1087-1:2000] NOTE: A term may contain symbols and variants, (e.g. different forms of spelling).		Enter definition here	_
)ef2:			$\overline{}$	
)ef3:				
)ef4:				
Def5:				Figure 5: Adding Terms, Definitions,
Source Note:				Setting Approval Status
Editorial Note:				Setting Approval Status
Scope Note:				
- Administrativ	e Attributes:			
Approval:	Capelidate		_	
Workflow:	Candidate Machine Load			
Language:	Pending		1	
locked:	Approved Change	status to App	proved	
BLAT:	Nes elle			
BTN:	🔿 Yes 💿 No			

Enter the definition in the Def1 field (see Figure 5 above). Multiple definitions should be entered in subsequent Def fields.

To make the term visible in the Terminology Services interface, set the approval status to Approved.

4. Editing an Existing Term

To Edit an Existing Term, you can use the Search tab.

Enter <u>an existing term</u> in the search box. Select the Exact Search mode.

Select the glossary (object class) where the term is recorded. If you don't select the glossary, the system will search in all object classes. In this example, we entered <u>Terminology</u> and selected the Terminology Services Glossary.

Synaptica®								
Taskviews	Search	Tree Browse	A-Z Browse	Add	Reports	Tools	Admin	
Search								
Search Type	•			Search	Results			
Search Phras	se: Terminok	ogy						
🔘 S		gins 💿 Contains 🌘	Exact					
		use wildcards						
💿 Range -	Begin: a 🖣	End: z 👻						
C Specific	UID:	or						Figure 6: Searching for Existing Term
Specific	UD.	or						<u>.</u>
Use adv	anced filters	only						
Object Class								
	rization Term acy Glossar	-						
	ogram Glossa							
	Reforms (201							
	S&T Glossar Services Glo							
(Start Searc	h Reset Search	h					

Click START SEARCH

All records containing the search term appear on the right side of the page, with the glossary (object class) in parentheses after each term.

naptica®	
askviews Search Tree Browse A-Z Browse	e Add Reports Tools Admin
Search	
Search Type	Search Results
Search Phrase: Terminology Smart Begins Contains Exact use wildcards or Range - Begin: a End: z Or Specific UID: Or Use advanced filters only	Terminology (Terminology Services Glossary) 1 Items Found Figure 7: Search Result fo
Object Class: Superfund Reforms (2010) Superfund S & T Glossary Terminology Services Glossary	

Click on the desired term.

An Item Summary window appears.

Item Summary	У	Â	Relationships
Descriptor Object Categories	Terminology Terminology Services Glossary		Add/Edit Relationships Tree View Visualize
Status UID	Active; Approved; Preferred; Unlocked 1746190		Terminology
Created Modified Save Refresh Deactivate			Top Level Parents Parents Children Associations Variants
Sub-Elements	•		
Descriptor: Def1:	Terminology Set of designations belonging to one special language. [ISO 1087-1:2000] NOTE: A term may contain symbols and can have variants, (e.g. different forms of spelling).	Ш	Figure 8: Item Summary for an Existing Term

In the Item Summary of a term you can:

- edit the term (in the descriptor field)
- add/delete a definition(s)
- delete a term
- restore a deleted term
- add/delete AB/AF or Use/UF relationships (see below)

After making changes to the Item Summary, **click SAVE.** Synaptica will timeout after a period of time so it is best to SAVE once changes are made.

The change is saved when the Modified field reflects the change.

5. Deleting a Term

Item Summary	Y		Relationships
Descriptor Object Categories	Terminology Terminology Services Glossary		Add/Edit Relationships Tree View Visualize
Status UID	Active; Approved; Preferred; Unlocked 1746190		Terminology
Created Modified Save Refresh Deactivate			Top Level Parents Parents Children Associations Variants
Sub-Elements Descriptor:	Terminology		
Def1:	Set of designations belonging to one special language. [ISO 1087-1:2000] NOTE: A term may contain symbols and can have variants, (e.g. different forms of spelling).	н	Figure 9: Changing Term to Deleted

From the Item Summary of a Term --

Click DELETE. Delete is highlighted in red on the Item Summary page. A confirmation message appears.

Click YES to confirm.

NOTE: The term and all its information will be retained in a deleted status. To find deleted terms within an object class, use the status filters under the SEARCH tab, and change the STATUS field to DELETED. Click START SEARCH. The deleted terms will appear in the results list.

To restore a deleted term to active status, click on the term and then click the RESTORE button. This button only appears in records of terms that have deleted or deactivated (temporarily unavailable) status. If you have trouble locating a term that you think should be in the glossary, contact a Terminology Services Coordinator.

6. Adding and Deleting AB/AF Relationships

If you are adding a term such as "Environmental Protection Agency (EPA)", the term and acronym should be added separately. Terminology Services has a special relationship (AB/AF) that connects full terms to their acronym/abbreviation. This feature supports the ability to search terms and acronyms separately within the Terminology Services Terms & Acronyms tab.

AB = Abbreviated By (applies to the acronym/abbreviation); AF = Abbreviated For (applies to the term)

Use the steps below to create an AB/AF relationship if both terms "Environmental Protection Agency" and "EPA" already exist in the glossary. If either term does not exist, follow the steps above for adding a term.

Click SEARCH tab to start your search.

Enter the full term in the search box (in this example, "<u>Environmental Protection Agency</u>"). Select your glossary from the object class scroll menu.

Click START SEARCH.

The results of the search appear on the right panel of the screen. Select the appropriate term. An Item Summary popup window appears.

Item Summary		ĥ	Relationships
Descriptor Object Categories Status UID Created Modified Save Refresh Deactivate	Environmental Protection Agency Test Glossary Active; Candidate; Preferred; Unlocked 1795531 nikkia_anderson 1/31/2011 10:56:13 PM nikkia_anderson 9/28/2011 12:26:14 PM Add New Subsume Categories History Delete Restore	m	Add/Edit Relationships Tree View Visualize
Sub-Elements Descriptor:	Environmental Protection Agency		Variants

Figure 10: Adding a Relationship

Select the ADD/EDIT RELATIONSHIPS button in the right frame.

Enter the acronym/abbreviated term (for this example, "<u>EPA</u>") into the search box and click the **SEARCH** button. The system will check to see if the term already exists. All records where the term appears are displayed, with the respective glossary (object class) in parentheses after each term. If the system finds that the term does not exist, the system will ask if you want to add the term.

Click on the term you need.

Descriptor	Environmental Protection Agency	Search phrase:
Object	Test Glossary	EPA
Categories		Smart Begins Contains Exact Object Class filt
Status	Active; Candidate; Preferred; Unlocked	Searching all permissible object classes
UID	1795531	EPA (Test Glossary)
Created	nikkia_anderson 1/31/2011 10:56:13 PM	
Modified	nikkia_anderson 9/28/2011 12:26:14 PM	
Save Refresh	Add New Subsume Categories History	
Deactivate	e Delete Restore Copy	Assign relationship: AB Cancel
Sub-Elements		
Descriptor:	Environmental Protection Agency	Current Relationships

Figure 11: Adding a Relationship to Existing Term

The right frame presents your options to assign and then add a relationship type.

Item Summary	1		Search for related terms
Descriptor	Environmental Protection Agency		Search phrase:
Object	Test Glossary		EPA
Categories			Smart Begins Contains Exact Object Class filter
Status	Active; Candidate; Preferred; Unlocked		Searching all permissible object classes
UID	1795531		EPA (Test Glossary)
Created	nikkia_anderson 1/31/2011 10:56:13 PM		
Modified	nikkia_anderson 9/28/2011 12:26:14 PM		
Deactivate	B Delete Restore Copy	.	Assign relationship: AB Add Relationship AB Cancel
Descriptor:	Environmental Protection Agency		Current Relationsh BT Limit to Taskview Show All
Def1:			

Figure 12: Adding an AB relationship

Select the AB relationship type and click ADD RELATIONSHIP.

You have now created the term/acronym (AB/AF) relationship: ENVIRONMENTAL PROTECTION AGENCY AB EPA

Item Summary		Search for related terms
Descriptor	Environmental Protection Agency	Search phrase:
Object	Test Glossary	EPA
Categories		Smart Begins Contains Exact Object Class f
Status	Active; Candidate; Preferred; Unlocked	Searching all permissible object classes
UID	1795531	EPA (Test Glossary)
Created	nikkia_anderson 1/31/2011 10:56:13 PM	
Modified	nikkia_anderson 9/28/2011 12:26:14 PM	
Save Refresh Deactivate	Add New Subsume Categories History Delete Restore Copy	Assign relationship: AB Add Relationship Cancel
		Current Relationships
Descriptor:	Environmental Protection Agency	
		DEL AB EPA (Test Glossary)
Def1:		

Figure 13: AB/AF Relationship

The relationship you created is listed under Current Relationships.

The system automatically builds the reciprocal relationship EPA **AF** ENVIRONMENTAL PROTECTION AGENCY.

The interface also supports Use/UF relationships. This relationship type distinguishes between preferred/non-preferred terms. If you have terms with this type of relationship in your glossary, follow the same steps listed above to create the Use/UF.

Use = preferred term; UF = non-preferred term

If you have other relationships in your glossary, contact the Terminology Services Coordinators.

7. Setting Up a New Glossary

The previous functions have been performed on existing glossaries. If you need to create or import a new glossary, contact one of the Terminology Services Coordinators.

In addition, the Coordinator will need to know who should have access to the glossary and with which permissions. If there are new users who do not currently have access to Terminology Services, the Coordinator will need their contact information and a statement about the reason they will be accessing the system.