EPA Terminology Services
Glossary Management Guide

November 2011
(Revised June 12, 2012)

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 Hurst	Michael Pendleton
hurst.angelina@epa.gov	pendleton.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 <https://ofmext.epa.gov/sor_extranet/registry/termreg/manageterminology/accessterminologytool/>. 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 http://portal.epa.gov 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

Figure 1: Synaptica Homepage with Taskview List

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.
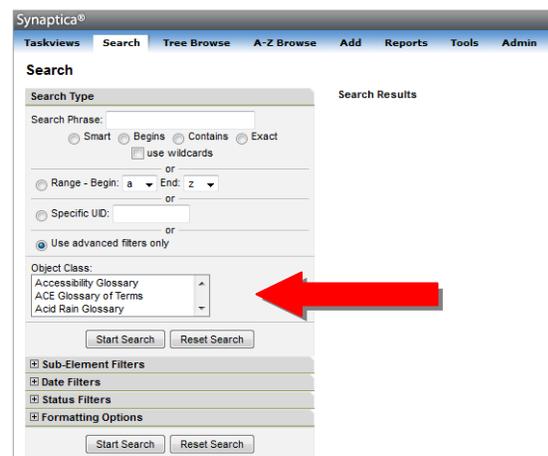

Figure 2: Search page

Click START SEARCH.
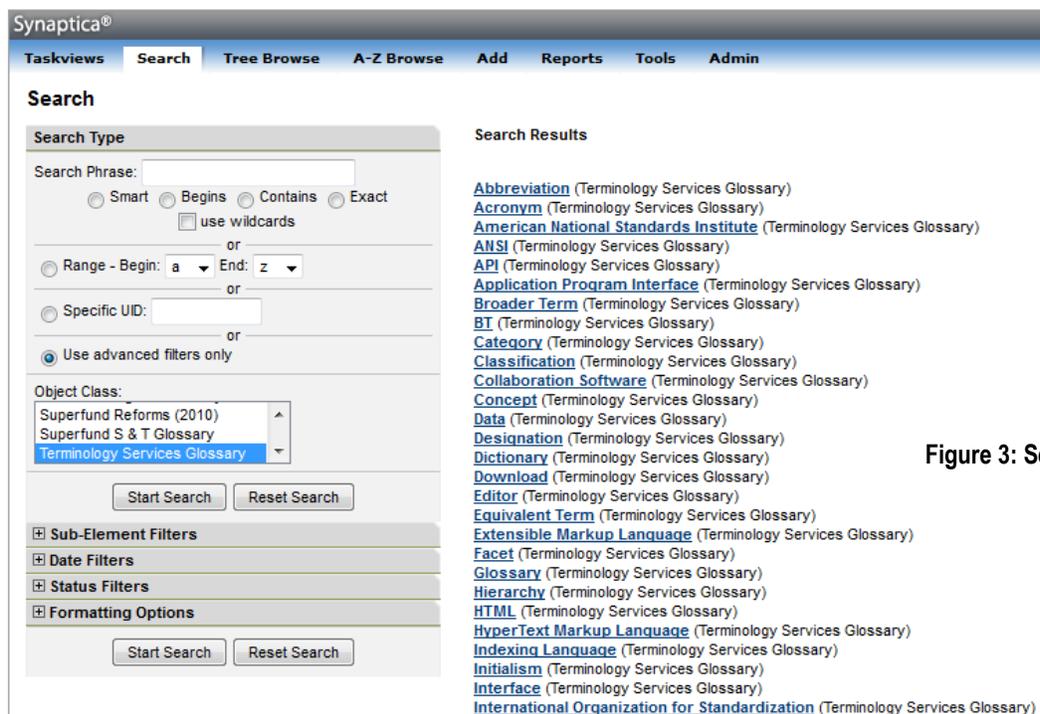
All the terms in your glossary are displayed.

Figure 3: Search Results Display

3.   Adding Terms and Definitions to an Existing Glossary

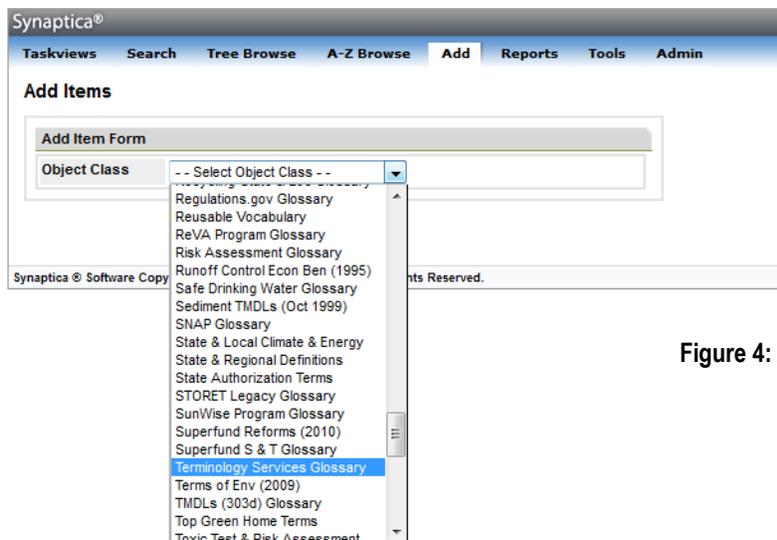**Click ADD from the top menu bar. Select your Glossary from the pick list.**

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>.

Figure 5: Adding Terms, Definitions, and Setting Approval Status

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.

Figure 6: Searching for Existing Term

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.
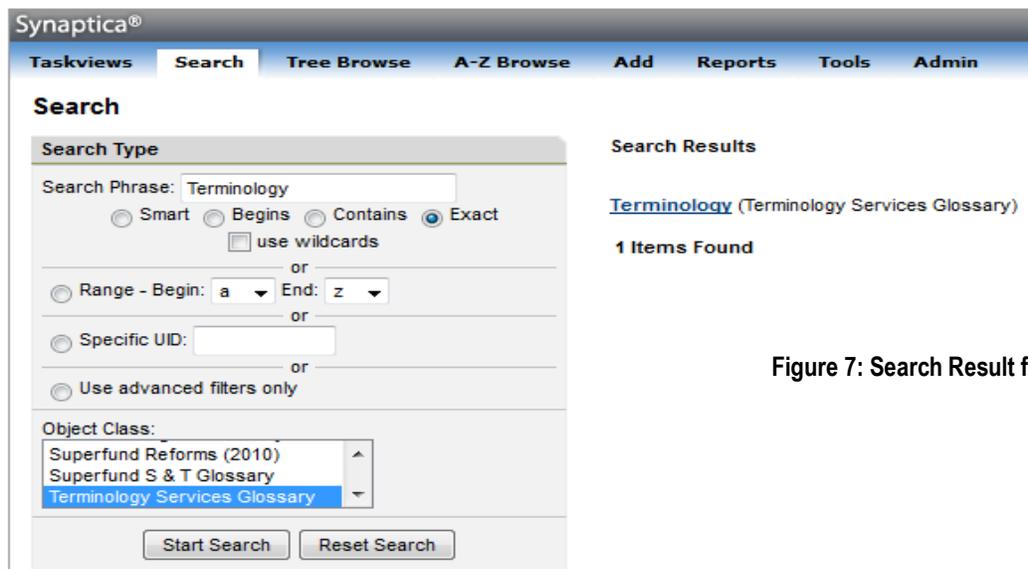

Figure 7: Search Result for Existing Term

Click on the desired term.
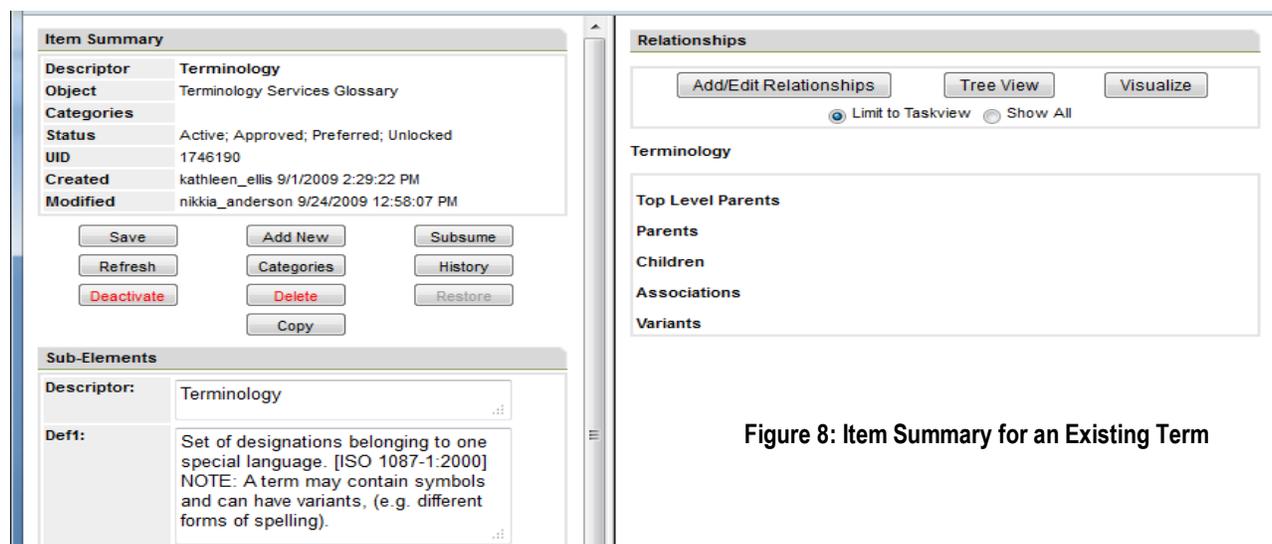
An Item Summary window appears.

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.
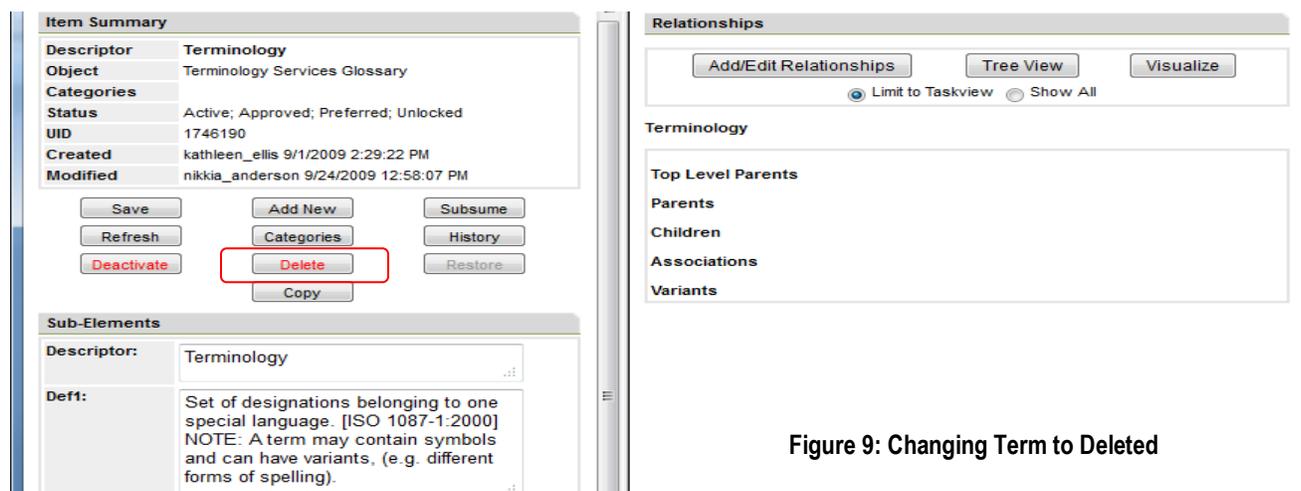
5. Deleting a Term

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, "Environmental Protection Agency"). 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.
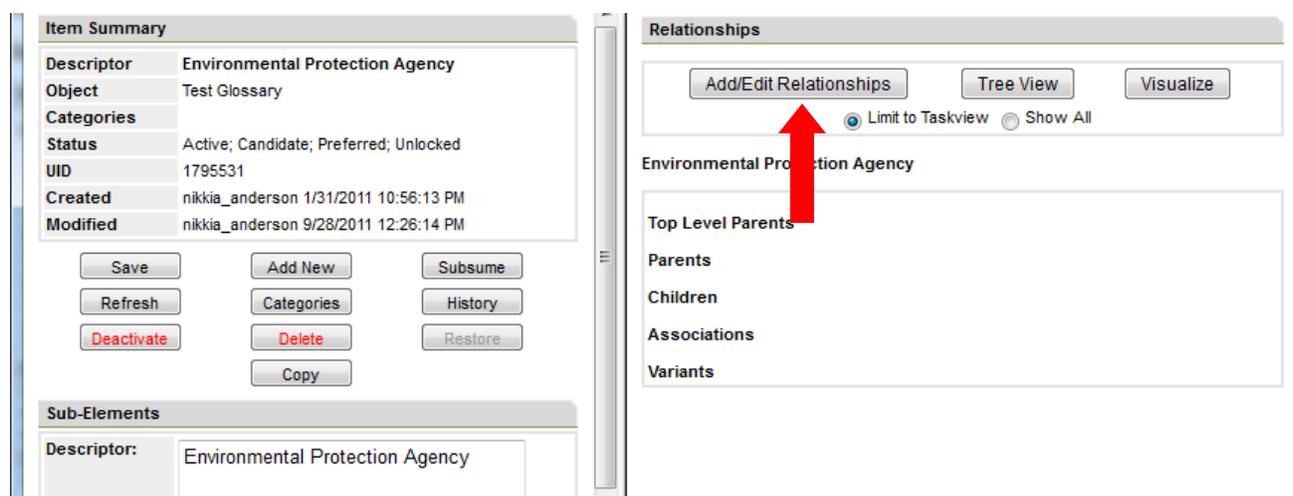

Figure 10: Adding a Relationship

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

Enter the acronym/abbreviated term (for this example, "EPA") 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.*
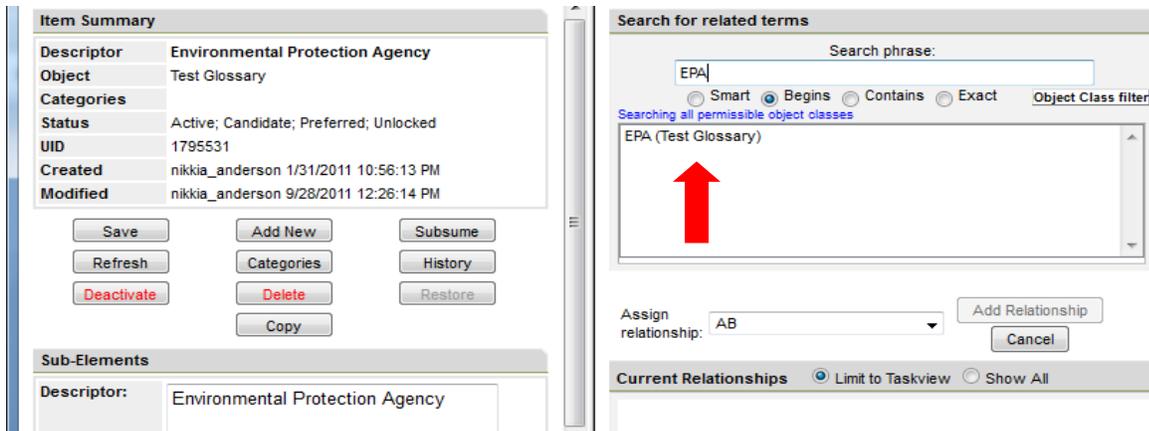
Click on the term you need.

Figure 11: Adding a Relationship to Existing Term

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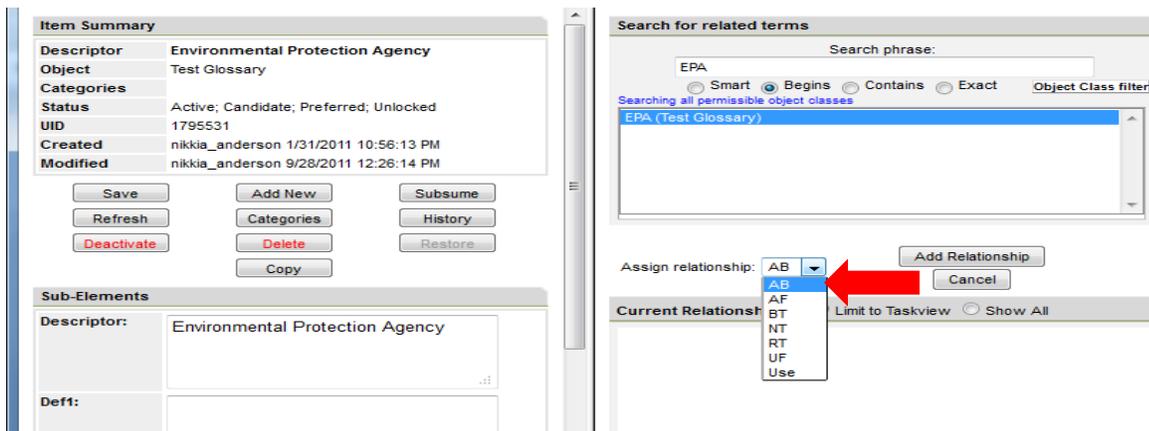

Figure 12: Adding an AB relationship

Select the AB relationship type and click ADD RELATIONSHIP.

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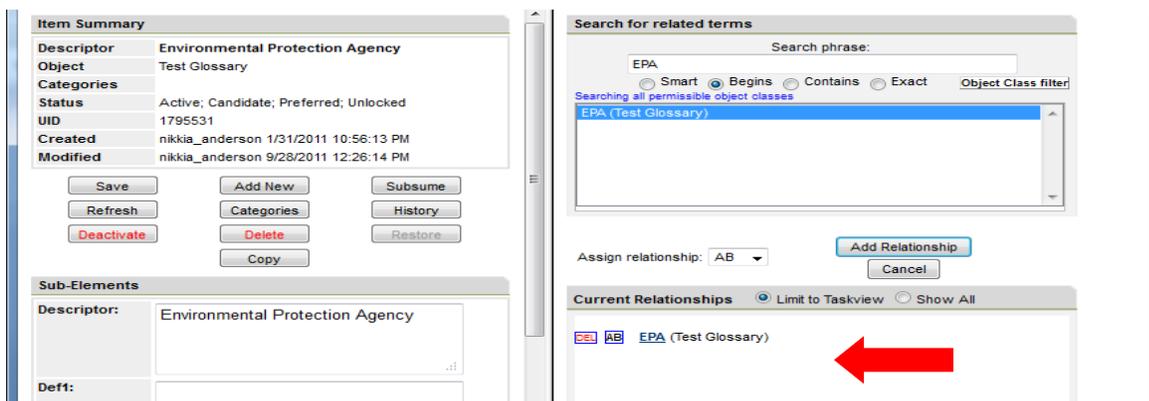

Figure 13: AB/AF Relationship

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.