



External Collaborator's Handbook

Last updated on 23.08.2023

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1. INTRODUCTION

The purpose of this handbook is to offer users with an External Collaborator role guidance on the completion of outsourced assignments in IATE.

An External Collaborator may be a freelance terminologist, a university student or a subject-field expert entrusted with the creation or update of IATE entries in their working language.

After logging on to IATE, the External Collaborator will have access to three modules: Search, Terminology Projects Module and Documentation:




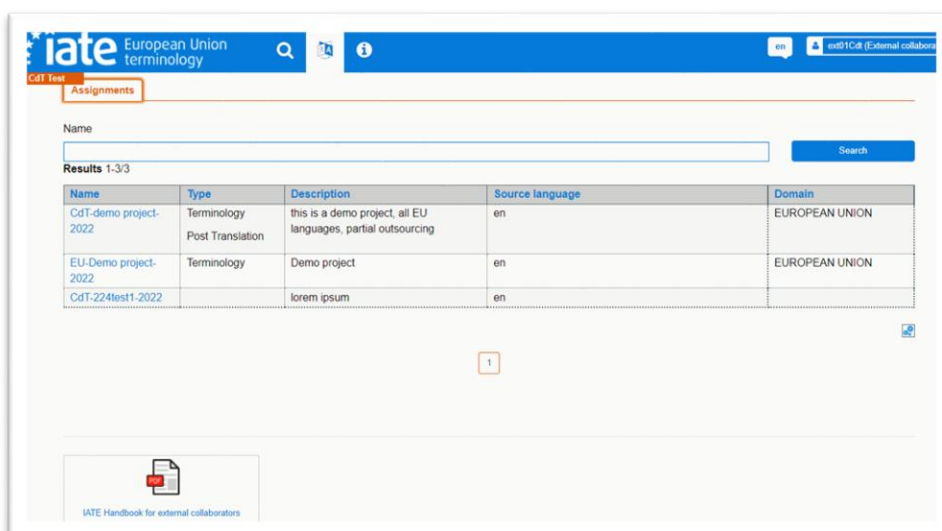
Outsourced assignments will be available in the Terminology Projects Module.

2. TERMINOLOGY PROJECTS MODULE (TPM)

The Terminology Projects Module has been created to allow users with the necessary rights to work on project entries directly in IATE.

In this module, users with the External Collaborator role can manage their assignments and tasks, based on the specific access rights granted for the IATE entries assigned to them as part of a project.

Clicking on the Terminology Projects Module  button gives direct access to the list of terminology projects.



The screenshot shows the IATE web interface. At the top, there is a blue header with the IATE logo and 'European Union terminology'. Below the header, there is a search bar and a 'Search' button. The main content area displays a table of project assignments. The table has five columns: Name, Type, Description, Source language, and Domain. There are three rows of data. Below the table, there is a small orange box with the number '1'. At the bottom left, there is a document icon and the text 'IATE Handbook for external collaborators'.

Name	Type	Description	Source language	Domain
CdT-demo project-2022	Terminology Post Translation	this is a demo project, all EU languages, partial outsourcing	en	EUROPEAN UNION
EU-Demo project-2022	Terminology	Demo project	en	EUROPEAN UNION
CdT-224test1-2022		lorem ipsum	en	

Each project will include a specific description, instructions, background reference material and other relevant information, as well as the list of assigned entries and access to the external forum.

CdT-demo project-2022

[Project info](#) [My assigned entries](#) [External forum](#)

Description: this is a demo project, all EU languages, partial outsourcing
Project type(s): Terminology, Post Translation

Background reference:
[EUIPO - Home \(europa.eu\)](#)
[WIPO - World Intellectual Property Organization](#)

Source language: en


Project instructions: Project instructions
Please proceed as follows:
- open each project entry by clicking on the entry ID
- add your language
- add terms and synonyms
- etc.

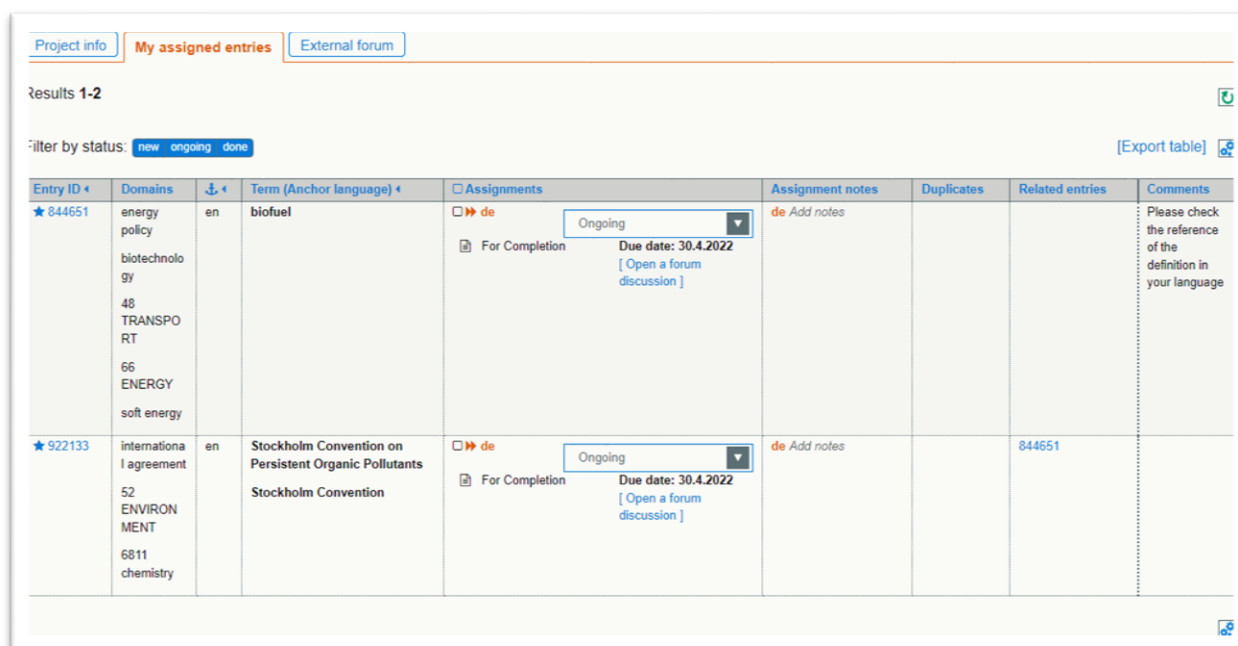
Coordinators:
CoordTPM (CdT / EN)
TPMcoord (CdT / Central Terminology)
tpm (CdT / Central Terminology)

Domain:
10 EUROPEAN UNION


3. MANAGING ASSIGNMENTS



To start working on your assignment, first select the terminology project by clicking on its name. Then click on the tab 'My assigned entries'.

Here you have direct access to clickable entry IDs, which will allow you to open the full entry view and update the content. You will also find here the assignment instructions (by left-clicking on the  icon), the task type and the assignment due date, as well as additional information provided by the project coordinator, such as duplicates detected, related entries and other comments, all grouped in a table.



Entry ID	Domains	Term (Anchor language)	Assignments	Assignment notes	Duplicates	Related entries	Comments
★ 844651	energy policy biotechnology 48 TRANSPORT 66 ENERGY soft energy	en biofuel	<input type="checkbox"/> de Ongoing Due date: 30.4.2022 [Open a forum discussion] <input type="checkbox"/> For Completion	de Add notes			Please check the reference of the definition in your language
★ 922133	international agreement 52 ENVIRONMENT 6811 chemistry	en Stockholm Convention on Persistent Organic Pollutants Stockholm Convention	<input type="checkbox"/> de Ongoing Due date: 30.4.2022 [Open a forum discussion] <input type="checkbox"/> For Completion	de Add notes		844651	

In order to configure your project entries table, click on the 'Choose and sort columns' button . On the right, you will see the columns currently displayed in the table. On the left, there is a list of other available columns, which you can drag and drop into the right-hand box in order to see their content in the table. You can change the order of the columns by dragging them into the desired order in this box.

Additionally, you can sort the entries in the project table by clicking on the left arrow  in the title row. When sorting is applied in a certain column, this will be indicated by a down arrow .

If you wish to have a copy of the project entries table outside IATE, it is possible to export it in Excel format, by clicking on the button [Export table].

In the project entries table, you can change the assignment status from **New** to **Ongoing** or **Done**. You can do this entry-by-entry, by choosing the desired status from the drop-down list available in the Assignments column, or in batches, by ticking the box in the Assignments column to select several entries and then using the selector ('Change status of selected assignments to') displayed at the bottom of the page.

Entry ID	Domains	Term (Anchor language)	Assignments
★ 844651	<ul style="list-style-type: none"> energy policy biotechnology 48 TRANSPORT 66 ENERGY soft energy 	en biofuel	<input checked="" type="checkbox"/> de Ongoing <input type="checkbox"/> For Completion Due date: 30.4.2 [Open a forum d
★ 922133	<ul style="list-style-type: none"> international agreement 52 ENVIRONMENT 6811 chemistry 	en Stockholm Convention on Persistent Organic Pollutants Stockholm Convention	<input checked="" type="checkbox"/> de Ongoing <input type="checkbox"/> For Completion Due date: 30.4.2 [Open a forum d

If you want to see entries having only one specific status, a 'Filter by status' button is available above the table. Click on the different status options **new ongoing done** to display or hide them. A blue background indicates that entries with that status are displayed and a white background indicates that entries with that status are filtered out. When the filtering applied does not match any items in the table, an information bar is displayed with a button allowing you to reset the filters.

The 'Assignment notes' field allows you to keep track, in private mode (i.e. visible only to you), of any comments and remarks on each entry.

You can communicate with the project coordinator(s) via a forum.

You can create a discussion for a specific project entry, either by clicking on the button '[Open a forum discussion]' in the Assignments column, or by clicking on the External forum tab.

Project info | My assigned entries | External forum

Create a new discussion [Search] x Q

this is a new comment

[Text input field]

Answer

I need to ask a question

Related entry: 844651

this is a reply from the coordinator

[Text input field]

Answer

4. ENTRY LEVELS

When you click on the entry ID in the project entries table, you will access the full entry view, which displays by default the entry's anchor language and your working language, if that language is present on the entry. A Quick edit panel on the left-hand side allows you to open the editable fields at Language Level and Term Level in your working language.

Quick edit #844651

IATE ID: 844651

Domain: energy policy [ENERGY > energy policy]
biotechnology [PRODUCTION, TECHNOLOGY AND RESEARCH > technology and technical regulations]
Domain note: biomass biofuel bioenergy
48 TRANSPORT
66 ENERGY
soft energy [ENERGY > soft energy]

Cross-references:
Cross-reference: current entry is narrower than 752087 fuel
Cross-reference: current entry is broader than 3561399 food based biofuel
Cross-reference: current entry is related to 753749 biomass

Owner: CdT

NOT VALIDATED

Definition: Editing definition:
1) aus Biomasse hergestellter Brennstoff IATE:752087
2) flüssiger oder gasförmiger Kraftstoff IATE:743479 für den Verkehr, der aus Biomasse IATE:753749 hergestellt wird

Definition reference: vgl. RL 2009/28/EG Förderung der Nutzung von Energie aus erneuerbaren Quellen, Art.2 Buchst.l (ABl. L_140/2009, S.16) CELEX:32009L0028/DE

Definition reference: Richtlinie 2009/28/EG des Europäischen Parlaments und des Rates vom 23. April 2009 zur Förderung der Nutzung von Energie aus erneuerbaren Quellen und zur Änderung und anschließenden Aufhebung der Richtlinien 2001/77/EG und 2003/30/EG (Text von Bedeutung für den EVVR)

Note: 1) kann flüssig (z. B. Rapsölmethylester), gasförmig (Biogas) oder fest (z. B. jede Art von Holz) vorliegen; DIVI: st 25.10.06, UFDI: aka s.04.09, ahl 16.4.2010 2) Achtung: nicht dasselbe wie Biobrennstoff

TPM project assignment: EU-Demo project-2022

Definition: 1) fuel produced from dry organic matter or combustible oils produced by plants 2) liquid or gaseous fuel for transport produced from biomass

Definition reference: IPCC Third Assessment Report > Glossary of terms > 'biofuel' (16.3.2002) (p. 367)

Definition reference: Directive 2009/28/EC on the promotion of the use of energy from renewable sources and amending and subsequently repealing Directives 2001/77/EC and 2003/30/EC (Text with EEA relevance)

Note: 1) Examples include alcohol (from fermented sugar), black liquor from the paper manufacturing process, wood, and soybean oil. Agrofuels, woodfuels, and municipal biofuel are all types of biofuel. Not to be confused with narrower entry biofuel (FR: biocarburant) IATE:960487, which specifically refers to liquid or gaseous biofuel used as transport fuel. Unlike in some other languages, in English the term 'biofuel' is used to cover both concepts. 2) See also 'agrofuel' [IATE:2244025] (in some languages the prefix

IATE entries are divided into three levels:

1. Language-Independent Level (LIL) – not editable

Contains concept-related information (domains, origin, etc.) and administrative information, and applies to all the data in the levels below it. In the full entry view it is collapsed by default, showing only the main information. You can see more details by clicking on the 'Show more' button

IATE ID: 3664629

Domain: financing policy [FINANCE > financing and investment > financing]
5206 environmental policy [ENVIRONMENT]
sustainable development [ECONOMICS > economic policy > economic policy > development policy]

Owner: EEA

2. Language Level (LL) – editable in your working language

It is written in a particular language, and it applies to all the terms in that language. A definition of the concept as well as any related notes can be found here.

en


TPM project assignment: CdT-My assigned entries-2022

Definition: levy on imported goods to counter carbon leakage, in order to avoid industries in countries with stricter rules being penalised

Definition reference: CdT-Terminology Coordination, based on: Carbon Tax Center, 'What's a carbon tax?', <https://www.carbontax.org/whats-a-carbon-tax/> (21.4.2020)

Note: The aim is to counter "carbon leakage" whereby EU industries are penalised by cheaper imports from countries that apply less strict rules to tackle climate change. (<https://www.reuters.com/article/us-climate-change-eu-carbontax-explainer/explainer-what-an-eu-carbon-border-tax-might-look-like-and-who-would-be-hit>)

Owner: EEA



3. Term Level (TL) – editable in your working language

Contains a term or terms in a particular language.

Term: CO2 border tax

Term reference: EU High-Level Group on Sustainable Finance (HLEG), 'Financing a sustainable European economy', Final Report 2018, https://ec.europa.eu/info/sites/info/files/180131-sustainable-finance-final-report_en.pdf (21.4.2020)

Term type: term


Reliability: ★★★★★

Contexts:

Term in context: Despite the long-term benefits that are undisputed, ambitious steps to fight climate change can entail short-term costs. The Commission should ensure that employment in the EU is not negatively affected by lower ambition in some other constituencies and consider action in case of possible distortions ('CO2 border tax').

Context reference: EU High-Level Group on Sustainable Finance (HLEG), 'Financing a sustainable European economy', Final Report 2018, https://ec.europa.eu/info/sites/info/files/180131-sustainable-finance-final-report_en.pdf (21.4.2020)

Owner: EEA




Term: carbon border tax

Term reference: European Environment Agency (EEA), validated by the national experts (3.11.2020)

Term type: term

Reliability: ★★★★★

Owner: EEA




5. ADDING OR MODIFYING DATA

As an external collaborator, your task is to add new data or to modify and update existing data at the Language Level and at the Term Level. Open the entry by clicking on the entry ID listed in the tab 'My assigned entries'. Please be aware that if you open the entry from the general search results page, your editing rights will not be enabled. You need to open the entry from the list of assigned entries.

5.1. How to add a language

If your working language is not present on the entry, the language code that appears on the language navigation bar has a grey background. This indicates that you have to add the language yourself. Hover the mouse over your language code, right-click and select 'Add new language'.

 + Add new language

This will create a new language section containing the main fields at LL and TL. You can see more fields by clicking on the 'Expand' icon .

Fill in all the relevant fields and then click on the 'Save all' button at the bottom.

Discard

Save all

The following fields must be filled in for all terms:

- Term
- Term reference
- Term type
- Reliability.

Read your assignment carefully to see whether there are other fields which are compulsory for you.

5.2. How to modify existing content

If your working language is already present on the entry, it is displayed automatically, side by side with the entry's anchor language. To make changes to existing content, you first have to open it for editing. The easiest way is to double-click on the blue language code, which is visible in three different places: in the language navigation bar, in the language section below it and in the Quick edit panel. That opens all available fields for editing. For more ways to open fields for editing, see section [7. How to open a field for editing](#).

When you edit a free text field, you can format the text in various ways using the formatting bar. First select the text to be formatted and then click on the desired formatting button. In certain fields, you can also insert hyperlinks, or search for and insert EUR-Lex references. Hover your mouse over each icon to see what it means and then click on the button corresponding to the desired action.

You can for example use **bold** or *italics*.

 B I x₂ x² ✖ A    




For other types of field, you will get a drop-down list, from which you need to choose the correct option.

The image shows a dropdown menu for 'Term type'. The menu is open, displaying a list of options: 'term', 'abbrev', 'formula', 'phrase', 'short form', and 'term'. The 'term' option at the bottom is highlighted in blue. The dropdown arrow is visible on the right side of the menu.

Once you have done all the necessary changes at the Language Level and the Term Level, click on the 'Save all' button at the bottom.

The image shows two buttons: 'Discard' and 'Save all'. The 'Save all' button is highlighted in blue, indicating it is the active or recommended action.


5.3. Adding or removing fields

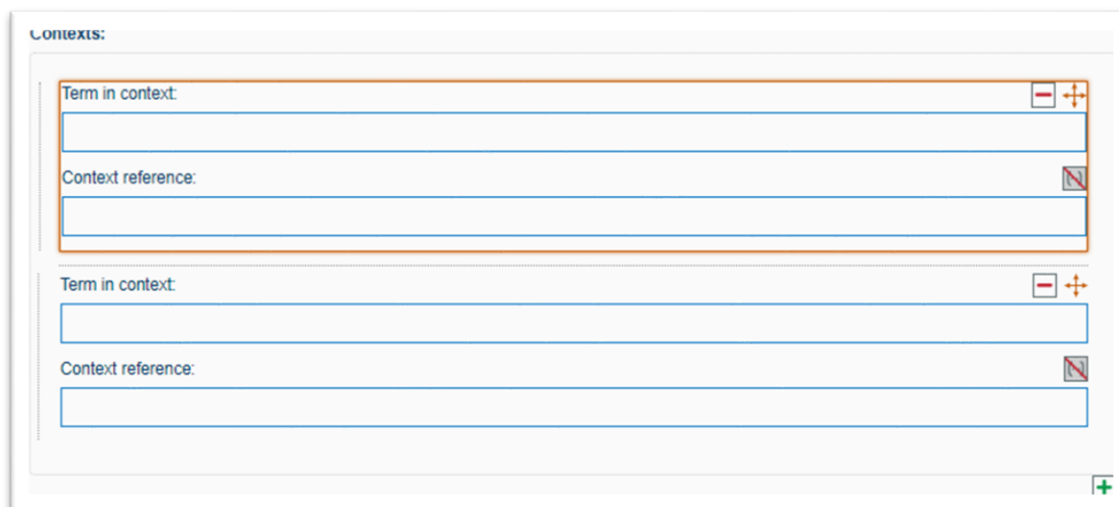
If you need to add a new term or a second reference, for example, you can use the  'Add' button. Hover your mouse over this button to see what you can do with it, for instance, 'Add term reference', 'Add context' or 'Add term'. The 'Add' button always appears under the field, composite field or level to which it refers.


The image shows a form for editing a term. It includes several fields: 'Term' (empty), 'Term reference' (empty with a delete icon), 'Term type' (dropdown menu showing 'term'), and 'Reliability' (dropdown menu showing '**'). There are also 'Add' and 'Remove/Delete' buttons. The 'Add Term' button is located at the bottom right of the form.

Following the same logic, it is also possible to remove certain optional fields, using the 'Remove/Delete'  button. Note that in the case of fields, this button appears on top, whereas when it applies to the entire level, it is displayed below.

5.4. Sorting

In the case of multiple fields, a ‘Sort’ icon  appears above the field. It enables you to rearrange the order of the fields according to your needs by dragging the icon and dropping it on top of the icon of the other element whose place it should take.



You can also add or sort terms via the language section menu (accessible by clicking on the  button at the top right corner of the Language Level).



5.5. Validation status

The content you create or modify will be unvalidated. The validation task will be assigned to the internal terminologists.

6. USER PREFERENCES

You can adjust various search and data visualisation settings yourself. These settings can be found by clicking on your user name (at the top right corner of the screen) and then selecting the ‘User preferences’ tab.

User profile | **User preferences** | Bookmarks | Notifications

RESET Save

General

User interface: default

Search/Results

Matching type: All words

Results per page: 10

Source language: bg cs da de el **en** es et fi fr ga hr hu it lt lv mt nl pl pt ro sk sl sv la mul

Target language: bg cs da de **el** en es et fi fr ga hr hu it lt lv mt nl pl pt ro sk sl sv la mul

Visualisation: Standard view

Display languages (Interpreters' view):

bg	cs	da	de	el	en	es	et	fi	fr
ga	hr	hu	it	lt	lv	mt	nl	pl	pt
ro	sk	sl	sv	la	mul				

Show more

Owner:

<input checked="" type="checkbox"/> CdT	<input checked="" type="checkbox"/> CJUE	<input checked="" type="checkbox"/> COM	<input checked="" type="checkbox"/> Consilium	<input checked="" type="checkbox"/> ECA
<input checked="" type="checkbox"/> ECB	<input checked="" type="checkbox"/> EESC/COR	<input checked="" type="checkbox"/> EIB	<input checked="" type="checkbox"/> EP	<input checked="" type="checkbox"/> External
<input checked="" type="checkbox"/> ACER [CdT]	<input checked="" type="checkbox"/> CEDEFOP [CdT]	<input checked="" type="checkbox"/> CEPOL [CdT]	<input checked="" type="checkbox"/> Codict [EP]	<input checked="" type="checkbox"/> COM Freelance [COM]
<input checked="" type="checkbox"/> CPVO [CdT]	<input checked="" type="checkbox"/> EASA [CdT]	<input checked="" type="checkbox"/> EBA [CdT]	<input checked="" type="checkbox"/> ECDC [CdT]	<input checked="" type="checkbox"/> ECHA [CdT]
<input checked="" type="checkbox"/> EDA [CdT]	<input checked="" type="checkbox"/> EDPS [CdT]	<input checked="" type="checkbox"/> EEA [CdT]	<input checked="" type="checkbox"/> EFSA [CdT]	<input checked="" type="checkbox"/> EIGE [CdT]
<input checked="" type="checkbox"/> EIOPA [CdT]	<input checked="" type="checkbox"/> ELA [CdT]	<input checked="" type="checkbox"/> EMA [CdT]	<input checked="" type="checkbox"/> EMCDDA [CdT]	<input checked="" type="checkbox"/> EMSA [CdT]
<input checked="" type="checkbox"/> EPPO [CdT]	<input checked="" type="checkbox"/> ERA [CdT]	<input checked="" type="checkbox"/> ESMA [CdT]	<input checked="" type="checkbox"/> ETF [CdT]	<input checked="" type="checkbox"/> EU-OSHA [CdT]
<input checked="" type="checkbox"/> EUAA [CdT]	<input checked="" type="checkbox"/> EUIPO [CdT]	<input checked="" type="checkbox"/> Eurofound [CdT]	<input checked="" type="checkbox"/> Eurojust [CdT]	<input checked="" type="checkbox"/> Europol [CdT]
<input checked="" type="checkbox"/> FRA [CdT]	<input checked="" type="checkbox"/> FRONTEX [CdT]	<input checked="" type="checkbox"/> IATE [CdT]	<input checked="" type="checkbox"/> MAOC-N [CdT]	<input checked="" type="checkbox"/> Ombudsman [CdT]
<input checked="" type="checkbox"/> SCIC [COM]	<input type="checkbox"/> all			

Full entry view

Visualisation: default

Expand LIL by default: No

Expand LL collections: No

Expand TL collections: No

Preferred languages: bg cs da de el **en** es et fi fr ga hr hu it lt lv mt nl pl pt ro sk sl sv la mul

Terminology projects

Search (My assignments) Apply preset: default (external users)

Drag and drop language codes here in the desired order.

Type	Description	Assignments per language
Source language	Domain	

My assigned entries Apply preset: Not specified

Drag and drop language codes here in the desired order.

Entry ID	Duplicates	Cross-references	Domains	↓
Term	Assignments	Assignment notes		

RESET Save

These are the preferences that you can save in your profile:

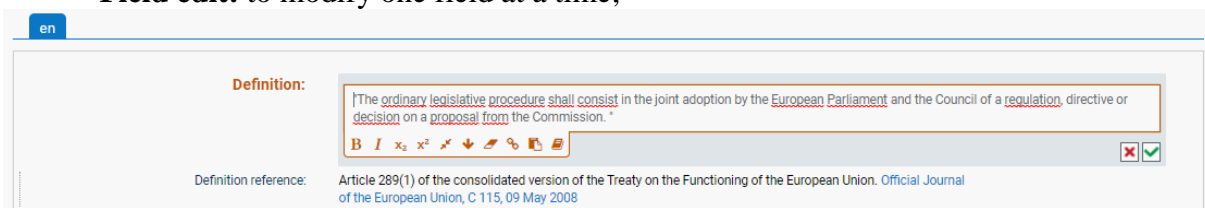
- **General:** colour scheme of the user interface
- **Search/Results:** matching type, results per page, source language, target languages, display order (interpreters' view), owner filter
- **Full entry view:** choice between side-by-side and list view (default value will display side-by-side view if you are opening up to three languages, and list view if you open more than three languages), other display options (default expansion of several metadata) and preferred languages (displayed immediately after the source language and the anchor language)
- **Terminology projects:** columns choice and columns sorting for the various customisable tables available in the Terminology Projects Module, including some institution specific presets.

After you have made the necessary adjustments, press the blue 'Save' button at the bottom.

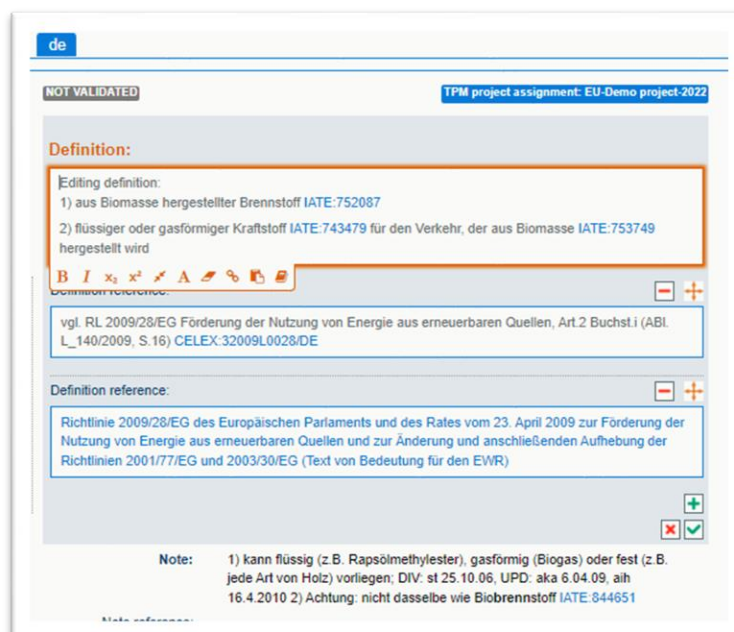
7. HOW TO OPEN A FIELD FOR EDITING

Depending on your needs, you can choose between several options:

- **Field edit:** to modify one field at a time;



- **Group edit:** to modify composite fields together (for instance: definition and definition reference fields) or multiple references together without the main field;

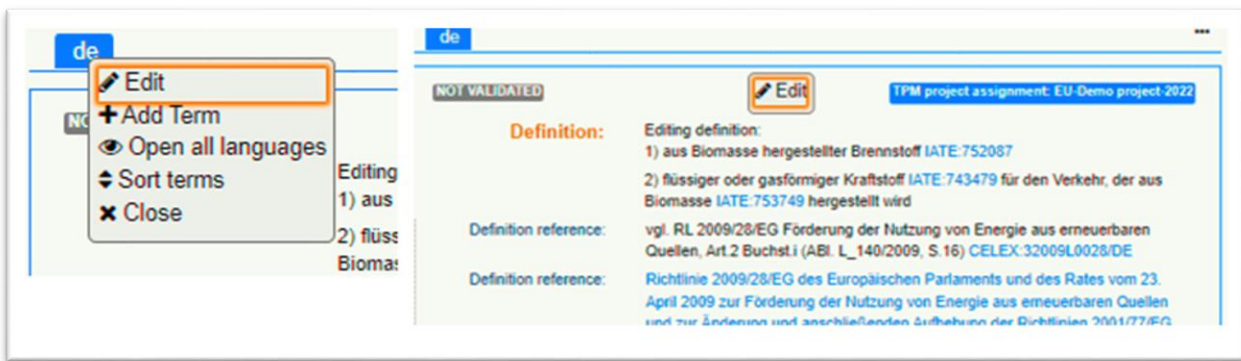


- **Form edit:** to modify the full level at once (either LL or TL). You can also edit an LL and all its TL(s) by right-clicking on the language code (in the entry or in the Quick edit panel). In 'Form edit' mode, all available fields (populated or not) are displayed for the selected level(s).

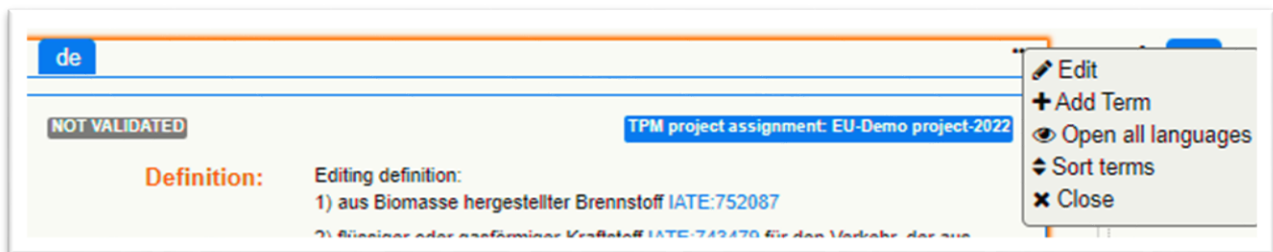
There are multiple ways to edit the same content:

- through the **'Edit' buttons** (open the full level for modification);

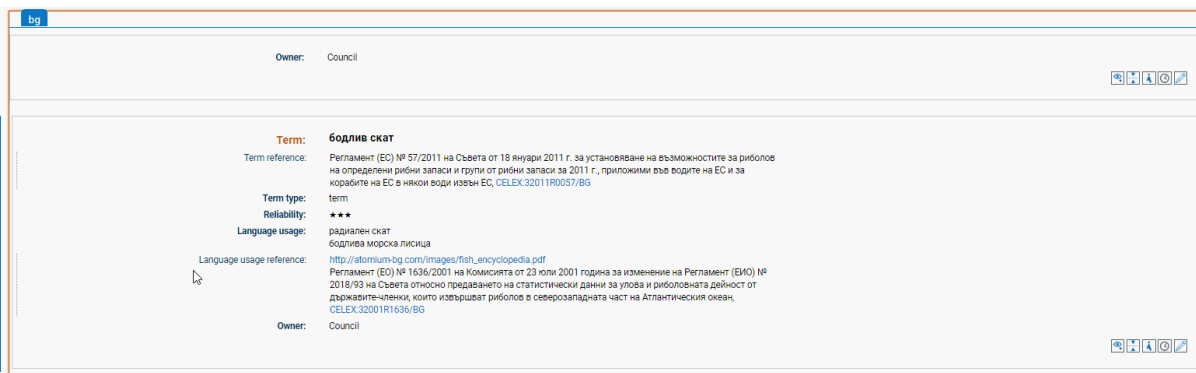
- via the **contextual menus** (accessible by right-clicking on each field or area);




- via the language section menu (accessible by clicking on the **...** button at the top right of each Language Level);





- by **double-clicking** on a field or area;

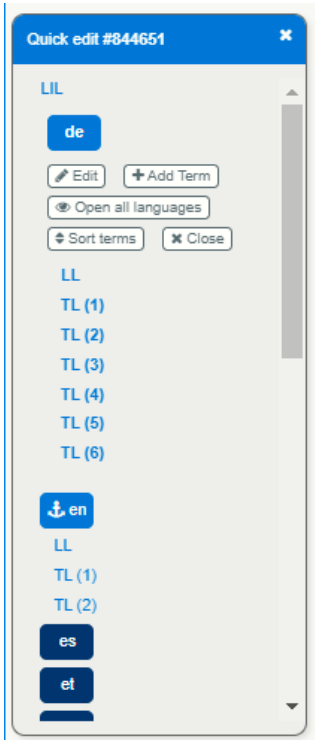


- through the **Quick edit panel**.

At each level, you can display all the fields (including empty ones) by clicking on the ‘Show more’  button.

Confirm or discard your changes by clicking on the appropriate icon   (or with Ctrl+S or Escape if you prefer to use the keyboard).

Quick edit panel



The Quick edit panel gives you an overview of the structure of the entry you are editing. It also helps you to navigate through the fields easily: clicking on any of the levels will expand it, displaying all the fields together with all the possible actions, making the available options per field or level more visible.

The Quick edit panel includes exactly the same features as are available directly in the entry – it simply provides an alternative way to access them.

The Quick edit panel is hidden as soon as you start editing an entry and displayed again as soon as you save or discard your changes. Your working language(s) are always displayed at the top.

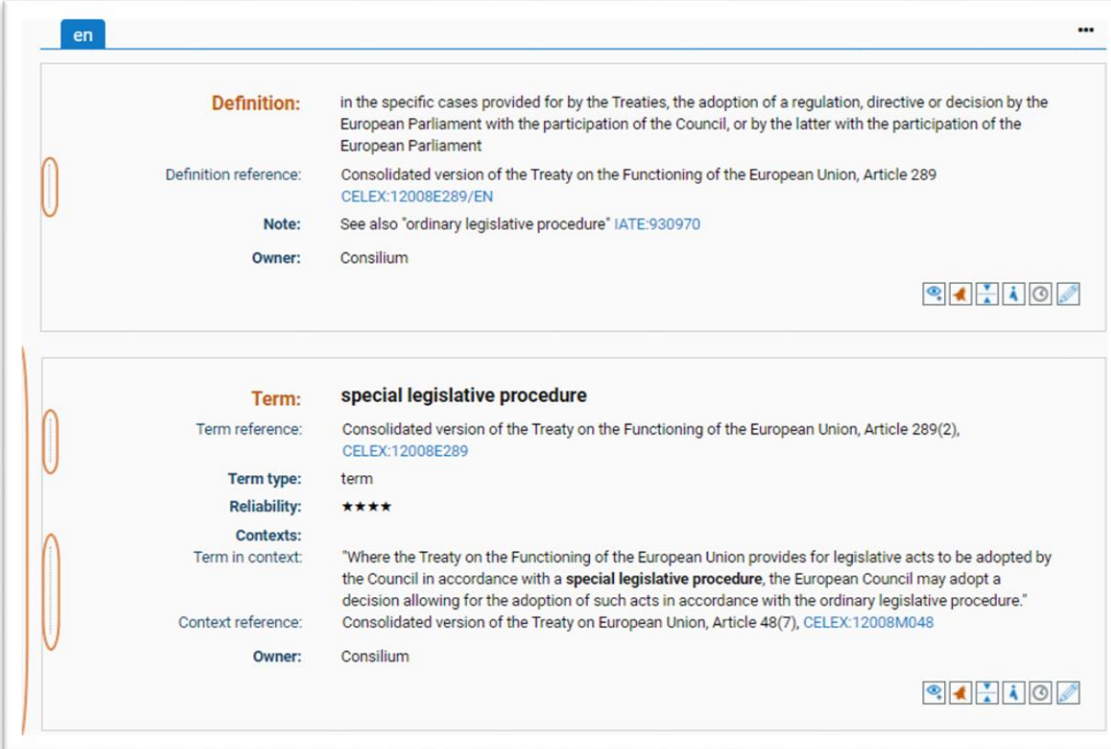
Clicking on a level or on a field name will set an orange focus on it; double-clicking on a field or selecting ‘Edit’ will open the level or field for modification.

Edit using the areas and dotted side lines

By clicking on the outer border of the level, you select the entire level and all the possible options in the Quick edit panel. Right-clicking on the outer border will open the associated contextual menu. Double-clicking on the outer border will open the full level for editing.



The dotted side lines next to some fields enable you to select multiple fields or composite fields for editing as a group. Double-clicking on this inner dotted side line will open the fields for editing, including the possibility of adding a new one (see for instance the fields ‘Term in context’ and ‘Context reference’).



The screenshot shows a web interface with a language selector 'en' in the top left and a menu icon '...' in the top right. It displays two entries, each with a dotted side line on the left for editing. The first entry is a 'Definition' with fields for 'Definition reference', 'Note', and 'Owner'. The second entry is a 'Term' for 'special legislative procedure' with fields for 'Term reference', 'Term type', 'Reliability', 'Contexts', 'Context reference', and 'Owner'. Both entries have a set of icons at the bottom right for editing actions.

en ...

Definition: in the specific cases provided for by the Treaties, the adoption of a regulation, directive or decision by the European Parliament with the participation of the Council, or by the latter with the participation of the European Parliament

Definition reference: Consolidated version of the Treaty on the Functioning of the European Union, Article 289
[CELEX:12008E289/EN](#)

Note: See also "ordinary legislative procedure" [IATE:930970](#)

Owner: Consilium

Term: **special legislative procedure**

Term reference: Consolidated version of the Treaty on the Functioning of the European Union, Article 289(2),
[CELEX:12008E289](#)

Term type: term

Reliability: ★★★★★

Contexts:

Term in context: "Where the Treaty on the Functioning of the European Union provides for legislative acts to be adopted by the Council in accordance with a **special legislative procedure**, the European Council may adopt a decision allowing for the adoption of such acts in accordance with the ordinary legislative procedure."


Context reference: Consolidated version of the Treaty on European Union, Article 48(7), [CELEX:12008M048](#)

Owner: Consilium

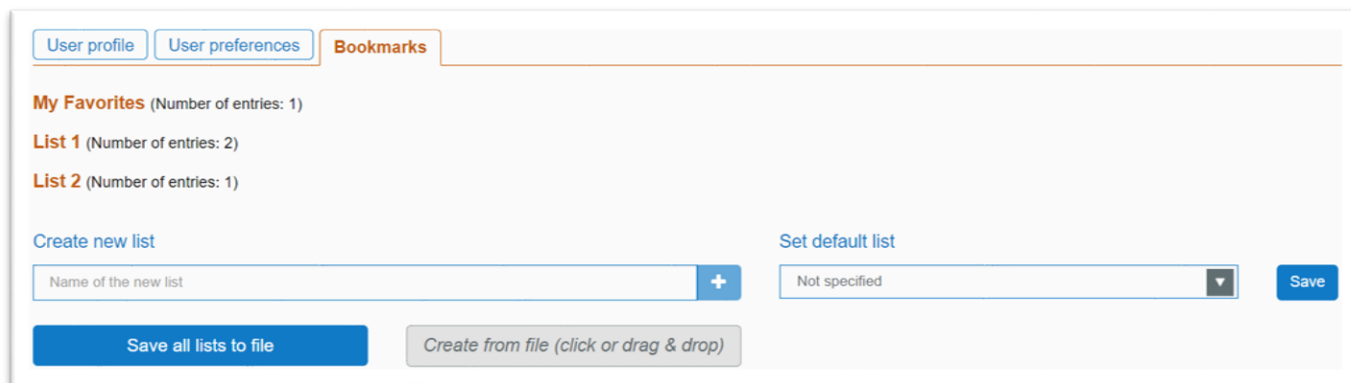
Right-clicking on the dotted side line will open the associated contextual menu.

By clicking on the outer dotted side line next to the TLs you select the LL and its TL(s) together. Right-click on it to open the contextual menu or double-click on it in order to edit the LL and its TL(s) in one go.


8. BOOKMARKS

You can bookmark entries and save them in lists. To do this, click on the bookmark icon  and select 'My Favourites' or another list that you have previously created.

You can manage your lists from the 'Bookmarks' tab, accessed by clicking on your user name in the top right corner.



The screenshot shows the 'Bookmarks' tab in a user interface. At the top, there are three tabs: 'User profile', 'User preferences', and 'Bookmarks'. Below the tabs, there are three list entries: 'My Favorites (Number of entries: 1)', 'List 1 (Number of entries: 2)', and 'List 2 (Number of entries: 1)'. Underneath these lists, there is a 'Create new list' section with a text input field labeled 'Name of the new list' and a blue '+' button. To the right of this is a 'Set default list' section with a dropdown menu currently showing 'Not specified' and a blue 'Save' button. At the bottom of the interface, there are two buttons: a blue 'Save all lists to file' button and a grey 'Create from file (click or drag & drop)' button.

To create a new list, enter the name of the new list and click on the  button.

To consult your bookmarked entries, click on the list name. This will open a results page containing the entries and a selector for the display of languages.

The bookmark lists are stored in the database, in your user profile. You can also save your lists to a file.