Configuration manual

termXact 2017

Desktop Checker 2019

As of: January 2020

Valid for:

termXact 2017 for Microsoft Word, Excel, PPT

termXact Desktop Checker 2019

termXact 2017 for Flare

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Before you start working with termXact to check the terminology of text, a configuration file has to be stored by the termXact-administrator.

As termXact-administrator you will have several possibilities:

a) You can use a termXact default configuration that is scope of delivery. The default configuration file can be rolled out at the same time with termXact-AdddIn by the IT management (please contact TermSolutions in this case).

b) You can prepare different configurations for user groups (e. g. version englisch and version german based on the default configuration) which can be loaded by the users.

c) You can propose a central configuration that can be individually adapted and saved by users.

termXact always uses the last loaded configuration when starting the editor (Word, Excel, PowerPoint or Desktop Checker).

For the configuration of termXact proceed as follows:

(1)   Start the editor.

(2)   In the menu bar click on termXact.

(3)   Click on the symbol

The configuration window contains the tabs *Colors and Verification Mode*, *Terminology File* and *File Location*.

The following buttons (listet under item 1.1) have the same functions in each tab. The Desktop Checker has less functions than MS-Office-Programs. These missing functions are marked in the following tables with this symbol

1.1 Saving and loading configurations

Button	Description
Cancel	Closes the dialog wihtout saving changes.
Load Standard (optional)	Loads a preset standard configuration (if set).
Load	Jumps to the file system, where you can load an existing configuration file.
Apply	The defined values are applied only to the current check. The saved configuration file will be unchanged.
Save As	Save your settings under an individual file name.

1.2 Tab *Colors and Verification Mode*

Field title	Description
Section *Colors*	
for allowed terms/ *for forbidden terms /* *for ambiguous terms*	Select a color that marks found terms or rather select no color *(---)*. Ambiguous terms are terms in the terminology list, which are (for different or identical terms) allowed and forbidden, or which have no current state or another current state as allowed or forbidden.

Section *Verification Mode*	
Verification Mode	Choose which section should be checked:
	In MS Word:
	- *current document* checks the complete document
	- *current selection* checks the selected text
	- *current section* checks the section where the pointer is placed
	In MS Excel:
	- *current workbook* checks the complete workbook
	- *current selection* checks the selected cells
	- *current worksheet* checks the worksheet shown in the foreground
	In MS PowerPoint:
	- *current document* checks the complete document
	- *current selection* checks the selected text
	- *current slide* checks the slide shown in the foreground
	In Flare:
	- *current document* checks the currently displayed document
	- *selection* checks the selected text
	- *files in same folder* checks all files in the selected folder

	- *all opened documents* checks all documents that are currently loaded in Flare
	- *choose folder* jumps to the selection of a folder/file in the directory system
File types (only Flare)	Select which file type to check: *All, Topics (*.htm)* or *Snippets (*.flsnp)*.

Tips:

– Only color *red for forbidden terms* and color *yellow for ambiguous terms*. In this case allowed terms will not be marked in the text.

– Additional color *grey for allowed terms*. This setting elucidated to the user which terms are already existing in the database. Nevertheless only forbidden and ambiguous hits will be passed during the check.

– Check completely without colors *(---)*: Select these setting if the original text already contains color formattings. Otherwise these color formattings will be deleted in the original text if the function *Delete marks* (hits found by termXact) is used.

1.3 Tab *Term Database* (Excel sheet)

Field title	Description
Section *File*	
File Location	Specify the file path to indicate which term database you want to use. Click on button *Browse* to select the term database file. Normally .xls- or .xlsx files are used.
Password	Enter the password if the term database is protected with a password.
Sheet Name	Enter the name of the Excel sheet that contains the term database.
Section *Language to be verified*	Enter the code for the language which should be checked (e. g. EN for English). The language code must be identical with the entry in the Excel column *Language*. Please note upper and lower case letters.
Section *Data*	
Header Row	Enable the cklick box if the term database contains a header row. termXact then automatically inserts the header row names.
Filter Term Database	Enable the cklick box to run a check based on a reduced term database. In the field *Filter column* enter the name of the column that contains the filter value. In the section *Column Values* field *Value(s) for filtered list* enter the value that is relevant for checking (e. g. „Yes"). In this case only rows of the term database are taken

	into account that correspond to the filter criteria.
Concept ID	Enter the name of the column that contains the concept id (see also description figure 1 on page 8).
Language	Enter the name of the column that contains the language that needs to be checked.
Term	Enter the name of the column that contains the terms.
Usage Status	Enter the name of the column that contains the usage status of the terms (e. g. allowed, forbidden, erlaubt, verboten etc.).
Last column to be shown in the result window	Enter the name of the column as to where fields are shown in the result window.
Column with information for exact matches	Column e. g. types of words that contains picklist values like abbreviations or product names which should be found exclusively as whole-word.
Filter Column	Enter the name of the column that contains the filter value to run a check based on a reduced term database (see also description above: *Filter Term Database).*
Section *Column Values*	
Value(s) for allowed terms	Enter the values for allowed terms that are shown in the column *Usage Status* (e. g. allowed, valid or zugelassen). Please separate multiple entries by semicolon.
Value(s) for forbidden terms	Enter the values for forbidden terms that are shown in the column *Usage Status* (e. g. forbidden, invalid or verboten). Please separate multiple entries by semicolon.
Value(s) for exact matches	Enter the values for exact matches shown in *Column with information for exact matches.* Please separate

	multiple entries by semicolon.
Value(s) for filtered list	Enter the filter value that reduces the term database to specific rows (e. g. „Yes"). The filter value must exist in the column that is declared in the section *Data* field *Filter Column*. See also description above: *Filter Term Database).*

Concept ID	Language	Term	Usage Status
25	en	bicycle	allowed
25	en	bike	forbidden
25	en	cycle	forbidden
25	en	two-wheeler	forbidden
25	en	tandem	forbidden

Figure 1: Example for a simple term database

Important: The column that contains the concept id must be filled. The concept id marks different terms that belongs to the same entry, i. e. terms are held together in one or several languages (term autonomy). Also the column that contains the language code (e. g. language codes corresponding to ISO) must be filled. This also applies if only one language exists in the term database.

Important: All columns between *Concept ID* and *Term* will not be displayed in the result window. All columns after column *Term* will be displayed up to the entry that has been defined in the field *Last column to be shown in the result window.*

1.4 Tab *File Location*

Field title	Description
Section *Configuration*	
File Name	Displays the name of the saved configuration file.
File Path	Displays the file path of the configuration file.
Section *Statistics*	Options for saving the statistic file.
– *always*	Statistic file will be always saved.
– *never*	Statistic file will be never saved.
– *on request*	Statistic file can be saved or not after a request dialogue box has been displayed.
File Path	Sets the directory where the statistic file should be saved (in case of selection *always* and *on request*). If no directory is set, the statistic file will be automatically saved in the directory of the file to be checked.
Section *Verified File*	Options for saving the file to be checked (save colored markings in the original file or in a file copy).
– *always*	Colored markings are always saved in a copy of the original file.
– *never*	Colored markings are never saved in a copy of the original file. Colored markings will be saved in the original file.
– *on request*	Colored markings are saved or not in a file copy after a request dialogue box has been displayed.

File Path	Sets the directory where the verified file should be saved (in case of selection *always* and *on request*). If no directory is set, the verified file will be automatically saved in the directory of the file to be checked.