uPerform Glossary: More Than Just a Dictionary

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Webinar Housekeeping

- All phones are muted upon entry.
- For direct questions, please use the WebEx Q & A panel.
- The webinar recording will be posted in the ANCILE Product Support Knowledgebase.
Agenda

- Glossary Overview
- Author Functionality
- Glossary Administrator Functionality
- Using Translations with Glossary
- Starting a Project Without Glossary
- Implementing Glossary After a Project Has Started
- Questions
The Glossary is a database of terms and definitions.
Glossary Overview

The terms are field names captured in procedural documents during the recording process.

4. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>R</td>
<td></td>
</tr>
</tbody>
</table>

Example:
1000
Glossary Overview

There is one Glossary database per server, but different definitions for the same term can be applied to different projects and different contexts within the same project.

Definitions

**Definition:** The number of items in the shopping cart.
**Language:** English (United States)
**Context:** ANCILE uPerform Workspace > ACME Fireworks > Document Library > Online Sales

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**Definition:** The total amount owed by the customer.
**Language:** English (United States)
**Context:** ANCILE uPerform Workspace > ACME Fireworks > Document Library > Retail Outlets

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**Definition:** Total tons of explosives.
**Language:** English (United States)
**Context:** ANCILE uPerform Workspace > ACME Industrial Explosives > Document Library
Globalization collects new terms from documents, catalogs which documents contain which terms, and adds approved definitions to terms in documents.

- **When globalization happens**
  - Every time a document is checked in
  - When a definition that applies to a document is updated the document is automatically assigned to the Globalization Queue.

- **Automatically publish documents after globalization**
  - Version 4.4 and later
  - Select option under Administration > Server Administration > Global Settings
  - Documents must have been previously published
  - New version of document must be same major version as previously published document

Automatically globalize documents in the globalize queue and publish documents in the publishing queue using the uSchedule utility.
Authors

Authors collect terms and suggest definitions for them.

Administrators

Administrators ensure that the correct, consistent definition is used every time a term appears in a document.
Author Functionality

1. Record document.

2. Check in document to assign context.

3. Select Tools > Update Term Definitions to fill in any existing definitions that apply to the assigned context.

4. Suggest new definitions for any terms that do not currently have one, and suggest changes to existing definitions if necessary.

The suggestions will automatically be assigned to the document context. The Glossary Administrator can change this if necessary.
Demonstration
Glossary Administrator Functionality

- Enable Glossary
- Enable rich text
- Add terms
- Delete term
- Add definitions
- Edit definitions
- Add/change context
- Add/change synonyms

- View all suggestions
- View term usage
- View undefined terms
- View unused terms
- View term summary by project
- Import/export glossary terms and definitions
- Manage the globalization queue

Since there is a single Glossary database for the entire uPerform server, the Glossary Administrator role applies to the entire server. It is not project specific.
Demonstration
Using Translations with Glossary

• Things to consider...

• Will your translated documents be created by multi-lingual authors or will you be sending them to a translation company?

• Will you be creating the translated documents with screens in the original language or the target language?
Using Translations with Glossary

Multi-lingual authors + screens in the original language

- Author suggests a new definition for the original term in the translated document.
- Translated definition for the existing term is created in the Glossary.

Administrators may not be able to see suggested definitions in alternate languages on the server in v5. Please contact Product Support for assistance if you experience this issue.
Using Translations with Glossary

Multi-lingual authors + screens in the target language

• Author suggests a new definition for the new (translated) term.

• New term/definition is added to Glossary.
Using Translations with Glossary

Translation company + screens in the original language

- Export Glossary translation XML file with the correct source and target languages selected.

- Send it to the translation company to translate the definitions into the target language.

- Import the translated Glossary with the target language selected.
Using Translations with Glossary

Translation company + screens in the target language

- Export the existing Glossary one context at a time in the original language or export Term Summary by Project report.

- Send them to the translation company to translate the terms and the definitions.

- Import the translated Glossary files with the target language and context selected.

- Re-record documents in the target language.

- Check in documents.

- During editing, use Tools > Update Term Definitions to fill in definitions.

- Use the translated Glossary “cheat sheet” to fill in the rest using Suggest Definition since all terms might not match the translations.
Starting a Project Without Glossary

Best Practices

• Start with Glossary disabled.

• Authors enter definitions into documents manually.

• Authors maintain a spreadsheet throughout the development process that contains:
  • Field names/terms
  • Definitions
  • Context

• If you decide to enable Glossary at a later date, the Administrator can:
  • Divide terms/definitions into separate spreadsheets by context.
  • Convert spreadsheets into tab delimited files.
  • Import the terms and definitions one context at a time.
Starting a Project Without Glossary

Before importing check your spreadsheet for the following:

- Carriage returns
- Duplicates
- Terms/definitions that exceed the character limit (1000 for terms, 2000 for definitions).

Note – Character limits were reversed in v4.5. This issue was resolved in v5.
Implementing Glossary After a Project Has Started

To implement the Glossary all at once:

• Check out each document one at a time.
• Manually enter each term, definition and context into a spreadsheet.
• Create separate tab delimited files for each context.
• Enable the Glossary.
• Import the files one context at a time.
• Globalize the documents.

This process will prevent the administrator from having to accept each suggestion one at a time.
Implementing Glossary After a Project Has Started

To implement the Glossary gradually:

• Enable the Glossary.

• Each time a document is checked out for editing, use the Suggest Definition functionality to suggest each definition in the document.

• Administrator approves definitions as they come in.

• Only documents that have been through this process should be globalized, otherwise definitions will be wiped from other documents.
A .PDF copy of the presentation as well as the recording will be available on the Product Support Center. (https://ancile.parature.com)

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ANCILE Products Users Group (APUG) Conferences Announced!

North America - September 11 - 13, Washington, DC

APJ - May 14, Singapore / September 9 - 10, Sydney, Australia

EMEA - September 23 - 24, London, UK