



## **User's Handbook**

Last updated on 25.03.2024

# IATE Handbook

This handbook sets out the purpose and principles of IATE and can be used as a step-by-step guide to using the tool.

The content evolves in line with new developments in IATE, and is regularly revised by the IATE Handbook Task Force.

Questions and feedback are welcome and should be sent by email to [iate@cdt.europa.eu](mailto:iate@cdt.europa.eu).

## **Release notes**

Version 4.3.2022: TPM assignments management, TPM forum, possibility of showing in full entry view whether each entry belongs to a TPM project, TRM automatic use of default exclusion list, TRM cancellation on demand, TRM scheduling, TRM filter ‘not in collection’, decommissioning of TRM/TEM sensitive, linking/unlinking of collections at LIL/LL/TL via an import file, alphabetical sorting of results in interpreters’ view, standard search and search by collection: collection filter applied to LL and TL.

Version 4.5.2022: TPM outsourced assignments, TPM external forum, TEM layout.

Version 5.8.2022: new developments in the Term Extraction Module and the validation monitoring screen, improvements in the Terminology Projects Module, the language selector, the Excel light output, the table view and sorting of languages, possibility to collapse all fields in the full entry view, new filters in the watch mechanism, exclusion of historical entries in TRM output, collection type ‘Other’ renamed as ‘Miscellaneous’.

Version 21.10.2022: new entry level and language-based filters in ‘Search by collection’, bilingual term extraction and background duplication detection in the Term Extraction Module, new developments in the Terminology Projects Module, new ID export format, enhanced keyboard navigation panel on the ‘Search’ screen, various improvements and new export format in ‘Table view’.

Version 03.02.2023: non-EU languages in ‘User preferences’, sorting of bookmarks lists, ‘Collection type’ filter in ‘Advanced search’ (LIL, LL, TL), index in ‘Table view’ print function, TPM reassignment mechanism, TRM standalone, statistics for TRM live, tutorials page.

Version 09.06.2023: enhanced search by URL, possibility to set LLs and TLs as pre-IATE or non-validated (individually or in batch) from full entry view, TEM candidate management, improved progress monitoring in Terminology Projects Module, IATE search widget.

Version 22.08.2023: Online Help for external users, notification system for the TPM external forum, validation status update in bulk (at LIL and at LL), public exports enriched with new metadata, origin added to TRM outputs and dumps, cross-references added to full exports in Excel, batch import of cross-references, default recipient for marks created by terminologists, possibility to include a login parameter to invite users to login via an IATE URL.

Version 04.12.2023: table view optimisation and migration of table view documentation in the Online Help, cascading ownership from LL, TPM: 'my assigned entries' sorting by type of task, shortcut for an LL mark for update, experimental features for Admins (support for drafting definitions, support for completing terms in missing languages, machine translation of existing definitions and notes for information purposes, EUR-Lex context retrieval), and OLP post-adoption POC.

Version 22.03.2024: opening of data from EU agencies in certain non EU-languages, EUR-Lex search by title, composite field confidentiality, additional global statistics (including qualitative metrics without pre-IATE data), enriched user preferences with option to filter by collection type, additional details on collections, monolingual TRM, option in TRM to include results only available in source language but not in selected target language, new criteria in advanced search to filter by cross-references, various improvements to TPM, small changes to experimental features.

## Contents

IATE Handbook .....	2
Release notes .....	2
1. Introduction .....	8
1.1 Browser compatibility .....	8
1.2 First login and synchronisation with IATE 1 account.....	9
1.3 Documentation .....	9
1.4 Multilingual interface .....	10
1.5 General principles .....	10
1.6 General input criteria.....	10
2. Data migration.....	11
3. Search .....	12
3.1 Basic search.....	12
3.2 Expanded search.....	14
3.3 Search by URL .....	19
3.4 Results .....	20
3.5 Last queries .....	23
3.6 Saved queries.....	23
3.7 Bookmarks .....	23
3.8 Search by collection .....	26
3.9 Full entry view .....	27
3.10 Permanent link to full entry view .....	30
3.11 Last viewed entries .....	30
4. Overview of structure.....	31
4.1 Entry levels.....	32
4.2 Contextual menu .....	34
4.3 Confidentiality.....	35
4.4 Protection .....	36
4.5 Pre-IATE .....	37
5. How to create an entry .....	39
5.1 List of fields .....	41
5.2 Action buttons .....	42
5.2.1 Adding or removing fields in entry creation form .....	42
5.2.2 Confidentiality.....	43
5.2.3 Sorting .....	44
5.2.4 Creation of particular fields.....	44
5.3 Duplicate detection.....	45
5.4 Preview.....	47
5.5 Browser data cache.....	48
6. How to modify an entry .....	49
6.1 Quick edit panel .....	52
6.2 Edit using the areas and dotted side lines.....	52
6.3 Modification of particular fields.....	54
6.4 Parallel work on an entry .....	58
7. User preferences.....	58
8. Locking mechanism .....	61
9. Audit/history.....	62
10. Validation .....	63
10.1 Autovalidation .....	66
11. Field completion score .....	66



12.	Detailed overview of an entry .....	69
12.1	Language-Independent Level (LIL) .....	69
12.1.1	Domain .....	69
12.1.2	Domain note .....	72
12.1.3	Primary entry .....	72
12.1.4	Anchor language .....	73
12.1.5	Confidential entry .....	73
12.1.6	Entry status .....	74
12.1.7	Protected entry .....	74
12.1.8	Origin .....	74
12.1.9	Origin note .....	74
12.1.10	Lifecycle .....	75
12.1.11	Management .....	75
12.1.12	Cross-references .....	75
12.1.13	Related projects .....	78
12.1.14	Language independent level note(s) .....	78
12.1.15	Language independent note reference(s) .....	78
12.1.16	Collections .....	79
12.1.17	Collection type .....	82
12.1.18	Attachments .....	83
12.1.19	Attachments note .....	84
12.1.20	Attachments/Attachments note confidentiality .....	84
12.1.21	Marks .....	84
12.2	Language Level (LL) .....	84
12.2.1	Language .....	84
12.2.2	Definition .....	84
12.2.3	Definition reference(s) .....	85
12.2.4	Language level note .....	88
12.2.5	Language level note reference(s) .....	88
12.2.6	Related material .....	88
12.2.7	Management .....	88
12.2.8	Collections .....	88
12.2.9	Attachments .....	89
12.2.10	Attachments note .....	89
12.2.11	Attachments/Attachments note confidentiality .....	89
12.2.12	Other features at LL .....	89
12.3	Term Level (TL) .....	89
12.3.1	Term display order .....	90
12.3.2	Term type .....	91
12.3.3	Term .....	92
12.3.4	Term reference(s) .....	93
12.3.5	Reliability .....	94
12.3.6	Evaluation .....	95
12.3.7	Note .....	96
12.3.8	Note reference(s) .....	96
12.3.9	Term in context .....	96
12.3.10	Context reference .....	97
12.3.11	Other features at TL .....	97
13.	References .....	99
13.1	Minimum information .....	100

13.2	Types of references .....	100
13.2.1	EU documents .....	100
13.2.2	EUR-Lex documents .....	101
13.2.3	Treaties, Conventions, Agreements .....	103
13.2.4	Web pages and websites .....	103
13.2.5	Human sources .....	104
13.3	Entry-to-entry links .....	104
13.3.1	Automatic creation using the entry ID .....	104
13.3.2	Manual creation using the entry ID .....	105
13.3.3	Automatic creation using the URL .....	105
13.4	Local storage clipboard .....	106
14.	Delete and Undelete .....	107
14.1	Delete .....	107
14.2	Undelete .....	110
15.	Consolidation .....	111
15.1	How to select a primary entry .....	111
16.	Merging entries .....	113
16.1	Manual merge .....	113
16.2	Automatic merge .....	116
17.	Marks: feedback, tasks and comments .....	118
17.1	Feedback from external users .....	120
17.2	Tasks .....	121
17.3	Comments .....	121
18.	Watch mechanism .....	121
19.	Entries 'owned' by other institutions .....	124
19.1	Interinstitutional update .....	124
19.2	Interinstitutional delete .....	125
19.3	Change of ownership .....	126
20.	Collections management screen .....	127
21.	Attachments management screen .....	128
22.	Advanced search (query builder) .....	129
23.	Batch search .....	132
24.	Export IATE data in Excel, TBX and SDLTB .....	134
25.	Import new entries (only Administrators) .....	135
26.	Import new LLs and TLs into existing entries (only Administrators) .....	137
27.	Batch update of existing content (only Administrators) .....	138
28.	Import file for batch linking or unlinking of collections (Administrators only) .....	139
29.	Import file for batch creation or update of cross-references (Administrators only) ..	140
30.	Data management: table view .....	141
31.	Term Recognition Module (TRM) .....	142
32.	Term Extraction Module (TEM) .....	149
32.1	Monolingual term extraction .....	149
32.2	Bilingual term extraction .....	152
32.3	Data processing .....	152
33.	Terminology Projects Module (TPM) .....	153
33.1	Create a project .....	154
33.2	Update a project .....	154
33.3	Full project view .....	157
33.4	Preparatory material table .....	158
33.5	Project entries table .....	162

33.6	Delete a project.....	162
33.7	Search a project and results .....	162
33.8	Assignments .....	165
33.9	Internal assignee view .....	168
33.10	External collaborator view .....	170
33.11	Internal forum.....	171
33.12	External forum.....	171
34.	Notifications .....	172
35.	Experimental features.....	172
36.	Statistics .....	177
37.	Tutorials .....	177
38.	Template repository.....	178
39.	Downloadables .....	178
40.	IATE search widget.....	178
41.	User access control.....	178
42.	Accessibility .....	179
43.	Annex I: Basic vocabulary .....	180
44.	Annex II: Formatting.....	181
45.	Annex III: Advanced Search .....	182
46.	Annex IV: Intellectual property rights (IPR) .....	195
47.	Annex V: Taxonomy .....	197

# 1. INTRODUCTION

IATE (**I**nter**a**ctive **T**erminology for **E**urope) is a dynamic terminology database designed to support the multilingual drafting of EU texts, and legal texts in particular.

It aims to provide relevant, reliable, easily accessible data which represent a distinct added value compared with other sources of lexical information (e.g. translation memories, the internet, electronic archives).

For IATE to be usable with translation aid software, the database must be managed with rigour: such software is able to retrieve information from IATE, but, unlike translators, it is not able to detect discrepancies between language versions.

The fact that IATE is available to the public gives language professionals, academics, national experts, public administrations, policy advisers, private sector companies and the general public access to validated terminology. It allows EU terminologists to make a greater contribution to the EU policy of encouraging multilingualism and making EU legislation more transparent to the citizen. It also allows EU terminologists to receive feedback from external users.

The suggested citation style for an IATE entry is as follows:

European Union, ‘ordinary legislative procedure’, *IATE terminology database*, accessed on 20 November 2020, <https://iate.europa.eu/entry/result/930970>

The URL should be the permalink displayed at the bottom left of the full entry display:

A screenshot of a URL permalink displayed in a light blue box. The URL is <https://iate.europa.eu/entry/result/930970>. The text is in a sans-serif font, and there is a small blue square icon to the left of the URL.

Click on the URL to copy it to your clipboard, or hover your cursor over it and click on [Forward by email] to forward it by email.

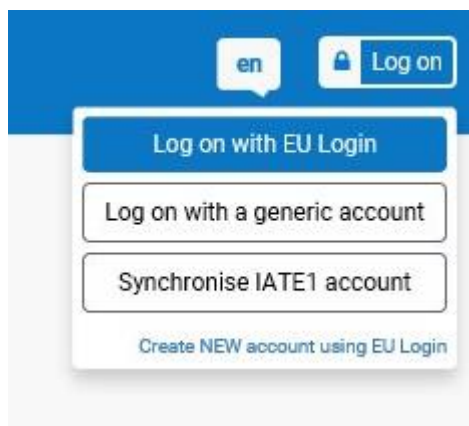
## 1.1 Browser compatibility

IATE has been thoroughly tested with the latest versions of Edge, Edge Chromium, Chrome and Firefox. Tests have also been performed with various versions of Safari and issues have been detected with old versions of the browser.

As Internet Explorer has been discontinued by Microsoft, it has not been included in the thorough tests.

## **1.2 First login and synchronisation with IATE 1 account**

Internal IATE users should follow this login procedure:




- **If you have an IATE 1 account**, you must synchronise it with your EU Login account following the instructions on the IATE login menu. All the data linked to your IATE 1 account (username, institution, division, working languages, role and all past edits – insertions, modifications and deletions) will be transferred to your IATE 2 account.  
NB: If you have forgotten your IATE 1 password, contact your central terminology service to have it reset.
- **If you did not have an IATE 1 account**, you can create an IATE 2 account directly by clicking on the appropriate link. Your role will be ‘Basic’ by default. If you need editing rights, contact your central terminology service to have your role upgraded.
- **If you had an IATE 1 account but have logged in via EU Login and created a new IATE 2 account by mistake**, you can still synchronise your IATE 1 account with your new IATE 2 account at any time by following the procedure described in the first point above. Your IATE 1 account details will replace the IATE 2 account details, and the IATE 2 account will be automatically disabled.
- **If you have been using a generic account (not linked to an individual username) in IATE 1**, you will be able to log in via the appropriate link for generic accounts.

## **1.3 Documentation**

The latest version of the **IATE Handbook** and other information on the ongoing development of IATE are available via the ‘Documentation’ menu.

It is also important for editors to familiarise themselves with the new [IATE data guidelines](#), which are available in the ‘Documentation’ menu.

The **IATE Online Help** is a step-by-step guide to using IATE. The first version covers the features available to external users. The Online Help is accessible directly in IATE, wherever

you see the dedicated ‘Help’  icon. Clicking on this icon will open a side panel containing a short explanation of a screen, a feature or an option.

In this panel you can also search the entire IATE Online Help. Alternatively, you can go to the full IATE Online Help by clicking on the ‘Online Help’ button, to search or browse all content.

## **1.4 Multilingual interface**

IATE has a multilingual interface in the 24 official languages of the EU. You can change the interface language using the language selector in the top right corner. Some labels/warnings/options may nevertheless appear in English, even if you have selected another interface language: this is usually because recent improvements to the interface involved the introduction of new text which is in the process of being translated. The translated labels/warnings/options will usually be available in the next software release.

## **1.5 General principles**

### **Usefulness for the drafting of texts**

IATE’s usefulness for multilingual drafting, translation and interpretation in the EU sphere must always be the prime concern. However, IATE is not a general language dictionary, so ordinary words and expressions should not be entered. Phrases may be entered only if their use is restricted to a specific context (e.g. standard formulas in EU legislation).

### **Credibility of entries**

A well thought-out IATE entry must give users all the necessary information to allow them to judge whether the proposed solution is appropriate and reliable. It must also allow other terminologists wishing to work on the entry to understand and delimit the concept clearly, and not to confuse it with other related concepts.

### **Multilingualism**

It is very important to promote the development of IATE entries towards multilingualism, by consolidating and merging any monolingual or bilingual entries for the same concept and by adding as many languages as possible to new entries.

## **1.6 General input criteria**

Please ensure that all terminology work you carry out (including importing data from external sources) complies with the IATE data guidelines and the guidelines in this handbook.

### **One concept, one entry**

- Every entry should deal with a **single concept** (see [Annex I](#) for a definition of ‘concept’), and all data relating to a given concept should be consolidated in one entry.

- Before creating an entry, you should check that there is not already an entry for the concept. We recommend that you check the term or terms and their synonyms in both English and French. If there is already an entry for the concept (even if the term or terms are different), add the new terms, languages, etc. to the existing entry, rather than creating a new one. You should also check the database for any spelling variants of your term or terms.
- Every entry must include sufficient information for the concept it is meant to establish to be identified unambiguously.
- A concept can be represented by one or more:
  - terms (designating general concepts, e.g. ‘carbon dioxide’, or individual concepts, e.g. ‘United Nations’)
  - symbols (designating individual or general concepts, e.g. @).
- When adding information to an existing entry, check that your term(s) and data match the concept.

### **Reliability and accuracy**

- When creating or updating an entry, check the accuracy of the terms and data to be added.
- Each term must have at least one reference that is as reliable as possible, and either a clear definition or a quotation showing how the term is used (‘Term in context’), or both.
- The terminologists for a given language act as a filter to ensure that validated terms are reliable.

### **Relevance and added value**

- Terms must be relevant, i.e. they should correspond to a past, present or potential drafting, translation or interpretation problem in a field relevant to the EU, and not simply to a one-off name or occurrence.
- Add any useful information which is readily available from relevant sources in any language you know sufficiently well (i.e. not just your mother tongue), with a view to facilitating the work of other terminologists. As a minimum, you should indicate the document in which you found the term or terms as a reference, so that terminologists updating the entry at a later stage can understand what the concept is. Your changes will appear in the validation queue of the terminologists for the language in question. The information you include must have an added value over documentary databases and the internet. Added value may mean, for instance, the addition of a definition or reference, the evaluation of the term, the endorsement of a particular translation, usage warnings, multilingualism, etc.

## **2. DATA MIGRATION**


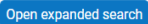
The following data have been migrated from IATE 1 to the IATE 2 database:

- All terminological data (all entries)
- Domains
- Lookups encoded with the ‘;’ separator in IATE 1 have been split and placed below the relevant term level (TL).

- URLs have been migrated as hyperlinks (with the URL as both the target and the label).
- CELEX references have been migrated as hyperlinks (with the CELEX number as the label).
- Multiple references, contexts, notes, etc. in a single field in IATE 1 were not split when they were migrated to IATE 2.
- Validation/Confidentiality values
- Basic audit data: creation date/created by/last modification date/last modified by/validation date/validated by
- Protection values
- Collections, cross-references, attachments
- Marks
- User management information
- History of IATE 1 entries (creations, modifications, deletions)

## 3. SEARCH

### 3.1 Basic search

Searching for terms is one of the main functionalities of IATE. The **basic search** offers a simple but powerful tool: just select the source and target language(s), insert (type, or copy and paste) a search string in the search field, and click on the Search button . If you wish to restrict your search to exact matches, click on the ‘Open expanded search’ button  and select the ‘Exact match’ matching option, as the use of quotation marks in the search box is not supported.

If you have selected a single source language and you start typing a term, as soon as you have typed 5 or more characters an **autocomplete feature** will show matching terms in the source language. However, the entry (or entries) on which a matching term appears may not include an equivalent term in your target language, and may not meet other search criteria that you have selected, so it is possible that your search will produce no results.

You have a choice between two views: the ‘standard view’ and the ‘interpreters’ view’. In both views, you can select a single source language and as many target languages as you wish. However, if you create a user account and log on, you can select up to six source languages. The option to select ALL for the target languages of your search is available only in the standard view.

You can set your source and target languages in your user preferences (accessed by clicking on your username at the top right of the screen) and also the order in which languages will display in the different columns in the interpreters’ view. See 7 User preferences for more information.

When selecting ‘**Any**’ or **multiple source languages**, the autosuggest feature will not display any suggestions. Please note that if you select ‘Any’ or multiple source languages, the search results will include entries containing the matching search string in any of the selected EU



languages (specific language rules are applied for each potential source language; see the detailed table below). The matching search string will be highlighted.

If you have previously selected several languages but now want to select a new one instead, double-click on the new language you want. This will remove all previously selected languages in one go.

The basic search launches a search for the search string in the ‘Term’ field, with ‘All words’ as the default matching option. This means that terms containing all of the words in the search box will be retrieved. Language-specific rules apply for this default matching option (retrieval of plurals, inflected forms, etc.). See the table below for more details.

For example, searching for *European Commission* will retrieve:

*European Commission*  
*European Commission of Agriculture*  
*European Travel Commission*  
*European Travel Commissions*  
*Commission of the European Communities*

Results are sorted by relevance:

1. exact matches are displayed first (*European Commission*),
2. followed by exact strings (*European Commission of Agriculture*),
3. followed by all words (*European Travel Commission*).

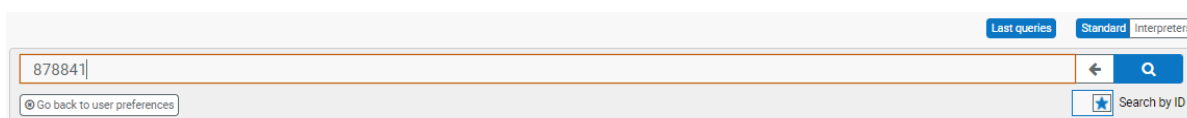
Similar results which are not an exact match are displayed beneath one of the following messages:

No exact results found with your settings Similar results displayed below

No more exact results found with your settings Similar results displayed below

Irrespective of the source and target languages selected, **Latin and Multilingual** (MUL) are also included as source languages and displayed as target languages by default.

In addition to searching by term, you can also **search by entry ID** by entering a number in the search box. This will automatically activate the ‘Search by ID’ option, and all the available languages on the entry will be retrieved. If you wish to search for a number in the text fields, you can do so by switching off the ‘Search by ID’ option.



The screenshot shows a search interface with a search box containing the number '878841'. To the right of the search box is a search button with a magnifying glass icon. Below the search box is a checkbox labeled 'Search by ID' which is currently checked. In the top right corner, there are three tabs: 'Last queries', 'Standard', and 'Interpreters'. In the bottom left corner, there is a link that says 'Go back to user preferences'.

**Multiple entries can be retrieved** by entering a list of entry IDs separated by commas, spaces or semicolons, up to a limit of 100 entries. The results will be displayed in the same order as the list provided as input. If an entry does not exist, it will simply be skipped.

## 3.2 Expanded search

The expanded search offers various options:

The screenshot shows the 'Expanded search' interface. At the top, there are navigation tabs: 'Search' (selected), 'Search by collection', 'Advanced search', and 'Batch search'. Below these are utility links: 'Bookmarks', 'Last queries', 'Standard view', and 'Interpreters' view'. A search bar contains the text 'migration' with a search icon and a back arrow. Below the search bar are two utility links: 'Go back to user preferences' and 'Set user preferences'. The main search options are organized into three sections:

- Matching:** Includes radio buttons for 'Exact match', 'Exact string', 'All words' (selected), 'Any word', 'Partial string', and 'Regular expression'.
- Search in term types (source):** Includes checkboxes for 'Term' (checked), 'Abbrev' (checked), 'Formula' (checked), 'Phrase' (checked), 'Short form' (checked), and 'all' (checked).
- Search in fields (source):** Includes checkboxes for 'Term' (checked), 'Term Note', 'Term reference', 'Term in context', 'Context reference', 'Definition', 'Definition reference', 'Language level note', and 'all'.

Below these options is a 'Filters' section with 'Domains' and 'Collections' (both with 'Add' buttons) and 'Owner' (with an 'Edit' button). A status message reads 'Searching in data from all institutions'. At the bottom right of the search area are links for 'Go back to user preferences' and a 'Search' button. At the very bottom of the interface are 'Show more' and 'Close expanded search' buttons.

### Matching:

To launch an 'Exact match', 'Exact string' or 'Any word' search, select the relevant 'Matching' option in the expanded search.

If you select '**Any word**', results matching any one of the words in the search string will be displayed below the more relevant results (e.g. if you search for *European Commission* with 'Any word' selected, '*European citizen*' would be displayed below the results listed above).

In all cases, results which are not an exact match are shown beneath one of the following messages:

No exact results found with your settings Similar results displayed below

No more exact results found with your settings Similar results displayed below

If you select an option other than 'Exact match' or 'Exact string', specific language rules are applied to the source language selected in order to increase the retrievability of relevant results (plurals, inflected forms, derivations).

By default, search strings containing characters with diacritic marks will retrieve the diacritic characters and the base characters as exact matches.

For example, an 'Exact match' search for *role* in French will retrieve:

*role*

*rôle*

and an 'Exact match' search for *déjà vu* in French will retrieve:

*déjà vu*

*deja vu*

This also applies to special characters and their extended equivalents.

For example, an 'Exact match' search for *Füße* in German will retrieve:

*Füße*

*Fuße*

*Fusse*

It also applies to different types of hyphenation and spaces.

For example, an ‘Exact match’ search for *energy generating product* in English will retrieve:

*energy generating product*

*energy-generating product* (with a hyphen)

*energy–generating product* (with an en-dash)

*energy—generating product* (with an em-dash)

Two new matching options are also available for searches in the term field: ‘Partial string’ and ‘Regular expression’.

‘**Partial string**’ retrieves results containing the search string within a longer string. The string doesn’t need to be full words. For example, searching for ‘book’ will retrieve ‘book’, but also ‘e-book’, ‘booking’, ‘notebook’, etc. (i.e. results which contain ‘book’ inside the string).

‘**Regular expression**’ allows you to run more advanced searches using the [patterns described here](#).

Overview of specific language rules (stemming, stopwords) applied with the various matching options:

SOURCE LANGUAGE	MATCHING OPTION	LANGUAGE RULES APPLIED (stemming, stopwords)	GENERIC IMPROVEMENTS APPLIED (diacritics, hyphenation types)
BG, CS, DA, DE, EL, EN, ES, FI, FR, GA, HU, IT, LT, LV, NL, PT, RO, SV (languages with language-specific analyser)	Exact match	NO	YES
	Exact string	NO	YES
	All words (default)	YES	YES
	Any word	YES	YES
	Partial string	NO	YES
	Regular expression	NO	NO
ET, HR, MT, PL, SK, SL (EU standard analyser)	Exact match	NO	YES
	Exact string	NO	YES
	All words (default)	YES	YES
	Any word	YES	YES
	Partial string	NO	YES
	Regular expression	NO	NO
ANY as source language	Exact match	NO	YES
	Exact string	NO	YES

	All words (default)	YES (for each of the languages searched)	YES
	Any word	YES (for each of the languages searched)	YES
	Partial string	NO	YES
	Regular expression	NO	NO

**Search in specific term types** (all term types are selected by default): searching in a specific term type in the selected source language will retrieve lookup forms which are exact matches only, if available. You can select multiple term types (the search will be run in the selected term types only, ignoring results from other term types, and synonyms which do not have the selected term type will not be displayed in the results list).

**Search in specific fields:** you can search in fields other than the default ‘Term’ field if you select a source language other than ‘Any’. ‘Partial string’ is the default matching option in this case, with the option to switch to ‘Regular expression’. The fields available for selection (individually or combined) are:

- descriptive fields: ‘Term in context’, ‘Term note’, ‘Definition’, ‘Language level note’
- reference fields: ‘Term reference’, ‘Context reference’, ‘Definition reference’.

You can search for a specific string in the descriptive fields, e.g. ‘human rights’ in the ‘Context’, ‘Definition’ and ‘Term Note’ fields, to see how this term behaves in context. Fields containing a match are expanded by default in the results list, and the match is highlighted.

The screenshot shows a search results page for the term 'international agreement' and 'human rights'. The page is organized into sections for different languages: English (en) and French (fr). Each section lists relevant documents with their titles, star ratings, and brief descriptions. The English section includes the 'Convention for the Protection of Human Rights and Fundamental Freedoms' and the 'European Convention on Human Rights'. The French section includes 'Convention de sauvegarde des droits de l'homme et des libertés fondamentales', 'Convention européenne des droits de l'homme', and 'CEDH'. Each entry includes a definition, a definition reference, and a term note. The page also features navigation icons and a 'Council' label for each entry.

You can also search for a partial URL in order to retrieve all entries with a URL containing that partial string in a reference field.

The screenshot shows the search interface for www.ohchr.org. At the top, there is a search bar with the URL 'www.ohchr.org' and a search icon. Below the search bar, there are two buttons: 'Go back to user preferences' and 'Set user preferences'. The main search area is divided into three sections:
 

- Matching:** Radio buttons for 'Exact match', 'Exact string', 'All words', 'Any word', 'Partial string' (selected), and 'Regular expression'.
- Search in term types (source):** Checkboxes for 'Term', 'Abbrev', 'Formula', 'Phrase', 'Short form', and 'Lookup form'.
- Search in fields (source):** Checkboxes for 'Term' (checked), 'Term Note', 'Term reference' (checked), 'Term in context', 'Context reference' (checked), 'Definition', 'Definition reference' (checked), 'Language level note', and 'all'.

Visible URLs containing a match are highlighted in full in blue. Hypertext containing a URL matching the search string is highlighted in full in orange.

The screenshot shows search results for the query 'Special Rapporteur on extrajudicial, summary or arbitrary executions'. The results are displayed in a table-like format with columns for language, title, rating, and source.
 

- English (en):** 'Special Rapporteur on extrajudicial, summary or arbitrary executions' (3 stars). Reference: United Nations, Human Rights, Office of the High Commissioner, English > Your Human Rights > Executions, 'Special Rapporteur on extrajudicial, summary or arbitrary executions', <http://www.ohchr.org/EN/Issues/Executions/Pages/SRExecutionsIndex.aspx> [9.8.2016]. Definition: expert appointed by the United Nations Human Rights Council to examine questions relating to extrajudicial, summary or arbitrary executions. Definition reference: Council-EN, based on OHCHR website, <https://www.ohchr.org/EN/Issues/Executions/Pages/SRExecutionsIndex.aspx> [31.7.2018].
- French (fr):** 'rapporteur spécial sur les exécutions extrajudiciaires, sommaires ou arbitraires' (3 stars). 'rapporteur spécial sur les exécutions sommaires ou arbitraires' (3 stars, marked as obsolete).

 The English result shows a blue highlight on the URL in the reference and an orange highlight on the URL in the definition reference.

**Filter by domain:** you can restrict your search to entries belonging to a specific domain or subdomain. When you select a domain or subdomain, the subdomains below it are included by default: the search retrieves entries belonging to the selected domain or subdomain and all of its children. However, you can also choose to exclude subdomains and only retrieve entries which match the specific domain or subdomain selected.

Please note that entries migrated from IATE 1 only have first-, second- and third-level domains. Therefore, if you filter your search using a lower level, you will miss results for which the domains have not been added or updated since the migration.

**Filter by LIL owner:** by default, all data owners are selected. It is possible to restrict the search to only one or several LIL owners. You can save your preferred setting under 'User preferences'.

**Filter by collection:** you can run a search by keyword and see which thematic collections are available, for example in a given subject area or for a particular language. One or more

collections can be selected and the search will only retrieve matches belonging to the selected collections.

NB: This feature is available for collections attached at any level in the entry: Language-Independent Level (LIL), Language Level (LL) and Term Level (TL).

Under ‘Show more’ [Show more](#), **other expanded search criteria** are available:

- Filter by primarity at LIL.
  - Filter by aggregated completion score at LIL.\*
  - Filter by confidentiality at LIL.
  - Filter by entry status. The systematic inclusion or exclusion of raw entries can be saved under ‘User preferences’.
  - Filter by collections at LIL.
  - Filter by validation status/pre-IATE status at TL (for source and target language). The systematic inclusion or exclusion of TL pre-IATE data can be saved under ‘User preferences’.
  - Filter by collections at LL (for source and target language).
  - Filter by reliability at TL (for source and target language).
  - Filter by collections at TL (for source and target language).
  - Filter by aggregated completion score at LL (for source and target language).\*
- \* Only available to administrators.

The screenshot displays a search interface with the following sections:

- Matching:** Radio buttons for Exact match, Exact string, All words (selected), Any word, Partial string, and Regular expression.
- Search in term types (source):** Checkboxes for Term, Abbrev, Formula, Phrase, Short form, and all (selected).
- Search in fields (source):** Checkboxes for Term, Term Note, Term reference, Term in context, Context reference, Definition, Definition reference, Language level note, and all.
- Filters:**
  - Domains:** Add button.
  - Collections:** Add button.
  - Owner:** Edit button. Searching in data from all institutions.
  - Primarity:** Checkboxes for Primary entries, Not primary entries, and all (selected).
  - Confidentiality:** Checkboxes for Confidential entries, Not confidential entries, and all (selected).
  - Entry status:** Checkboxes for raw, not raw (selected), and all.
  - Aggregated field completion score (LIL):** Slider from 0 to 20.
  - Collections (LIL):** Add button.
  - Source language:**
    - Language validation:** Checkboxes for Validated, Not validated, Pre-IATE, and all (selected).
    - Collections (LL):** Add button.
    - Term validation:** Checkboxes for Validated, Not validated, Pre-IATE, and all (selected).
    - Reliability:** Checkboxes for ☆, ☆☆, ☆☆☆, ☆☆☆☆, ☆☆☆☆☆, and all (selected).
    - Collections (TL):** Add button.
    - Aggregated field completion score:** Slider from 0 to 16.
  - Target language:**
    - Language validation:** Checkboxes for Validated, Not validated, Pre-IATE, and all (selected).
    - Collections (LL):** Add button.
    - Term validation:** Checkboxes for Validated, Not validated, Pre-IATE, and all (selected).
    - Reliability:** Checkboxes for ☆, ☆☆, ☆☆☆, ☆☆☆☆, ☆☆☆☆☆, and all (selected).
    - Collections (TL):** Add button.
    - Aggregated field completion score:** Slider from 0 to 16.
- Footer:** Go back to user preferences button and Search button.

NB: These filters are strict, meaning that they add to each other (AND condition) and data not matching the search criteria AND the applied filter will not show up in the results list (e.g. terms matching the applied criteria will show up, but their synonyms will not if they do not fully match the same criteria).

You can go back to your user preferences (if any) in the expanded search by clicking on .

### 3.3 Search by URL

You can launch a search via a URL as follows:

```
https://iate.europa.eu/search/byUrl?
term=credit
&sl=en
&tl=all
&fields=0
&type=0,2
&matching=5
&domains=E60E2A656AFE4A42AF39186973A7C147
&source_reliability=3,4
&target_reliability=3,4
&primaryity=1
&collection=1BD08E1EC86F4D8C9E3D5B198579D06F
&owner=8BA9662AF9D04F069072CB5230E3AFA0
&login=true
```

Where:

- **term\*** = (any string)
  - **sl\*** = language code
  - **tl** = comma-separated list of language codes or 'all' (default)
  - **fields** = comma-separated list of field codes  
Accepted values are:
    - 0: *term* (default)
    - 2: *term note*
    - 3: *context*
    - 7: *language level note*
  - **matching** = single value
    - 3: *exact match*
    - 2: *exact string*
    - 1: *all words* (default)
    - 0: *any word*
    - 5: *partial string*
  - **type** = comma-separated list of term types  
Accepted values are:
    - 0: *abbrev*
    - 1: *formula*
    - 2: *phrase*
    - 3: *short form*
    - 4: *term*
- Default: all
- **domains** = comma-separated domain codes, as indicated on <https://iate.europa.eu/em-api/domains/tree>.  
When a domain is selected, all its subdomains are included (this option cannot be disabled).
  - **source\_reliability** = comma-separated list of reliabilities  
Accepted values are:
    - 0: ☆
    - 1: ★

- 2: ★★
  - 3: ★★★
  - 4: ★★★★
- Default: all
- **target\_reliability** = comma-separated list of reliabilities  
Accepted values are:
    - 0: ☆
    - 1: ★
    - 2: ★★
    - 3: ★★★
    - 4: ★★★★
 Default: all
  - **primaryity** = comma-separated list of primaryities  
Accepted values are:
    - 0 : *Not primary*
    - 1 : *Primary*
 Default : all
  - **collection** = comma-separated collection codes, as indicated on <https://iate.europa.eu/search/collections>.
  - **owner** = comma-separated institution codes, as indicated on <https://iate.europa.eu/uac-api/ws/institutions>
  - **login** = true, false or missing (intended to force a login request to the user)

Please note:

- Only the fields marked with \* are mandatory. For the other fields, the default value will apply if nothing is specified.
- For searches in fields other than the term field, the only accepted matching value is 5 (partial string), and no value at all is accepted for the term type.
- Only the parameters available for external users are available when searching by URL.

More information is available on the ‘IATE for developers’ page: <https://iate.europa.eu/developers>

### **3.4Results**







When you launch a search, a summary of the search criteria is displayed above the results. The default number of results per page is ten, but this can be changed to a higher value in your [user preferences](#).

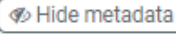
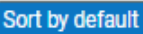
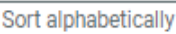
Results matching the search criteria will be displayed on a results page presenting two layout alternatives: the standard view shows results in a list, while the interpreters’ view shows results in a table.

The following information is displayed:

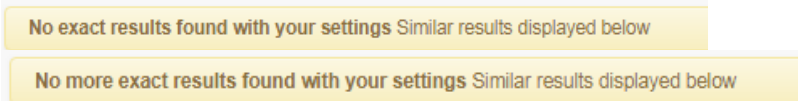
- Entry ID
- Domain
- Institution at LIL
- Specific status of the entry (primary/confidential/protected/raw)
- Management options (if selected in the user preferences)
- Specific LIL information (lifecycle/origin)
- Languages searched (source and target and potentially LA and MUL if available on the entry)



- Anchor language if available
- Terms available in the specified languages (with matches for the search query highlighted)
- TL information: institution, reliability, term reference (via the expandable tooltip ) , term in context (via the expandable tooltip ) , term note (via the expandable tooltip ) , evaluation, TL protection, TL validation status (including pre-IATE) and ‘additional information’ (via the expandable tooltip )
- LL information: definition (via the expandable tooltip ) , language level note (via the expandable tooltip ) , LL protection, LL validation status (including pre-IATE)
- Collections information: only available in the interpreters’ view.

In the interpreters’ view, the entry, language and term metadata are displayed in a column named ‘Additional information’. You can display the language- and term-specific metadata by clicking on the terms displayed in the table. There is also the option to display or hide the ‘Additional information’ and ‘Collections’ columns  , or to sort the results displayed per page in alphabetical order  .

**The default sorting displays results according to their relevance** to the search criteria. This means that exact matches are displayed first, followed by similar matches (exact strings below exact matches, followed by ‘all words’ results and ‘any word’ results). A message indicates that similar results are displayed below any exact matches, or in the absence of exact matches:



If there are duplicates with the same relevance score, they are sorted as follows:

- closer length to the search string first
  - with matches coming from normal term types displayed before lookup forms
  - with matches coming from entries with a lifecycle value sorted as follows: no lifecycle, historical, proposed, abandoned
- primaries are given priority
- maximum reliability across all TLs for the source language
- number of languages (entries with more languages are displayed first)
- validated terms for the search languages are given priority.

If all the criteria above are the same for several entries, then they are sorted by entry ID in descending order (i.e. the most recent entries are displayed first).

The matching part of the term is highlighted, taking into account that for ‘All words’ and ‘Any word’ matches, the stemmed match is highlighted.

Regarding the **sorting of languages on entries**, the source language is displayed first and the target language is displayed below it. If you select multiple target languages, they are sorted below the source language in alphabetical order (EU languages first, followed by LA, MUL and non-EU languages).

If you select ‘Any’ as the source language, the languages on the entry will be sorted alphabetically.

Language	Term	Evaluation	Source
en	Atlantic cod	***	Council
	cod	***	COM
	codfish	***	COM
	codling	***	COM
de	Kabeljau	***	COM
	Dorsch	***	COM
fr	cabillaud	***	Council
	morue de l'Atlantique	***	Council
	morue franche	***	Council
la	Gadus morhua	****	Council
	Gadus morhua <span>deprecated</span>	**	Council
	Gadus callarias <span>deprecated</span>	**	Council
mul	COD	****	Council

If a language on an entry contains synonyms, the **terms are sorted** as follows: for IATE 1 data, terms are sorted by term group; for new IATE 2 entries, terms are sorted by display order.

If the term group is the same, the following sorting criteria are applied:

- by term type: term, short form, abbrev, formula, phrase
- by evaluation (preferred, admitted, deprecated, obsolete)
- terms with higher reliability at the top
- by validation status: validated terms appear above non-validated and pre-IATE terms

If all the criteria above are the same for several terms, then they are sorted by term ID.

If there are lookup forms (a specific term type) in the source language which match the search string as an exact match, the relevant entry(ies) will be sorted according to the relevance criteria above. For clarity, lookup forms are labelled as Redirected from:.

You can launch a new search from the results page by double-clicking on a term. In the case of multiple-word terms, you can choose whether to launch a new search for the full term or only a part of it (by selecting only the words that should be contained in the new search). The language of the newly selected term will become the new source language. The initial search settings can be reset by clicking on ‘Go back to user preferences’.

You can also refine or expand the results of a search by applying or removing a filter by domain, primary, entry owner and collection, by clicking on the specific metadata (which launches a filtered search) or by clicking on the applied filter in the results criteria on top of the results list (which launches a search without that filter).

### 3.5 Last queries

You can consult your last 10 queries via the **Last queries** button on the ‘Search’ screen. A summary of the search criteria for the highlighted query is displayed on the right, and you can relaunch a query by selecting it and clicking on **Run this query again**.

The screenshot shows the 'Last queries' interface. On the left, there is a list of 10 queries with their timestamps and partial text. The first query is highlighted. On the right, the search criteria for the selected query are displayed: 'Query: 'legislative body'', 'Source language: en,Ja,mul', and 'Target language: fr,Ja,mul'. Below this, there are search parameters: 'Search in fields (source): Term', 'Matching type: All words', and 'Search in term types (source): All term types'. At the bottom right, there are two buttons: 'Run this query again' and 'Save query'. Below the search criteria, there is a text input field labeled 'Give this query a name' and a 'Save query' button.


### 3.6 Saved queries

You can save queries by giving a name to the query and clicking on **Save query**. The saved queries can be managed (rerun or removed from the list) from the **Saved queries** tab.

The screenshot shows the 'Saved queries' interface. On the left, there is a list of two saved queries: 'query2 'legislative pro...'' and 'query1 'legislative act...''. The first query is highlighted. On the right, the search criteria for the selected query are displayed: 'Query: 'legislative process'', 'Source language: en,Ja,mul', and 'Target language: fr,Ja,mul'. Below this, there are search parameters: 'Search in fields (source): Term', 'Matching type: All words', and 'Search in term types (source): All term types'. At the bottom right, there are two buttons: 'Remove' and 'Run this query again'.

*List of saved queries with summary of criteria per query and options to rerun the query or to remove the query from the list*

### 3.7 Bookmarks

You can bookmark entries from any results page or from the full entry view and save them in lists. To do this, click on the bookmark icon  next to the result and select ‘My Favourites’ or another list that you have previously created.

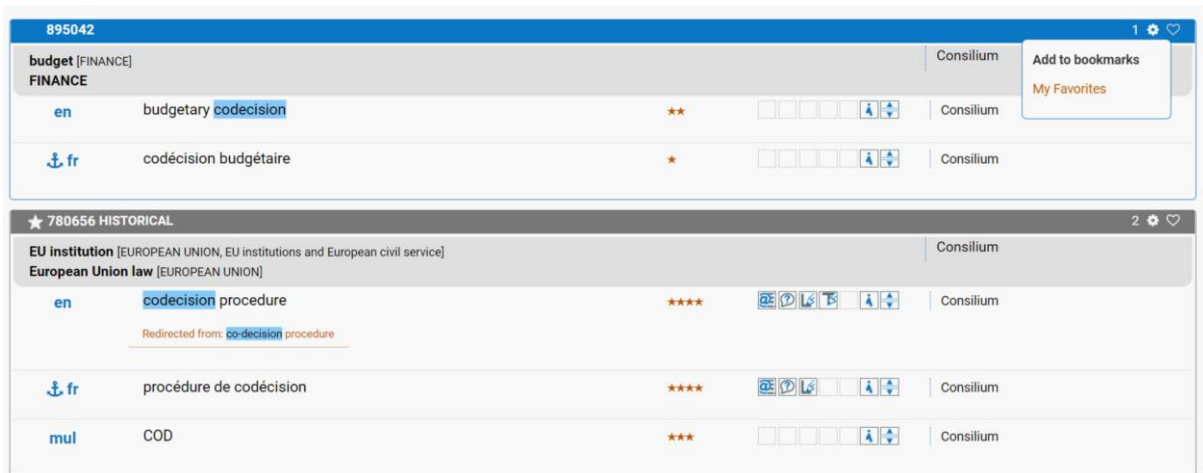


Figure: bookmarking an entry from results list (standard view)

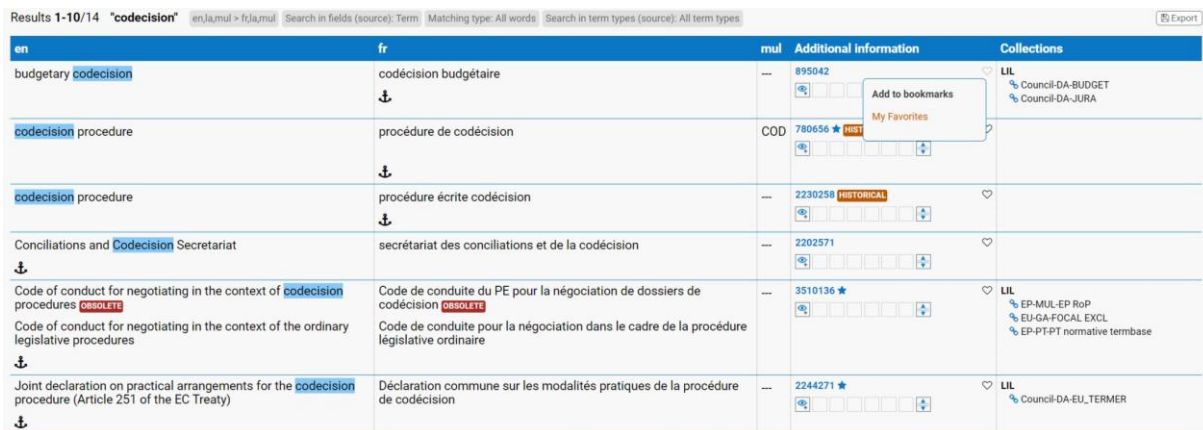


Figure: bookmarking an entry from results list (interpreters' view)

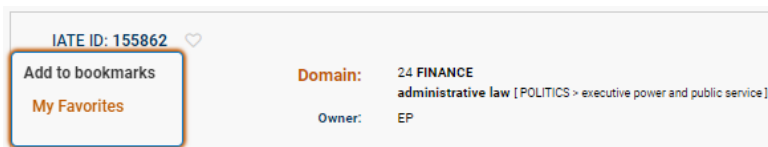



Figure: bookmarking an entry from the full entry view

If you have already bookmarked the entry, you can click on the bookmark icon  to remove the entry from the list.

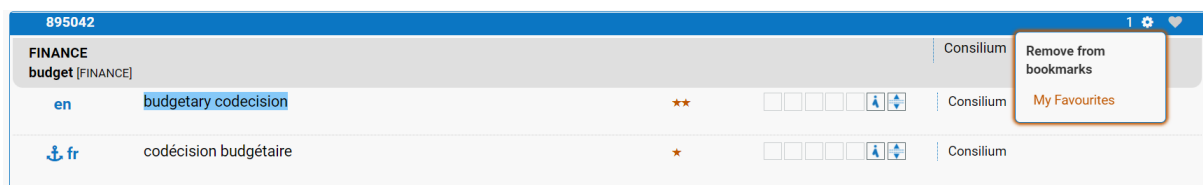


Figure: removing a bookmark from results list (standard view)

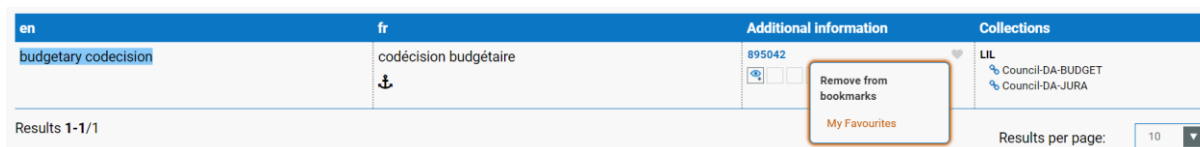
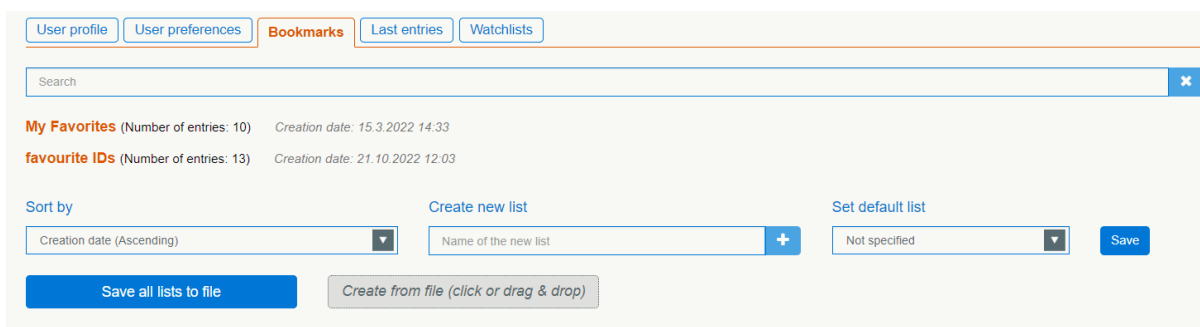


Figure: removing a bookmark from results list (interpreters' view)

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



To create a new list, enter the name of the new list and click on the button. If you have more than one list, they will all appear in a drop-down list when you click on the bookmark icon in the results list or in the full entry view.

If you set a **default list** – by clicking on the 'Set default list' box, selecting a list from the drop-down list, and then clicking on the 'Save' button – you will be able to bookmark an entry to your default list (or remove it from that list) with a single click on the bookmark icon in the results list or in the full entry view. To bookmark an entry to any other list, you will first need to change your default list, or reset it to 'Not specified'.

If you have several lists, you can sort them by creation date, modification date, name and number of entries, allowing you to quickly access the list you are looking for.

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. Here you can also rename your list, delete it, or add it to 'Table view'. You can also export your list in the languages of your choice or in all languages (including non-EU languages).



Figure: displaying a list of bookmarked entries (standard view)

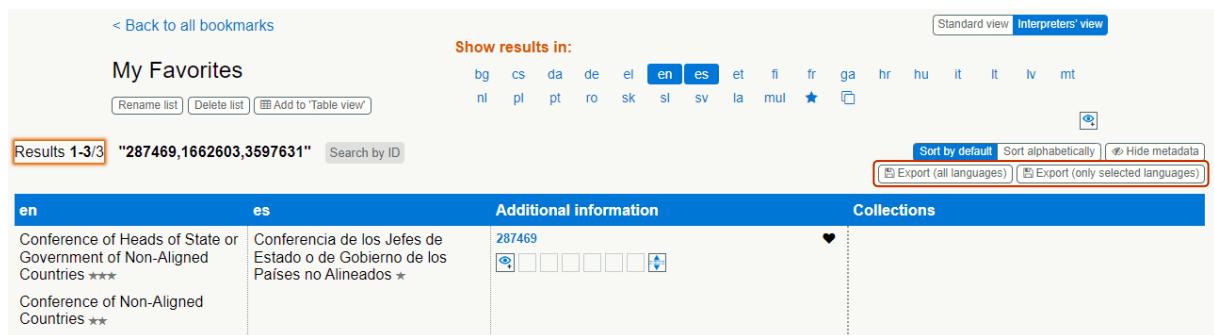


Figure: displaying a list of bookmarked entries (interpreters' view)

The bookmark lists are stored in the database, in your user profile. You can also save your lists to a file (one list in .xlsx format or all lists together in .fav format) and retrieve them from the saved file or share them with your colleagues.

To save all lists in one go, click on 'Save all lists to file' at the bottom of the Bookmarks tab. To restore all your lists, click on the 'Create from file (click or drag & drop)' button, select the saved file (IATE\_bookmarks.fav) and click on 'Open', or drag and drop the saved file on this button.

To save an individual bookmark list, open it, scroll to the bottom and click on 'Save to file'. To restore a lost bookmark list, first create an empty list with the desired name, open the list, click on the 'Create from file (click or drag & drop)' button, select the saved file (e.g. IATE\_My Favourites.xlsx or IATE\_List 1.xlsx) and click on 'Open', or drag and drop the saved file on this button.

### 3.8 Search by collection

A dedicated page to search by full collection(s) enables you to retrieve existing collections attached at Language Independent Level (LIL), Language Level (LL) and/or Term Level (TL) and select these collections for visualisation (+).

'Search by collection' can be launched by typing one or more keywords in the search box.



Clicking on the ‘Open expanded search’ button provides you with more filters to search by ID, description, language, institution, type, creation date and confidentiality. If you are looking for a collection with no set language, select ‘No language’ in the ‘Language’ filter. If you have indicated in your user preferences that you only want to see certain types of collections, the filter by Type field will only have those types selected.

The screenshot shows a search interface with several filter sections. At the top, there are buttons for 'Search', 'Search by collection', 'Advanced search', and 'Batch search'. Below these, there are tabs for 'Standard view' and 'Interpreters' view'. The 'Collections' section has a 'Close' button and input fields for ID, Name, and Description. The 'Language' section has a dropdown menu set to 'Not specified'. The 'Institution' section has a dropdown menu set to 'Not specified'. The 'Type' section has three checkboxes: 'related to project management', 'related to subject area', and 'Miscellaneous', all of which are checked. The 'Created after' and 'Created before' sections have input fields with 'x' buttons. The 'Confidentiality' section has a dropdown menu set to 'Not specified'. At the bottom, there are 'Clear' and 'Search' buttons. Below the search area, there is a 'Sort by:' section with options for 'Creation date', 'ID', 'Name', and 'Type', and buttons for 'Ascending' and 'Descending'. At the very bottom, there are 'Close results' and 'Close expanded search' buttons.

By default, **the results are shown in** the target languages defined in your user preferences (for more details, see 7 User preferences). If none are defined, the results will be shown in the interface language. You are free to change the language selection at any point. You can export the results by clicking on the ‘Export’ button. The export will contain only the languages you have selected.

The list of results belonging to a particular collection can be displayed in the standard view or the interpreters’ view. The results are sorted according to the same rules as for the standard search (except for the matching criteria, since you are not searching for a particular string here).

Just like in a basic search, you can apply quick filtering to the search results (applicable to domains, collections, owners, primarity). However, the possibility to launch a new search from a term in the results is not available, since no previous search criteria were defined in this screen apart from the collection selection and the displayed languages. To refine your results, you can use the ‘Advanced search’ button (see Annex III: Advanced Search).

If you receive a link to a confidential collection, make sure that you are logged in to IATE before trying to view it, otherwise you will not be able to. A warning message has been put in place to remind users about this.

### **3.9 Full entry view**

From the results page, you can access the full entry view by clicking on the entry ID at the top-left of the entry or by clicking on one of the language codes on the entry. Clicking on the entry ID will display the source and target language(s) selected for the search (bilingual,




trilingual or multilingual display), whereas clicking on a language code will show the selected language in a monolingual display.

You can show other languages by clicking on the language code (directly in the language bar) or hide languages by right-clicking on the language code and selecting 'Close'. Through the right-click menu, there is also an option to 'Open all languages': it will display all available languages in list view.


Any registered user can save an entry to a list of bookmarks using the heart-shaped icon available next to the entry ID [IATE ID: 3539850](#) .

After creating an entry, different display options are available in full entry view. The default view is a bilingual or monolingual view of the created languages or language. However, you can modify the display as follows:

- Close or open the displayed languages
- Switch columns
- Collapse or expand the LIL, including the advanced management options with the duplicate detection feature
- Collapse or expand the LL of the displayed language(s) to align terms
- Collapse or expand individual TLs for side-by-side alignment with another language as needed
- Display the available languages in list mode (  button)


You can collapse or expand in one go all the fields included at LIL, LL and TL by using the 'Collapse all' | 'Expand all' buttons at the top of the full entry view:



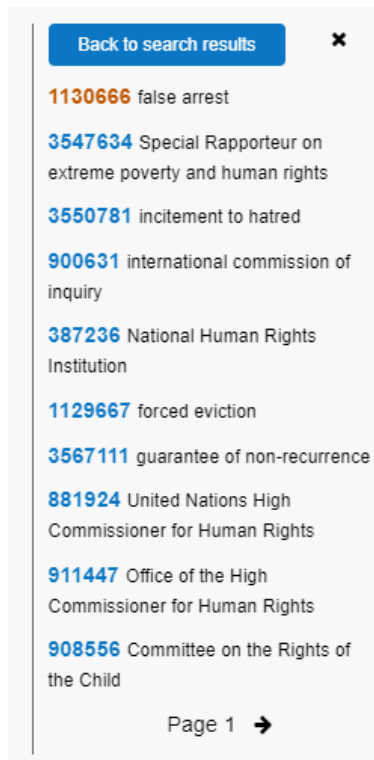
The language navigation bar allows you to quickly see which language is the anchor language (if any), which languages are currently displayed in the detailed view (light blue) and which languages are on the entry (dark and light blue). Non-EU languages can also be displayed in the navigation bar (right-click on any language and select  Show all languages on the contextual menu).



From the full entry view, you can also navigate through the search results with the right-side navigation panel. Note that when you navigate from one entry to another through the navigation panel, the languages displayed will be the ones visible in the previous entry. For instance, if your search was from EN into SV, but once in the entry you decide to show DA as well, the three languages will be visible in the next entry that you open through the navigation panel (if they all exist on that entry). The navigation panel also allows you to return to the results page by clicking on the 'Back to search results' button.

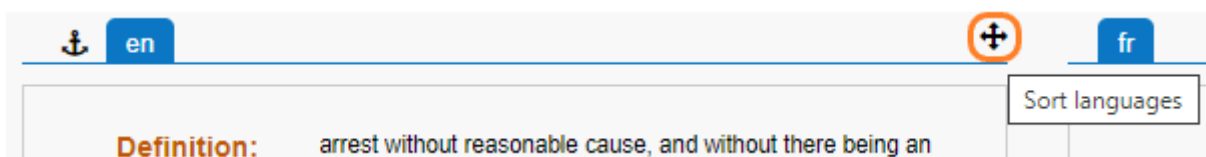
You can close the navigation panel and it will remain closed in future sessions. You can choose to reopen it at any time via the icon .








You can switch from the side-by-side view, which is available for up to three languages in screens with a resolution of at least 1 600 pixels, to a list view (one language below another), which is available for any number of languages. The [Side-by-side view](#) [List view](#) buttons are located in the top right corner of the screen.

In side-by-side view, you can also switch the order of the displayed languages by dragging the ‘Sort languages’ icon and dropping it on the icon of the language you wish to swap with.



In side-by-side view, you can collapse the language level to align the term levels, or you can collapse term levels to align a specific term level across languages. To do so, click on the collapse  and expand  buttons. You can also collapse levels in list view.

If you have editing rights, you can modify the entry from this view by opening a field, group of fields or level for editing. There are four ways to render content editable:

- using the  button at LIL, LL or TL;
- using the Quick edit panel;
- double-clicking on the part that you need to modify (either a field, a group of fields or a level);
- using the ‘Edit’ option or other relevant actions in the various contextual menus (right-clicking on field, level, area).

Once content is open for editing, a grey background will appear around the editable field(s). If you opened an entire level, empty fields will also be displayed.

For more information on data modification, see section 6 How to modify an entry.

### 3.10 Permanent link to full entry view

You can link directly to the full view of an entry as follows:

<https://iate.europa.eu/entry/result/2242201> (where 2242201 is the entry ID; this information is displayed at the bottom of the full entry view and also obtained in the API response)

The following language display options are available:

<https://iate.europa.eu/entry/result/2242201/en-fr-bg-el> (specific languages)

<https://iate.europa.eu/entry/result/2242201/all> (multilingual view)

<https://iate.europa.eu/entry/result/2242201/et-lt-all> (multilingual view, specific languages first)

<https://iate.europa.eu/entry/result/2242201> (multilingual view)

While navigating through search results with the navigation module, the language display options are kept from one entry to the next.

### 3.11 Last viewed entries

You can consult your last viewed entries (entries which you have opened in full entry view) by clicking on your username (top right corner of the screen) and selecting ‘Last entries’.

The list of last viewed entries contains the consultation date and time, the IATE ID, the term and the languages viewed when first opening the full entry view. You can preview the entry or consult its history by clicking on the icons on the right.

User profile   User preferences <b>Last entries</b>			
Date	IATE ID	Term	Languages
27.1.2020 15:36	<a href="#">2216452</a>	Confirmation of the European Commission	en-fr-la-mul  
27.1.2020 15:36	<a href="#">3500691</a>	European Commission Chief Spokesperson	en-fr-la-mul  
27.1.2020 15:36	<a href="#">961314</a>	European Commission Host Organisation	en-fr-la-mul  
27.1.2020 15:36	<a href="#">196197</a>	European Commission of Human Rights	en-fr-la-mul  
27.1.2020 15:36	<a href="#">262736</a>	European Commission on Agriculture	en-fr-la-mul  
27.1.2020 15:36	<a href="#">782662</a>	European Commission on Agriculture	en-fr-la-mul  
27.1.2020 15:36	<a href="#">961271</a>	European Commission on Agriculture	en-fr-la-mul  
27.1.2020 15:36	<a href="#">1482992</a>	department of the European Commission	en-fr-la-mul  
27.1.2020 15:36	<a href="#">1231098</a>	member of the Commission	en-fr-la-mul  
27.1.2020 15:35	<a href="#">118094</a>	Commission Delegation	en-fr-la-mul  
27.1.2020 15:35	<a href="#">1161947</a>	President of the European Commission	en-fr-la-mul  

## 4. OVERVIEW OF STRUCTURE

**IATE ID:** 930970

**Domain:** 1011 European Union law [EUROPEAN UNION]  
legislative procedure [POLITICS - parliamentary proceedings]

**Anchor language:** fr

**Origins:**  
Origin: (EU) European Union

**Cross-references:**  
Cross-reference: current entry is antonym of 2243075 special legislative procedure

Cross-reference: current entry is successor of 780656 codecision procedure

Cross-reference: current entry is successor of 786695 cooperation procedure

**Owner:** Council

### Language Independent Level (LIL)

**Definition:** "The ordinary legislative procedure shall consist in the joint adoption by the European Parliament and the Council of a regulation, directive or decision on a proposal from the Commission."

**Definition reference:** Article 289(1) of the consolidated version of the Treaty on the Functioning of the European Union <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:115:0001:01:EN:HTML>

**Note:** The ordinary legislative procedure is described in Article 294 of the consolidated version of the Treaty on the Functioning of the European Union <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:115:0001:01:EN:HTML>. Cf. special legislative procedure [IATE:2243075]

**Owner:** Council

### Language Level (LL)

**Term:** ordinary legislative procedure

**Term reference:** Article 294 of the consolidated version of the Treaty on the Functioning of the European Union. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:115:0001:01:EN:HTML>

**Term type:** term

**Reliability:** \*\*\*\*

**Note:** As a result of the Lisbon Treaty, the codecision procedure [ IATE:780656 ] becomes the 'ordinary legislative procedure'.

**Owner:** Council

**Abbrev:** OLP

**Term reference:** European Parliament resolution of 10 March 2010 on the regulation applying a scheme of generalised tariff preferences (2010/2020)

**Term type:** abbrev

**Reliability:** \*\*\*

**Language usage:** The abbreviation is not found in the official acts establishing the ordinary legislative procedure, but is commonly used elsewhere.

**Owner:** Council

**Definition:** procédure normale pour l'adoption d'actes législatifs de l'UE, qui consiste en l'adoption d'un règlement, d'une directive ou d'une décision conjointement par le Parlement européen et le Conseil, sur proposition de la Commission.

**Definition reference:** Version consolidée du traité sur le fonctionnement de l'Union européenne, article 289, par. 1 [ CELEX:12008E289/fr ]

**Note:** La procédure ordinaire est décrite à l'article 294 de la version consolidée du traité sur le fonctionnement de l'Union européenne [ CELEX:12008E294/fr ]. Voir aussi: procédure législative spéciale [IATE:2243075].

**Owner:** Council

### Language Section

**Term:** procédure législative ordinaire

**Term reference:** Version consolidée du traité sur le fonctionnement de l'Union européenne, article 289 [ CELEX:12008E289/fr ]

**Term type:** term

**Reliability:** \*\*\*\*

**Contexts:**

**Term in context:** "Avec l'entrée en vigueur du Traité de Lisbonne, la codecision deviendrait la 'procédure législative ordinaire' et s'appliquerait quasiment à tous les domaines contenus dans l'ancien pilier communautaire. L'article 294 TFUE donne les détails de cette procédure, qui consiste en deux lectures, suivies d'une conciliation, et d'une troisième lecture qui permet l'adoption finale de l'acte. Il y a également une progression de la procédure de consultation dans le deuxième et surtout le troisième pilier, alors qu'habituellement le Parlement était uniquement informé des décisions prises dans ces domaines. Ainsi, le Parlement est consulté avant l'édiction de décisions-cadres, décisions ou élaboration de conventions."

**Context reference:** Le partage du pouvoir législatif entre PE et Conseil: fondements et évolution, support de cours en ligne, Sciences po (1.12.2009)

**Owner:** Council

## 4.1 Entry levels

As illustrated above, IATE entries are divided into three levels:

### 1. Language-Independent Level (LIL)

This level contains metadata (administrative information, collection-related information, management data) and concept-related information (domains, origin, etc.) which apply to all the data in the levels below it. In full entry view, it is collapsed by default and only shows the main information. More detailed information on the contents of the LIL can be found in section 12.1 Language-Independent Level (LIL).

★ IATE ID: 930970

**Domain:** 1011 European Union law [ EUROPEAN UNION ] legislative procedure [ POLITICS > parliamentary proceedings ]

**Primary:** Primary

**Anchor language:** fr

**Origins:** Origin: (EU) European Union

**Lifecycle:** historical

**Management:** [EP] Terminology for Parliamentary Work glossary [Council] - Project No 6/07 Part III - IGC - Reform Treaty [Council] - Lisbon 100-09 (Treaties)

**Notes:**

**Cross-references:** Cross-reference: current entry is antonym of 2243075 special legislative procedure Cross-reference: current entry is related to 780656 codecision procedure

**Inbound cross-references:** Cross-reference: 2243075 special legislative procedure is antonym of current entry Cross-reference: 883241 legislative procedure is broader than current entry Cross-reference: 780656 codecision procedure is related to current entry Cross-reference: 853538 co-legislator is related to current entry

**Collections:** COM-EU [related to subject area](#) General European Union Terminology Council-DA-CONV [related to subject area](#) The European Convention Council-DA-EU\_TERMER [related to subject area](#) EU jargon Council-DA-JURA [related to subject area](#) Law Council-NL-EURCONVENTIE [related to subject area](#) -- Council-PT-CONV [related to subject area](#) -- EP-MUL-MEP glossary [related to subject area](#) Terminology for Parliamentary Work glossary EU-GA-FOCAL [related to subject area](#) Focal Irish project

**Attachments:**

**Confidentiality:** Not confidential

**Protection:** not protected

**Owner:** Council

### 2. Language Section

This is not really a level in the data structure, but refers to the language and its Language Level and Term Levels below. Many options applicable to all the terms or to the LL and TL are available in the Language Section.



### 3. Language Level (LL)

This level relates to the concept, but it is written in a specific language and applies to all the terms in that language. The definition of the concept must be similar in all languages and applicable to all the terms on the entry. Ideally, the definition would be placed in the LIL, but this is obviously impossible: in order to have a definition in each language, the definitions appear in the LL. The concept of the entry is identified by the information available in the anchor language (if one has been defined). Any notes about the concept are also found at LL. This level is discussed in more detail in section 12.2 Language Level (LL).

The LL can be collapsed and expanded in full entry view.



**Definition:** procédure normale pour l'adoption d'actes législatifs de l'UE, qui consiste en l'adoption d'un règlement, d'une directive ou d'une décision conjointement par le Parlement européen et le Conseil, sur proposition de la Commission.

**Definition reference:** Version consolidée du traité sur le fonctionnement de l'Union européenne, article 289, par. 1 [ [CELEX:12008E289/fr](#) ]

**Note:** La procédure ordinaire est décrite à l'article 294 de la version consolidée du traité sur le fonctionnement de l'Union européenne [ [CELEX:12008E294/fr](#) ].  
Voir aussi: *procédure législative spéciale* [ [IATE:2243075](#) ].

**Note reference:**

**Related material:**

**Management:**

**Collections:**

**Attachments:**

**Pre-IATE:** No

**Confidentiality:** Not confidential

**Protection:**  not protected


**Owner:** Council

**Language code:** fr



#### 4. Term Level (TL)

This level relates to a specific term in a specific language. See section 12.3 Term Level (TL) for more detailed information.

If there is more than one TL in a language and you have the necessary editing rights, you can change the display order by clicking on the 'Sort terms' icon  (accessible by right-clicking on the language code at the top of the LL or by clicking on the language code in the Quick edit panel) and dragging and dropping the TL boxes into the desired display order (drag the icon of the term you wish to move and drop it on top of the icon of the term whose place it should take).

TLs can be collapsed and expanded in full entry view.

<b>Term:</b>	<b>ordinary legislative procedure</b>
Term reference:	Article 294 of the consolidated version of the Treaty on the Functioning of the European Union. Official Journal of the European Union, C 115, 09 May 2008
Term type:	term
Reliability:	★★★★
Evaluation:	
Part of speech:	
Gender:	
Number:	
Note:	As a result of the Lisbon Treaty, the codecision procedure [ IATE:780656 ] becomes the "ordinary legislative procedure".
Note reference:	
Contexts:	
Language usage:	
Regional usage:	
Management:	
Collections:	
Customer:	
Pre-IATE:	No
Confidentiality:	Not confidential
Protection:	🔒 not protected
Owner:	Consilium

---

**Abbrev:** OLP ★★★ ⬆️

## 4.2 Contextual menu

To access the contextual menu, right-click on the field label, the dotted side-line, the outer border of the level, or the language code.

**NB:** The set of options available will differ depending on the field in question and on your user rights. **Please note that the same options are also available in the Quick edit panel.**

Example of a contextual menu for the IATE ID field:

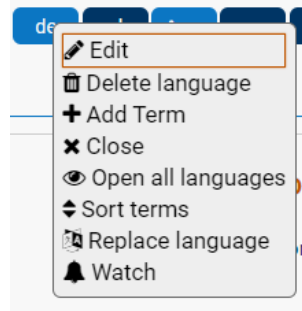
★ IATE ID: 930970


Anchor

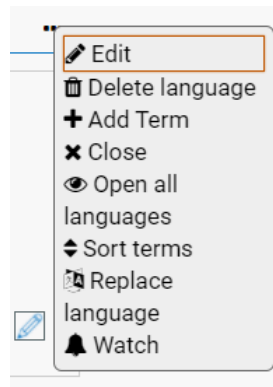
- ✎ Edit
- + Add new language
- 🔒 Lock entry
- 📎 Add to batch attachments operation
- 📁 Add to batch collections operation
- 🔄 Add to merge operation

Origin: (EU) European Union


Example of a contextual menu for the language code:




You can also display the contextual menu for a language section by clicking on the  icon on the far right:



### **4.3 Confidentiality**

By default, all entries are ‘public’. This means that all information will be visible in public IATE once the data have been validated. However, you can restrict the confidentiality of an entire entry, of a specific LL or TL (via the specific ‘Confidentiality’ field) or of any reference or note field at LL and TL (by right-clicking on the field label, by opening the field for editing and selecting the confidentiality value , or by clicking on the relevant option in the Quick edit mode after selecting the specific field). The values available are:

Not confidential	Default setting and recommended option, unless there are strong reasons to hide the data.
Confidential 	Information available to staff in all IATE partner services. (This is useful where internal documents cannot be accessed by the general public. However, if a document is subsequently made public, the confidentiality settings should also be changed to ‘Not confidential’.)

- Change the setting from the default ‘Not confidential’ only where absolutely necessary.
- When making a previously confidential entry public, first make sure that it does not duplicate another entry.

## 4.4 Protection

By default, all entries are unprotected, which means that users from any institution with specific editing rights can modify them. However, Administrators can protect a LIL, LL or TL so that only users from their institution, or only Administrators from their institution, can modify the data. This offers greater control of specific data validated by national authorities, harmonised with other sources, etc.

Protection: Protected

Protection strategy: Loose protection (protect o...)

Protection level: Only users from the owner

Cascade protection: Do not cascade protection

Owner: CdT

Only users from the owner institution can modify the data.

Only administrators from the owner institution can modify the data.

The protection can be applied to just a specific level or ‘cascaded’ to include sub-levels.

Protection: Protected

Protection strategy: Loose protection (protect o...)

Protection level: Only users from the owner

Cascade protection: Do not cascade protection

Owner: CdT

Cascade protection to sub-levels

Do not cascade protection to sub-levels

The protection can be loose (only data owned by your institution are protected, other institutions can still add additional languages or terms), or strict (all data are protected – in case of conflicts, you are blocked and cannot apply strict protection or a warning is displayed informing you of the conflict, which needs to be resolved by the IATE Support & Development Team – and other institutions cannot add additional languages or terms).

Protection: Protected

Protection strategy: Loose protection (protect o...)

Protection level: Only users from the owner

Cascade protection: Do not cascade protection

Owner: CdT

Loose protection (protect only content belonging to my institution)

Strict protection (protect all content, even if it does not belong to my institution)

Protection can also be applied via collections (only by Administrators), with the same options and rules as above (loose/strict, cascading/not cascading, users in own institution/only Administrators in own institution). For more details on the protection of collections, see section 12.1.16 Collections.

Labels with the protection information will be displayed for all protected levels in full entry view. In the results page, you can also see protection labels when protection has been applied directly to the entry (and not via a collection).



To protect a new entry when creating it, select the value ‘Protected’ in the ‘Protection’ field and the relevant protection options. There is a ‘Protection’ field in each level (LIL, LL and TL) to facilitate granular protection of data.

An existing entry or level can also be protected via the ‘Protection’ field that can be found at LIL, LL and TL in full entry view.

## 4.5 Pre-IATE

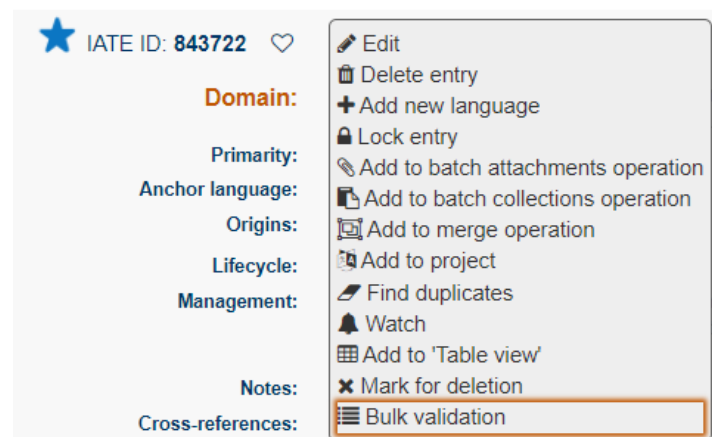
Pre-IATE is used to identify batches of entries (e.g. glossaries) imported into IATE *en masse*, making potentially useful information available quickly and effortlessly. Terminologists can then incorporate this into IATE proper (if and when they have time), and in the meantime users can search for it or choose to exclude it from their search. It is also used to mark raw or draft data that needs to be checked and completed.

‘Pre-IATE’ is treated as a validation status. By default, all newly created data are IATE data (either validated or not validated). However, users with specific rights can set the status of LLs and TLs to ‘Pre-IATE’ when creating an entry, modifying data, or importing data. This status can be changed at any time by users with specific rights:

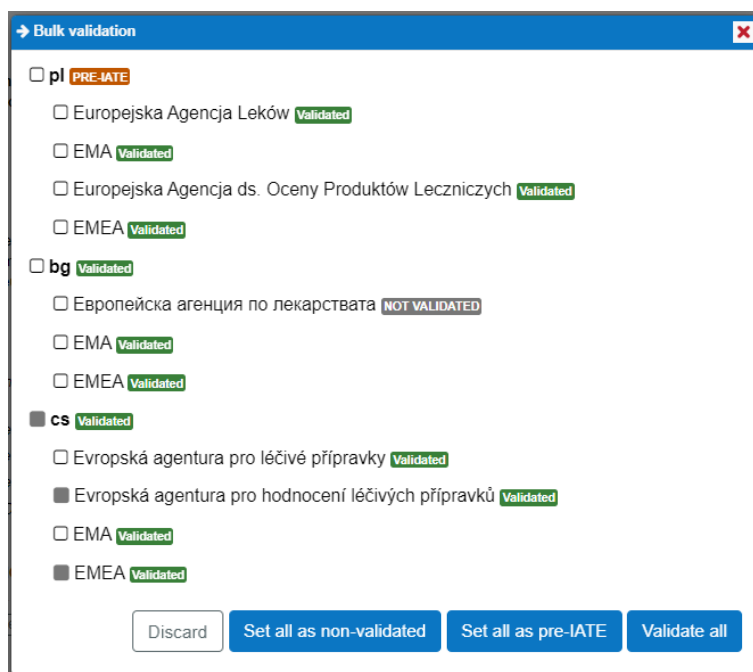
- via the contextual menu (right-click the language level outer border or the term level outer border and select ‘Set as Pre-IATE’ or ‘Set as not Pre-IATE’);
- via the Pre-IATE field (available at LL and TL after clicking on ‘Show more’ or on the ‘Edit’ pencil icon);
- via the Quick edit panel (at LL and TL);
- via a batch update (Administrators only).



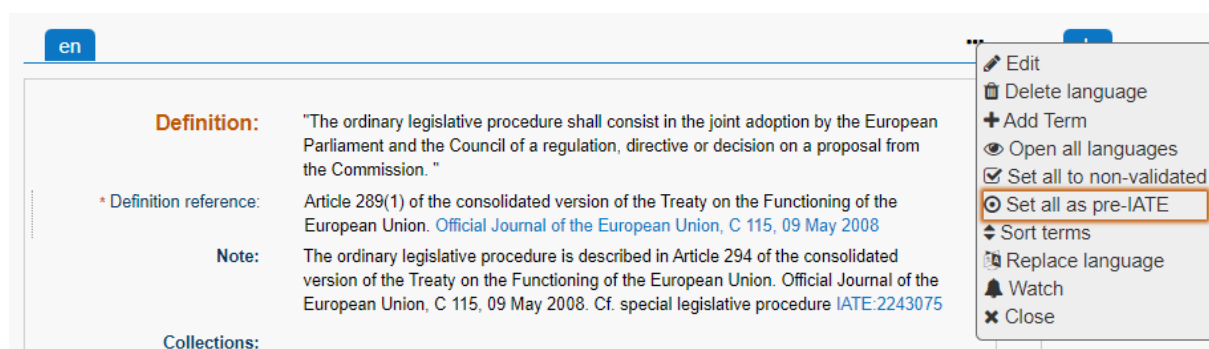
In addition, the contextual menu and Quick edit panel at LIL and LL allow users with specific rights to change the status of all LLs and TLs below in one click, by selecting the ‘Set all as pre-IATE’ option.



The ‘Bulk validation’ button available at LIL for entries owned by the institution of the user enables users with specific rights to select the levels (LLs and TLs) to which a status change should be applied. The validation status is displayed for each level. Levels belonging to another institution are not available for selection. The user can decide which status to apply to the selected levels: validated, not validated or pre-IATE.



At LL, users with specific rights can change the validation status for all the levels of a language if the levels belong to their institution and the user has validation rights for that language.



In the results screen, pre-IATE data are identified by a pre-IATE label ( **PRE-IATE** or **PRE-IATE** ) to the left if it applies to the language level and to the right if it applies to the term.


★ 930970 European Union		6	
legislative procedure [POLITICS > parliamentary proceedings]		Council	
European Union law (1011) [EUROPEAN UNION]			
en	ordinary legislative procedure	★★★★	Council <b>PRE-IATE</b>
	OLP	★★★	Council
fr	procédure législative ordinaire	★★★★	Council

Pre-IATE data are not displayed for non-authenticated users, but they are retrieved together with other available data when searches are performed by authenticated users. Authenticated users may choose to exclude pre-IATE data by filtering out the pre-IATE results at TL or LL in the expanded search filters on the search screen.

Source language	Target language
<b>Language validation</b> <input checked="" type="checkbox"/> Validated <input checked="" type="checkbox"/> Not validated <input type="checkbox"/> Pre-IATE <input type="checkbox"/> All	<b>Language validation</b> <input checked="" type="checkbox"/> Validated <input checked="" type="checkbox"/> Not validated <input type="checkbox"/> Pre-IATE <input type="checkbox"/> All
<b>Term validation</b> <input checked="" type="checkbox"/> Validated <input checked="" type="checkbox"/> Not validated <input type="checkbox"/> Pre-IATE <input type="checkbox"/> All	<b>Term validation</b> <input checked="" type="checkbox"/> Validated <input checked="" type="checkbox"/> Not validated <input type="checkbox"/> Pre-IATE <input type="checkbox"/> All

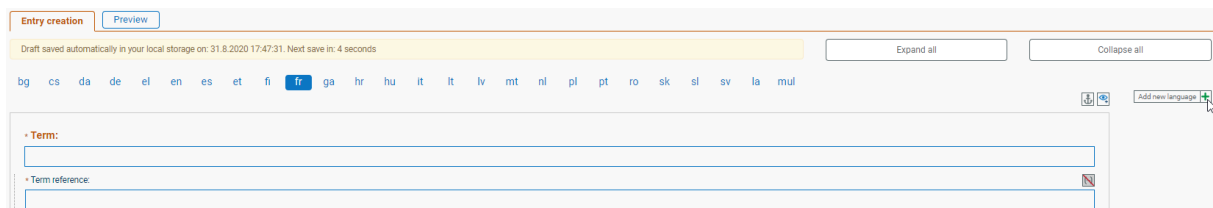
If a pre-IATE entry relates to a useful concept which does not appear elsewhere in IATE, make any changes needed to the TL(s) in your language, your LL, and the LIL, then select ‘Set as not pre-IATE’ on the contextual menu for the LL and TL(s).

## 5. HOW TO CREATE AN ENTRY

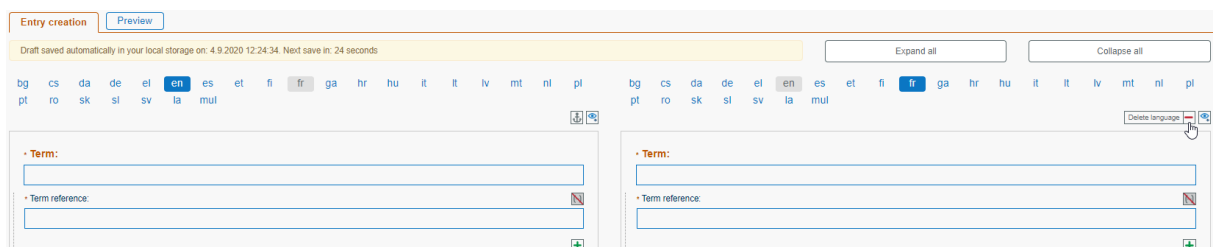
Clicking on the ‘New entry’  menu will open the entry creation form. The languages displayed by default are based on your working languages (as defined in your user account). If you have only defined one working language, the second will be English (if not already present), or French.



You can set the default mode (monolingual or bilingual) in the user preferences (for more details see section 7 User preferences), but you can always switch from the monolingual creation form to bilingual or vice versa by deleting or adding a language. You cannot delete the language that has been set as the anchor language.

### Monolingual entry creation:




### Bilingual entry creation:



You can display non-EU languages by clicking on the ‘Show more’  icon, or hide them by clicking on the ‘Show less’  icon. The anchor language is identified by the anchor  icon and can be changed by clicking on the  icon.

There are no contextual menus in the entry creation module: all action buttons are visible on the screen.

By default, only the mandatory fields are displayed (equivalent to the previous ‘Quick mode’). You can expand each level by clicking on the ‘Expand’ button . You can expand all levels at once or quickly return to the concise view (which includes the mandatory fields and any other fields which have already been filled in) by clicking on the ‘Expand all’ and ‘Collapse all’ buttons in the top right corner. Additional information can also be added at a later stage, i.e. after creating the entry. As entry creation is either monolingual or bilingual, additional languages can only be added after the entry has been created.

Once you have started to draft an entry, it will be saved automatically every 30 seconds. You can export it in order to resume your creation work later by clicking on the ‘Save to file’ and ‘Create from file’ buttons. These two buttons can also be used to clone entries or to prepare templates that can be shared among users and uploaded to the creation form.

You can also save an existing entry as a template (option available at LIL when displaying one or two languages in full entry view) and create new entries based on it.

Clicking on ‘Cancel’ will reset the form and bring you back to the ‘Search’ screen; ‘Reset’ will empty the creation form; ‘Check’ will verify that all mandatory fields are filled. Once you have inserted all your data in the form, finalise the creation procedure by clicking on the ‘Create’ button: it will generate the new entry and assign an IATE ID to it. If any mandatory field has not been completed, you will get an alert and will not be able to proceed. Once the entry has been created, it will open in full entry view (for more details about this view, see section 3.9).

When you create data (either a full entry using the entry creation form or a specific LL or TL in full entry view), the data are considered your own data until another user modifies them.

Your own data are labelled as ‘Owner’, and you usually have more rights on such data than on other users’ data.

## **5.1 List of fields**

Mandatory fields are marked with an asterisk \* in front of the field label. If you do not enter data in the mandatory fields, you will not be able to create the entry (and you will get an alert to that effect).

Mandatory fields:

- Source and target languages
- Term
- Term reference
- Term type (lookups allowed provided there is at least one non-lookup term in the language)
- Reliability
- Domain

Optional fields (the reference **fields in bold** are mandatory if the associated field is filled):

- Evaluation (TL)
- Part of speech (TL)
- Gender (TL)
- Number (TL)
- Note (TL)
- Note reference (TL)
- Term in context (TL)
- **Context reference** (TL)
- Language usage (TL)
- Language usage reference (TL)
- Regional usage (TL)
- Regional usage reference (TL)
- Management (TL)\*
- Collections (TL)
- Customer (TL)
- Customer note (TL)
- Pre-IATE (TL)\*
- Confidentiality (TL)\*
- Protection (TL)\*
- Protection strategy (TL)\*
- Protection level (TL)\*
- Owner (TL) – for information only
- Definition (LL)
- **Definition reference** (LL)
- Note (LL)
- Note reference (LL)
- Related material (LL)\*
- Management (LL)\*
- Collections (LL)
- Attachments (LL)
- Attachments note (LL)


- Pre-IATE (LL)\*
- Confidentiality (LL)\*
- Protection (TL)\*
- Protection strategy (LL)\*
- Protection level (LL)\*
- Owner (LL) – for information only
- Primaryity (LIL)
- Origin (LIL)
- Origin note (LIL)
- Lifecycle (LIL)
- Management (LIL)\*
- Note (LIL)
- Note reference (LIL)
- Cross-references: ID and type (LIL)
- Collections (LIL)
- Attachments (LIL)
- Attachment note (LIL)
- Confidentiality (LIL)\*
- Entry status (LIL)\*
- Protection (TL)\*
- Protection strategy (LIL)\*
- Protection level (LIL)\*
- Cascade protection (LIL)\*
- Owner (LL) – for information only

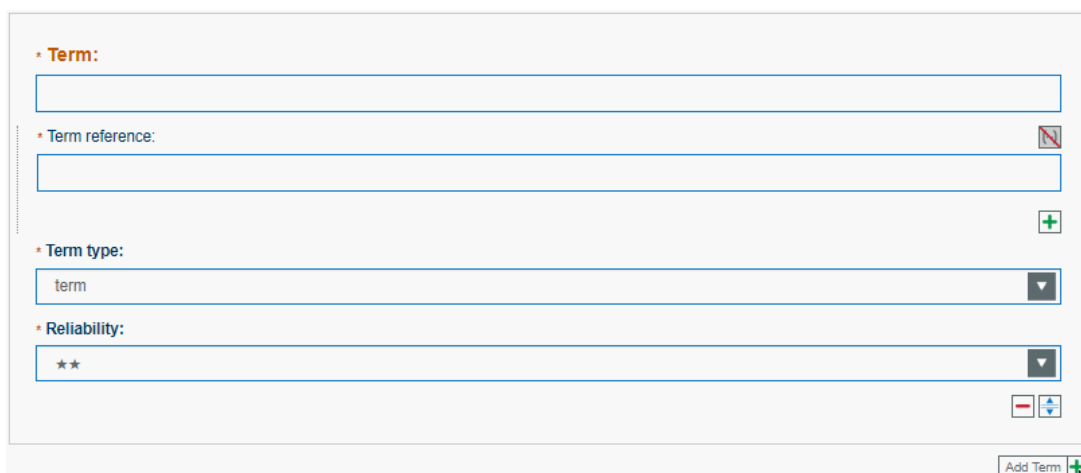
Fields/metadata with \* in the above list are not visible to external users.

For more details about each field, see section 12 Detailed overview of an entry.

## 5.2 Action buttons

### 5.2.1 Adding or removing fields in entry creation form


There are multiple occurrences of the  ‘Add’ button – hovering your mouse over it will display a tooltip, 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 screenshot shows a form with four main sections, each with a label and a corresponding input field:

- Term:** A text input field.
- Term reference:** A text input field with a red 'X' icon on the right.
- Term type:** A dropdown menu with 'term' selected.
- Reliability:** A dropdown menu with '★★' selected.

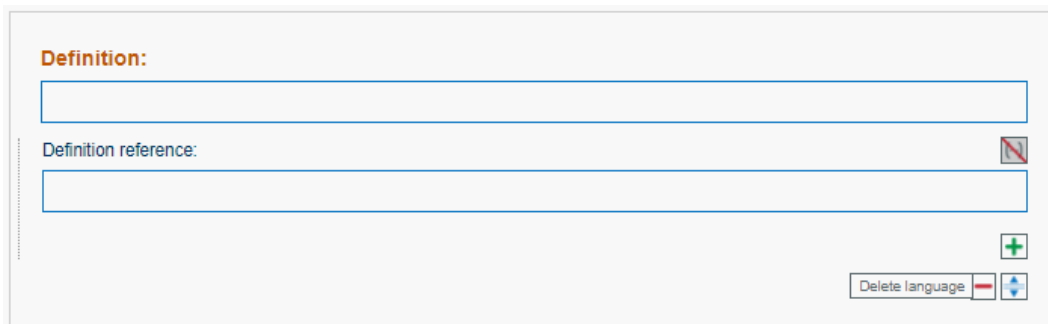
At the bottom right of the form, there is a small button labeled 'Add Term' with a green plus icon.

Following the same logic, the 'Remove/Delete'  button also applies to levels ('Delete language' or 'Delete term') and to fields and composite fields (to remove a reference, a customer, a term in context, etc.). Note that in the case of fields, it appears on top, whereas when it applies to the entire level, it is displayed below.

'Remove context' in order to delete the 'Term in context' and the associated 'Context reference' fields:




'Delete language' in order to remove the entire LL:




In full entry view, the add/delete options for LIL, LL and TL can be found in the contextual menu or the Quick edit panel.

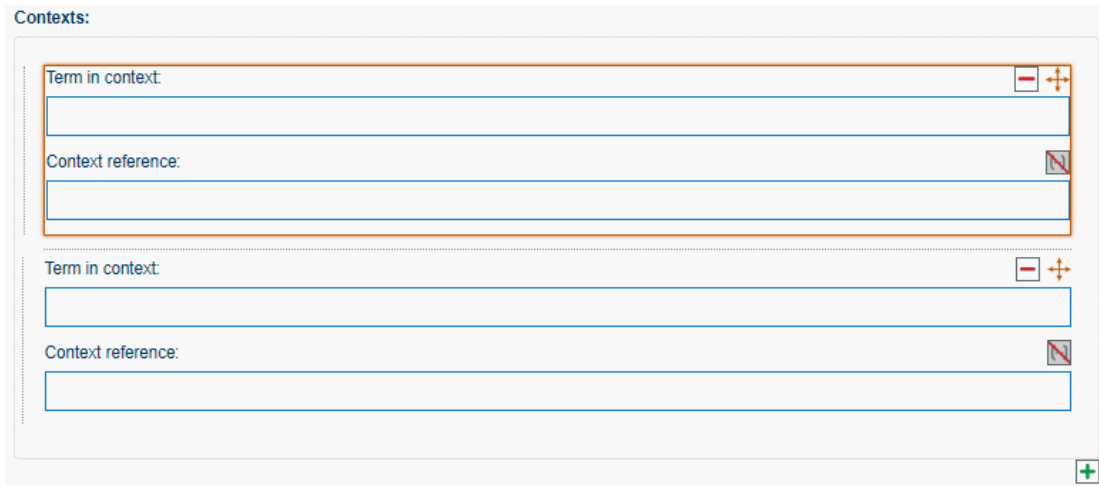
## 5.2.2 CONFIDENTIALITY

By default, all fields are . Clicking on this button will set the field as confidential as displayed in the screenshot below. The 'Confidential' label is also visible.

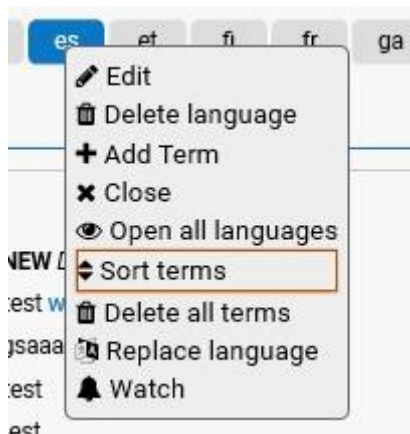


### 5.2.3 SORTING

In the case of multiple fields or multiple composite 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.



The sorting of term levels is one of the options available in the language section (once the entry has been created).



### 5.2.4 CREATION OF PARTICULAR FIELDS

In order to manage cross-references, **Collections:** [Edit](#), **Attachments:** [Edit](#) and **Domain:** [Add](#), please refer to the relevant section (12.1.12 Cross-references, 12.1.16 Collections, 12.1.18 Attachments, 12.1.1 Domain).


Click on the 'Close' button next to the field name to close the Collections, Attachments or Domain module.



Collections: [Close](#)

Search ✕ Clear [Q Search](#)

Sort by: Creation date ID Name Type Ascending Descending

 Open expanded search

[Create new collection](#)

### 5.3 Duplicate detection

When you insert a term in the ‘Term’ field, an automatic duplicate detection mechanism launches in the background and displays an alert if the database already contains potential duplicates in the same language. The duplicate detection search is run as an ‘Exact match’ search, which means that only exact matches are identified as potential duplicates (plurals are not exact matches of the term in the singular, and are therefore not recognised as potential duplicates).

• Term:

legislative procedure

*I*  $x_2$   $x^2$   $x^2$   $x^2$   $x^2$   $x^2$   $x^2$

This term might be a duplicate. Please check.

You can click on the alert message to view the list of potential duplicates in a separate browser tab. Once you have clicked on the duplicate detection alert, the alert disappears.

Duplicate detection is not launched if the term type is abbreviation or lookup form. Entries with status ‘Raw’ are taken into account and displayed by default in the results obtained via duplicate detection.

Duplicate detection is also launched when updating an existing term in full entry view (see section 6 How to modify an entry).

An advanced option to find duplicates by entry is also available in the results page and in full entry view.

Results 1-25/325 [Export](#)

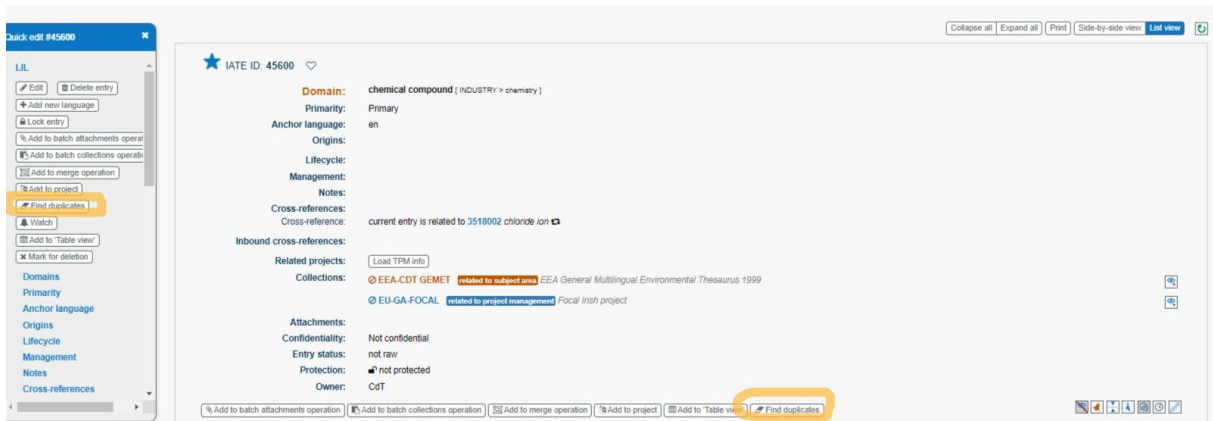
"chloride" en,fr,la,mul > es,it,ia,mul Search in fields (source): Term Matching type: All words

Search in term types (source): All term types Entry status: not raw Owner: Everything except SCIC [COM]

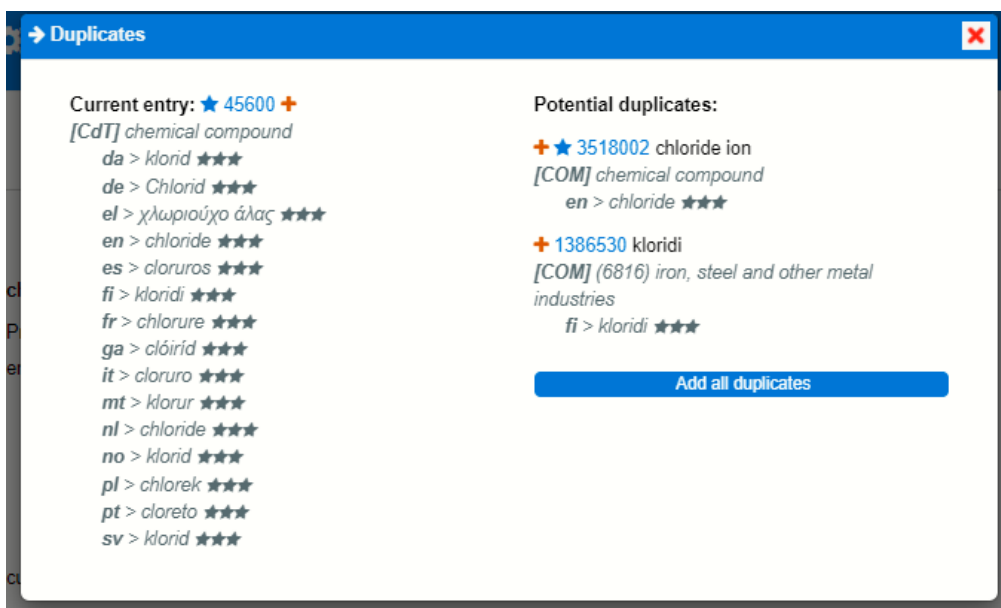
★ 45600 1 ♥

% Add to batch attachments operation % Add to batch collections operation % Add to merge operation % Add to project % Add to 'Table view' **Find duplicates**

chemical compound [INDUSTRY, chemistry]			CdT
en	chloride	***	CdT
es	cloruros	***	CdT
it	cloruro	***	CdT



This option is available only if you have selected ‘Display management options’ in your User preferences. The advanced duplicate detection search is run as an ‘Exact match’ search for **all the terms in all the languages available on the current entry**. Results are sorted in descending order of exact matches, with entries containing the highest number of exact matches across all languages on top. Various metadata are displayed to facilitate the analysis of potential duplicates (domain, LIL owner and term reliability).



The proposed duplicates, as well as the current entry, can be selected individually or all together and you can obtain a list of their IDs, add them to a merge operation, save the selected IDs to a file or add them to ‘Table view’ to make use of other overview options.

Any potential duplicate in the list can also be removed individually, by clicking on the bin icon which appears when you hover your mouse next to the duplicate in question.

## 5.4 Preview

When creating a new entry, you can see what the resulting entry will look like by clicking on the 'Preview' tab. The 'Preview' is a read-only view with a layout identical to the full entry view of a created entry. Any mandatory fields which have not yet been populated are highlighted.

Entry creation Preview

Warning! This is a preview of the entry you are creating. The new entry has not been saved.

Print Side-by-side view List view

**Domain:** EU financing  
EU budget  
**Anchor language:** en  
**Origins:** (EU) European Union  
**Owner:** Cdt

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

en

**Definition:** system proposed as part of the 2021-2027 multiannual financial framework to protect the EU budget by making receipt of EU funding conditional upon respect for the rule of law  
**Definition reference:** Council-EN based on points 22 and 23 of Conclusions of the Special meeting of the European Council (17, 18, 19, 20 and 21 July 2020)  
**Note:** Under this regime, the Commission would, in the event of a breach of the rule of law, propose measures for adoption by the Council by qualified majority.  
**Note reference:** Council-EN based on point 23 of Conclusions of the Special meeting of the European Council (17, 18, 19, 20 and 21 July 2020)  
**Owner:** Cdt

**Definition:** système proposé dans le cadre du cadre financier pluriannuel en vue de protéger les intérêts financiers de l'UE et qui consiste à conditionner l'octroi de financement européens au respect de l'état de droit  
**Definition reference:** Conseil-FR, d'après les conclusions de la Réunion extraordinaire du Conseil européen (17, 18, 19, 20 et 21 juillet 2020) – Conclusions (28.8.2020)  
**Note:** En cas de manquement aux principes démocratiques, notamment à l'état de droit, la Commission proposera des mesures qui seront adoptées par le Conseil statuant à la majorité qualifiée.  
**Note reference:** Site du Conseil de l'UE, Conseil européen extraordinaire, 17-21 juillet 2020 (28.8.2020)  
**Owner:** Cdt

**Term:** regime of conditionality  
**Term reference:** Conclusions of the Special meeting of the European Council (17, 18, 19, 20 and 21 July 2020)  
**Term type:** Term  
**Reliability:** \*\*\*  
**Evaluation:** **validated**  
**Owner:** Cdt

**Term:** régime de conditionnalité  
**Term reference:** Réunion extraordinaire du Conseil européen (17, 18, 19, 20 et 21 juillet 2020) – Conclusions (28.8.2020)  
**Term type:** Term  
**Reliability:** \*\*\*  
**Contexts:**  
**Term in context:** "Un régime de conditionnalité lié au respect de l'État de droit sera introduit pour protéger le budget et le plan de relance. Dans ce contexte, la Commission proposera des mesures à adopter par le Conseil à la majorité qualifiée."  
**Context reference:** L'Echo - Charles Michel: "L'accord sur le plan de relance européen est une évolution copernicienne" (28.8.2020)  
**Owner:** Cdt

**Lookup form:** conditionality mechanism  
**Term reference:**  
**Term type:** lookup form  
**Reliability:** \*  
**Owner:** Cdt

You can preview an entry as many times as you need to before creating it.

On the 'Preview' tab, a **Print** button allows you to print the current draft entry with a similar layout. It is also possible to print an existing entry via the same 'Print' option from the full entry view.

## 5.5 Browser data cache

If, while creating a new entry, you close your browser by accident (or on purpose) or there is a network issue and your session is lost, your data will reappear in the form when you reopen the browser (provided it is the same browser on the same PC). If you do not want to reuse the temporary data, you can reset the form by clicking on **RESET**.

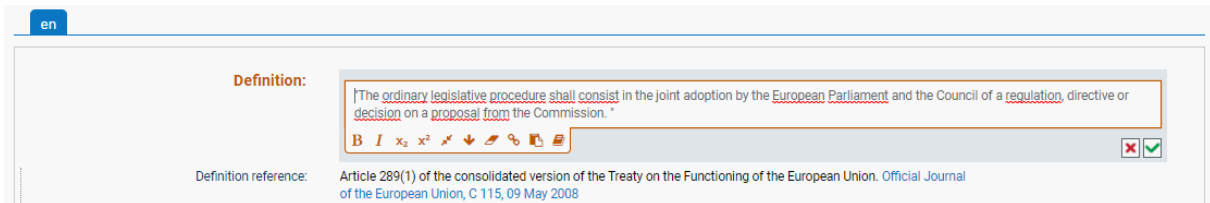
For the time being, every time a new version is deployed, the browser data cache will be cleaned automatically for all users in order to avoid conflicts. If you experience any issues when accessing IATE, it might be due to a conflict of versions (due to a new deployment). In that case, you can click on this link to clear the cache:

<https://iate.europa.eu/assets/reset.html>

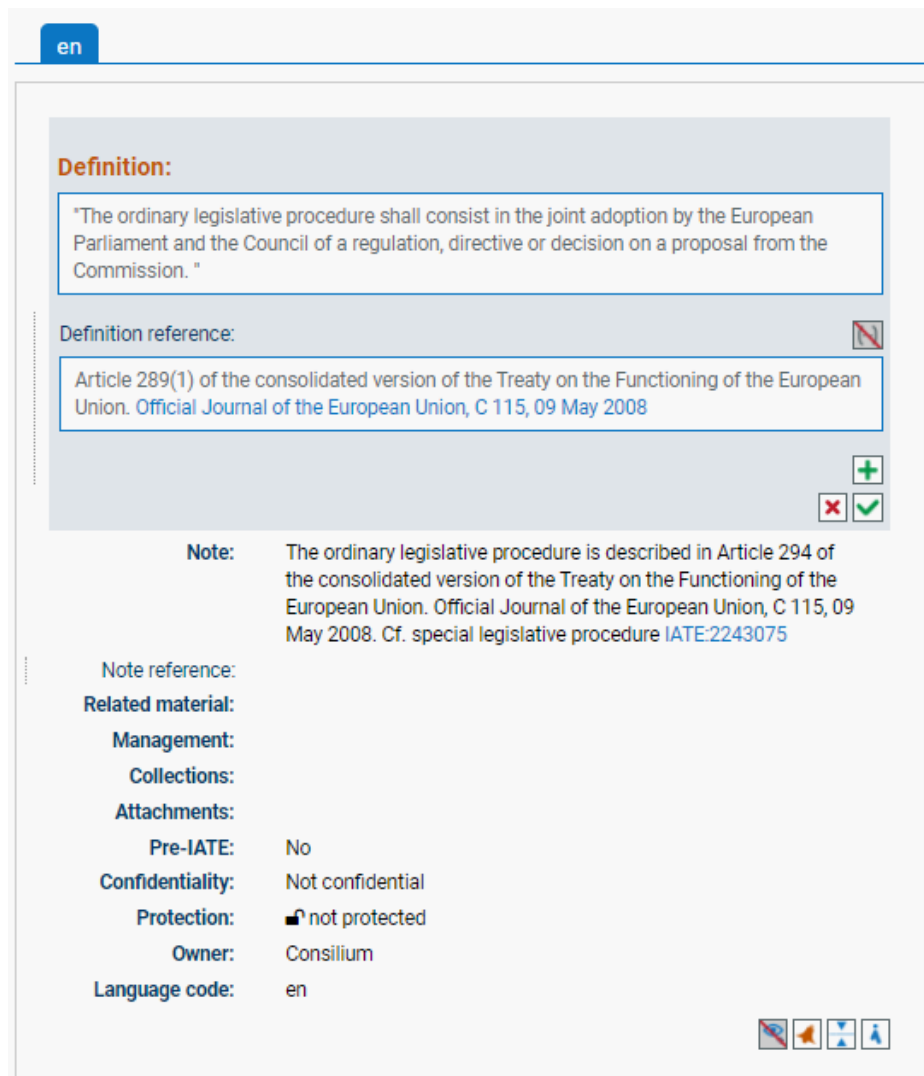
## 6. HOW TO MODIFY AN ENTRY

Users with specific editing rights can modify existing entries in full entry view. 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;

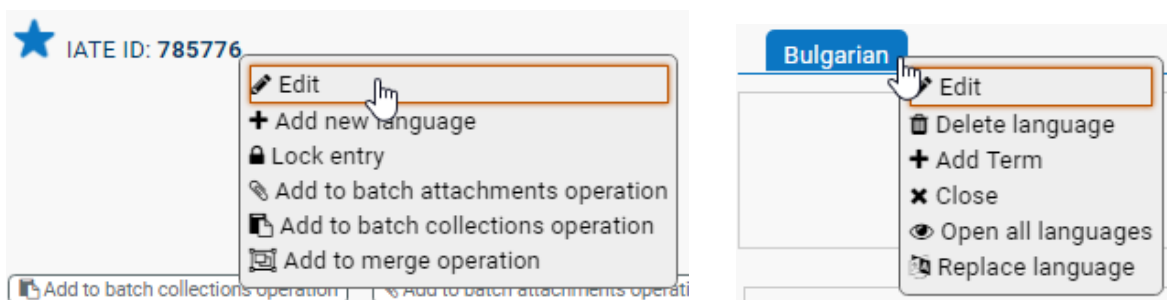



- **Form edit:** to modify the full level at once (either LIL, LL or TL). You can also edit an LL and all its TL(s) by right-clicking on the language code (in the entry or in the Quick edit panel). In ‘Form edit’ mode, all available fields (populated or not) are displayed for the selected level(s).

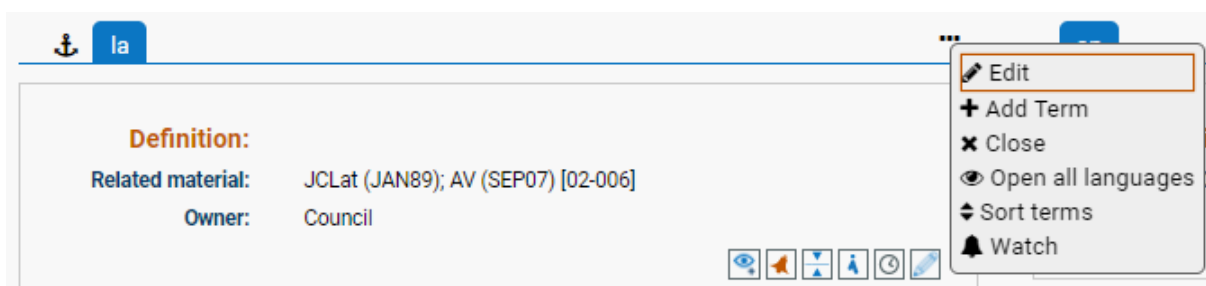
There are multiple ways to edit the same content:

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

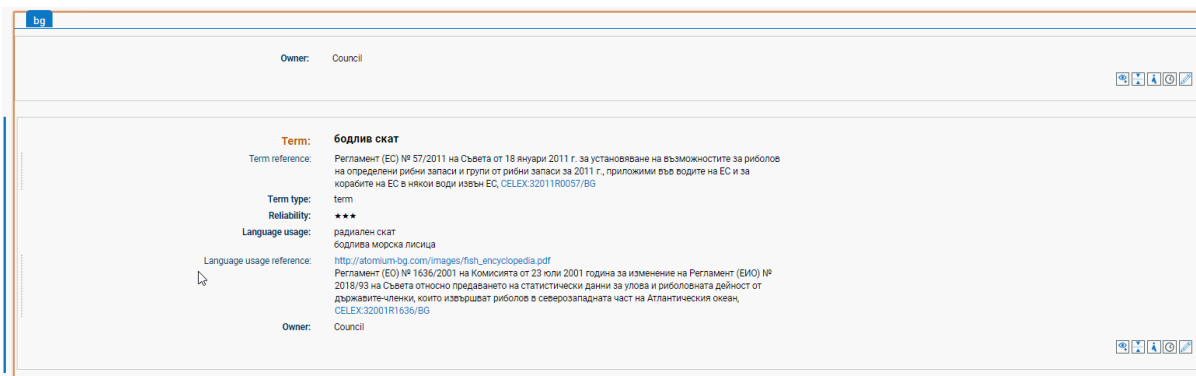
- via the **contextual menus** (accessible by right-clicking on each field or area);




- 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 (see more details under 6.2 Edit using the areas and dotted side lines);



- 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).

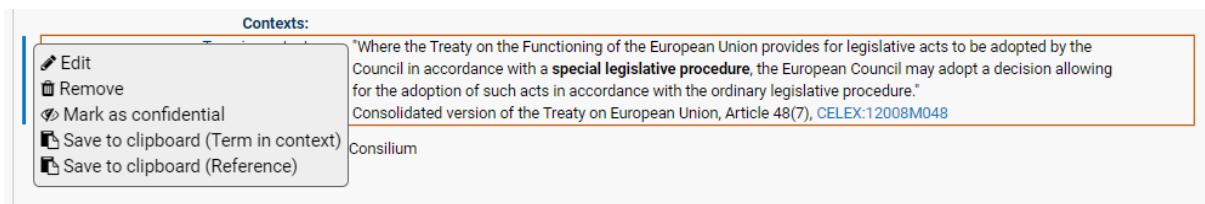




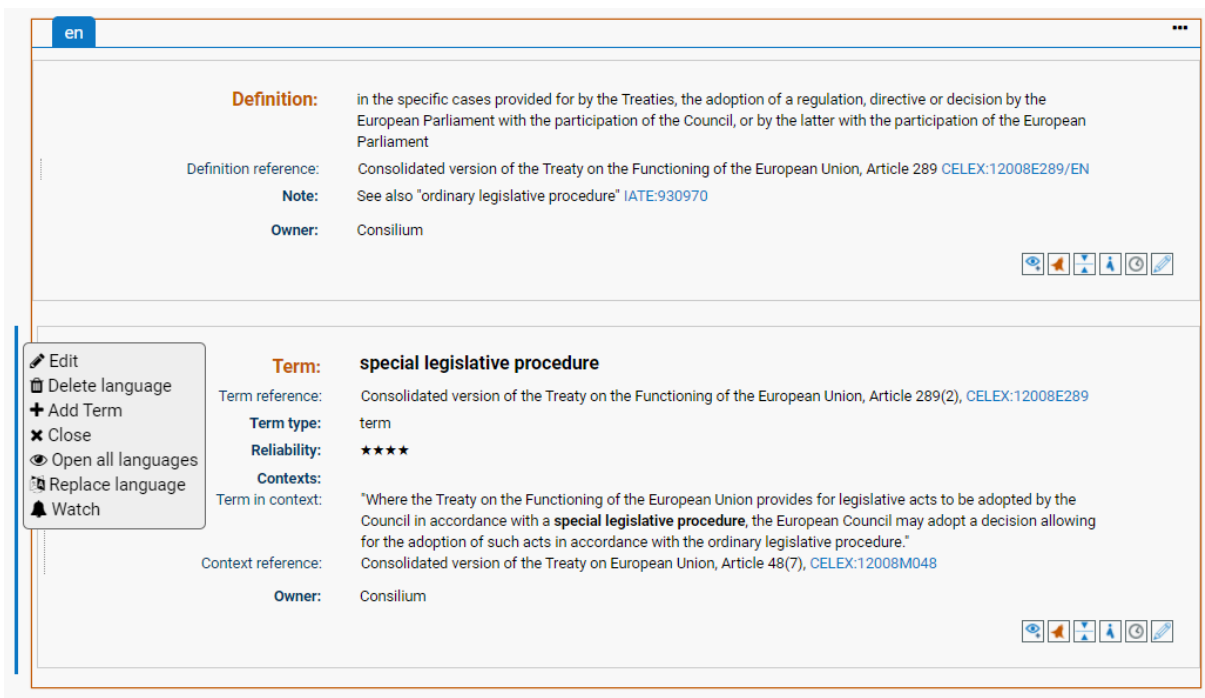
Double-clicking on the outer border will open the full level for editing.

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’).

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

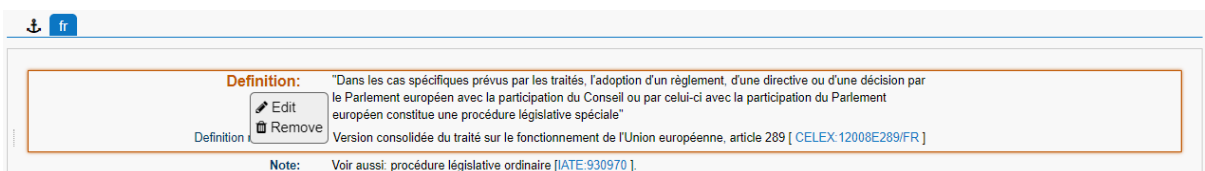


By clicking on the outer dotted side line next to the TLs you select the LL and its TL(s) together. Right-click on it to open the contextual menu or double-click on it in order to edit the LL and its TL(s) in one go.

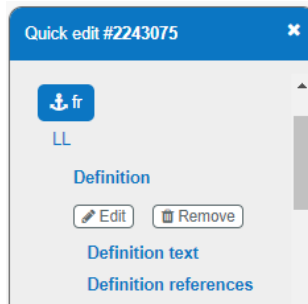




### 6.3 Modification of particular fields

- **Remove non-mandatory fields.** Right-click on the field and select ‘Remove’. If you remove a field which has a dependent field, the dependent field will also be removed (e.g. if you remove the ‘Definition’ field, the ‘Definition reference’ field will be removed at the same time).



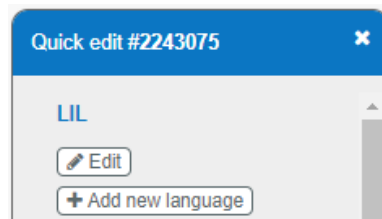
You will find the same option in the Quick edit panel, by clicking on the ‘Definition’ composite field.




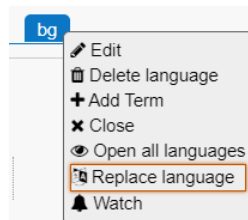
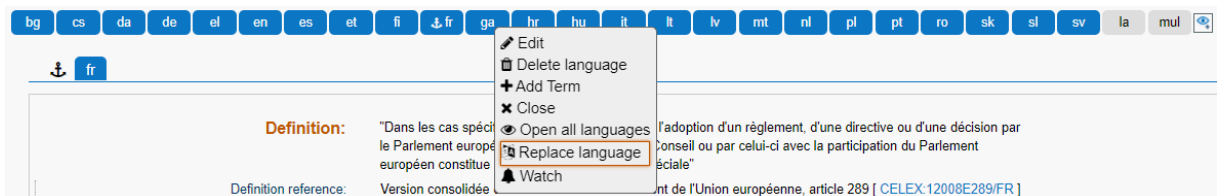
- **Add a new language.** Right-click on the relevant language code on the language navigation bar (languages not yet available on the entry are displayed in light grey) and select ‘Add new language’ or click on the ‘Add new language’ button  at the end of the bar. This will create a new language containing the main fields at LL and TL. You can fill in more fields by clicking on the ‘Expand’  icon.



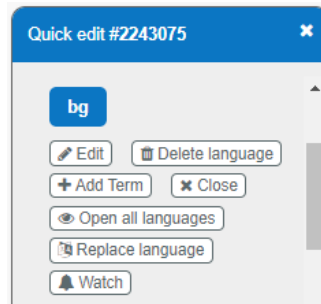
In the Quick edit panel, the ‘Add new language’ feature is available at LIL.




- **Modify an incorrect language code.** Right-click on the relevant language code and choose ‘Replace language’, select the correct language and validate your selection .

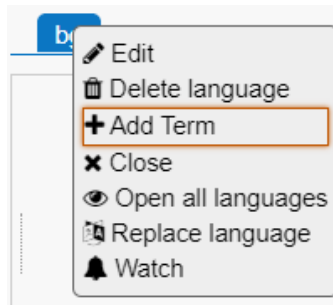


You can also replace the language via the Quick edit panel.

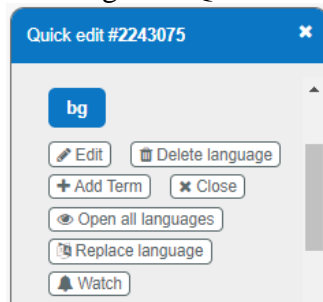


In all cases, you are modifying the 'Language code' field available at LL. This field is only editable if the language is not set as the anchor. Otherwise, you will need to change the anchor language before replacing the language.

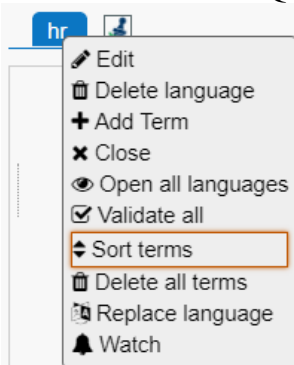
- **Add a new term.** Right-click on the language code and select 'Add term'. A new TL will be added with the fields expanded. Or click on the 'Add new term' button  located below the last existing TL.

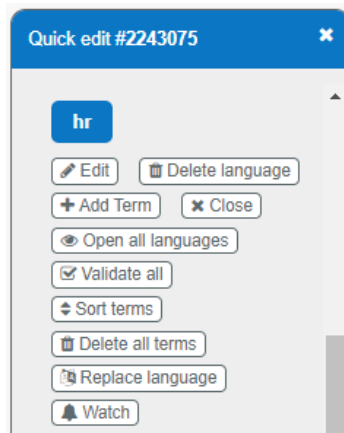


This feature is also available through the Quick edit panel.

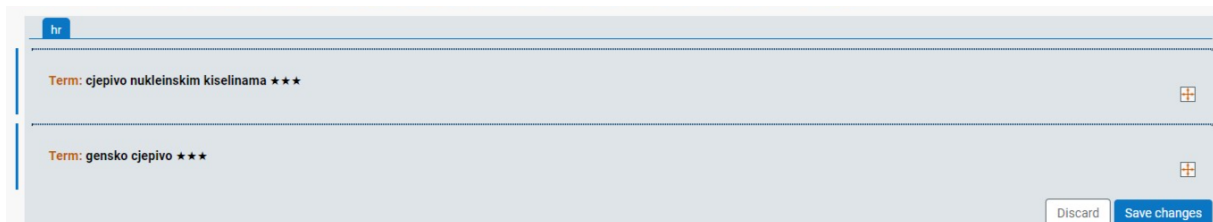


- **Change the display order of the existing TLs for a language.** Right-click on the language code and select 'Sort terms' or use the Quick edit panel.

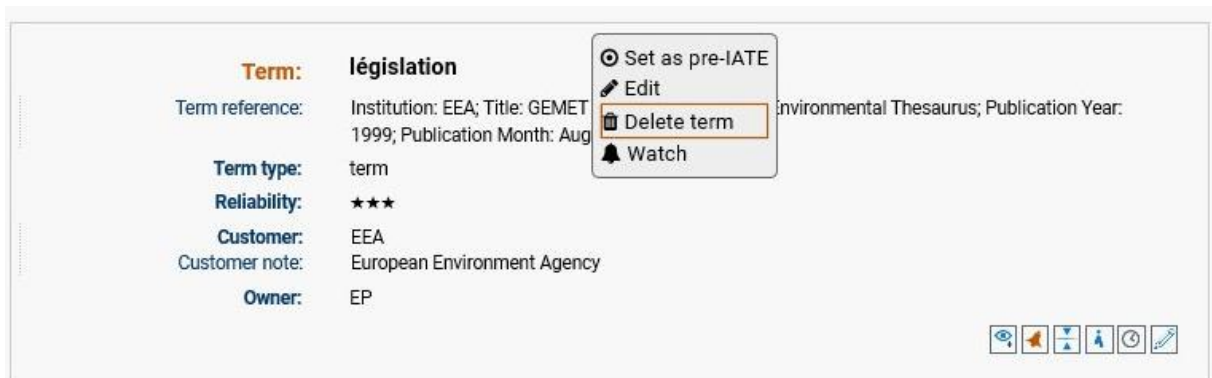




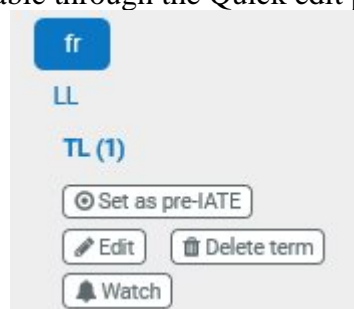
The TLs will be displayed in a compact view where you can drag and drop the TL(s) into the desired display order (dragging the ‘Sort’ icon and dropping it on top of the icon of the TL whose place it should take). Once you have changed the display order, click on ‘Save changes’.



- **Delete an existing term.** Right-click on the term level outer border and select ‘Delete term’.




This feature is also available through the Quick edit panel under the specific TL.



## **6.4 Parallel work on an entry**

IATE allows different users to edit the same entry, language and term at the same time, in order to facilitate parallel work and avoid blocking the entry. In case of conflict (if different users update the same field at the same time), the data saved last will prevail. Each time you confirm a change, the entry view is refreshed and the entry's audit/history is updated. In order to prevent conflicts, Administrators have the possibility to lock an entry for a certain period of time. For further details, see section 8 Locking mechanism.


It is also possible to batch-edit/create entries (see sections 25 Import new entries (only Administrators), 26 Import new LLs and TLs into existing entries (only Administrators) and 24 Batch update of existing content (only Administrators)). For further details, please contact your [terminology coordination team](#).

Some collections or batches of entries are write-protected at some or all levels. This function is activated to prevent users from changing content that has been verified and confirmed by experts for a particular institution, or content that comes from external resources and is imported and updated in batches. If the protection is 'loose', the buttons allowing users to add synonyms and additional languages are still available; if it is 'strict', no additional information can be added. Protected entries can be identified by the  icon. The institution which protected the content (institution owner) is indicated after the icon. A star is displayed if only Administrators of that institution can modify the data. You should send feedback on protected entries to the institution owner. See section 4.4 Protection for more details.

Any modification at LL and TL unvalidates that specific level. More information on validation is available in section 10 Validation. Automatic validation for specific users will be put in place later on.

## **7. USER PREFERENCES**

You can save the following search and data visualisation preferences in your profile:

- General: colour scheme of the user interface, default expansion of entry management options (including advanced duplicate detection) in full entry view and results page
- Search/Results: matching type, results per page, source and target languages (including non-EU languages, which can be viewed by clicking on the 'Show more' button ), display order (interpreters' view), validation filter, owner filter, entry status filter, type of collections that show up in the results in interpreters' view and in the 'Search by collection' screen
- 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), loading by default at LIL of information on an entry's inclusion in TPM terminology projects, and preferred languages (displayed immediately after the source language and the anchor language)
- Entry creation: monolingual or bilingual display

- Terminology projects: column choice and column sorting for the various customisable tables available in the Terminology Projects Module, including some institution-specific presets.

The settings can be found by clicking on your user name (at the top right of the screen) and then selecting the 'User preferences' tab.

[User profile](#) | [User preferences](#) | [Bookmarks](#) | [List entries](#) | [Watchlist](#) | [Notifications](#)

### General

User interface:

Display management options:

### Search/Results

Matching type:

Results per page:

Source language: 
 ca da de el en es et fi fr ga hr hu it jv ko lt lv ml nl no pl pt ro sk sl sv ta th tr uk ur vi zh

Target language: 
 bg ca da de el en es et fi fr ga hr hu it jv ko lt lv ml nl no pl pt ro sk sl sv ta th tr uk ur vi zh

Visualisation:

Display languages (integrated view):
 

bg	ca	da	de	el	en	es	et	fi	fr	ga	hr	hu	it	jv	ko	lt	lv	ml	nl	no	pl	pt	ro	sk	sl	sv	ta	th	tr	uk	ur	vi	zh
----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----

Drag and drop language codes here in the desired order:
 

en	fr	en	en	en
----	----	----	----	----

Language validation (Source language):  Validated  Not validated  Pre-ATE

Language validation (Target language):  Validated  Not validated  Pre-ATE

Term validation (Source language):  Validated  Not validated  Pre-ATE

Term validation (Target language):  Validated  Not validated  Pre-ATE

Owner:
 

<input checked="" type="checkbox"/> Cdt	<input checked="" type="checkbox"/> CULB	<input checked="" type="checkbox"/> COM	<input checked="" type="checkbox"/> Consortium	<input checked="" type="checkbox"/> ECA
<input checked="" type="checkbox"/> ECD	<input checked="" type="checkbox"/> CE-SCCQR	<input checked="" type="checkbox"/> EIS	<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"/> CEFDL (Cdt)	<input checked="" type="checkbox"/> CoNet (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"/> ECDG (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"/> EOPK (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"/> EJAA (Cdt)
<input checked="" type="checkbox"/> EURPO (Cdt)	<input checked="" type="checkbox"/> Eurofins (Cdt)	<input checked="" type="checkbox"/> European (Cdt)	<input checked="" type="checkbox"/> Eurostat (Cdt)	<input checked="" type="checkbox"/> FRA (Cdt)
<input checked="" type="checkbox"/> F-HONELX (Cdt)	<input checked="" type="checkbox"/> ATE (Cdt)	<input checked="" type="checkbox"/> MACON (Cdt)	<input checked="" type="checkbox"/> Ombudsman (Cdt)	<input checked="" type="checkbox"/> SCIC (COM)

new  not new

### Full entry view

Visualisation:

Expand LL by default:

Load TFM info:

Expand LL collections:

Expand TL collections:

Preferred languages: 
 ca da de el en es et fi fr ga hr hu it jv ko lt lv ml nl no pl pt ro sk sl sv ta th tr uk ur vi zh

### Entry creation

Creation form:

### Terminology projects

Search (Projects):

Apply preset:

Assignments per language, Description, Author, Last modification, Confidentiality, Outsourcing, International file number, Internal reference, Source language, Target language, Comments, CurTerm link, Related collections, Domain, Related projects

Search (My assignments):

Apply preset:

Project status, Assignments per language, Description, Author, Last modification, Confidentiality, Outsourcing, International file number, Internal reference, Source language, Target language, Comments, CurTerm link, Related collections, Domain, Related projects

Preparatory material:

Apply preset:

Languages, Owner (LL), Management role, Cross-reference, Collections, Definition, Feedback

Project entries:

Apply preset:

Languages, Management role, Cross-reference, Collections, Duplicates, Related entries

Drag and drop language codes here in the desired order:
 

#	Owner (LL)	Entry ID	↓	Term	Domain	Multilingual	Definition	Comments	Feedback
---	------------	----------	---	------	--------	--------------	------------	----------	----------

My assigned entries:

Apply preset:

Drag and drop language codes here in the desired order:
 

Entry ID	Domain	↓	Term	Assignments	Assignment notes	Duplicates	Related entries	Comments
----------	--------	---	------	-------------	------------------	------------	-----------------	----------



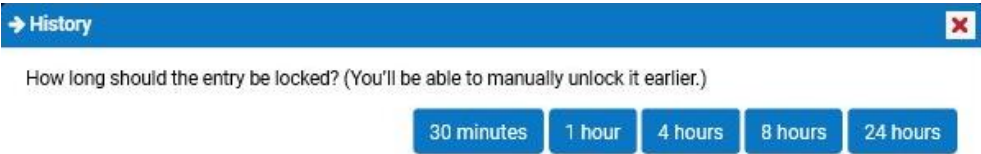
When you run a search using different criteria to those defined in your user preferences, the criteria from your last query will continue to be used for your next query until you change them or reset them by clicking on ‘Go back to user preferences’. In the same way, if you change your user preferences, you will need to apply them by clicking on ‘Go back to user preferences’ in the case of the search screen or by refreshing the page in the case of the full entry view (otherwise you will continue using the previous settings).

## 8. LOCKING MECHANISM

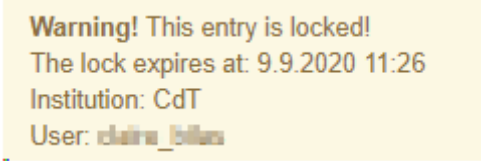
A **locking mechanism** is available to Administrators to allow for extensive modification of an entry or language without interference from other users. Entries can be locked via the contextual menu accessed by right-clicking on the entry ID.



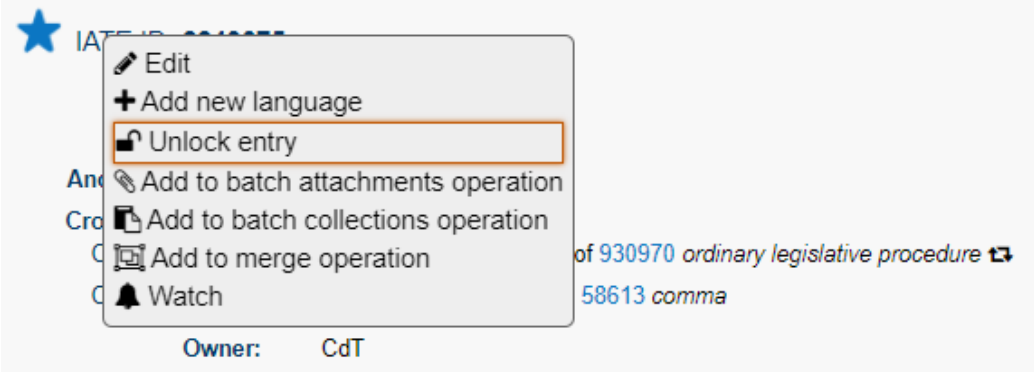
You can choose when the lock will expire.



A warning will be displayed to all users consulting the locked entry.





The entry can be unlocked at any time before the lock is scheduled to expire.



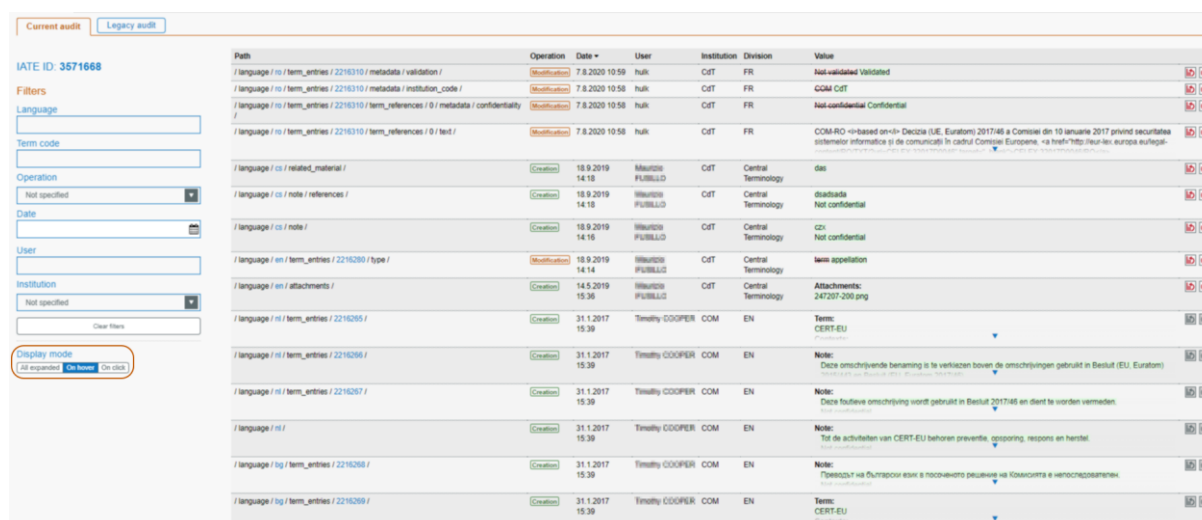
## 9. AUDIT/HISTORY

Every change made to a new or existing entry is recorded in the IATE audit module.

Basic administrative information is available at LIL, LL and TL via the  icon. This consists of information on when the entry was created, last modified and validated, and by whom.

To see the history of changes made to an entry (or a specific level of an entry), click on the history icon . The history screen will open in a new tab, showing details of the type of operation, date, previous content and new content (track changes mode available). In order to optimise space and display more rows of transactions, the content is collapsed. You can expand it by hovering over the 'Value' column with your mouse. You can also change the display mode (always expanded or expand on click) via the display options on the left of the screen (below the filters).

Please note that in order to optimise loading, a slow loading strategy is applied, which means that the page loads first and the content is populated progressively as soon as it is ready for rendering.



Path	Operation	Date	User	Institution	Division	Value
/language/fr/term_entries/2216310/metadata/validation/	Validation	7.8.2020 10:59	hulk	C&T	FR	Not-validated Validated
/language/fr/term_entries/2216310/metadata/institution_code/	Validation	7.8.2020 10:58	hulk	C&T	FR	CGM C&T
/language/fr/term_entries/2216310/term_references/0/metadata/confidentiality/	Validation	7.8.2020 10:58	hulk	C&T	FR	Not-confidential Confidential
/language/fr/term_entries/2216310/term_references/0/text/	Validation	7.8.2020 10:58	hulk	C&T	FR	COM-RO «<=based on<=» Decizia (UE, Euratom) 2017/48 a Comisiei din 10 ianuarie 2017 privind securitatea sistemelor informatice și de comunicații în cadrul Comisiei Europene. «<=link=<=»http://eur-lex.europa.eu/legal-content/FR/TXT/?uri=CELEX:32017D0048-01-1-ENG
/language/cs/related_material/	Creation	18.9.2019 14:18	Maurizio FUBILLIO	C&T	Central Terminology	gas
/language/cs/note/references/	Creation	18.9.2019 14:18	Maurizio FUBILLIO	C&T	Central Terminology	dradada Not confidential
/language/cs/note/	Creation	18.9.2019 14:16	Maurizio FUBILLIO	C&T	Central Terminology	cz: Not confidential
/language/en/term_entries/2216290/type/	Validation	18.9.2019 14:14	Maurizio FUBILLIO	C&T	Central Terminology	term appellation
/language/en/attachments/	Creation	14.5.2019 15:36	Maurizio FUBILLIO	C&T	Central Terminology	Attachments: 247207-206.png
/language/nl/term_entries/2216295/	Creation	31.1.2017 15:39	Timothy COOPER	COM	EN	Term: CERT-EU
/language/nl/term_entries/2216296/	Creation	31.1.2017 15:39	Timothy COOPER	COM	EN	Note: Deze omschrijvende benaming is te verliezen boven de omschrijvingen gebruikt in Besluit (EU, Euratom) 2017/48 a Comisiei din 10 ianuarie 2017 privind securitatea sistemelor informatice și de comunicații în cadrul Comisiei Europene.
/language/nl/term_entries/2216287/	Creation	31.1.2017 15:39	Timothy COOPER	COM	EN	Note: Deze foutieve omschrijving wordt gebruikt in Besluit 2017/48 en dient te worden vermeden.
/language/nl/	Creation	31.1.2017 15:39	Timothy COOPER	COM	EN	Note: Tot de actualisatie van CERT-EU behoren preventie, opsporing, respons en herstel
/language/bg/term_entries/2216298/	Creation	31.1.2017 15:39	Timothy COOPER	COM	EN	Note: Терминът на български език е посоченото решение на Комисията в несподобяването
/language/bg/term_entries/2216299/	Creation	31.1.2017 15:39	Timothy COOPER	COM	EN	Term: CERT-EU

The IATE 1 history has been migrated and can be consulted via the ‘Legacy audit’ tab.

IATE ID: 3571668

**Filters**

Language

Term code

Operation  
Not specified

Date

User

Institution  
Not specified

**Display mode**

The history screen can be filtered by language, term code, operation type, date (or range of dates), user, institution and division. To use the filters, type the relevant information in the appropriate field or simply click on the value (language or term code) you would like to use as a filter in the path and the list will be filtered automatically.

You can undo specific operations in the ‘Audit/History’ screen using the ‘Undo’ button . This can be done for any of the three levels (LIL, LL and TL) if you have editing rights for the data. It is also possible to revert to a specific point in time by undoing all operations carried out in the meantime using the ‘Rollback’ button . The ‘Rollback’ button is only available in the LIL ‘Audit/History’ screen (where all operations on the entry can be seen) and its use is restricted to Administrators. These actions are only possible for IATE 2 operations (not for IATE 1 audit).

The ‘History’ screen is paginated.

## 10. VALIDATION

Validation is a confirmation that a basic check has been performed on an entry to ensure that it complies with IATE data entry rules and is therefore fit for release to non-authenticated users. The entry need not be perfect, and its content is not set in stone.

Terminologists for each language at each institution are responsible for validating their language data. This can be done directly from the full entry view by clicking on the ‘Validate’ icon (LL or TL validation) or by clicking the ‘Validate all’ button (validation of an LL and all its TLs for which you have validation rights).

en

**NOT VALIDATED**

**Collections:** EU-TL LL LIL test collection-2020 related to subject area TL LL LIL test collection

**Owner:** CdT

---

**NOT VALIDATED**

**Phrase:** European initiative for democracy and the protection of human rights

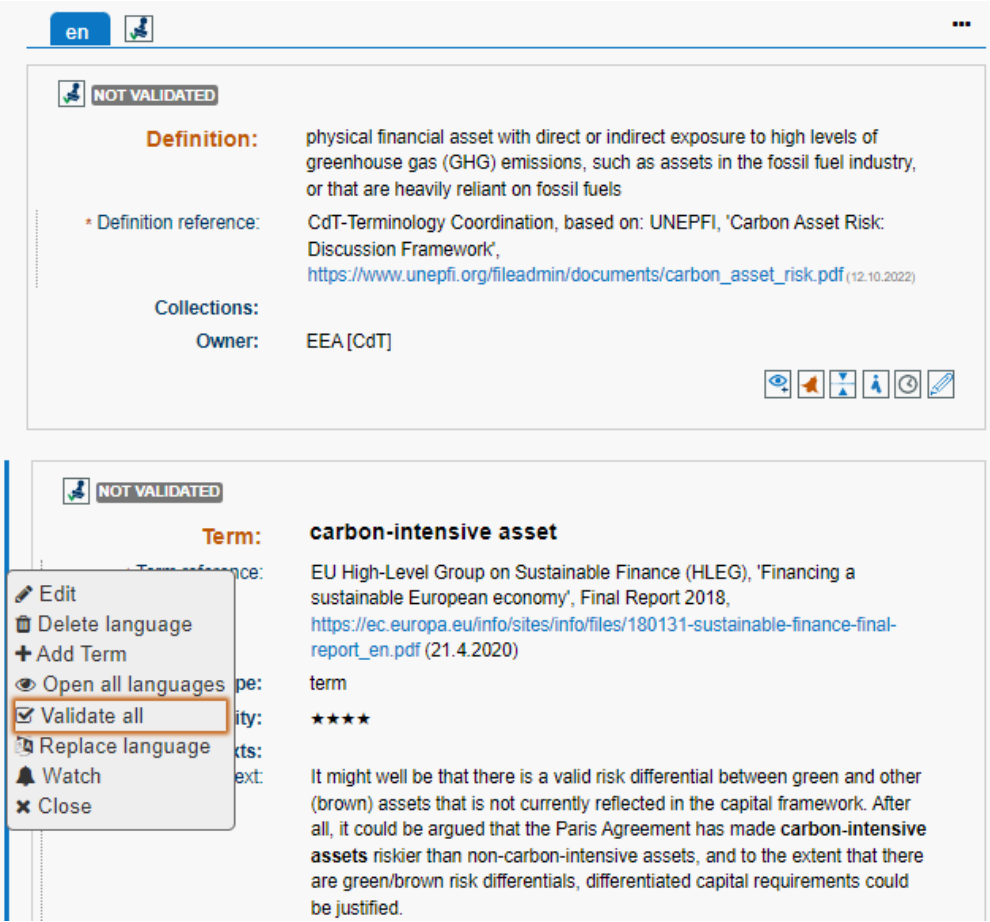
**Term reference:** General report on the activities of the European Union,1995

**Term type:** phrase

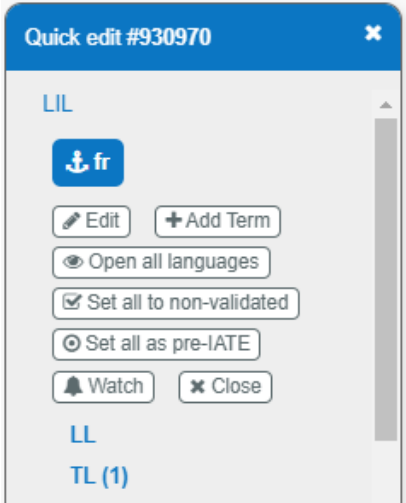
**Reliability:** ★★★

**Owner:** CdT


Right-clicking on the outer dotted side line (in blue in the screenshot below) also allows you to validate an LL and all its TL(s) for which you have validation rights at once.



Through the Quick edit panel, you can ‘Validate all’ under the specific language code, or you can validate a single level under the LL or TL section.



The contextual menu and Quick edit panel at LIL and LL include an option to set all the LLs and TLs below as non-validated or pre-IATE in batch (validation permissions for all existing languages are needed).

Validation can also be carried out from the ‘Validation’ monitoring screen, available in the ‘Management’ menu (). The level to be validated (language code or term) is displayed in orange in the results list.

Results 1-6/6

<input type="checkbox"/>	Entry ID	Operation	Domains	Level	Language	Term	Triggered on
<input type="checkbox"/>	3582967 ★	Modification	• ENVIRONMENT	TL	ro	ape de tranzitie NOT VALIDATED	17.12.2020
<input type="checkbox"/>	3648351	Creation	• gender equality [LAW, rights and freedoms, social rights]	LL	ro NOT VALIDATED	---	21.5.2021


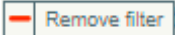
Some filtering options are available if you want to refine your results. The default filters are the validation status, the latest modification date (‘Changed before’), your working language(s) (‘Show results in’) and your institution (‘Owner’), although this last one is applied but not displayed by default.

Validation [Collections](#) [Attachments](#) [Asynchronous requests](#) [Marks](#) [Table view](#) [Merge](#) [Undelete](#)

Validation status: Not validated

Changed before: 27.07.2022


Show results in: bg cs da de el en es et fi fr ga hr hu it lv mt ni pl pt **ro** sk sl sv la mul


If you wish to add some other filters, click on the ‘Choose and sort filters’ button in the top right corner (). You can drag and drop filters into the display order you want, and a summary of all those applied will be available above the results list. To remove filters from your search, hover your mouse over the filter name and a ‘Remove filter’ icon () will be displayed. Click on ‘Search’ again to apply the new filtering.

The additional filters available are: the earliest modification date (‘Changed after’), the user who triggered the change of status or that user’s role, institution or division, list of IATE IDs, collections, subject domain(s) and entry primary. If you wish to display only interinstitutional changes, check ‘all’ and then unselect your own institution in the filter ‘Institution of the user triggering last validation change’.

The most recent data are displayed at the top of the results list. You can change the number of results displayed per page (the range goes from 5 to 100, 10 being the default). If you change the value, your choice will be saved in the local storage.

Clicking on an entry ID will take you to the language containing the LL or TL to be validated. You can also refine the search by clicking on a specific username ('triggered by' or 'last modified by').

You can consult the history of the relevant LL or TL directly from the 'Validation' monitoring screen (click on the 'History' icon .

You can also access marks to see any tasks/comments directly from the 'Validation' monitoring screen (click on the 'Marks' icon .

You can validate several items at once by checking the relevant boxes in the first column and clicking the 'Validate all' button. Please use this time-saving feature with caution, and only validate items which have been properly checked. Validation queues should be checked regularly and non-validated data should be validated as soon as possible.

**NB** When a TL with reliability 1 is validated, IATE will automatically set the reliability to 2, except in the case of lookups. A warning informs you that the reliability has been automatically upgraded.

Please note that a non-validated LL does not prevent validated TLs below it from being displayed to non-authenticated users.

### **10.1 Autovalidation**

An administrator can set an autovalidation language for a user in the User Access Control module.

For an EU language (including LA and MUL) to be added, it needs to be one of the working languages of the user. When a user modifies content in a language which is their autovalidation language, the creation/modification is validated automatically. If the user is modifying data that were previously validated by another user, the 'Validated' status will be maintained: therefore, in the additional information box, the previous user will appear as validator (with the corresponding validation date). Autovalidation works only for data belonging to the user's own institution. In addition, pre-IATE data cannot be autovalidated and remain as pre-IATE.

Non-EU languages are validated automatically upon creation/modification.


## **11. FIELD COMPLETION SCORE**

The **field completion score** is a real-time score allocated to LIL, LL and TL in line with the fields populated in each level. In other words, it shows how rich a level of an entry is. The field completion score is recalculated after each modification of a TL, LL or LIL to reflect the current situation of an entry.

→ Additional information



Creation date:	30.3.2020
Created by:	[REDACTED]
Modification date:	28.4.2020
Modified by:	[REDACTED]
Field completion score:	3
Aggregated field completion score:	13 / 20

It is displayed (for Administrators only) under ‘Admin info’  at LIL, LL and TL. The values are calculated as follows:

LIL: The maximum score at LIL is 4. One point is assigned to the following fields if populated:


- E\_Domain
- E\_Anchor language
- E\_Primary
- E\_Management

LL: The maximum score at LL is 5. One point is assigned to the following fields if populated:

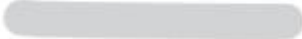
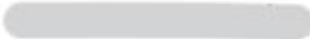
- L\_Definition
- L\_Definition reference
- L\_Note
- L\_Note reference
- L\_Management

TL: The maximum score at TL is 11. One point is assigned to the following fields if populated:


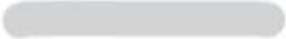

- T\_Term reference
- T\_Reliability (should be at least 2)
- T\_Context
- T\_Context reference
- T\_Note
- T\_Note reference
- T\_Language usage
- T\_Language usage reference
- T\_Regional usage
- T\_Regional usage reference
- T\_Management



An **aggregated field completion score** is also displayed under ‘Admin info’  and shows how rich an entry is at LIL or at LL. The maximum aggregated field completion score is 20 for LIL (sum of LIL, highest LL and highest TL individual field completion scores in the entry) and 16 for LL (sum of the LL and the highest TL field completion score in that LL).

→ Additional information 

Creation date:	30.3.2020
Created by:	
Modification date:	28.4.2020
Modified by:	
Field completion score:	3
Aggregated field completion score:	13 / 20

→ Additional information 

Creation date:	30.3.2020
Created by:	
Modification date:	30.3.2020
Modified by:	
Validation date:	30.3.2020
Validated by:	
Field completion score:	2
Aggregated field completion score:	8 / 16

Administrators can make use of the aggregated field completion score via a specific filter in the standard and advanced search. To filter in standard search, click on [Open expanded search](#)  and then on the 'Show more' icon . You can set the minimum and maximum accepted parameters using the sliders according to the LIL and/or the LL in the source and/or target language.



You can also filter by the aggregated field completion score in the advanced search (see 22 Advanced search (query builder)).

For the time being, the completion score filters in the standard search and advanced search are only available to users with the Administrator role.

## 12. DETAILED OVERVIEW OF AN ENTRY

### 12.1 Language-Independent Level (LIL)

Below you will find a description of all the editable fields available at LIL.

#### 12.1.1 DOMAIN

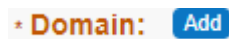
- The domain is the field of knowledge to which the concept belongs.
- The chosen domain(s) should clearly identify the special language and context to which the concept belongs. An IATE entry should usually have between one and three domains.
- Domains are represented by the domains (level one, two digits), subdomains (level two, four digits) and descriptors (levels three to eight, no digits) used in [EuroVoc](#) (the EU's multilingual thesaurus). IATE 2 contains the full EuroVoc thesaurus (and not just the first three levels as was the case in IATE 1). IATE currently uses EuroVoc version 4.6.
- An additional domain branch has been added in order to cover the needs of the Court of Justice ('14 LAW' CJEU).
- Some of the domains under the new '14 LAW' CJEU branch have duplicates in EuroVoc, but since they do not belong to the EuroVoc '12 LAW' branch, they were

regrouped under the new branch ‘14 LAW’. If you search for equivalent domains (for example: ‘social security legislation’ and ‘social security law’), IATE will retrieve results matching your criteria for both domains. This mapping and joint retrieval is applied in the domain filter in the standard search, in the Term Recognition Module and in the IATE download feature (public exports).

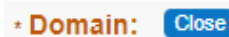
- When looking for the appropriate domain(s) in IATE, always try searching for the term itself or related terms. You can also browse the full domain structure to search for where you would logically expect to find the term in question (but please note that entries migrated from IATE 1 only contain domains from levels 1-3 and not lower-level descriptors).
- When adding your language to an existing entry, first check whether your term is used in the same context as that indicated by the existing domain(s). For example, a ‘hedge’ in the financial context is quite different from a ‘hedge’ in the environmental context. Do not add new domains which would result in the entry covering more than one concept. Note, however, that the existing domain(s) may not always be correct, especially in the case of legacy entries (i.e. entries that were imported from previous databases).
- If you are updating a legacy entry that has the domain ‘00 - Domain code not specified’, please add a real domain, making sure it is relevant to the concept, and delete ‘00 - Domain code not specified’. In case of doubt, contact the [terminology coordination team](#) of your institution.

### How to add domains

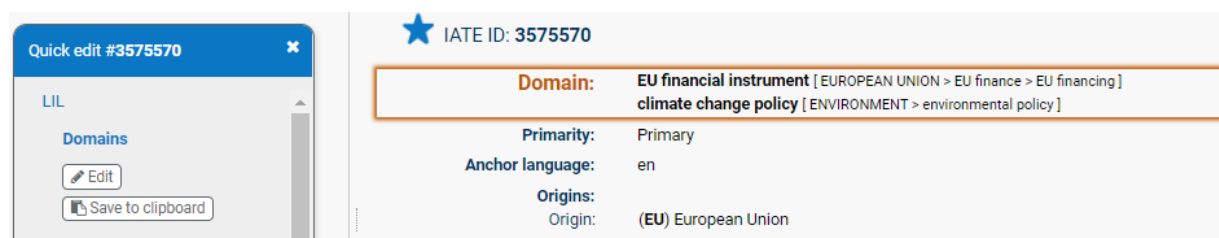
- When you are creating a new entry, click on the ‘Add’ button next to the ‘Domain’ field.



When the domain selector is open, the ‘Add’ button is replaced by a ‘Close’ button.




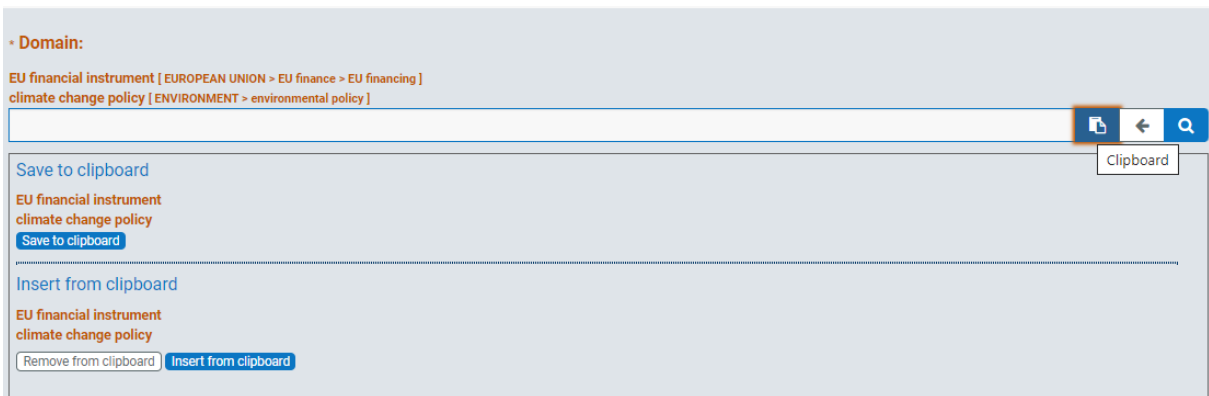
- When you are modifying an entry, either ‘Edit’ through the Quick edit panel, double-click on the field or right-click and select ‘Edit’. You can also modify the entire LIL, in which case you will be able to ‘Close’ the domain selector, as while creating an entry.



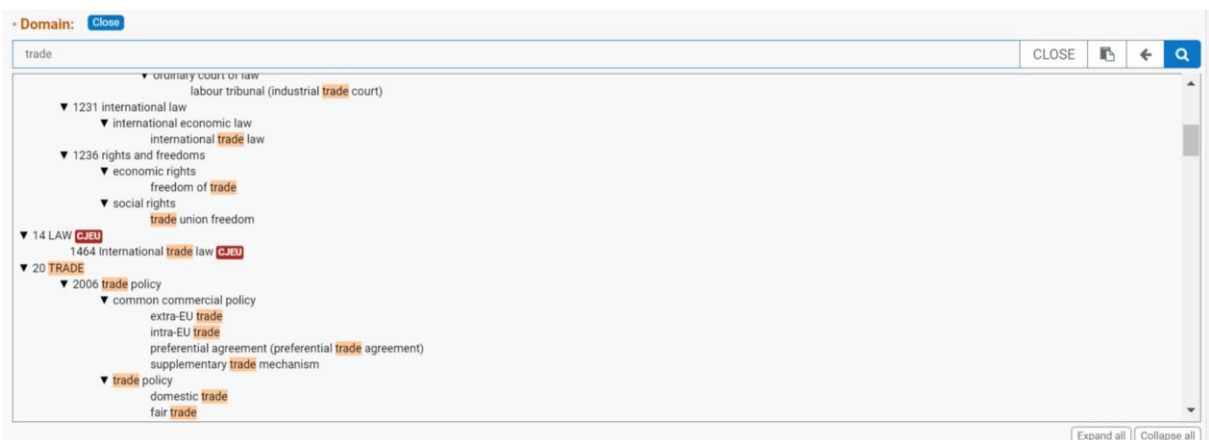
- You can either browse the domain classification by expanding (using the black arrows ▶) and collapsing the different domains, subdomains and descriptors as needed or by expanding the full tree (Expand all), or you can search for a keyword in the search field. If the keyword you have searched for is a non-descriptor (non-standardised term), you will be directed to the associated descriptor (standardised term). The EuroVoc descriptor may not be the preferred term to designate the concept

in IATE, e.g. ‘atmospheric pollution’ is the EuroVoc descriptor for the concept for which ‘air pollution’ is the preferred term in IATE.

- Once you have identified the relevant domain, subdomain or descriptor, click on it and it will be added to the list of selected domains (in orange in the lower part of the domain section). Technically, a maximum of ten domains can be selected, although conceptually this is probably excessive.
- Should you need to remove a selected domain, hover your mouse over it in the domain tree or in the list of selected domains, then click on the bin  icon to remove it.
- If you select two or more cascading domains (a domain and one or more subdomains belonging to it), you will get a warning, as this is not good practice.
- If you want to reuse the set of domains selected in a particular entry, you can save them using the ‘Save to clipboard’ button available in the Quick edit panel, in the contextual menu and in the domain selector. You will then see the saved domains when you next open the domain selector, and you can insert the relevant set of domains in your entry by clicking the ‘Insert from clipboard’ button.



- When you have finished selecting domains, either save your changes or close the domain selector to continue editing other fields.
- The root domain ‘Legal domains’ can be selected for search purposes in order to include all lower levels, but it cannot be added to an entry as a proper domain. If you search for duplicated domains (for example: ‘social security legislation’ and ‘social security law’), IATE will retrieve results matching your criteria for both domains.



NB: If you are using keyboard support, you need to press ENTER and then TAB to enter the domain tree in creation/modification.

### 12.1.2 DOMAIN NOTE

- The ‘Domain note’ field is a legacy field (for IATE 1 data): it gives more specific information on the context in which the concept is used, particularly the EuroVoc level four, five, six, seven and eight descriptors, since they were not available in IATE 1. Ideally, this content should be transferred to the ‘Domain’ field by selecting the appropriate descriptor, then removing the domain note. The ‘Domain note’ field cannot be changed from the full entry view, only removed. Users with specific permissions can populate or modify this field via imports and batch updates.

### 12.1.3 PRIMARY ENTRY

Marking an entry as ‘primary’ is an indication of overall quality and/or preference among possible duplicates. Marking an entry as primary can:

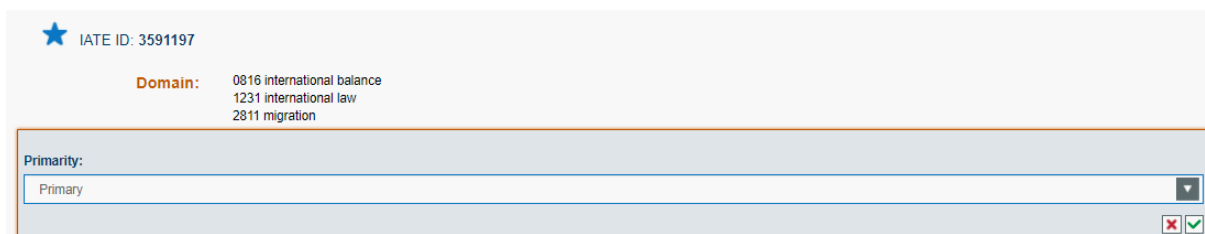
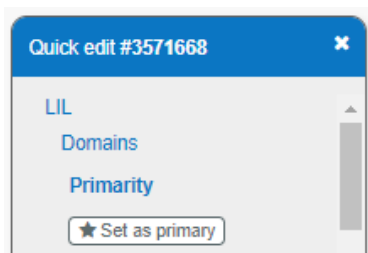
- help translators to find the most reliable entry among duplicates;
- help terminologists to identify the best entry for completion and signal which entry new languages should be added to;
- identify the entry in question as the one to be updated and kept for the purposes of consolidation projects.

Primary entries which have terms that correspond exactly to your search will appear first among possible duplicates on your list of results. They are marked with a star ★ next to the entry number.


It is usually terminology coordinators at central level who mark entries as primary by adding the primary star at LIL during consolidation projects. The use of the primary star should be **consistent**. In particular, the star should only be used when minimum quality criteria are met (see section 15.1 How to select a primary entry).

When you are creating an entry, you can make it a primary entry by selecting ‘Primary’ on the Primaryity drop-down menu. For existing entries, edit the ‘Primaryity’ field by double-clicking on it, by right-clicking on the field and selecting ‘Set as primary’, or by choosing the same option in the Quick edit panel.

If the entry was set as primary by mistake, Administrators can correct the error by right-clicking on the star next to the entry ID and selecting ☆ Set as not primary.



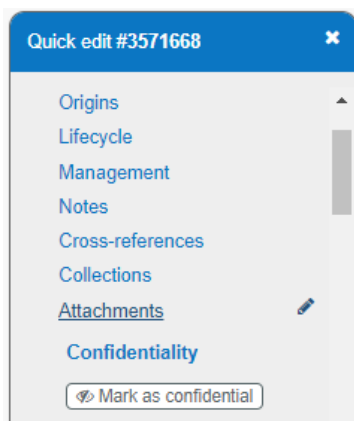
## 12.1.4 ANCHOR LANGUAGE

- The anchor language is the anchor to which all the other languages in the entry are attached. The definitions in the other languages should be as similar as possible to the definition in the anchor language.
- The anchor language is usually the source language of the text in which the term occurred. However, if the object of a concept is country-specific, the anchor language should be (one of) the language(s) of the country concerned (which should be indicated in the 'Origin' field). For animals, plants and other life forms, the anchor language should usually be Latin.
- The '[Reliability](#)' value of a term in another language indicates how reliably the term denotes the concept as defined in the anchor language.
- When creating an entry, the language in the left column is set as the anchor language by default. You can change this and set the language on the right side as anchor by clicking the 'anchor language' icon  in the right column. You must set one of the languages on the entry as the anchor language.
- Legacy entries may not have an anchor language. If a legacy entry is to be kept, an anchor language should be defined. An entry should not be set as 'primary' until an anchor language has been defined and the concept clearly identified in the anchor language.
- If you need to change the anchor language of an existing entry, you can do so by modifying the 'Anchor language' field at LIL.



## 12.1.5 CONFIDENTIAL ENTRY

Confidential entries are not available to non-authenticated users.

You can restrict the confidentiality of a new entry when you create it by selecting the 'Confidential' option from the 'Confidentiality' drop-down list.



For existing entries,

- open the LIL for edit  and click on 'Show more'  to display the 'Confidentiality' field and double-click on it;
- or use the Quick edit panel to mark the entry as confidential.

### General principles:

- Change the default setting from 'Not confidential' only where absolutely necessary.
- When making a previously confidential entry public, first make sure that it does not duplicate another entry.

For more details, refer to 4.3 Confidentiality.

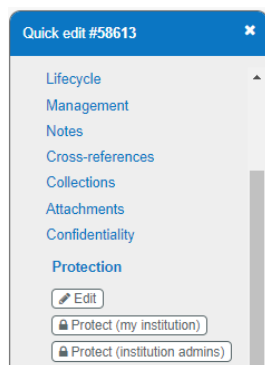
## 12.1.6 ENTRY STATUS

Entries in their early stage of completion (particularly as part of a project managed in the Terminology Project module) or undergoing extensive work can be marked as ‘Raw’. All other entries are categorised as ‘Not raw’ (the default status for new and existing entries).

Entries marked as ‘Raw’ are filtered out by default in basic search (this can be changed in the specific LIL filter in Expanded search or directly in the User preferences), and systematically excluded from TRM. They are also hidden from external users. In the case of the duplicate detection mechanism when creating a new entry, entries with status ‘Raw’ are taken into account and displayed by default in the results.



## 12.1.7 PROTECTED ENTRY

If an entry is ‘protected’, only users, or in some cases only Administrators, from the institution which ‘owns’ it can edit the data. If it is not protected, all users with editing rights can update it, irrespective of the institution they work for. Users must have specific rights to set and change the protection level of an entry.



You can protect a new entry when you create it by selecting ‘Protected’ in the ‘Protection’ drop-down list. This will display the protection options, where you will be able to define the strategy, the level and whether the protection should be cascading or not.

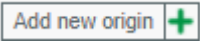
For existing entries,

- open the LIL for edit  and click on ‘Show more’  to display the ‘Protection’ field and double-click on it;
- or use the Quick edit panel to modify the protection settings.

Note that protection is available at each level. For more details, see section 4.4 Protection.

## 12.1.8 ORIGIN

Use this field when a concept is country-specific (or EU-specific). Click the drop-down list and select the name of the country (or ‘EU’).

You can insert multiple origins if needed (by double-clicking on the ‘Origins’ label and adding a second origin ). They will be displayed in their full form and in alphabetical order in the results page and in the full entry view.

## 12.1.9 ORIGIN NOTE

The origin note should be completed in English. It can be used to give more specific information on the national or geographical origin of a concept.

### 12.1.10 LIFECYCLE

This is a drop-down menu used to flag the subject of an entry as ‘historical’ (no longer in use or in existence), ‘proposed’ (but not yet adopted), or ‘abandoned’ (proposed but ultimately not adopted). ‘Historical’ and ‘abandoned’ entries can be easily identified by the grey background applied in the results page and in the full entry view.

### 12.1.11 MANAGEMENT

The management field at LIL should be used only by [terminology coordination team members](#) to record information concerning the management of the full entry, e.g. the projects to which it belonged (feature used in IATE 1; new projects launched in IATE 2 are not indicated here, they can be found under project collections instead) or any other concise information relevant for coordination purposes.

Any new line created in this field should start with the name of the institution adding it in the format [COM], [EP], [Consilium], etc. (names in the format used by IATE itself).

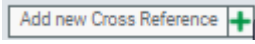
This field is not public.

### 12.1.12 CROSS-REFERENCES

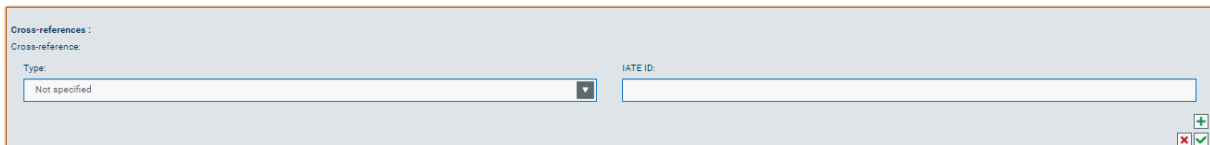
You can add a cross-reference to another entry in the specific LIL field. The entry referred to should have decent quality, and its anchor language part should be in order.

There are several ways to create or modify cross-references:

- through the Quick edit panel:
  - by clicking on the ‘Edit’ button at LIL or next to the cross-references field;
- in the entry directly:
  - by double-clicking on the LIL outer border or clicking on the ‘Edit’ button of the level;
  - by double-clicking on the ‘Cross-references’ field.

You can add an additional cross-reference by clicking on the  button.

#### Creation of a cross-reference:



## Modification of cross-reference(s):

Cross-references :

Cross-reference: [-]

Type:  IATE ID:

780656 *codecision procedure*

---

Cross-reference: [-]

Type:  IATE ID:

2243075 *special legislative procedure*

[+] [x] [check]

You should indicate the entry ID and the relation type, selecting it from the following preset list of values:

### List of relation types:

*is broader than / is narrower than*  
*is related to*  
*is antonym of*  
*is predecessor of / is successor of*  
*has as capital city / is capital city of*  
*has as currency / is currency of*  
*has as demonym / is demonym of*  
*has as part / is part of*  
*has as seat / is seat of*  
*is caused by/is cause of*  
*is not to be confused with*

Multiple cross-references (to different entries) can be inserted, but this must be done one at a time. Only one type of relation is possible between the same two entries. It is not possible to cross-reference an entry to itself. IATE will check whether the inserted cross-referenced entry exists. If it does not exist, you will get an alert to that effect and the cross-reference will not be created.

### Bidirectional cross-references

While creating a new cross-reference, you have the possibility to make it bidirectional, i.e. to create a reciprocal cross-reference in the selected entry. You just need to check the dedicated checkbox. Note that this process is asynchronous – it might not be done instantaneously.

Cross-references :

Cross-reference: [-]

Type:  IATE ID:

860970 *Kingdom of Belgium*

Create a reciprocal cross-reference in the selected entry.

[+] [x] [check]

### Inbound cross-references

The icon appears to the right of an outgoing cross-reference if it is bidirectional. If the relation types do not match, it is accompanied by a warning icon indicating that the type of cross-reference in the linked entry might be wrong. If other entries have cross-references to the current entry and the current entry has no corresponding outbound cross-reference, such unmatched ‘inbound cross-references’ are displayed below the outbound cross-references when the LIL is expanded (click on ‘Show more’ at LIL).

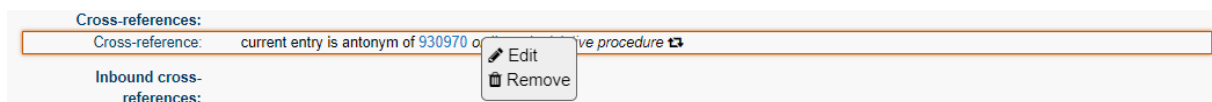




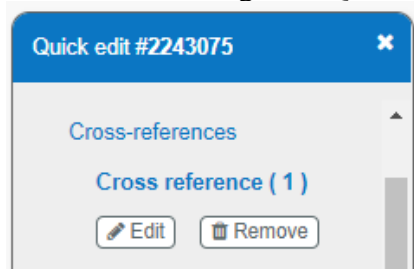
Note that only outbound cross-references are included in the full Excel export.

### Removing a cross-reference

Users with specific rights can remove an existing cross-reference from an entry. To do so, right-click on the cross-reference to open the contextual menu and click 'Remove':

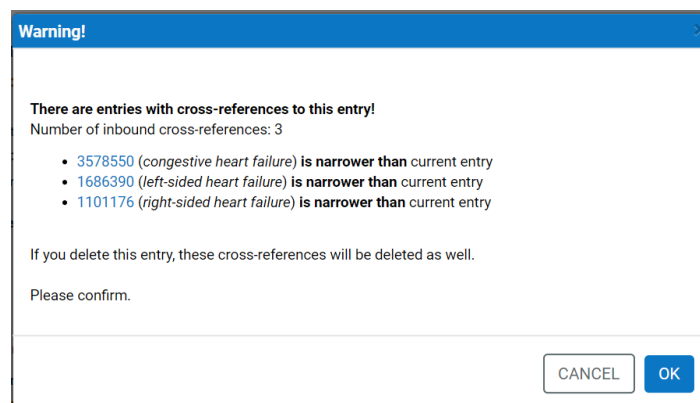


or remove it through the Quick edit panel:



### Deleting an entry with cross-references

If you delete an entry to which there are cross-references in other entries, a list of the inbound cross-references will be displayed and you will be warned that if you delete the entry, these inbound cross-references will be deleted too. You might want to redirect them to the primary entry for the concept covered by the entry you are deleting.



### **Undeleting an entry with cross-references**

If you undelete an entry which contained a cross-reference to another entry which no longer exists, an alert will be displayed informing you that the cross-referenced entry no longer exists and the cross-reference will not be undeleted.

### **Protected entries**

You cannot create a cross-reference from a protected entry unless you have editing rights for that entry. However, you can create a cross-reference to a protected entry even if you do not have editing rights for that entry.

### **Displayed language of terms in cross-references**

Cross-references display the entry ID and the term of the cross-referenced entry. The language of the term corresponds to the interface language if available, otherwise anchor language, English, French, German or other EU languages alphabetically. All term types are taken into account except lookups and the display order is followed when selecting the term to be displayed.

### **Advanced management of cross-references**

It is also possible to include cross-references when exporting entries for data management (one column for the type of cross-reference and another column for the referenced ID). Additionally, users with an Admin role can also manage cross-references in batch via a specific import file, where new cross-references can be created and existing cross-references can be modified (but existing cross-references cannot be deleted).


‘Advanced search’ offers two criteria that filter according to cross-references (or the lack thereof): is empty/is not empty, and by type.

## **12.1.13 RELATED PROJECTS**

This field is visible only to internal users and displays the terminology projects the entry belongs to (if any). To see the content of the field, you either have to click the ‘Load TPM info’ button or select ‘Load TPM info’ as the default setting in your user preferences.




## **12.1.14 LANGUAGE INDEPENDENT LEVEL NOTE(S)**

Use this field for any relevant information that relates to the concept and applies to all languages, rather than to a specific language or term. It can also be used for confidential information, in which case click on the ‘Not confidential’  button when creating or modifying the content in order to set it as confidential.

The note at language independent level is a multiple field, i.e. multiple notes can be created in individual LIL note fields, each with its own reference.

## **12.1.15 LANGUAGE INDEPENDENT NOTE REFERENCE(S)**

Indicate the source of the information in the ‘Note reference’ field. Each note field has its own reference, which is optional (can be left empty).

URLs should be stored via the URL format button  to allow for verification that the URL is working and proper link creation. You can look up and insert EUR-Lex references using the EUR-Lex reference module. For more information, see section 13 References.

The note reference can be set as confidential if necessary.

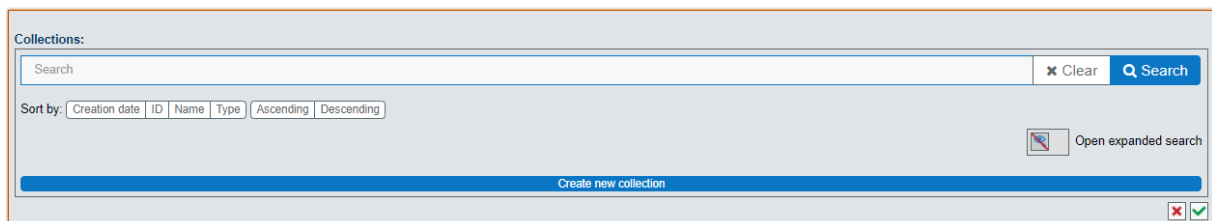
## 12.1.16 COLLECTIONS

Collections at LIL, LL and TL can be used to group subsets of data in IATE pertaining to specific projects or subdomains and to simplify the management of such data.

LIL is used for collections managed by the central terminology coordination teams in each institution and for multilingual interinstitutional (EU-) collections. It is recommended that language-related collections are situated at LL or TL. TL collections are also useful for various data management purposes related to specific terms.

### Creating a collection (and collection naming patterns)

You can create a new collection at LIL, LL and/or TL when creating an entry or updating an existing entry by clicking on ‘Create new collection’. You can also create a collection directly from the ‘Collections’ management page.



The collection creation form has the following fields:

- a drop-down list of institutions, including ‘EU’ (mandatory);
- a drop-down list of languages (optional);
- a collection short name that is unique (max. 70 characters; hyphen, minus sign, en-dash and em-dash are not allowed) (mandatory);
- a drop-down list of years (optional);
- a collection description (max. 2 500 characters) (mandatory). The description should be in English or in French, and its content should be transparent for other users.
- a collection type (project management-related, subject area-related, miscellaneous) (mandatory). Each type is displayed in a different colour.
- the protection toggle button.
- the confidentiality toggle button.

**Create new collection: -**

\* Institution: CdT

\* Short name: [empty]

\* Description: [empty]

\* Type: related to project management

Language: Not specified

Year: Not specified

Not protected

Confidential

Discard CREATE

**Naming rules for collections:**

INSTITUTION CODE (Institutions list + EU)-[MUL/LANG CODE/Not specified]-  
 SHORT NAME [free text, max. 70 characters, hyphen not allowed]-YEAR [optional]

**Examples:**

COUNCIL-MUL-COUNTRIES  
 EP-MUL-EP Political bodies  
 CdT-MUL-REACH&CLP-2008

The institution, the short name, the description and the type are mandatory. A duplicate detection mechanism for the collection name will be launched to avoid having more than one collection with the same name.

A collection ID is automatically assigned to a newly created collection.

A newly created or existing collection can be protected by clicking on the protection slider. More details can be found in section 4.4 Protection.

**Finding existing collection names**

On the ‘Collections’ management page, or from the full entry view/entry creation form, you can manage collections and launch a search with the following criteria:

- Textual search by collection name – searches for a ‘partial string’. This is possible directly in the main collections search field. The rest of the criteria can be found in the expanded search.
- Textual search by collection description – searches for a ‘partial string’;
- Search by collection ID;
- Institution (which created the collection);
- Creation date range;
- Search by type.

Validation Collections Attachments Import Asynchronous requests Marks Merge Undelete Batch deletion

ID: [empty] Name: [empty] Description: [empty] Institution: Not specified

Type: Not specified Created after: [calendar icon] Created before: [calendar icon]

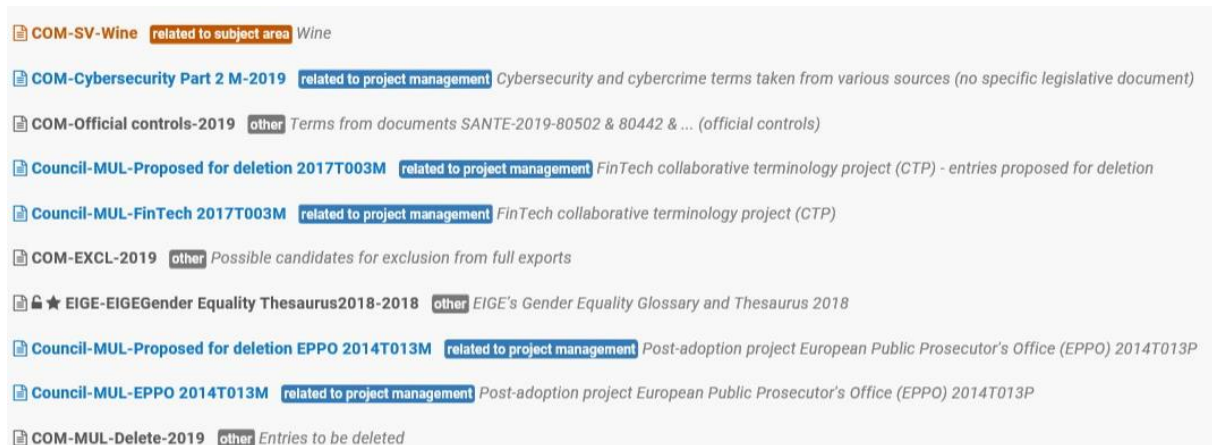
Delay (Export only)  Execute after core hours

← Clear Export Search


Sort by: Creation date ID Name Type Ascending Descending

Close expanded search

The results list can be sorted by column/value (alphabetical order, chronological order, numerical order and type). You can tell if a collection contains entries from the icon next to it (an empty page means there are no entries in the collection, while a page with writing on it means it contains entries). A lock icon indicates that a collection is protected (closed if strict protection is applied, open if loose protection is in place), and a star indicates that only Administrators from the specific institution can modify entries belonging to that collection.




### Including an entry in a collection


On the 'Collections' management page, or from the full entry view/entry creation form, you can search for a collection and add it to the entry by clicking on the  icon. You can also remove collections from an entry.

It is possible to link protected entries to any collection via the collection batch linking without limitations. However, only users with rights to modify the protected entry and users belonging to the institution being the author of the collection, and with access to the batch operation for collections, can undo this.

### Finding entries that belong to a collection

You can manage and search for collections on the 'Collections' management page. In the results list, you can view the number of entries linked to the selected collection by clicking on the 'Show more'  button. Click on 'Expand' to display the full list of entry IDs. You can also view the list of entries in the form of a results list by clicking on 'View'.

### Batch-linking collections

It is possible to link an existing collection (after search and retrieval) to a batch of entries, LLS or TLLs. On the 'Collections' management page, click on 'Start batch operation' and run a search for the desired collection(s), then click on the  icon. You can run a link or unlink operation for a list of entries (it is possible to attach protected entries to any collection) and select the specific level (LIL, LL or TL). To avoid overloading the system, please do not batch-link/unlink more than 300 entries per operation.

**Modifying and deleting collections** can only be done on the 'Collections' management page. You can run a search, obtain results and select the collection to be modified. Changes are allowed in the following fields: 'Collection name', 'Description', 'Type'. Any changes will be audited (under development). Administrators can delete collections. A collection can be deleted only if it is empty, i.e. if no entries are linked to it. Therefore, before deleting a collection that has entries linked to it, those entries first have to be unlinked. This can be done

by running an unlinking batch operation or by removing the collection label from the entries one-by-one.

### **Protection of collections**

Administrators can protect collections. There are no technical restrictions: any Administrator can protect any collection. Best practices apply and Administrators should not protect collections that were not created by their institution.

There are two protection categories, giving different editing rights: Administrators in the specific institution (only Administrators belonging to the institution having created the protected collection will be able to modify content belonging to a protected collection), or users in the specific institution (any user with editing rights belonging to the institution having created the protected collection can modify content belonging to a protected collection).



Collections can be protected in a strict mode or in a loose mode. For strict protection to take effect, the institution having created the protected collection must be the institution owning the level where the strict collection is applied.

Strict protection blocks the whole level to which the collection is attached and all the levels below, irrespective of the owner of the data. If a strictly protected collection is attached at LIL, it blocks the whole entry, meaning that only users or Administrators from the institution having created the protected collection can modify the data.

Loose protection only blocks the level where the collection is attached and the levels below that belong to the institution having created the protected collection (data from other owners will not be blocked).

A lock icon next to the collection name shows that it is protected. A closed lock indicates strict protection; an open lock indicates loose protection.

### **Confidentiality of collections**

By default, all collections are created as confidential . This means that the collection name will not be visible for non-authenticated and external users. The confidentiality of the collection does not affect the visibility of the entries in it; the entries themselves are available to all users (unless they have been set as confidential or pre-IATE, or none of the terms has been validated). This feature enables external users to refine their search with a collection filter and to export the content of specific collections. Therefore, if you consider that this metadata can be shared, you can mark your collection as ‘not confidential’ .

## **12.1.17 COLLECTION TYPE**

The following collection types are available: ‘related to project management’, ‘related to subject area’ and ‘miscellaneous’.

The collection type ‘related to project management’ should be used only for projects. Indicate the project year in the name of the project collection, if relevant. If the year cannot be put in the collection name, include at least the starting year in the description field. You can also explain the status of the project (ongoing, finished, etc.) in the description field. If relevant,

indicate the mandatory or non-mandatory nature of the project in the collection name and description.

The collection type ‘miscellaneous’ is used for various administrative purposes: deletions, post-adoption updates, excluded entries, permanently confidential entries, candidate entries for a project, multi-domain termbases, etc.

To search for content belonging to a specific collection type, you can use the ‘collection type’ criterion in ‘Advanced search’.

Collections that may be useful to external users of IATE should be marked as ‘Not confidential’.

### **12.1.18 ATTACHMENTS**

You can attach documents or graphics to an entry or LL by opening the attachments section and dragging and dropping the relevant file into the upload area or by clicking on the upload area and browsing for the file. Files already uploaded for other entries are stored in an attachments database and can be reused and attached to other entries as needed (they can be searched for by file name, note, creation date, and modification date). Existing attachments can be previewed from the full entry view or from the Attachments management page by clicking on them.


- File extensions: the supported document formats are .doc, .docx, .xls, .xlsx, .ppt, .pptx, .pdf, .rtf, and the supported image formats are .bmp, .jpg, .jpeg, .gif, .tif, .tiff, .png.
- You can upload as many files as you wish, with a global size limitation of 5 MB per file.
- All uploaded images must be free of [copyright](#).
- If you need to upload documents that are internal to your institution, please consider that they will be stored in an external cloud platform and make sure you comply with all your institution’s information security rules. Consider also that, even when marked as ‘Confidential’, an attachment will be visible to any internal authenticated user.

#### **Finding existing attachment(s)**

On the ‘Attachments’ management page, or from the full entry view/entry creation form, you can launch a search with the following criteria:

- Textual search by attachment name or attachment note (‘partial string’)
- Creation date range
- Modification date range


#### **Attaching an attachment to an entry**

On the ‘Attachments’ management page, or from the full entry view/entry creation form, you can select an existing attachment by clicking on the  icon and link it to a specific entry. Please note that on the ‘Attachments’ management page you have to click ‘Start batch operation’ first. You can also remove an attachment from an entry.

**Modifying and deleting attachments** can only be done on the ‘Attachments management’ page, where you can run a search and select the attachment to be modified/deleted. Changes will be audited (under development).



### **Batch-linking attachments**

You can link an existing attachment (after search and retrieval) to a batch of entries or LLs. On the ‘Attachments’ management page, click on ‘Start batch operation’. You can then search for attachments, select them with the  icon, and input the list of entries and the operation level (LIL or LL). To avoid overloading the system, batch-linking is limited to 100 entries or LLs per operation.

You can also batch-unlink attachments from entries following a similar procedure (search by attachment, see how many entries are linked to it, and select the entries to be unlinked).


### **12.1.19 ATTACHMENTS NOTE**

Insert a description of the attached file in this field.

### **12.1.20 ATTACHMENTS/ATTACHMENTS NOTE CONFIDENTIALITY**

You can mark a specific attachment and its note as confidential so that they are not displayed to non-authenticated users.

### **12.1.21 MARKS**

In the full entry view, you can consult, create, edit, reply to, forward by email, archive or remove marks attached to the current entry. Click on the marks button  and then, depending on your role and related permissions, you will be able to create a task or a comment about the entry. To facilitate data lifecycle management, shortcuts are also available to create a mark ‘for deletion’ (from the contextual menu at LIL) or a mark ‘for update’ (from the contextual menu at LL). For more details on the marks module, please see section 17 Marks: feedback, tasks and comments).

## **12.2 Language Level (LL)**

Below you will find a description of all the editable fields available at LL.

### **12.2.1 LANGUAGE**

- ‘MUL’ (multilingual) should be used exclusively for codes or signs that are language-independent (ISO codes, chemical formulae, certain acronyms and abbreviations, etc.).
- If such standard codes, signs, formulae, etc. are included as MUL, there is no need to reproduce them in other languages.

### **12.2.2 DEFINITION**

- It is strongly recommended that you provide a **clear and concise** definition (max. 5 500 characters including spaces) so that users can readily understand exactly what the entry refers to. If you cannot find or write a suitable definition, then as a minimum you should provide a [Term in context](#) quotation at TL.



- The definition must be equally valid for all the terms included under it; it should also correspond to the definition given in the anchor language – which serves as the anchor for the entry as a whole. This follows from the key principle in IATE that each entry corresponds to a single concept, which applies ‘horizontally’ across all languages and ‘vertically’ for all the terms in each language.
- It is acceptable to translate the definition provided in the anchor language, particularly when that definition has been validated by experts in the field, provided it fully covers the term(s) in your language. This will help to avoid any conceptual drift between languages.
- There will be cases where this cannot be perfectly achieved: for instance, where an entry covers a legal concept, definitions at LL may have to accommodate shades of meaning specific to particular legal traditions. In such a case, you should explain, in the ‘Note’ field below, any nuance of meaning that differentiates the concept as defined for your language from the concept as defined in the anchor language.
- The definition should include only the core elements required to make the concept of the entry clear. Examples, illustrations and any non-essential information which is subject to change (e.g. the number of member states belonging to an international organisation) should be given – sparingly – in the ‘Note’ field, not in the definition itself.
- When writing an intensional definition (see [Annex I](#), Basic Vocabulary), you may use the substitution principle as a guideline: it should be possible to replace the term by the definition in a text, as illustrated below:

Term	earthquake
Definition	sudden shaking of the ground caused by the passage of seismic waves through the Earth’s rocks
Substitution	<ul style="list-style-type: none"> <li>• The <i>earthquake</i> measured 6.5 on the Richter scale.</li> <li>• The <i>sudden shaking of the ground caused by the passage of seismic waves through the Earth’s rocks</i> measured 6.5 on the Richter scale.</li> </ul>

- Formal definitions given in legislation which only apply to the instrument in question (e.g. ‘for the purposes of this Regulation’) should be used only if they are broad enough to identify the concept in a more general context, or if the entry itself relates solely to that particular act. Any information which is unclear out of context should be clarified if copied into IATE.
- Typographical definition standards should be agreed upon interinstitutionally at language community level and can be found in the language-specific annexes to this Handbook.

### 12.2.3 DEFINITION REFERENCE(S)

This tells the user where the definition has come from. It is mandatory if the ‘Definition’ field has been populated (a definition cannot be stored in the IATE database without a definition reference).

The source can be more or less ‘credible’: using a definition found on Wikipedia is acceptable, providing the concept has been researched more widely as well.

If you have written the definition yourself, give your language section/unit/department as the reference.

Examples:

English terminologist or translator from the Commission working on an EN definition: COM-EN

Bulgarian terminologist or translator from the European Parliament working on a BG definition: ЕП-БГ

Bulgarian terminologist or translator from the European Parliament working on an EN definition: EP-BG

French terminologist or translator from the Council working on a FR definition: Conseil-FR

French terminologist or translator from the Council working on an EN definition: Council-FR

Terminology coordinator from the Commission working on an EN definition: COM-Terminology Coordination

However, if you have based your definition on one or more published sources, the definition reference should be written as follows:

COM-EN, based on: [reference to original source(s)]

ЕП-БГ, въз основа на: [позоваване или линк към оригиналния източник]

Conseil-FR, d’après [référence source(s) originale(s)]


COM-Terminology Coordination, based on: [reference to original source(s)]

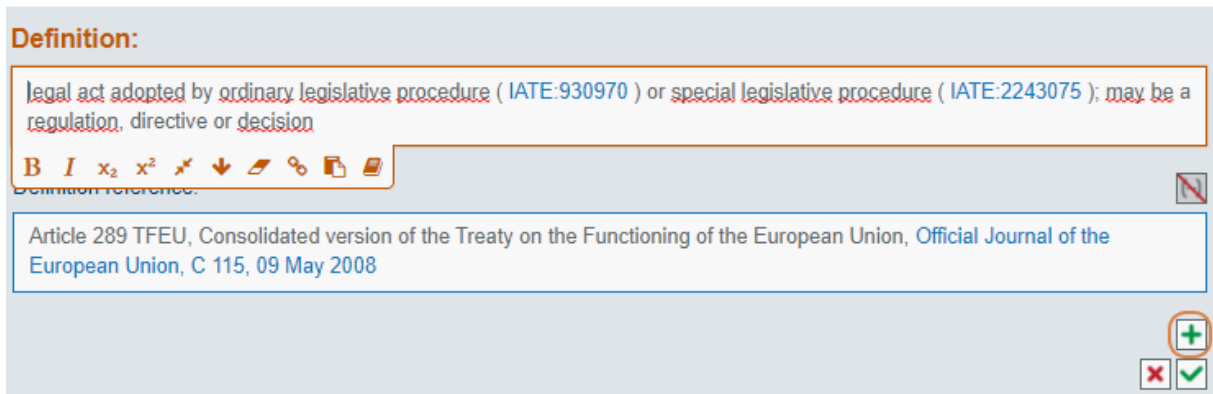
The references to your language section/unit/department as author of the definition and to the original source(s) on which you have based your definition should all appear in a single Definition Reference field. If you use multiple reference fields, only the first one will appear in termbase exports.

If the definition appears word for word in multiple sources, you can choose between:

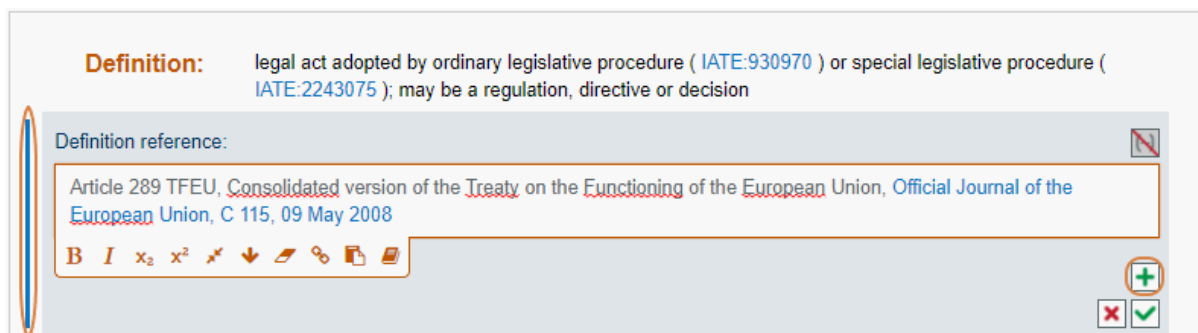
- citing only the most useful/relevant/authoritative source;
- citing multiple sources in a single reference field (if you consider it important for all of them to be included in termbase exports); or
- citing multiple sources in separate reference fields.

You can create multiple reference fields:

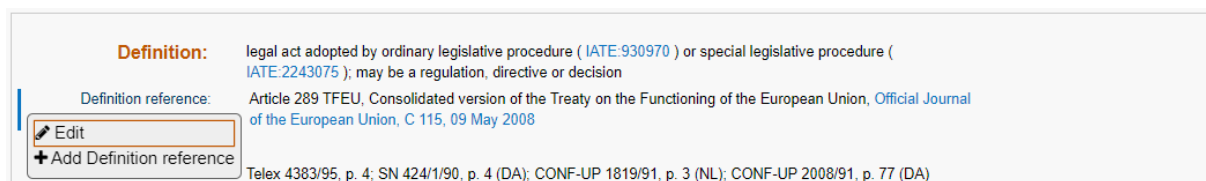
- by double-clicking on the Definition label, which opens the group edit for ‘Definition’ and ‘Definition reference’, allowing you to insert additional references (  Add ),
- by double-clicking the dotted line next to the ‘Definition reference’ field, which allows you to open the group of references and add new ones,
- by right-clicking on the same dotted line and selecting ‘Add Definition reference’ from the contextual menu, or
- by double-clicking on ‘Definition references’ in the Quick edit panel.



*Option 1: main field and references open for edit simultaneously*




*Option 2: reference fields open for edit*



*Option 3: contextual menu displayed by right-clicking the dotted line*



*Option 4: Quick edit panel*

URLs should be stored via the URL format button  to allow for verification that the URL is working and proper link creation. You can look up and insert EUR-Lex references using the EUR-Lex reference module.

For full details on how to reference see section 13 References.

Note that the definition and its reference are treated as a composite field. This means that both are hidden if labelled as confidential.


#### **12.2.4 LANGUAGE LEVEL NOTE**

Use this for any relevant information that relates to the concept (e.g. an explanation that cannot be part of the definition), rather than to a specific term. It can also be used for confidential information by selecting the relevant confidentiality option.

#### **12.2.5 LANGUAGE LEVEL NOTE REFERENCE(S)**

Indicate the source of the information in the ‘Note reference’ field.

Multiple references should be stored in separate reference fields as explained above for the ‘Definition reference’ field.

URLs should be stored via the URL format button  to allow for verification that the URL is working and proper link creation. You can look up and insert EUR-Lex references using the EUR-Lex reference module. For more information, see section 13 References.

#### **12.2.6 RELATED MATERIAL**

This field can be used to make a note of examples of documents in which the term occurs, in addition to those provided elsewhere on the entry (e.g. as references). This is particularly useful when creating a new entry in order to indicate the source text in which the anchor language term occurred. This can be helpful to the anchor language when validating the entry and to other languages when adding their terms to the entry.

This field is not public.

#### **12.2.7 MANAGEMENT**

The ‘Management’ field at LL should be used by central terminology services or by language terminologists to record management information concerning a specific language, e.g. the projects to which it belonged or any other concise information relevant for coordination or language-specific purposes.

Any new line created in this field should start with the name of the institution adding it in the format [COM], [EP], [Consilium], etc. (names in the format used by IATE itself).

This field is not public.

#### **12.2.8 COLLECTIONS**

Collections at LL can be used to create language-specific subsets of entries. For more details, see section 12.1.16 Collections.

This field is not public.

## 12.2.9 ATTACHMENTS

You can attach documents or graphics to a LL. For more details, see section 12.1.18 Attachments.

## 12.2.10 ATTACHMENTS NOTE

You can insert a description of the attached file in this field.

## 12.2.11 ATTACHMENTS/ATTACHMENTS NOTE CONFIDENTIALITY

You can set a specific attachment and its note as confidential so that they are not displayed to non-authenticated users.

## 12.2.12 OTHER FEATURES AT LL

### Pre-IATE

For specifying a specific non-validated status at LL. See section 4.5 Pre-IATE for details.

### Confidentiality

The entire LL can be set as confidential. See section 4.3 Confidentiality for details.

### Protection

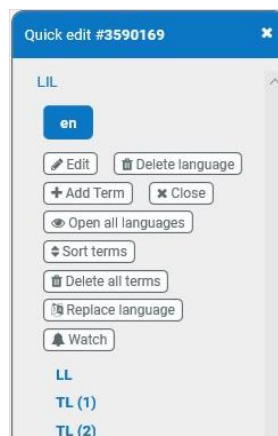
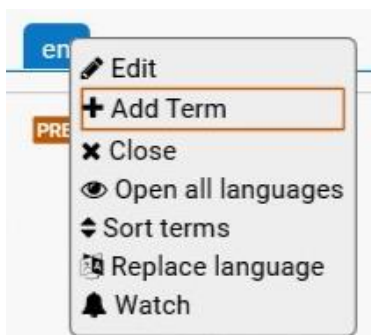
For restricting LL modification by other institutions and users. See section 4.4 Protection for details.

## 12.3 Term Level (TL)

It is possible to insert more than one term per language. All terms should refer to the same concept and should be entered separately, i.e. not in the same term field. This reflects the principle of *term autonomy*, i.e. that terms denoting the same concept should be documented separately. The following would therefore be incorrect since the term and its abbreviation have been saved under the same term entry:



In order to enter more than one term in your language (e.g. synonyms or abbreviations), first enter and save the first term, and then add subsequent terms by selecting ‘Add Term’ in the contextual menu of the language code, or under the language code in the Quick edit panel:



The completed entry, with the term and its abbreviation, would therefore look like this:

<b>Term:</b>	<b>ordinary legislative procedure</b>
<b>Term reference:</b>	Article 294 of the consolidated version of the Treaty on the Functioning of the European Union. <a href="#">Official Journal of the European Union, C 115, 09 May 2008</a>
<b>Term type:</b>	term
<b>Reliability:</b>	★★★★
<b>Note:</b>	As a result of the Lisbon Treaty, the codecision procedure [ IATE:780656 ] becomes the 'ordinary legislative procedure'.
<b>Owner:</b>	Consilium

<b>Abbrev:</b>	<b>OLP</b>
<b>Term reference:</b>	European Parliament resolution of 10 March 2010 on the regulation applying a scheme of generalised tariff preferences (2010/2020)
<b>Term type:</b>	abbrev
<b>Reliability:</b>	★★★
<b>Language usage:</b>	The abbreviation is not found in the official acts establishing the ordinary legislative procedure, but is commonly used elsewhere.
<b>Owner:</b>	Consilium



### 12.3.1 TERM DISPLAY ORDER

Each TL has a unique term display order which is used to display TLs within a language in a specific order. You can easily arrange TLs in the preferred display order by dragging and dropping them into the desired place (see detailed steps in section 6 How to modify an entry). The term display order value will be updated automatically (a change in the display order does not trigger an unvalidation).

The recommended display order is as follows:

- Order by term type: term, short form, abbrev, formula, [phrase]  
NB An entry for a concept can contain any of the first four term types, but should not also contain a phrase. An entry for a phrase should contain a single phrase per language, and no other term types.
- Within a term type, order by evaluation (preferred, no value, admitted, deprecated and obsolete)
- Order by reliability (higher on top)
- Order by validation status (validated terms on top)

TLs from IATE 1 will be sorted as follows:

- Term group
- Term type

- Evaluation
- Reliability
- Validation status

### 12.3.2 TERM TYPE

To update the ‘Term type’ field, double-click on it and select a value from the drop-down list:

Term (default)	One word or set of words which designates a general concept or an individual concept (‘appellation’) in a particular language.			
Abbrev	Abbreviation (acronym, initialism, contraction or truncation), to be written according to the rules applicable in the language in question (capitalisation, punctuation, etc.).			
Appellation	<p><del>Linguistic designation of an individual concept. It should be used for nomenclature and official denominations.</del></p> <p>The ‘appellation’ term type has been removed. It is no longer available when creating or modifying entries. It will eventually be replaced by a new ‘Concept type’ field at LIL with two values: individual and general. For the time being, individual concepts should be linked to collection EU-MUL-INDIVIDUALCONCEPTS, so that they can be identified and retrieved easily.</p>			
Short Form	<p>For example: the common name of an agreement or the short, unofficial name of a country, etc.; any accepted shorter version of a title or of a name.</p> <p>Terms that contain an abbreviation should also be considered short forms.</p>			
Phrase	<p>For phraseological units that are not strictly speaking ‘terms’ (i.e. they do not denote a definable ‘concept’), but which nevertheless have a standard translation – and must therefore always be translated in the same way – or which occur repeatedly in our texts and pose real translation problems. Phrases which merely illustrate the use of a term should be entered as a quotation in the ‘<a href="#">Term in context</a>’ field of the relevant entry.</p> <p>Phrases should contain no superfluous words. Where full sentences are given, typographical rules should be followed (initial capitals and punctuation), e.g.:</p> <table border="1" data-bbox="411 1534 1417 1771"> <tr> <td>‘surseoir à statuer’ (not: ‘Le tribunal sursoit à statuer.’)</td> </tr> <tr> <td>‘désigner comme plénipotentiaire’ (not: ‘Ils ont désigné comme plénipotentiaires...’)</td> </tr> <tr> <td>‘This statement for the minutes is not confidential and may therefore be released to the public.’</td> </tr> </table>	‘surseoir à statuer’ (not: ‘Le tribunal sursoit à statuer.’)	‘désigner comme plénipotentiaire’ (not: ‘Ils ont désigné comme plénipotentiaires...’)	‘This statement for the minutes is not confidential and may therefore be released to the public.’
‘surseoir à statuer’ (not: ‘Le tribunal sursoit à statuer.’)				
‘désigner comme plénipotentiaire’ (not: ‘Ils ont désigné comme plénipotentiaires...’)				
‘This statement for the minutes is not confidential and may therefore be released to the public.’				
Formula	Chemical formulae, mathematical and other scientific expressions, to be written wherever possible in accordance with international standards.			

Lookup form	<p>Any term or spelling variation that you wish to be searchable, but not displayed as a term in the hitlist (common spelling mistakes, alternative spellings, plural or inflected forms, etc.). Write the terms in full, not just parts of them.</p> <p>If there are several lookup forms, insert as many TLs with the term type ‘Lookup’ as needed. For this option to be available, the language must contain at least one TL with a term type which is not ‘Lookup’. Insert lookup forms below all other non-lookup TLs.</p> <p>There are no mandatory fields to be filled for lookup forms (except the term and term type). The other fields are optional; you can use them to document the lookup form as needed.</p> <p>Terms stored as lookup forms are searchable with all the matching options available, but they are only retrieved when they match the search string as an exact match. A message in the results page ( <span style="color: #c00000;">Redirected from:</span> ) will inform the user that the entry has been retrieved because of a match in one of its lookups.</p>
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### 12.3.3 TERM

Each term field should contain only one term. A term can take various forms (single word, more than one word, formula, acronym, phrasal unit etc.) but must refer to a **single concept** (as defined in the anchor language). Break complex expressions combining several concepts down into their constituent parts and create a separate entry for each concept. You can use italics, subscript, superscript, small text and different capitalisation options ( *I* <sub>x<sub>2</sub></sub> <sup>x<sup>2</sup></sup> x **A** ) as needed. No other formatting is allowed.

- **Write nouns and adjectives in the singular**, except where the term is habitually used in the plural.
- **Do not use articles or capital letters**, unless language rules dictate that you should.
- Use the appropriate canonical form, e.g. the nominative or other appropriate inflected form, according to the rules of the specific language. Where confusion is possible, indicate the part of speech in the relevant field.
- To make sure that your term is found in a search for an alternative spelling or a frequently used plural, add these as [lookup forms](#) below the other TLs which are not lookups.

**Special language vs. everyday language:** do not create entries for words from everyday language, unless there is an imperative need for their harmonisation in EU documents, or their inclusion in IATE provides added value in comparison to language dictionaries.

**Neologisms:** aim to propose well-founded solutions by considering processes for forming new terms and the socio-cultural factors that determine the acceptance of neologisms in a language community. Indicate in a note if the term is a neologism.

**Document titles:** do not create entries for the titles of secondary legislation (available from EUR-Lex, and via Quest), unless an instrument has acquired a short name that differs from its official title (e.g. ‘VAT Directive’). An entry created for such an instrument should be arranged as follows:



- short form (as well as abbreviation, if relevant) displayed on top (e.g. Groundwater Directive)
- full title (i.e. including the number, the adopting institution(s), the date of adoption and other information such as ‘amending...’ or ‘repealing...’, but without the phrase ‘Text with EEA relevance’ in brackets) displayed below (e.g. ‘Directive 2006/118/EC of the European Parliament and of the Council of 12 December 2006 on the protection of groundwater against pollution and deterioration’)
- older titles of the same act further down the list with the ‘obsolete’ evaluation, in reverse chronological order.

**Incorrect terms:** any term entered at TL must be correct and fit for use in a translation, or be marked as ‘Deprecated’ (see [‘Evaluation’](#) above). Commonly used incorrect terms should be included (so that they can be found when they appear in a source text) and marked as ‘Deprecated’ to ensure that they are not used in translations. Incorrect terms that are not commonly used should be stored as [lookup forms](#) below the other TLs which are not lookups.

**Provisional solutions:** where an organisation or an instrument does not yet have an official or definitive name, or where no name is known, propose a provisional harmonised solution to prevent usage from varying too widely and mark the term as ‘proposed’ in the ‘Evaluation’ field. Explain the situation in the ‘Note’ field and update the entry as soon as possible. If the organisation or instrument itself has been proposed but does not yet exist, mark the entry as ‘proposed’ (see [‘Lifecycle’](#)).

For details on duplicate detection when creating or modifying a term, see section 5.3 Duplicate detection.

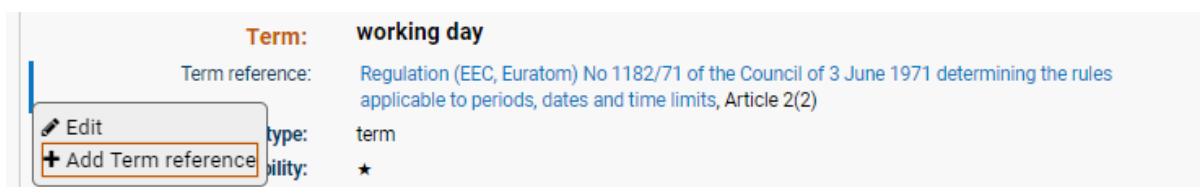
### 12.3.4 TERM REFERENCE(S)

This demonstrates the reliability of the term in question and should therefore be from an authoritative, credible source.

Multiple references should be stored in separate reference fields, by double-clicking the dotted line next to the ‘Term reference’ field, which allows you to open the group of references and add new ones, or by right-clicking on the same dotted line and selecting the ‘Add Term reference’ option in the contextual menu, or by double-clicking on ‘Term references’ in the Quick edit panel and selecting the specific option.




*Option 1: dotted line next to ‘Term reference’ (the blue side line in the screenshot).*



Option 2: contextual menu under the dotted line next to 'Term reference'



Option 3: specific option on Quick edit panel

URLs should be stored via the URL format button  to allow for verification that the URL is working and proper link creation. You can look up and insert EUR-Lex references using the EUR-Lex reference module. For more information, see section 13 References.

### 12.3.5 RELIABILITY

- Reliability values (see table below) indicate the match between a particular term and the concept as defined in the [anchor language](#), as well as the reliability of the sources used.
- Reliability should not be confused with the validation status, which is part of the management process.

Choose the level of reliability to assign to the term:

Code	Description	Explanation
☆	Downgraded prior to deletion	Assigned by a terminologist to indicate that a term can be deleted, e.g. in the context of a consolidation project.
★	Reliability not verified	Automatically assigned to terms entered by non-native speakers. The code will not change until the reliability is assessed by a user with editing rights for the language (usually a terminologist and native speaker).  All lookup forms have a reliability of one. This value cannot be changed for this specific term type.
★★★	Minimum reliability	Automatically assigned to terms entered or updated by native speakers. Terminologists should change this value to 3 or 4 stars, unless they have doubts as to the reliability of the term because:

		<ul style="list-style-type: none"> <li>• no relevant sources are available;</li> <li>• there are doubts concerning the reliability of the sources used;</li> <li>• the term is a neologism and has not been sanctioned by a competent body or source;</li> <li>• the sources available, though apparently reliable, present conflicting solutions.</li> </ul>
☆☆☆	Reliable	<p>Manually assigned by a terminologist following a reliability assessment. Reliable terms should satisfy at least one of the following criteria:</p> <ul style="list-style-type: none"> <li>• having been obtained from a trusted source;</li> <li>• having been agreed on by a representative body of same-language terminologists;</li> <li>• being the common designation of the concept in its field.</li> </ul> <p>This code is usually sufficiently high for a well-researched term.</p> <p><b>NB</b> This code was automatically assigned to many entries, regardless of their previous validation status, following the merger of existing databases to create IATE. Therefore, some entries marked as ‘reliable’ are not necessarily so.</p>
☆☆☆☆	Very reliable	<p>Manually assigned following a reliability assessment. Very reliable terms are:</p> <ul style="list-style-type: none"> <li>• well-established and widely accepted by experts as the correct designation, or</li> <li>• confirmed by a trusted and authoritative source, in particular a reliable written source.</li> </ul> <p>Using 4 stars rather than 3 stars indicates you are absolutely certain of your choice, e.g. for the original-language name of an organisation (as defined in its constitution or founding instrument) or for a legal concept created by a legislative act (in all authentic language versions of that act).</p>

### 12.3.6 EVALUATION

- Leave this field blank if the LL includes no more than one term of each [term type](#) and all are correct and fit for use in EU texts.
- Any term which is ‘obsolete’ or ‘deprecated’ must be labelled as such.
- You can use the following evaluations:

Preferred	The best term (of its ‘term type’) to use in an EU text. A term may be ‘preferred’ because it is intrinsically better than the other terms, or because it has been chosen to ensure consistency in EU texts. Use sparingly.
Admitted	A term which is correct, but for which better synonyms exist. Any term which is not preferred, deprecated or obsolete is considered to be ‘admitted’, so admitted terms do not need to be labelled as such. Use only in exceptional cases.
Deprecated	A term which is widely used, and is therefore likely to appear in EU documents or which appears in an apparently authoritative source, but which should be used neither in originals nor in translations because it is not correct or fit for use in EU texts. Variant spellings should not be included as

	deprecated terms, but added as <a href="#">look-up forms</a> .
Obsolete	A term which was previously used to denote the concept, but is no longer in use (e.g. the ‘Bank Identifier Code’ is now called the ‘Business Identifier Code’, see IATE:926311).
Proposed	A term or denomination which has been proposed but not yet fully adopted.

It is recommended that you explain the reasons for choosing a particular evaluation in the ‘[Language usage](#)’ field, e.g. the ‘preferred term’ is mandatory in legislation, while the ‘admitted term’ may be used in press releases and web pages.

### 12.3.7 NOTE


Here you can enter any relevant information related to the term which does not fit into other specific fields, like ‘[Language Usage](#)’ or ‘[Regional Usage](#)’ (see below).

**NB** Notes about the concept belong at LL, not TL!

### 12.3.8 NOTE REFERENCE(S)

This indicates the source of the information in the ‘Note’ field.

Multiple references should be stored in separate reference fields, as explained above for ‘Term reference’.

URLs should be stored via the URL format button  to allow for verification that the URL is working and proper link creation. You can look up and insert EUR-Lex references using the EUR-Lex reference module. For more information, see section 13 References.

### 12.3.9 TERM IN CONTEXT

A ‘term in context’ (i.e. a short quotation from a reliable source that illustrates the use of a term) is always useful, particularly if your entry does not have a [definition](#).

**The use of specific formatting (e.g. using quotation marks or not, putting the relevant term in bold, etc.) should be agreed upon at interinstitutional level by each language community and recorded in the language-specific annexes to this Handbook. Please note that hyperlinks are not allowed in the ‘Term in context’ field.**



It is fine to use a context containing an inflected or plural form, or a context where a term composed of more than one word is split in the running text.



You can add multiple contexts in separate ‘Term in context’ fields, each with its own reference. Right-click on the ‘Contexts’ label and select ‘Add new context’ or select the same option in the Quick edit panel under ‘Contexts’.



### 12.3.10 CONTEXT REFERENCE

If you have provided a context, you will need to indicate the source, which should be credible. URLs should be stored via the URL format button  to allow for verification that the URL is working and proper link creation. References to EUR-Lex should be searched for and inserted using the EUR-Lex reference module . For more information, see section 13 References.

Note that the context and its reference are treated as a composite field. This means that both are hidden if labelled as confidential.

### 12.3.11 OTHER FEATURES AT TL

#### Collections

Collections at TL can be used to create subsets of terms pertaining to specific projects or subdomains and to simplify the management of such data (export, follow-up, etc.). For more details, see section 12.1.16 Collections.

#### Management



The ‘Management’ field at TL should be used to record information concerning the management of the language, either by central terminology services or by language terminologists, e.g. the projects to which it belonged or any other concise information relevant for coordination or term-specific purposes.

Any new line created in this field should start with the name of the institution adding it in the format [COM], [EP], [Consilium], etc. (names in the format used by IATE itself).

This field is not public.



#### Language usage

The following fields are available:

Language usage	For information on the way the term is used, e.g. a term which is always used in the plural or it is used in a certain context/by a certain institution, or to justify the reasons for choosing a particular evaluation.
Language usage reference(s)	If necessary, indicate the source of the information in the ‘Language usage’ field. Multiple references should be stored in separate reference fields, by right-clicking on the ‘Language usage reference’ label and then selecting  Add or  Add Language usage reference . See <a href="#">below</a> for guidance on references.
Confidentiality	See <a href="#">above</a> for more details.

## Regional usage

The following fields are available:

Regional usage	For information on the geographical area in which the term is used (e.g. when different NL terms are used in Belgium and in the Netherlands).
Regional usage reference	Where appropriate, indicate the source of the information in the 'Regional usage' field. Multiple references should be stored in separate reference fields, by right-clicking on the 'Regional usage reference' label and then selecting  Add or  Add Regional usage reference .  See <a href="#">below</a> for guidance on references.
Confidentiality	See <a href="#">above</a> for details.

## Customer

Customer	Used where different institutions/bodies use different terms for the same concept, and mainly by services who work for different customers, e.g. the Translation Centre.
Customer note	Where appropriate, explain the preferred choice for a particular customer.
Confidentiality	See <a href="#">above</a> for details.

## Part of speech, Gender and Number

For grammatical information on part of speech, gender and number. This is particularly useful if the part of speech to which the term belongs is not clear (e.g. a verb that can also be a noun).

## Confidentiality

The entire TL can be set as confidential. See section 4.3 Confidentiality for details.

## Protection

For restricting TL modification by other institutions and users. See section 4.4 Protection for details.

## 13. REFERENCES

**Every term, definition and context must have a reference to a source.** If the source is a document (rather than a person or institution), the term, definition or context must be contained in the source referred to. It is perfectly acceptable to use a source, particularly for the ‘Term in context’ field, in which your term is inflected, in the plural form, etc.

Other fields, such as ‘Language level note’, ‘Term note’, ‘Language usage’ and ‘Regional usage’, also have reference fields, but they are optional (i.e. you can add a term note without a reference).


References to documentary sources must be **sufficiently comprehensible and precise** for users to be able to find and consult them if need be. Avoid abbreviations. Sources accessible via the internet are preferable and the primary source URL should be used (and not a secondary URL pointing to the source from a metasearch tool or from a search engine).


**References should lend credibility** to the information provided and should, where possible, be to a credible authority in the relevant field. Only for the definition reference may a less reliable source be used.

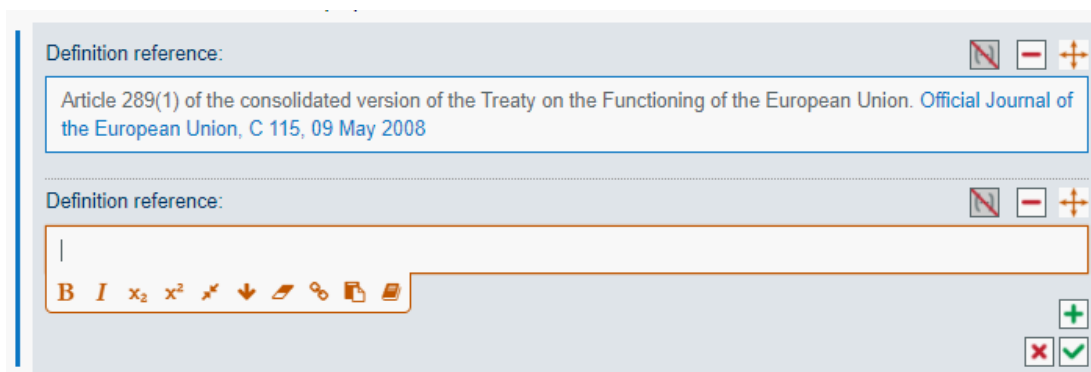
Reference documents should be originals and preferably written by a native speaker. Translations should only be used if they are authentic from a legal point of view or if they are recognised as authoritative.


If you are aware of sources with a restricted access policy (subscription or other), this should be indicated by adding ‘(restricted access)’ after the hyperlink or URL.

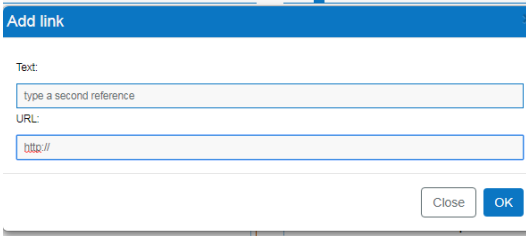
Adhere to copyright guidelines at all times.

Multiple references should be stored in separate reference fields, by right-clicking on the dotted line next to the reference label and selecting the ‘Add’ option, by double clicking on the same dotted line and selecting the  icon, or by selecting the specific ‘Add’ option in the Quick edit panel under the relevant field.

If you insert multiple term references, only the first one will be included in any SDLTB or TBX export file created. You should therefore ensure that the most important reference appears first. You can easily sort references by opening the group of references for edit and then dragging the  icon for one reference and dropping it on the icon for another reference.



URLs should be stored via the URL format button  to allow for verification that the URL is working and proper link creation. Fill in the form shown below (text + URL). The date of consultation will be appended automatically to the reference in the specific language date format.



For language-specific referencing rules, please refer to the annexes.

### 13.1 Minimum information

For all types of references, the key pieces of information to start with are:

**Title:** the main title of the item you are using. It can be difficult to work out what this is: use common sense and try to identify the key piece of information that describes what you have used, and will allow the reader of your work to identify that information.

**Author/editor:** for websites or web pages without an author, cite the ‘corporate author’ i.e. the name of the organisation or company to which the website or web page belongs.

**Date (of publication/consultation):** usually a year, but for sources such as newspaper articles, include day/month/year. Some websites include the date of copyright/last update at the bottom of the page. If none of this information is available, including the date of consultation is sufficient. If a hyperlink is created using the ‘Add link’ button, the date of consultation is added automatically after the link text. The date format follows language-specific conventions.

**NB** When the source is a glossary, dictionary or encyclopaedia, always include the headword in the reference.

### 13.2 Types of references

Try to keep the referencing style consistent by following the guidelines below or by following referencing instructions given in the cited source.

#### 13.2.1 EU DOCUMENTS

All language versions of EU legislation are regarded as authentic originals, and are therefore the primary source for EU-specific terminology.

- If the concept has been created by the EU, reference the relevant legal instrument.
- If the term does not appear in the founding instrument, reference the founding instrument at LL (where you define the concept), but find another reliable source for the term at TL.



- It may also be useful to include a reference to the relevant page(s) on Europa explaining the concept in plain language.

EU documents are not necessarily reliable sources of terminology for concepts which also exist independently of the EU. In these cases, the primary reference should ideally be to a non-EU source, e.g. the FAA for aviation terms, IMO for maritime terms, etc.


In order to promote consistent usage in EU texts, the primary reference may be supplemented by reference(s) to EU legislation. Try, however, to cite an instrument that discusses the concept in some detail.


For internal documents, the references should contain:

- the short name for your institution (e.g. COM)
- the document number
- the title of the document; if the document is confidential, do not use the full title.

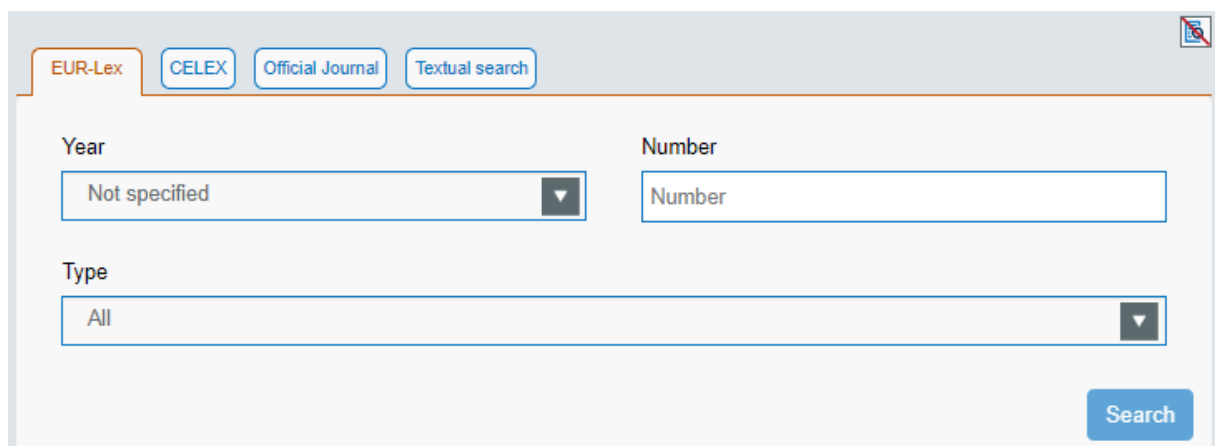
As far as possible, try to cite internal documents as references only if they are available to staff at the other institutions; provide a link if possible (e.g. Council register).

### 13.2.2 EUR-LEX DOCUMENTS

You should look up and insert EUR-Lex references using the EUR-Lex reference module, which is available in every reference field (click on the ‘EUR-Lex’ search icon  in the

formatting bar  ).

There are four different search forms to retrieve EUR-Lex documents (via the document number, CELEX number, Official Journal, or using a textual search in the document title):




Once you have performed your search, select the correct option in the results list and click **INSERT** to insert it in the reference field.



This will automatically insert the title and permanent EUR-Lex link as hypertext in the appropriate language. You can modify the title, e.g. to make a long title more concise by omitting the adopting institution and date of adoption (unless they are of particular relevance) and other information such as ‘amending...’, ‘repealing...’ and/or ‘(Text with EEA relevance)’.

Results are sorted in reverse chronological order (from newest to oldest). If available, the latest consolidated version will be at the top of the list, followed by any corrigenda relevant for the search language, with the first version of the document at the bottom.

In some cases, it might be useful for a text field to contain the link to EUR-Lex in the old way: CELEX:32006R1907 or the language specific variant CELEX:32006R1907/FR. This still works: the CELEX number will be displayed with a hyperlink to the relevant page.

If you want to change the case of a fully capitalised EUR-Lex title, you can use the ‘Lower case’  formatting button to change all letters to lower case, and then manually reinstate any capital letters needed.

Alternatively, you can click on the ‘Add link’ button, cut or copy the title and paste it in Word, where you can use the ‘Change case’ feature to switch to ‘Sentence case’ or ‘Capitalize Each Word’, make any further changes needed manually, and then copy the corrected text and paste it back in the ‘Text’ field of the ‘Add Link’ dialog. When you click on ‘OK’, the current date will be inserted in brackets after the link text as the date of consultation. As a date of consultation is not required for references to EUR-Lex, it should be deleted manually.

In the case of a textual search, only the 10 most recent results are displayed. The document code and URL for the results retrieved in this search are not the standard CELEX number and permanent EUR-Lex link for the time being, but rather the Cellar URI. This should be adjusted in the coming release.

### 13.2.3 TREATIES, CONVENTIONS, AGREEMENTS


Give references to treaties, conventions or agreements in concise form, using the established short form followed by the article number. The place or date of signing should be mentioned wherever necessary to avoid confusion.

EU treaties and protocols have a CELEX number and can therefore be searched for and inserted using the EUR-Lex reference module.

Wherever possible, references to international, non-EU documents should include a hyperlink where the text (of the article and/or the full instrument) can be consulted.

### 13.2.4 WEB PAGES AND WEBSITES

Include at least the following data:

- Title (as displayed on the page, not the metadata title)
- Author/Editor (use the corporate author if no individual author or editor is named)
- URL (inserted via the  'Add link' button in the format bar)
- (Date of consultation) (inserted automatically in the specific language format when using the 'Add link' button as per the following list)

no language selected (9.2.2018)

bg (9.2.2018 r.)

-cs (9. 2. 2018)

da (9.2.2018)

de (9.2.2018)

el (9.2.2018)

en (9.2.2018)

es (9.2.2018)

et (9.2.2018)

fi (9.2.2018)

fr (9.2.2018)

ga (9.2.2018)

hr (9.2.2018.)

hu (2018. 2. 9.)

it (9.2.2018)

lt (2018 2 9)

lv (9.2.2018.)

mt (9.2.2018)

nl (9.2.2018)

pl (9.2.2018)

pt (9.2.2018)

ro (9.2.2018)

sk (9. 2. 2018)

sl (9. 2. 2018)

sv (9.2.2018)

la (9.2.2018)

mul (9.2.2018)

If the reference is clearly to a web page, there is no need to write 'website'.

Always provide sufficient information so that the website or web page is still, in theory, traceable, even if the link is broken. If you are referring to a web page that is part of a well-structured website, add breadcrumbs, i.e. a greater-than sign (>) to separate levels. There is no need to include 'Home' in the breadcrumbs.

For more details, see the language-specific annexes.

### 13.2.5 HUMAN SOURCES

Do not enter any personal information (names, telephone numbers, email addresses, etc.) into the IATE database, either from internal or external human sources. Instead, include anonymous information which can be used to judge the person's authority on the subject, i.e. their job title or status, the name of the department and organisation where they work, and the date of consultation.

You can cite **your department** as a reference, for example if the wording of a definition is entirely your own or if a term is your proposal. If your proposed term or the definition you have drafted is based on information found in an authoritative source, you can add the words 'based on' followed by a reference to that source.

The obligatory part contains the identification of the institution and the language department in ISO code, or in the case of entries updated by Coordinators, 'Terminology Coordination'.

In addition, it is possible to add an explanation, e.g. the institution, the department and the unit, in parentheses, in order to give more information to the user. Each language department may choose to use this option, if they consider it necessary, in which case they should decide on a uniform manner of indicating the department and the unit.

It is also possible to add the date on which the term was discussed. The date must be indicated in a uniform way for each language (see above).

The form of the reference is the following:

**COM-<ISO code> (institution, language department, unit) (date)**

**Examples** of possible references:

Raad-NL (12.10.2012)

ЕП-БГ, въз основа на [позоваване или линк към оригиналния източник]

For terminology coordination teams use the following:

COM-Terminology Coordination

Council Terminology Coordination

EP-Terminology Coordination

## 13.3 Entry-to-entry links

It is possible to link to another entry in any free text field (except 'Term' and 'Term in context').

### 13.3.1 AUTOMATIC CREATION USING THE ENTRY ID

To create an entry-to-entry link using the entry ID as the link text, click on the 'Add link' button in the formatting bar and open the 'Entry-to-entry link' tab. You can insert the text that will display as hyperlink and the entry ID. Once you have entered your entry ID, a drop-down

list will appear containing ‘all’ followed by all languages available on the entry. You can either pick ‘all’ or select a single language.

The screenshot shows a dialog box titled "Add link". It has two tabs: "External link" and "Entry-to-entry link". The "Entry-to-entry link" tab is active. The form contains the following fields:

- Text:** legislature
- Entry ID:** 1393108
- Language:** en

Below the fields, the text "1393108 legislature" is displayed. At the bottom right, there are "Close" and "OK" buttons.

### 13.3.2 MANUAL CREATION USING THE ENTRY ID

If you prefer, you can create the link manually by typing IATE:entryID directly in the text field, e.g. IATE:1393108.

If you wish, you can add the language to be displayed, e.g. IATE:1393108/en.

This will automatically create a link to the relevant entry (and language) if it exists.

**IMPORTANT:** Please make sure you do not take any formatting when copy-pasting entry IDs, since formatting will break the automatic link generation. Remove the formatting with the ‘Clear format’ button.

### 13.3.3 AUTOMATIC CREATION USING THE URL

If you wish to use the term (or other appropriate text) rather than the entry ID as the link text, click on the ‘Add link’ button in the formatting bar but stay on the ‘External link’ tab. Enter the link text in the ‘Text’ box and the IATE permanent link (displayed at the bottom of the full entry view) in the ‘URL’ box.

If you wish, you can add the language(s) to be displayed, e.g.:

- <https://iate.europa.eu/entry/result/1393108/all>
- <https://iate.europa.eu/entry/result/1393108/en>
- <https://iate.europa.eu/entry/result/1393108/en-fr>
- <https://iate.europa.eu/entry/result/1393108/en-all>

As this tab is primarily for external links, the date of consultation will be added automatically, and should be deleted manually.

The choice between these three options depends on your needs and preferences and/or those of your language community. The first option is automatic and prevents copy-pasting and formatting issues. The second option may be quicker. In both cases, the hyperlink text is the

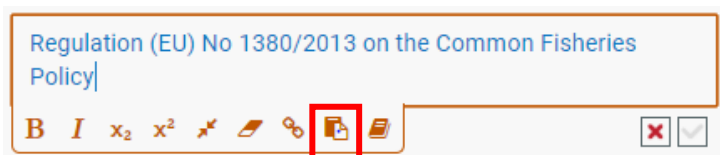
entry number, which can enhance clarity, but may interrupt the flow of the text. The third option allows you to use the term (or other appropriate text) as the link text, making it easier to read, but inserting the URL (and removing the date of consultation) takes more time and effort. Although the entry number is not visible in the link text, it can be seen when you hover over the hypertext.

## 13.4 Local storage clipboard

You can use the clipboard to store content, including links, in order to reuse it at a later stage. It is designed to help you ensure consistency among your references and to speed up the insertion of frequently used references. For the time being, content is stored in the local storage of your web browser, which means that it is browser- and PC-dependent. If the local storage is cleaned, the references in the clipboard will be lost. A permanent storage solution is planned for the future.

### How to save content to the clipboard

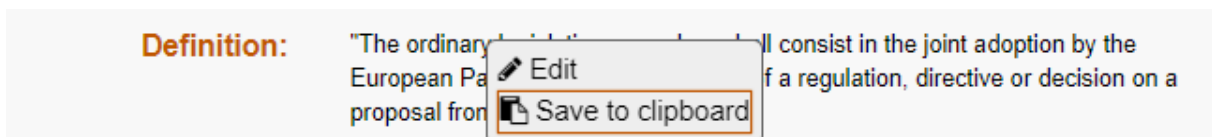
Select the field that you intend to store and open the clipboard by clicking on the button:



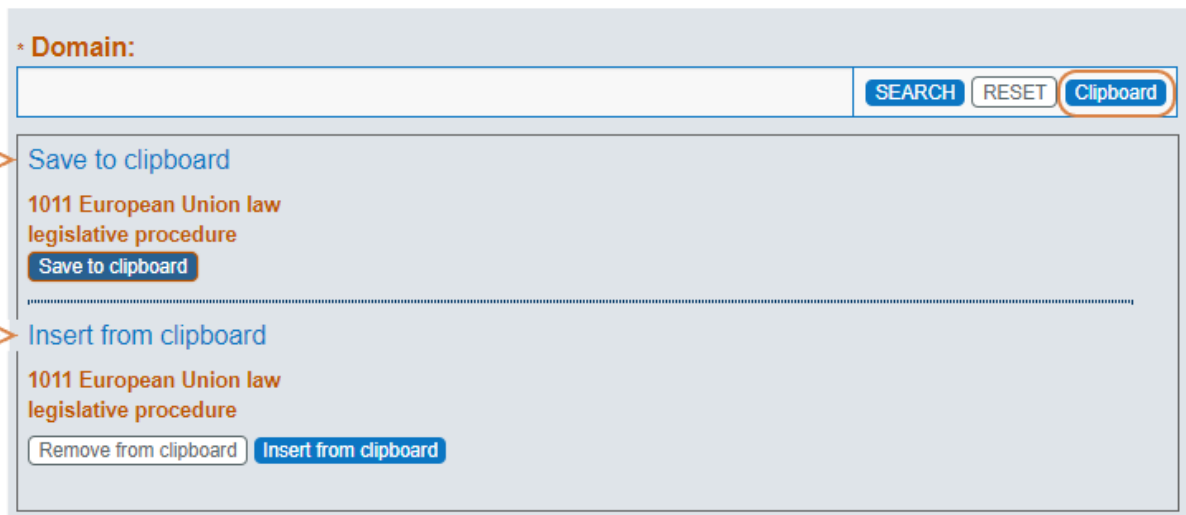
Click the save button:




You can also right-click on a populated free text field and select 'Save to clipboard'.

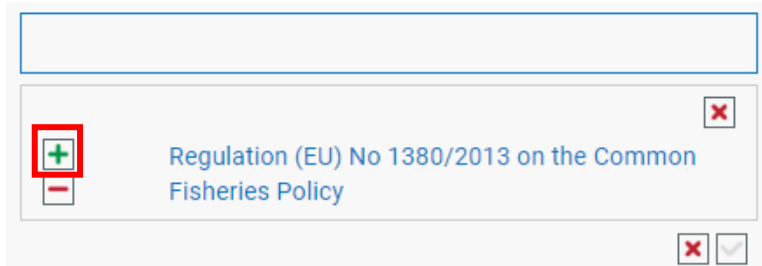



This feature is also available for Domains, where you can store your most used domains for easier reuse.



### How to reuse content that was previously saved

While editing a field, click on the clipboard button (or use the shortcut Ctrl+q) and click on  to retrieve the content:



This also enables you to remove unneeded content from your clipboard, by clicking on the  button.

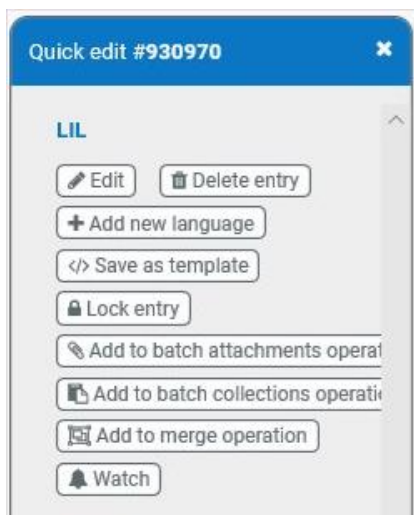
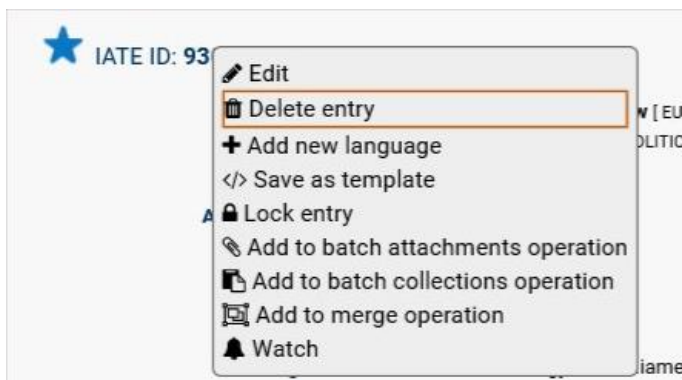
NB: even if this feature is primarily intended to store references, it can also be used for other kinds of recurrent content in free text fields.

## 14. DELETE AND UNDELETE

### 14.1 Delete

Whole entries are deleted mostly in the context of consolidation, when entries with no added value or secondary entries which have been merged onto the primary entry for a concept are deleted.

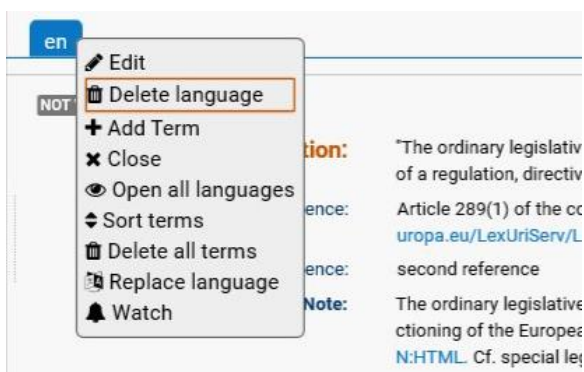
Entries can be deleted from the full entry view via the contextual menu accessed by right-clicking on the IATE ID or the Quick edit panel (option available at LIL):



Click on ‘Delete entry’ to delete the whole entry, including all its sublevels (a message will ask you to confirm this operation).

An individual language can be deleted from an entry by users with rights for that language. You can do this from the full entry view, via the contextual menu accessed by right-clicking on the language code, or the same option in the Quick edit panel (also under the language code). Click on **Delete language** to delete a LL together with all its terms (a message will ask you to confirm this operation).

**NB** You cannot delete a language if it is the only language on the entry or if it is the anchor language.





Terms (TL including all its fields) have to be deleted one by one. You can do this from the full entry view, via the contextual menu accessed by right-clicking on the outer border of the term level or via the quick edit panel. A message will ask you to confirm this operation.

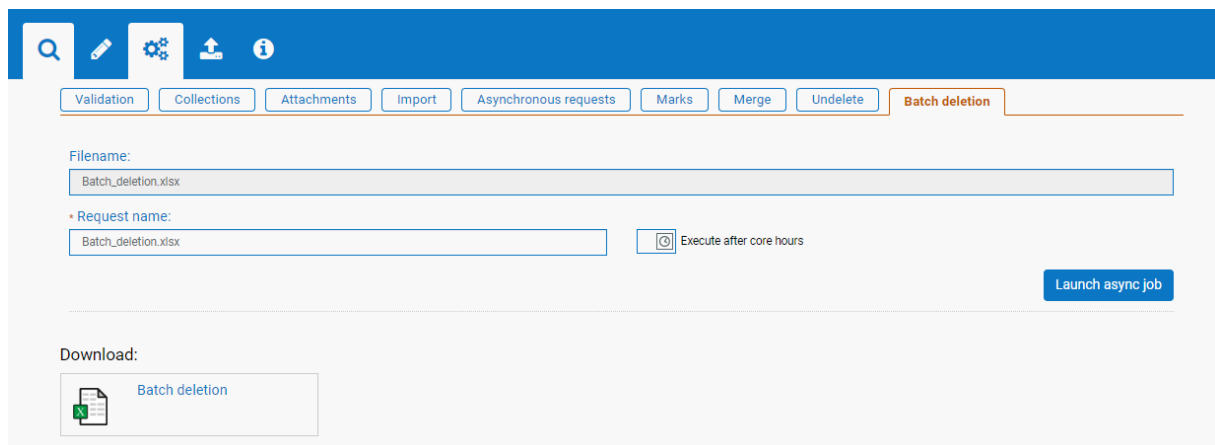
**NB** You cannot delete a TL if it is the only term on the entry.



### **Batch deletion**

Administrators can also delete full entries, LLs and/or TLs via the ‘Batch deletion’ screen. You first download an.xlsx template called ‘Batch deletion’, in which you add the IDs of the entries to be deleted, the languages (optional) and the terms (optional). You can decide whether or not the batch deletion should be shown in the standard ‘Undelete monitoring screen’ ([see 12.2 Undelete](#)). To hide the deletion, enter ‘0’ in the ‘visible’ column; to show it, enter ‘1’. (NB Only Administrators can see ‘hidden deletions’ in the ‘Undelete monitoring screen’.)

When you upload the Excel file to IATE, you must assign a request name (by default IATE uses the name of the file, but you can change it) and decide whether to execute the batch deletion after core hours  Execute after core hours (as this is a resource-intensive operation, which may overload the system, you are strongly recommended to execute it ‘after core hours’, in which case it will be executed after 10.00 p.m.). The operation is launched in asynchronous mode. You can follow the status of the request and the results in the ‘Asynchronous requests’ screen (in the ‘Management’ menu).



### **Deletion checks**

A language can be left empty if there are no equivalent terms in that language. It is therefore possible to delete all the terms in a language and leave it empty. However, at least one other language on the entry must contain at least one term (i.e. an entry should always contain at least one term).



As a general rule, if you delete a whole entry or part of an entry (depending on your IATE user rights), you must ensure that **there is no loss of relevant information**: any relevant content present in the (part of the) entry to be deleted should be transferred elsewhere (another entry, lookup form, notes on the same entry, etc.). For details, see the checklist applicable to all deletions under section 19.2 Interinstitutional delete.

## 14.2 Undelete

Deleted content can be recovered via the ‘Undelete’ screen, which is accessed via the ‘Management’ menu.

The ‘Undelete’ screen displays deleted content sorted by deletion date and grouped by entry, which means you can see all content deleted in the past for any given entry.

You can filter by a specific date or date range, user, language, entry ID, owner of the deleted data, user having deleted the content or type of deletion (‘All deletions’ means all data deleted by any institution; ‘Interinstitutional deletions’ means all data deleted by institutions which did not own the data). Administrators can also see and search for ‘hidden deletions’ (deletions performed in batch mode with a specific ‘hide’ option).

In the ‘Undelete’ screen you can preview the deleted level and its history in order to decide whether to undelete  the information. Already undeleted levels will display this icon .

Validation
Collections
Attachments
Import
Asynchronous requests
Marks
Merge
Undelete

Deleted after

Deleted before



















Username

Owner

Entry ID

Language

Deletion type

Entry ID	Level	Language	Term	Deletion date	Deleted by	Owner	
931866	LL	ro	-	15.7.2019 9:57	Constantin DINCA (Council)	Council	  
3580479	TL	pt	Montador de som	12.7.2019 14:21	Rui Filipe LOPES COSTA (Council)	Council	  
3580479	TL	pt	Montador de som	12.7.2019 12:10	Rui Filipe LOPES COSTA (Council)	Council	  
3580479	TL	pt	Montador de som	12.7.2019 12:08	Rui Filipe LOPES COSTA (Council)	Council	  
3580479	TL	pt	montador de som	12.7.2019 12:06	Rui Filipe LOPES COSTA (Council)	Council	  
3580479	TL	pt	Montador de som	12.7.2019 12:05	Rui Filipe LOPES COSTA (Council)	Council	  

IATE 1 deletions have been migrated and are also available – for information only – under a second tab in the ‘Undelete’ menu.

ist Validation Collections Attachments Import Asynchronous requests Marks Merge Undelete Batch deletion

IATE 2 IATE 1

Deleted after: 01.01.2019 Deleted before: 31.01.2019 Entry ID: Language: Not specified

Clear Search

Entry ID	Type	Language	Term	Deletion date	Deleted by	Owner
3578297	Delete Term Entry	lv	investiciju vērtšana	30.1.2019 10:52:19		
3578297	Delete Language Entry	lv	-	30.1.2019 10:52:19		
3579581	Delete Term Entry	en	fully automatic type weapon	30.1.2019 9:51:55		
3579581	Delete Term Entry	hu	automata rendszерű fegyver	30.1.2019 9:51:44		

## 15. CONSOLIDATION

If you find problems involving several languages or entries from different institutions, entries covering more than one concept or where the concept is badly defined, or duplicates, you may wish to start a consolidation operation.

This can be done:

- where only one or two languages or entries are concerned, by directly contacting the languages/institutions involved with your suggestions for change;
- where more than two languages or entries are concerned, by suggesting a consolidation project to the [terminology coordination service](#) of your institution; if you know how, you can prepare the project yourself, according to the procedures followed by your institution.

You should ensure your language section on the primary entry for each concept involved has been ‘cleaned up’ before involving any other players in consolidation.

Suggestions should be the result of careful scrutiny of entries, ensuring that entries for which merging (see [below](#)) or deletion is suggested refer to the same concept. Particular consideration should be given to the possibility that the terms used in certain languages may describe reality differently (e.g. ‘one term/one concept’ in one language may be subdivided into ‘two terms/two concepts’ in other languages, making it difficult for that language to follow requested merges).

### 15.1 How to select a primary entry

If there are two or more entries for the same concept, you should select one as the ‘primary’ entry (to be retained and improved), while all others are ‘secondary’ or ‘duplicate’ entries, which should ultimately be deleted. [Primary entries](#) that have been marked as such are identified by means of a star at LIL. It is usually terminology coordinators at central level who mark entries as primary during consolidation projects.

- First search thoroughly for entries which **cover the same concept** and examine their quality. To do this you should search for all spelling variants of all terms which might be

used to denote the concept (e.g. synonyms, ideally in all languages found on the entry, but at least in FR and EN).

- Decide whether potential duplicates really do denote the same concept by checking the domain code(s) and the information contained in the entry (definition, note, context, reference).
- Check other languages that you understand in the entries selected to see if there are signs of corruption (different concepts in the same entry) or other problems.
- Bear in mind that domain codes are not always reliable and a lack of definition/context may also mean the concept is unclear.

After having identified the ‘best candidates’, select the primary entry to be completed, using the following **criteria (in order of importance)**:

- 1) Overall coherence (one and the same concept for all languages).
- 2) Overall quality (amount of relevant information contained). Consider: collections, especially project collections, management field, definition, references and their reliability, reliability codes, context, usage notes, etc.
- 3) Number of languages present.
- 4) Ownership (if there are two equally good candidates belonging to different institutions, prefer your institution’s entry, as you can validate the changes you make).
- 5) Minimum content: the entry must have a correct domain code. If the domain code is missing or incorrect, correct it (see ‘[Domains](#)’ above).
- 6) EN must be present. If it is not, add an EN term with as much information as possible, or send a message to the functional mailbox of your institution’s [terminology coordination team](#) and/or the mailbox of your institution’s EN Terminology team before marking the entry as primary.
- 7) The entry should have an [anchor language](#) indicated and be updated in that language. This is usually EN (or FR), but could be LA (e.g. for animals, plants and other life forms) or another language (for country-specific concepts). If no language has been selected as anchor language, select one. If there is no reason for selecting another language, select EN. If in doubt, contact your institution’s [terminology coordination team](#).
- 8) There must be relevant references for at least the anchor language.

**If none of the entries fulfil the criteria**, choose the one which you consider to be the best, and make it as complete as possible.

**If all entries are corrupt** (i.e. confuse different concepts), it may be best to create a new entry. This applies particularly where there is a small group of closely related concepts (near synonyms) which have become confused. However, creating a new entry should be the last resort. Always build on an existing entry if possible.


### **Can there be more than one primary entry per concept?**

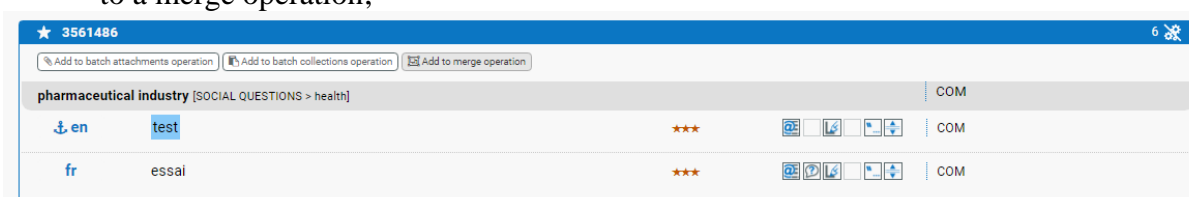
- No. There may be several primary entries for the same term, if it is used to denote different concepts (even where these are very close to each other).
- Where two entries for the same concept are both marked as primary (e.g. by different institutions working on projects in the same subject field), the institutions should agree which entry should retain the primary mark.

## 16. MERGING ENTRIES

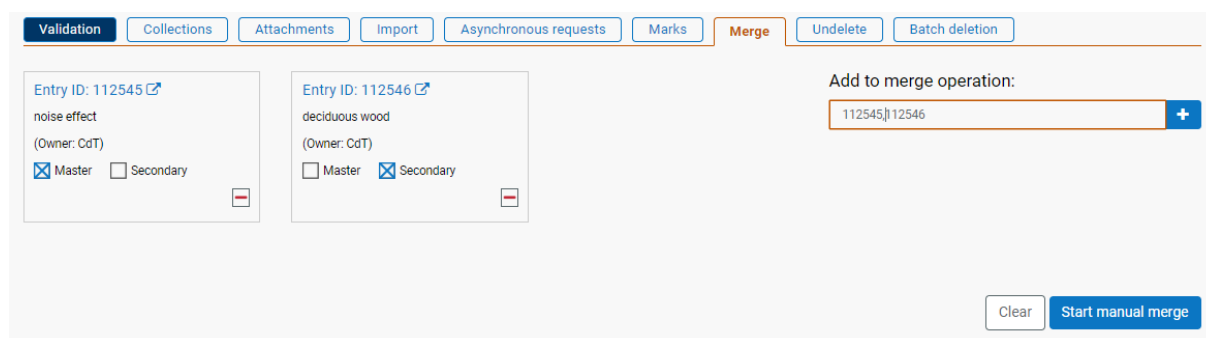
A merge module allows users with specific rights to merge the content of two or more entries into a single one. Two options are available, depending on the type of merge needed: a manual operation for selectively merging the content of two entries (one master and one secondary), where content is merged onto the master entry; and an automatic operation for a bulk merge of two to ten entries, where all the content is merged onto a newly created entry.


Users with specific rights can select two or more entries for merging from three different locations:

- from the results page, by clicking on the ‘Manage entry’ icon  and adding the entry to a merge operation;



- from the full entry view, by adding the entry to a merge operation (option in contextual menu or Quick edit panel at LIL);
- from the ‘Merge’ screen in the ‘Management’ menu, by entering the entry IDs.



In this screen you can store several entries for future merge operations. You can click on the  ‘Remove from selection’ button to remove an individual entry, or on the ‘Clear’ button to remove all entries.

### 16.1 Manual merge

This feature is restricted to users with the role of ‘administrator’, ‘terminologist+’ and ‘terminologist’. Users with the role of ‘terminologist+’ or ‘terminologist’ can only merge languages for which they have editing rights.

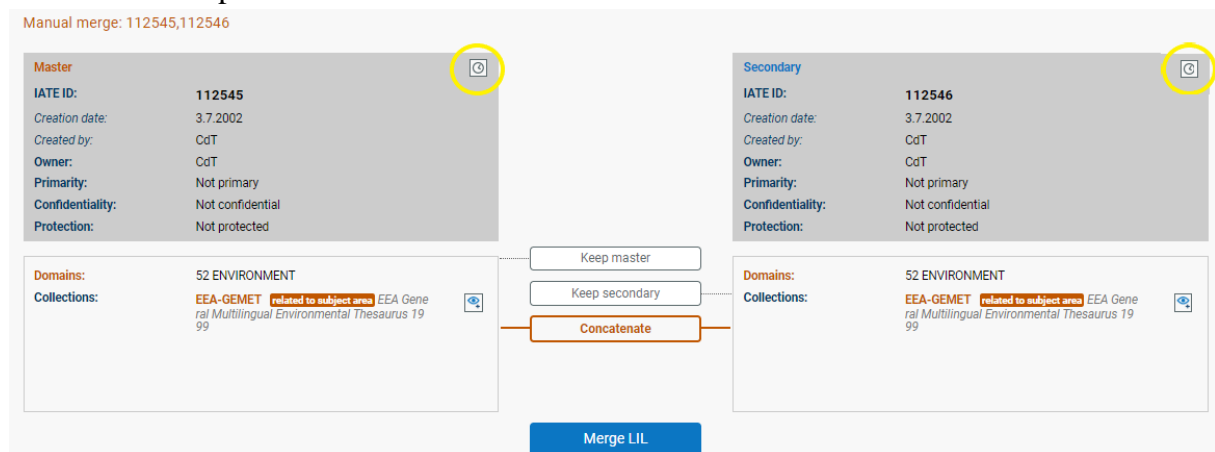
A manual merge operation allows you to consolidate duplicates and clean corrupt entries by transferring content from a secondary entry to a master entry. Entries with protected data can


only be selected for manual merge if the protection has been applied by your institution and you have the necessary permissions to work on those entries.

In the merge screen, select two of the entries as ‘Master’ and ‘Secondary’.

The operation works as follows:

- The master and secondary entries are both locked. The lock lasts 24 hours, or until removed manually.
- LIL: system information from the master is kept automatically.
- LIL: sensitive values (confidential, protected, primary) are taken from the master or secondary depending on the user selection (‘Keep master’ or ‘Keep secondary’).
- LIL: editable fields which are not sensitive can be concatenated, kept from the master or kept from the secondary. Concatenation (joining data from both entries) is the default option.



**NB:** As shown in the picture above, you can access the history of the entry from the merge screen by clicking on the history icon .

After the LIL has been merged, it is collapsed and a message indicates the time of the merge operation.


- LL: system information from the selected LL (master or secondary) is kept automatically.
- LL: sensitive values (protected, validation status including pre-IATE) are taken from the master or secondary depending on the user selection (‘Keep master’ or ‘Keep secondary’).
- LL: editable fields which are not sensitive can be concatenated, kept from the master or kept from the secondary. Keeping the LL from the master is the default option. When concatenating the LLs, the information concatenated in a single field will be numbered (1 for ‘from the master’, 2 for ‘from the secondary’). Multiple references will be inserted in order in multiple reference fields on the master entry.

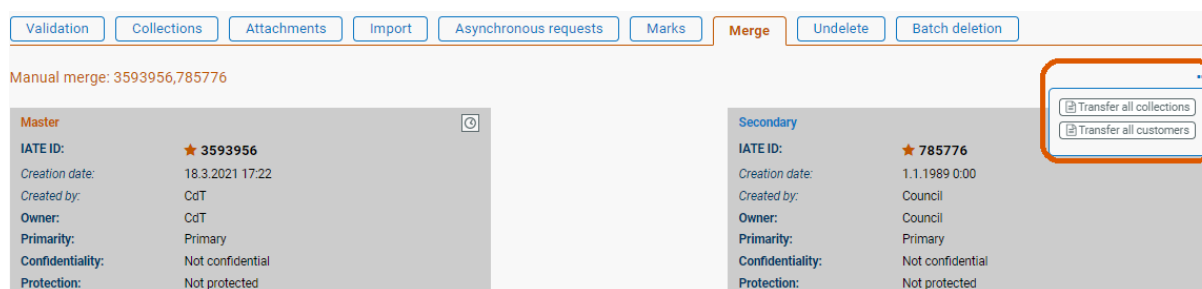


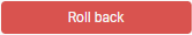
- TL: term levels from the master can be kept or deleted. TLs from the secondary can be inserted, ignored, or concatenated if the term matches a term in the master (exact match or close match – not case sensitive and disregarding spaces and dashes). When concatenating a TL, the system information from the master is kept, and sensitive values from the master prevail (protected, not validated). You can collapse the TLs during the merge operation to get a better view of the whole entry.

There is a single button for merging a language (LL and all its TLs, after selecting the desired options for each). When a language has been merged, the language code will be marked in green in the language navigation bar together with the merge date.

If an LL is present on the secondary, but not on the master, the default value will be ‘Keep secondary’, but you may decide to skip the merge for that particular language.

If you need to transfer all the collections (at LIL, LL and TL) or all the customers (TL) from the secondary to the master entry, you will find a dedicated button under the  button. This batch transfer of collections and customers does not trigger unvalidation.



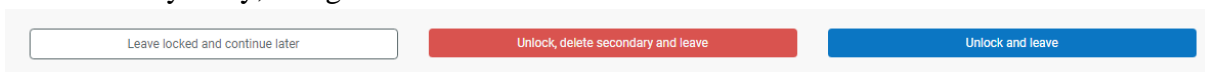
A rollback button  allows Administrators (but not Terminologists or Terminologists+) to reverse the merge operation at any time.

When you have completed the merge operation, the options available depend on your user rights. If you are a Terminologist or Terminologist+, you can unlock the entries and leave the screen.



Depending on the languages present in the entry and your user rights, you might then be able to delete the secondary entry manually.

Administrators can unlock the entries and leave the screen or unlock the entries and delete the secondary entry, using the red button.

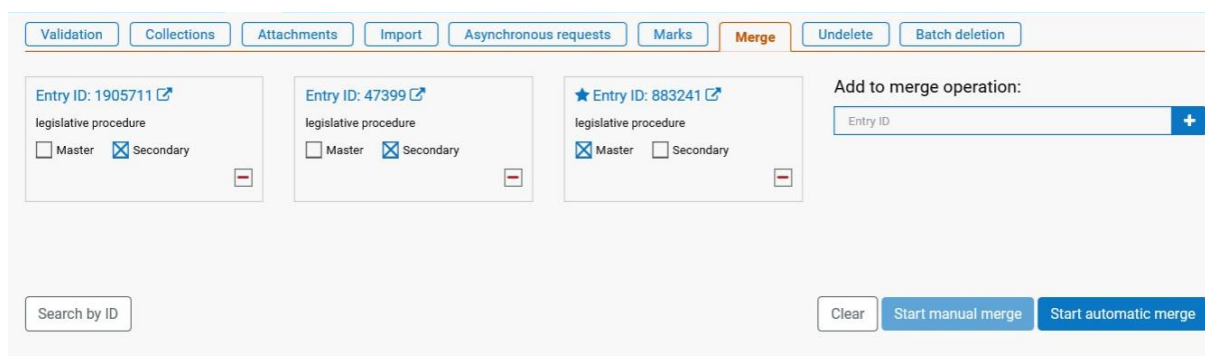


## 16.2 Automatic merge

An automatic merge operation allows you to consolidate from two to ten duplicates by merging all of them into a brand-new entry that you can clean up afterwards. All the merged entries (master and secondaries) are deleted automatically (if you have the necessary permissions).

This operation is available to Administrators and Terminologists+.

In the merge screen, select one of the entries as Master and the rest as Secondary.



In order to avoid polluting sensitive content, primary entries and entries marked as confidential at LIL, LL or TL cannot be included in an automatic merge operation. Entries with protected data can only be included if the protection has been applied by your institution and you have the necessary permissions to work on those entries.

The operation works as follows:

- The master and all the secondary entries are locked. The lock lasts 24 hours, or until removed manually.
- A preview of the new entry containing the merged data is displayed. You can check it and decide whether to execute the merge or discard it.



- The preview includes a warning of the entries that will be deleted or that cannot be deleted due to lack of permissions (for example, in the case of a protected master or secondary entry). If the character limit for a particular field is exceeded, the content is automatically truncated.




The data are merged as follows:

- LIL: data from all entries are concatenated in the new LIL, which will contain the admin info from the master entry.
- LIL confidential fields: if there are confidential fields in any of the entries, the corresponding field in the new entry will be confidential.
- LIL Lifecycle: if present in any of the entries, it is transferred to the new entry. If several values are present, the following order is applied: abandoned, historical, proposed.
- LIL Cross-references: if present in any of the entries, they are transferred to the new entry. In case of conflicting cross-references, only the first one is kept.
- LL: data from all entries are concatenated in the new LL, which will contain the admin info from the master entry, if that language was present in the master.
- LL pre-IATE: if an LL is marked as pre-IATE in any of the entries, this value is transferred to the new LL.
- LL confidential fields: if there are confidential fields in any of the LLs merged, the corresponding field in the new LL will be confidential.

- Concatenated LLs will be set to ‘not validated’. LLs inserted without modifications will retain the validation value they previously had.
  - TL: all TLs from all the entries will be inserted individually in the new entry (including duplicated terms). Each TL will retain the admin info from the original entry.
  - TL pre-IATE: if a TL is marked as pre-IATE in any of the entries, this value is transferred to the new TL.
  - TL confidential fields: if there are confidential fields in any of the TLs inserted, the corresponding field in the new TL will be confidential.
  - New TLs from the secondary entries will be ‘not validated’. TLs from the master entry will retain their original validation value.
- 
- A new mark (comment) is created in the new merged entry with the list of entries that were part of the automatic merge operation.

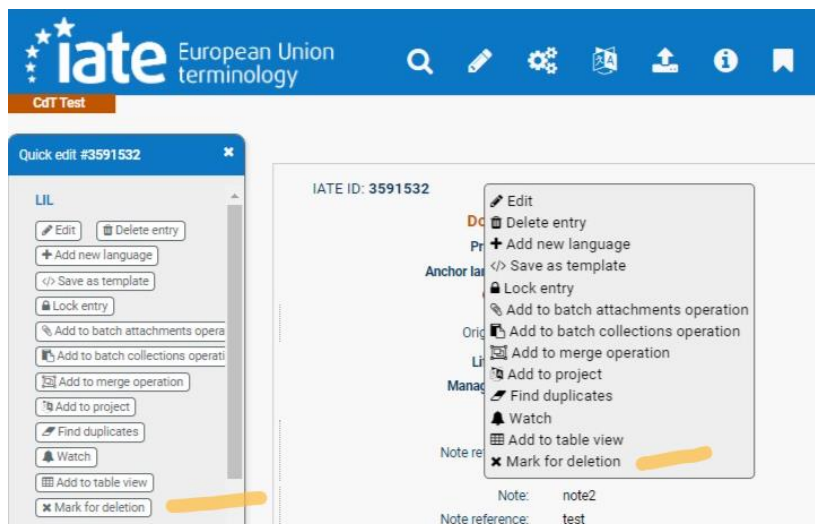
## **17. MARKS: FEEDBACK, TASKS AND COMMENTS**

Various types of marks can appear on an entry: feedback (from public users), comments (from internal users, without a recipient), and tasks (set by internal users and addressed to a recipient who is asked to perform an action, with a status: new, ongoing, done). You can append comments or tasks to any type of mark, thus creating threads, which can be archived by users with specific rights (see below). You can also convert a comment into a task, or vice versa.

- Marks can be accessed via the ‘Marks’ icon at LIL in full entry view. This icon changes according to the status of the mark(s) on the entry:  if there are no marks;  if there are new or ongoing tasks;  if all tasks have been completed (i.e. marked as ‘done’).

If a task has the type ‘for deletion’ and concerns the whole entry, a label will be visible in the full entry view at LIL to make users aware that deletion is suggested. If you have permissions to create tasks, you will be able to create a task with the type ‘for deletion’ via the contextual menu or side panel in full entry view. This task will be automatically addressed to the central division of the LIL owner with a standard comment.

Similarly, ‘for update’ tasks can be created at LL by clicking on ‘Mark for update’ in the contextual menu or side panel. These tasks are automatically addressed to the language division of the LL owner.



Marks can be modified as follows:


- Feedback cannot be changed (only the status can be changed by the recipient).
- Comments can be edited by their author and by Administrators, but only if there are no appended marks.
- Tasks can be edited by their author and by Administrators, but only if there are no appended marks or if their status is New. If the mark is created by a terminologist, the user's institution and division are pre-filled by default. If the user is an administrator, the institution and division fields are empty by default.

When editing the free text field, you can apply formatting (restricted to the standard options available in IATE text fields), use special characters, insert hyperlinks, and use the clipboard function.

Marks can be deleted (but once deleted they cannot be undeleted). Users with specific rights can delete marks as follows:

- Delete feedback and any item appended to it --> only by Administrators.
- Delete a comment with no items appended to it --> by author, users in the author's division, Administrators.
- Delete a task and any item appended to it --> by author, users in the author's division, Administrators, or users in the recipient's division if the mark has the status 'Deletable by recipients'.

If the mark to be deleted has marks appended to it, a warning will be displayed. If the deletion is confirmed, the mark and all marks appended to it will be deleted.

There is no automatic archiving of marks, but they can be archived manually. The archive icon  can be found on the main mark of a thread (the initial mark). When archiving a mark, the whole thread (including all appended marks) is archived. Archived marks can be consulted in full entry view ('Marks' icon) under the 'Archived marks' tab, and they can also be retrieved in the Marks monitoring screen by selecting 'Search in archived marks'. Archived marks cannot be modified or deleted.

If an entry containing active marks is deleted, the marks are kept in memory and are retrieved if the entry is undeleted.

There is a ‘Marks’ monitoring screen for easier follow-up by users with specific rights. It contains filters and links to the specific entries. The Marks monitoring screen enables you to retrieve marks meeting specific criteria (containing a specific text, addressed to a specific institution/division, with a specific type or status, with a specific creation date, or created by a specific user). The ‘Institution’ field is automatically set to your institution. The ‘Division’ field is also set to your division, unless you are an Administrator, in which case it is set to ‘Not specified’.

## 17.1 Feedback from external users

Only non-authenticated users (external users, and internal users who have not logged on) can submit ‘feedback’ via a form that can be opened from the full entry view.

The ‘Email’ and ‘Comment’ fields are mandatory. Users can optionally indicate whether the feedback relates to the whole entry or a specific language.

Central terminology services manage feedback via the ‘Marks’ monitoring screen. Feedback is labelled as such, and it is possible to update its status (‘New’, ‘Ongoing’, ‘Done’) and append comments or tasks to it. It is also possible to forward the feedback by email by clicking on the ‘Forward’ button. A comment is automatically appended to the feedback to record that it was forwarded on a specific date.

The only part of a feedback item that can be modified is its status.

## 17.2 Tasks

Tasks can be created by users with specific rights and assigned to an institution or division. You can indicate the type of task and whether it is related to a specific project or codecision file, and whether it can or cannot be deleted by the recipient.

The recipient of the task will be able to update the task status ('New', 'Ongoing', 'Done') and, if needed, forward the task by email using the [Forward by email](#) button.

It is possible to append comments or further tasks to a task.

## 17.3 Comments

Comments can be created by users with specific rights. They are not assigned to anyone and do not have a status. It is possible to append other comments or tasks to them.

# 18. WATCH MECHANISM

The watch mechanism enables you to 'follow' specific IATE content and be informed when it is modified or deleted. This feature is intended mainly for Administrators, so that they can monitor the evolution of collections or follow up the completion of specific entries, but it is also available to basic users, translators and terminologists who are interested in the evolution of particular terms or entries. Watch lists are user-specific.

You can watch whole entries, parts of entries and collections, and create lists of items to be monitored, by clicking on your username (top right) and selecting 'Watchlists'. The items in the lists are sorted by last change date of the level you are watching.



The screenshot shows a user interface for managing watchlists. At the top, there are navigation tabs: 'User profile', 'User preferences', 'Last entries', and 'Watchlists' (which is active). Below this, there are two sub-tabs: 'Watched entries' (active) and 'Watched collections'. The main content area displays a list of watchlists:

this is my new list	
new list	
second list	<input checked="" type="checkbox"/>
new watch list	

Below the list, it says 'Results 1 - 4 / 4'. There is a link 'Create new watchlist' and a form with the label 'Name of the new watchlist' and a '+' button.

### Watching entries

You can add entries to a watchlist either from the full entry view ('Watch' option in Quick edit panel, contextual menu and 'Watch' icon at LIL, LL and TL) or directly from the watchlist by inserting the list of IDs and indicating the level to be followed. You can watch a level individually or in cascading mode (including the levels below). The level watched, and whether it cascades or not, is recorded in a row in the table of watched entries.



When watching an individual level, an alert (orange bell icon) will be displayed if the level has been modified or deleted.

When watching in cascading mode, an alert will be displayed if the level or sublevels have been modified or deleted, or if a new sublevel has been created (a new LL or TL in the case of a cascading LIL, or a new TL in the case of a cascading LL).

New entries or levels can be added to an existing list at any time.



Figure: adding data to a watch list from the 'Watchlists' page by inserting a list of IDs.

Results 1 - 10 / 22

<input type="checkbox"/>	Entry ID	Level	Language	Term	Last modified on	Last modified by	
<input type="checkbox"/>	3576332	LIL	-	-	23.2.2022 10:08		
<input type="checkbox"/>	<del>3639276</del>	LL (cascading)	en	-	15.2.2022 23:02		
<input type="checkbox"/>	<del>3639276</del>	LL (cascading)	fr	-	14.12.2021 19:06		
<input type="checkbox"/>	<del>3648113</del>	LL (cascading)	en	-	11.5.2021 14:58		
<input type="checkbox"/>	<del>3648070</del>	LL (cascading)	en	-	6.5.2021 12:15		
<input type="checkbox"/>	<del>3648064</del>	LL (cascading)	en	-	29.4.2021 12:14		
<input type="checkbox"/>	<del>3648064</del>	LL (cascading)	fr	-	29.4.2021 10:56		
<input type="checkbox"/>	<del>3648062</del>	LL (cascading)	en	-	28.4.2021 11:52		
<input type="checkbox"/>	<del>3648063</del>	LL (cascading)	en	-	28.4.2021 11:39		
<input type="checkbox"/>	<del>3639278</del>	LL (cascading)	en	-	28.4.2021 10:21		

1 2 3 →

Results 1 - 10 / 22 Next →

Figure: detailed view of a watchlist with full pagination. An orange bell indicates that a level has been modified. Strikethrough indicates that a level has been deleted.

## Watching collections

You can search for a collection (LIL, LL or TL collection) and select it to be watched. In this case too, you can watch only the level to which the collection is attached (not cascading), or the sublevels as well (cascading).

Alerts will be displayed following the principle explained above.

You can mark the alerts as read both individually (prior selection) or in batch (   ).

When you see an alert, it might be useful to consult the History or the Preview of the entry or level that is available directly in the watchlist table.

<input type="checkbox"/>	Entry ID	Level	Language	Term	Last modified on	Last modified by	
<input type="checkbox"/>	139326	LL (cascading)	pt	-	11.9.2020 9:58	[Redacted]	
<input type="checkbox"/>	930407	TL	en	non-legislative act	4.9.2020 15:41	[Redacted]	
<input type="checkbox"/>	1085991	TL	en	lookup	4.9.2020 15:40	[Redacted]	

## Filtering watched items

In the list of watched items (either by collection or by list of entries), you can filter by user name and user institution by hovering over this information in the column 'Last modified by'. When you apply a filter, a search box will also be displayed where you will have the possibility to change your filter values or to clear the filtering altogether.

## Unwatching entries/collections





















It is possible to unwatch a collection by removing the list, and to unwatch entries by removing individual rows or the whole list.



Watched entries Watched collections View entries in list

Watchlist: test number

Results 1 - 10 / 24

<input type="checkbox"/>	Entry ID	Level	Language	Term	Last modified on	Last modified by	
<input type="checkbox"/>	▲ 3639276	LIL (cascading)	-	-	23.2.2022 9:59		 
<input type="checkbox"/>	⌘ 3648113	LIL (cascading)	-	-	11.5.2021 14:58		 
<input type="checkbox"/>	⌘ 3648070	LIL (cascading)	-	-	6.5.2021 12:15		 
<input type="checkbox"/>	⌘ 3648064	LIL (cascading)	-	-	29.4.2021 12:16		 
<input type="checkbox"/>	⌘ 3648062	LIL (cascading)	-	-	28.4.2021 11:52		 
<input type="checkbox"/>	⌘ 3648063	LIL (cascading)	-	-	28.4.2021 11:47		 
<input type="checkbox"/>	⌘ 3639278	LIL (cascading)	-	-	28.4.2021 10:21		 
<input type="checkbox"/>	⌘ 903624	LIL (cascading)	-	-	7.4.2021 11:17		 
<input type="checkbox"/>	⌘ 3639274	LIL (cascading)	-	-	7.4.2021 8:56		 
<input type="checkbox"/>	⌘ 930074	LIL (cascading)	-	-	6.10.2020 16:19		 

1 2 3 →

Results 1 - 10 / 24 Next →

Mark all as read Mark selected as read Stop watching selected rows Add to table view

You can also unwatch specific entries by selecting the option or icon directly in full entry view.

To avoid overloading the system, this functionality is asynchronous. This means that you may need to refresh your screen to see the latest alerts or watch labels (but in principle an automatic reload is triggered and the watch transactions are processed in near real-time).

## 19. ENTRIES ‘OWNED’ BY OTHER INSTITUTIONS

### 19.1 Interinstitutional update

Interinstitutional update was introduced in 2012: it allows users to modify data on an entry ‘owned’ by another institution. Data changed at LL and TL still have to be validated by the institution which technically ‘owns’ them.

The following basic rules are meant as guidelines for interinstitutional updating, thereby avoiding potential conflicts and validation backlogs. Validation backlogs should be avoided to ensure that all new or modified data, in particular data added by institutions other than your own, become visible for the public. The practical implementation should be agreed at language community level.

#### Generic advice

- Follow the rules of common courtesy at all times.
- Consider establishing rules for your language community.
- Stick to languages you know well enough.
- In delicate or controversial cases, consider asking a colleague from the other institution to perform the changes rather than doing it yourself.
- Unless changes are obvious, add rather than replace.
- If you can’t reach a consensus, reflect both points of view.



- Validation queues should be monitored and dealt with regularly.

### Specific rules

- When updating entries belonging to other institutions, terminologists should refrain from replacing existing valid references with what they consider to be better references; it is preferable to add your reference as a second or third reference. The person validating can then decide whether it's worth keeping one or the other, or both. However, terminologists should not hesitate to replace a reference which is clearly wrong (e.g. does not contain the term, definition or context referred to), defective (e.g. broken hyperlink), obsolete (e.g. proposal replaced by adopted act), obviously unreliable or so concise that the source cannot be identified.
- Before making substantive changes to a primary entry that is or has been part of a consolidation project (check the various 'Management' fields), you should contact the institution which owns the entry or launched the project, as the case may be.
- When downgrading a term belonging to another institution, a comment should be added explaining the reasons for doing so. If the term has been downgraded because a better primary entry exists, a comment should be added indicating the number of the primary entry.
- Before deleting a whole TL which has been worked on by another institution, please check with/contact the colleagues from the other institution who worked on it.
- The reason for some modifications may not be obvious, and there will inevitably be differences of opinion from time to time. It should therefore be possible to explain the reason for a modification. Pending the introduction of a feature which will make it possible to add comments to the 'history', the reason for a particular modification can be explained using one of the following workarounds:
  - Address a comment or send an email to the language unit/entity responsible for validating the entry.
  - After modifying an entry, send an email to the language unit/entity who entered the data you have modified, explaining the change you have made and indicating your willingness to discuss the issue with them should they disagree.
  - Where there is clearly a difference of opinion between institutions, send an email to the other institution before making a modification, with a view to discussing the issue and reaching a consensus. If no consensus can be reached, modify the entry so as to explain both points of view.

## 19.2 Interinstitutional delete

**General rule:** if you delete a whole entry or part of it (depending on your IATE user rights), you must ensure there is no loss of relevant information: any relevant content present in the (part of the) entry to be deleted should be transferred elsewhere (another entry, lookup form, notes on the same entry, etc.).

### Interinstitutional delete checklist

Before deleting (part of) an entry belonging to another institution, make sure that:

- it is a clear duplicate (i.e. it must clearly refer to the same concept as the primary) or has no added value;
- it is not part of an ongoing project (check management field, collections, management comments);
- it is not a primary entry.

If the deletion follows a merge, make sure that:

- the LIL has been concatenated to ensure that, for instance, no collection-related information is lost;
- the primary entry is then cleaned up (if necessary, with the help of native speakers of the languages concerned).

### 19.3 Change of ownership

Users with specific rights can change the ownership of a specific LIL, LL or TL: double-click the ‘Owner’ field in order to select the new owner from the drop-down list. Then indicate whether the change applies only to the current level or if it should cascade to lower levels. Don’t forget to confirm the change.

★ IATE ID 2243075

**Domain:** legislation [LAW > sources and branches of the law > source of law]  
legislative procedure [POLITICS > parliamentary proceedings]  
special legislative procedure [EUROPEAN UNION > European Union law > EU law > drafting of EU law]

**Priority:** Primary

**Anchor language:** fr

**Origins:** (EU) European Union

**Lifecycle:**

**Management:** [Council] - Lisbon 100-09 (Treaties)

**Notes:**

**Cross-references:**  
Cross-reference: current entry is antonym of 930970 ordinary legislative procedure ↗

**Inbound cross-references:**  
Cross-reference: 883241 legislative procedure is broader than current entry

**Related projects:** [Load TPM info]

**Collections:**  
COM-EU related to subject area General European Union Terminology  
Council-DA-EU\_TERMER related to subject area EU jargon  
Council-DA-JURA related to subject area Law  
EU-GA-FOCAL\_EXCL related to project management Excluded from Focal Irish project

**Attachments:**

**Confidentiality:** Not confidential

**Entry status:** not raw

**Protection:** not protected

**Owner:** CdT

**Cascade ownership changes:** Change ownership of sublevels too

**Change validation status:** Set all LL and TL as pre-IATE

If the ownership of a non-validated LL or TL is changed, the non-validated data will move to the validation cycle of the new owner institution. It is also possible to batch-change the validation status of the levels concerned when changing ownership.

If the ownership is changed at LL, you also have the possibility to keep the current validation status (provided that you have the necessary permissions).

## 20. COLLECTIONS MANAGEMENT SCREEN

In the 'Collections' management tab in the 'Management' menu, you can carry out the following operations:

- Search for collections by ID, name, description, language, institution, type, creation date, and confidentiality.
- Modify existing collections (change name, description and type).
- See how many and which entries are included in a collection.
- Open the collection content in 'Search by collection' (using the 'View' button) or in 'Advanced search'.
- Obtain statistics on the specific collection (number of entries/primary entries/terms/definitions/notes/contexts) by clicking on 'Show more' and then on 'Statistics'.
- See and copy the permanent link to a collection.
- Delete an existing collection from the database (only possible if no entries are linked to it).
- Create a new collection.
- Batch-link a collection to a list of entries (the system verifies that the selected entries exist).
- Batch-unlink a collection from a list of entries.

The screenshot displays the 'Collections' management interface. At the top, there is a navigation bar with buttons for 'Validation', 'Collections', 'Attachments', 'Import', 'Asynchronous requests', 'Marks', 'Table view', 'Merge', 'Undelete', and 'Batch deletion'. Below this, there are several search filters: 'ID', 'Name', 'Description', 'Language' (set to 'Spanish'), 'Institution' (set to 'Consilium'), 'Type' (set to 'Not specified'), 'Created after', 'Created before', and 'Confidentiality' (set to 'Not confidential'). There is also a 'Delay (Export only)' section with a checkbox for 'Execute after core hours'. At the bottom of the filter section, there are 'Clear', 'Export', and 'Search' buttons. Below the filters, there is a 'Sort by' section with options for 'Creation date', 'ID', 'Name', 'Type', 'Ascending', and 'Descending'. A 'Search entries by collections' button is also present. The main area shows a list of collections, each with a trash icon, a collection ID, a name, a description, and a 'View' button. The collections listed are: 'Consilium-ES-Peces' (related to subject area 'Fish names'), 'Consilium-ES-CONV' (related to subject area), 'Consilium-ES-POLMIL' (related to subject area), and 'Consilium-ES-RC' (related to subject area). At the bottom right, there are buttons for '+ Add new collection' and 'Start batch operation'.

You can also search for a set of collections and obtain a list of the entries belonging to all those collections by clicking on 'Search entries by collection' (a results page will open in a separate tab).

The screenshot shows the results of a search for entries by collection. It features a 'Sort by' section with options for 'Creation date', 'ID', 'Name', 'Type', 'Ascending', and 'Descending'. A 'Search entries by collections' button is visible. The results are displayed as a list of entries, each with a trash icon, a collection ID, a name, a description, and a 'View' button. The entries listed are: 'COM-Industrial emissions' (related to subject area 'L 2010/75 integrated pollution prevention/control'), 'COM-Greenhouse emissions' (related to subject area 'Greenhouse emissions monitoring/reporting'), and 'COM-Vehicle Emissions' (related to subject area 'UNECE standards & EU legisl. on vehicle emissions').

You can export a list of all collections or of a set of collections following a collections search from the expanded search. By default, the export is launched after core hours. The export file contains the main metadata on the collections, and is retrieved from the ‘Asynchronous requests’ tab.

ID	Name	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>
Language	Institution	Type
<input type="text" value="Not specified"/>	<input type="text" value="Not specified"/>	<input type="text" value="Not specified"/>
Created after	Created before	Confidentiality
<input type="text"/>	<input type="text"/>	<input type="text" value="Not specified"/>
Delay (Export only)		
<input type="checkbox"/> Execute after core hours		
<input type="button" value="Clear"/> <input type="button" value="Export"/> <input type="button" value="Search"/>		

More information on how to manage collections can be found in section 12.1.16 Collections.

## 21. ATTACHMENTS MANAGEMENT SCREEN

On the ‘Attachments’ management tab in the ‘Management’ menu, you can carry out the following operations:





















- Search for attachments: filename, note, creation date, modification date.
- Modify existing attachments (change file, filename, note and confidentiality value).
- Delete an existing attachment from the database (the system checks whether the attachment is linked to other entries, and if so an alert is displayed).
- Upload a new attachment to the database.
- Batch-link an attachment to a list of entries (the system verifies that the selected entries exist).
- Batch-unlink an attachment from a list of entries.

Validation Collections **Attachments** Import Asynchronous requests Marks Merge Undelete Batch deletion

Filename Attachment note

Created after Created before Changed after Changed before

← Clear Search

	<b>F1_1539.png</b> Last modification: 8.9.2020 Entries in which this attachment is used: 2 [View] [Expand] Kart runderdelen	  
	<b>GrammarInfo.PNG</b> Last modification: 8.9.2020 Entries in which this attachment is used: 1 [View] [Expand]	  
	<b>Ombudsman award</b> Last modification: 8.9.2020 Entries in which this attachment is used: 4 [View] [Expand]	  
	<b>CONFIDENTIAL MEPs names in BG.xlsx</b> Last modification: 8.9.2020 Entries in which this attachment is used: 50 [View] [Expand]	  
	<b>wind pump.PNG</b> Last modification: 8.9.2020 Entries in which this attachment is used: 4 [View] [Expand]	  

Results 1-5 / 912 Next →

Upload File (click or Drag & Drop)  
Maximum size allowed: 5 MB

Start batch operation

More information on how to manage attachments can be found in section 12.1.18 Attachments.

## 22. ADVANCED SEARCH (QUERY BUILDER)

Users with specific rights can run advanced searches combining different criteria and operators, with the option of displaying, counting or exporting the results for further analysis and data management. The last 10 advanced searches are saved automatically under the ‘Last queries’ button (queries saved in the database and associated to your user profile).

Using the advanced search, you can:

- select a specific IATE data structure field and a related parameter (number, drop-down value, text, etc.)
- add additional criteria by adding rules (‘Add rule’ button)
- add or clone a group of criteria with a different general operator (AND/OR)
- sort the inserted criteria differently using the drag and drop arrows
- delete inserted criteria (using the ‘Delete rule’ or ‘Delete group’ buttons)

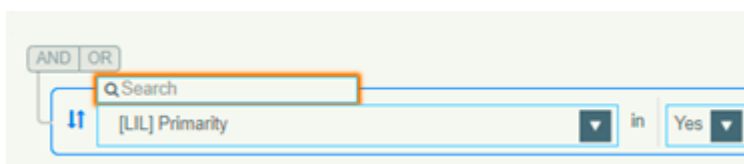
- obtain full entries in your selected display languages (default) or only strict results matching your criteria (e.g. only terms with a specific reliability value, but not other synonyms if they don't match the reliability value selected).

The parameters have the following meanings:

- IN: means one of the inserted values (OR)
- NOT IN: means that none of the inserted values are present (AND)
- ALL: means all the inserted values (AND)
- ONLY: means EXCLUSIVELY the inserted value
- Textual fields: include the same matching options as in the standard search
- Date fields: include different combinations for specific dates or date ranges
- 'is empty' in textual fields also includes fields containing '---', which is the convention used for empty mandatory fields migrated from IATE 1
- 'is not empty' in textual fields excludes fields containing '---'

All fields from the IATE data structure (including the main system fields: creation/modification/validation) are available except for the following: 'Origin note' and 'Customer note'.

To quickly find the field you are looking for, hover your mouse over the field box. You will then see a search box where you can type keywords. To see all available fields, expand the list by clicking on the arrow.



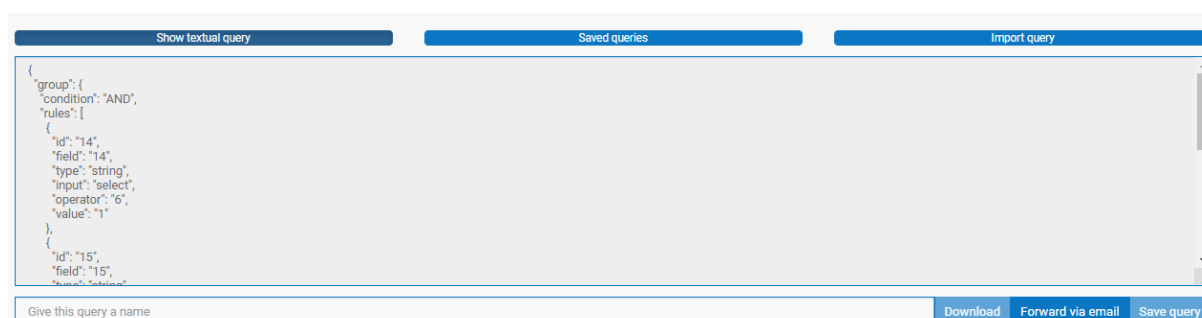
The language selection works as follows:

- **Has language (LIL)** means that the entry contains (operators: IN, ALL, ONLY) or does not contain (operator: NOT IN) that language (e.g. the rule '[LIL] Has language – not in – Bulgarian' will retrieve entries which do not contain Bulgarian).

- **Belongs to language** (LL or TL) means that the criteria for a specific LL or TL field or group of fields belong to a particular language (e.g. a specific term reference in French TLs).
- **Show results in** means that the results matching the criteria of the search will only be displayed or exported for the selected languages (which must of course exist on the entries found).
- For these three features, you have the possibility to select all EU languages at once.

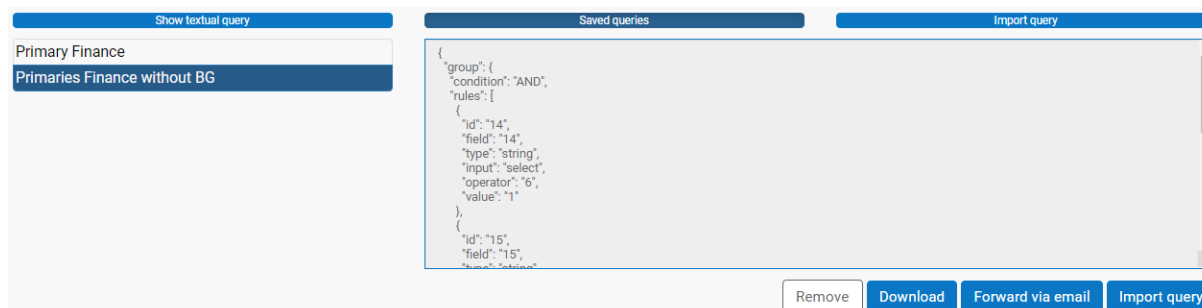
It is also possible to select ‘Number of languages’ (LIL) and search for entries with a concrete number of languages or within a range.

Users with technical knowledge can also consult the textual query they have built with the different rules by clicking on the ‘Show textual query’ option.



It enables them to:

- **Download** the query as a text file;
- **Forward** the query **via email**;
- **Save** the **query** with a specific name in order to retrieve it at a later stage under the ‘Saved queries’ or to forward it by email, as mentioned above.



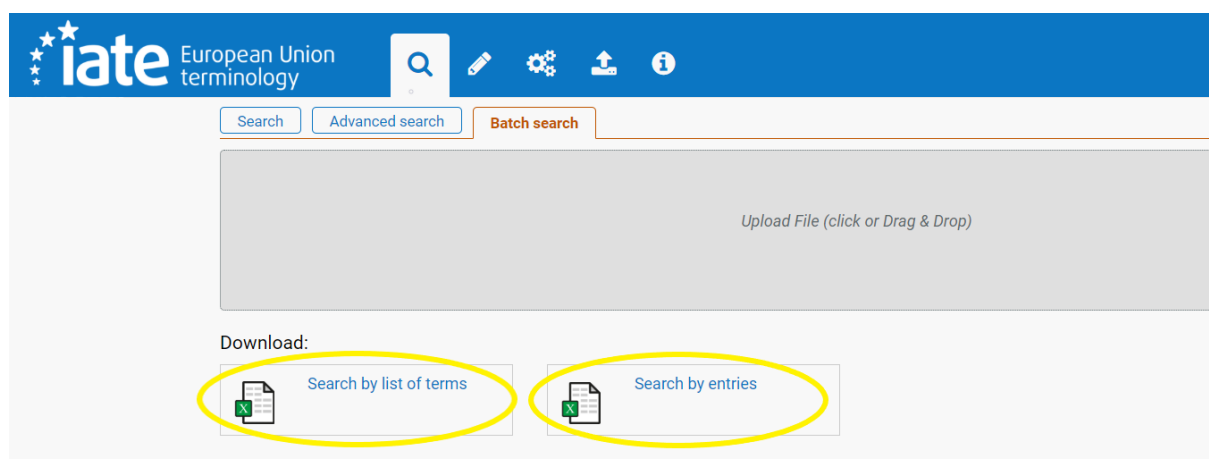
You can also import queries that you have prepared outside the ‘Advanced search/export’ screen, by copying the query into the ‘Import query’ box and clicking on the ‘Import query’ button. The imported query is then transformed into the selected criteria/operators/parameters in the top part of the screen.

Once your query is ready, you can of course launch the search, but it is also possible to request a count of results (i.e. count the number of entries) and to export the results in various output formats, as described in section 24 Export IATE data in Excel, TBX and SDLTB.

More detailed information about ‘Advanced search’ and specific examples is available in [Annex III](#).

## 23. BATCH SEARCH

Users with specific permissions can search for a set of entries by uploading a list of entry IDs or a list of terms. To run a search by a **list of entries IDs**, first download the template (.xlsx) available in the 'Batch search' screen and enter the entry IDs in the first column. You can also filter for language and term to restrict the search (optional).



Once you have uploaded the Excel file, you can set the following options:

1. Type: select 'search by entries' from the dropdown list.
2. Request name: by default, IATE fills in the name of the file you uploaded, but you can change it.
3. Output format: choose between .xls (default), .sdlbtb, .sdlbtb light and .tbx.
4. Execute after core hours  Execute after core hours: as this is a resource-intensive operation, which may overload the system, you are strongly recommended to execute it 'after core hours', in which case it will be executed after 10.00 p.m.
5. Export all fields: if you choose Excel as output format, you can decide whether to export all fields or only a specific set of fields, which can be selected from the list.

The operation is launched in asynchronous mode. You can follow the status of the request and the results in the 'Asynchronous requests' screen (in the 'Management' menu).

There is no technical limit on the number of entries that can be included in the Excel file for a batch search, but the recommendation is not to exceed 500 in order not to overload the system. The output file can contain up to 100 000 entries for Administrators and 5 000 entries for other internal users.




The second option to run a batch search is by a **list of terms**. First download the template, enter your list of terms (one per line), and upload it to IATE, then select the type of batch search, the **source language** of the terms and the **matching type**. The rest of the options are as described above, including the recommendations on the length of the list.

NB: unlike in the standard search, the default matching type is *Exact match*. Matching options *Any word* and *Regular expression* are not available in Batch search.

**Batch search report:** when you run a batch search by list of terms, you will get a detailed report as follows:

- Exported matched entries with the selected fields (Export tab)
- Summary of matching entries: list of IATE matches per term and list of matching IDs (Report tab)
- Details of the language coverage for each matching entry: list of EU languages with an X for the languages present in the matching entries (Languages tab)

Should you wish an exported file with clickable IDs pointing to the specific full entry view, don't forget to select the option  **Export IATE ID as link** before launching your request.

## 24. EXPORT IATE DATA IN EXCEL, TBX AND SDLTB

You can export search results in Excel format for a more detailed analysis and global overview. Other available output formats are TBX and SDLTB (including light and mini versions with fewer fields), which enable the use of a specific dataset in CAT tools.

You can export the results of a standard search (only the queried languages displayed in the results page are exported) or an advanced search (with the option to choose which languages to view and export). The standard export limit is set to 5 000 entries, while Administrators can run bigger exports (up to 100 000 entries). Please note that big exports should be executed after core hours (default option) in order to minimise the impact on the performance of the system. The exported file is available to download for seven days.

If you choose **Excel** as the output format, you can choose whether to export all fields in the IATE data structure (including technical fields, which are needed for batch update operations, as explained in section 25 Batch update of existing content (only Administrators)) or only a specific set of fields which you can select from the list. You can also choose whether to export the IATE ID as a clickable URL leading to the full entry view or as plain text (default option). Please be aware that the size of large export files could increase significantly when exporting the IATE ID as a URL. The last selected parameters are saved in the export model and can be reused for subsequent export requests across searches and sessions (please note that this is saved in the local storage of the browser and may be reset if you clear your browser cache or if a new version of IATE is released).

You can also select a simplified Excel version (**XLS light**) with a different layout (one row per entry) and fewer metadata: Entry ID (as hyperlink), Domains (showing only the root domain(s) concatenated in a single cell, separated by ‘;’), Full domains (containing the domain path), Primary, Lifecycle, Term (concatenated in a single cell if several terms for the language, separated by ‘|’), Reliability, Evaluation, Definition. The languages exported are the ones selected in the initial search.

If you choose **TBX** or **SDLTB full**, the following predefined set of fields is exported: entry ID, Domain, Primary, Language code, Definition, Language level note, Term, Term type, Evaluation, Reliability, Term reference, Term note, Institution TL, pre-IATE TL.

**SDLTB light** includes the following predefined set of fields: entry ID, Domain, Primary, Language code, Term, Term type, Evaluation, Reliability, Term reference, Institution TL.

**SDLTB mini** offers an even more restricted set of fields: entry ID (with hyperlink), Domain, Origin, Language code, Term, Evaluation.

The exported file can be retrieved in the ‘Asynchronous requests’ tab in the ‘Management’ menu, where you can monitor the status of the export, download the file once it is ready, and view the export criteria selected (for advanced searches, you can find the code for the query here; you can import this into the ‘Advanced search’ screen to repeat the query).

Please note that HTML-encoded data (bold, italics, subscript, underscript, small font and URLs) are exported with the HTML code. For the time being, IATE accepts different HTML tags sent by different browsers (i.e. <b> and <strong> for bold, and <i> and <em> for italics).

If you are running an export to work on the data and submit a batch update, you should export all fields, including technical ones. Subdomains are exported with their full path and it is

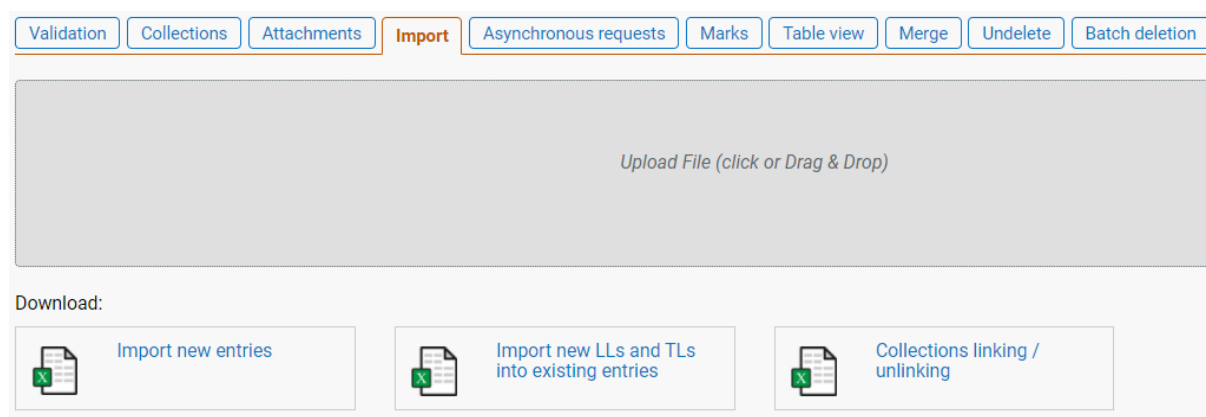
strongly advised to follow this pattern in imports. CJEU domains are always introduced with ‘CJEU’ to avoid any overlapping with EuroVoc domains.

A ‘Templates repository’ tab is available in the ‘Information’ menu. It contains templates for the customised exports in SDLTB and TBX.

## 25. IMPORT NEW ENTRIES (ONLY ADMINISTRATORS)

Users with specific rights can import new entries in batch from an Excel file using the template available in the ‘Import’ tab on the ‘Management’ menu. These templates are also available in the ‘Templates repository’ tab on the ‘Information’ menu.

**NB: Imported files cannot be bigger than 4 MB.**



The Excel file has a column for each field of an entry, and a separate row for each TL. However, entry-specific information (‘Domain’, ‘Origin’, ‘Lifecycle’, etc.) just needs to be encoded in the first row for each entry (there is no need to repeat the information in all rows relating to the entry). Mandatory fields (‘Domain’, ‘Language code’, ‘Term’, ‘Term reference’, ‘Reliability’, ‘Term type’) must be completed. Rows belonging to the same entry should be given the same identifier (a common ‘e ID’, for example, 1, 2, 3, etc.) so that they can be grouped together. Please note that any hidden or filtered rows will be ignored and will not be processed. Hidden columns will, however, be taken into account.

The import template can be used to import not only textual content data but also metadata such as protection, primary, confidentiality, validation status (for instance: pre-IATE, not validated or validated), etc. Regarding subdomains, it is mandatory to include the full domain path as indicated in the import template sample so that duplicated subdomains can be correctly imported. Example of domain path: LAW|rights and freedoms|human rights or CJEU|LAW|Civil law.

To import the data, drag the Excel file and drop it on the import field, or click on the import field to browse and select the Excel file. Assign a project name (the default will be the file name). Under ‘Type’, select ‘Import new entries’. Click on the ‘Import’ button.

Validation Collections Attachments **Import** Asynchronous requests Marks Table view Merge Undelete Batch deletion


Filename:


\* Request name:


Type:

Execute after core hours

Download:

 [Import new entries](#)

 [Import new LLs and TLs into existing entries](#)

 [Collections linking / unlinking](#)

The import operation is launched in asynchronous mode to avoid timeouts. It is recommended that you run import operations after core hours (default option) in order to minimise the impact on the performance of the system. You can follow the status of the request and the results in the ‘Asynchronous requests’ tab on the ‘Management’ menu, where all entries from the Excel file are displayed with their Excel ID and the new IATE ID. In the event of errors, you can easily identify the failed entries for further analysis. A list of the newly created IDs can be retrieved in text format, or viewed in a results page.

Validation Collections Attachments Import **Asynchronous requests** Marks Merge Undelete

**Template\_ImportNewEntries\_IATE2.xls** 16.7.2019

**Import results**

Excel ID: 2 <input checked="" type="radio"/> Entry ID: 3580605	Excel ID: 1 <input checked="" type="radio"/> Entry ID: 3580606
---	---

Users with interinstitutional administrator permissions can also import new entries with a specific owner at LIL, LL and TL (‘on behalf of’) and with specific admin info (creation date, created by, last modification date, last modified by, validation date, validated by).

## 26. IMPORT NEW LLS AND TLS INTO EXISTING ENTRIES (ONLY ADMINISTRATORS)

Users with specific rights can add new LLS and Tls to existing entries in batch from an Excel file using the template available on the 'Import' tab of the 'Management' menu.

**NB: Imported files cannot be bigger than 4 MB.**

Validation Collections Attachments **Import** Asynchronous requests Marks Table view Merge Undelete Batch deletion

Upload File (click or Drag & Drop)

Download:

Import new entries Import new LLS and Tls into existing entries Collections linking / unlinking

The Excel file has a column for each field at LL and TL, and a separate row for each TL. Mandatory fields ('Language code', 'Term', 'Term reference', 'Reliability', 'Term type') must be completed. The existing IATE ID should be inserted. Please note that any hidden or filtered rows will be ignored and will not be processed. Hidden columns will, however, be taken into account.

The import template can be used to import not only textual content data but also metadata such as protection at LL and TL, confidentiality of LL and TL fields, validation status (for instance: pre-IATE, not validated or validated), etc.

To import the data, drag the Excel file and drop it on the import field, or click on the import field to browse and select the Excel file. Assign a project name (the default will be the file name). Under 'Type', select 'Import new LLS and Tls into existing entries', then click on the 'Import' button.

Validation Collections Attachments **Import** Asynchronous requests Marks Table view Merge Undelete Batch deletion

Filename:  
Update-legal-terms.xls

Request name:  
Update-legal-terms.xls

Execute after core hours

Type:  
Import new LLS and Tls into existing entries  
Batch update of existing entries  
Collections linking / unlinking  
Import new entries  
Import new LLS and Tls into existing entries

Download:

Import new entries Import new LLS and Tls into existing entries Collections linking / unlinking

The import operation is launched in asynchronous mode to avoid timeouts. It is recommended that you run import operations after core hours (default option) in order to minimise the impact on the performance of the system. You can follow the status of the request and the results in the ‘Asynchronous requests’ tab of the ‘Management’ menu, where all entries from the Excel file are displayed with their IATE ID. In the event of errors, you can easily identify the failed entries for further analysis.

Permissions apply, which means that if you do not have specific permissions to modify the entry, the relevant LL and TL will not be imported (a ‘Forbidden’ label will be displayed in the results).

Users with interinstitutional administrator permissions can also import new LLs and TLs with a specific owner at LL and TL (‘on behalf of’) and with specific admin info (creation date, created by, last modification date, last modified by, validation date, validated by).

## 27. BATCH UPDATE OF EXISTING CONTENT (ONLY ADMINISTRATORS)

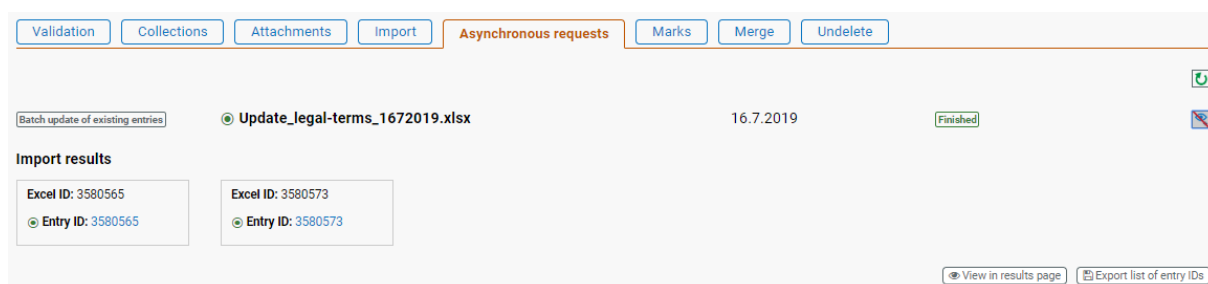
Users with specific rights can update existing IATE content in batch mode as follows:

- ✓ Run an export following a standard search or an advanced search (query builder). All fields should be exported (including the technical fields).
- ✓ Retrieve the exported data from the ‘Asynchronous requests’ tab of the ‘Management’ menu and modify the data off-line (you can modify, remove or add content, including the validation status at LL and TL).
- ✓ Load the updated Excel file for batch update on the ‘Import’ screen.

**NB: Imported files cannot be bigger than 4 MB.**

The screenshot shows the 'Import' tab selected in a navigation menu. Below the menu, there are several input fields and buttons. The 'Filename' field contains 'Export\_for\_batch\_update\_SK.xlsx'. The 'Request name' field also contains 'Export\_for\_batch\_update\_SK.xlsx'. The 'Type' dropdown menu is set to 'Batch update of existing entries'. There is a checkbox for 'Execute after core hours' and a 'Clear' button. At the bottom right, there is an 'Import' button. Below the main form, there is a 'Download:' section with three options: 'Import new entries', 'Import new LLs and TLs into existing entries', and 'Collections linking / unlinking'.

- ✓ View the results of batch operations on the ‘Asynchronous requests’ screen.



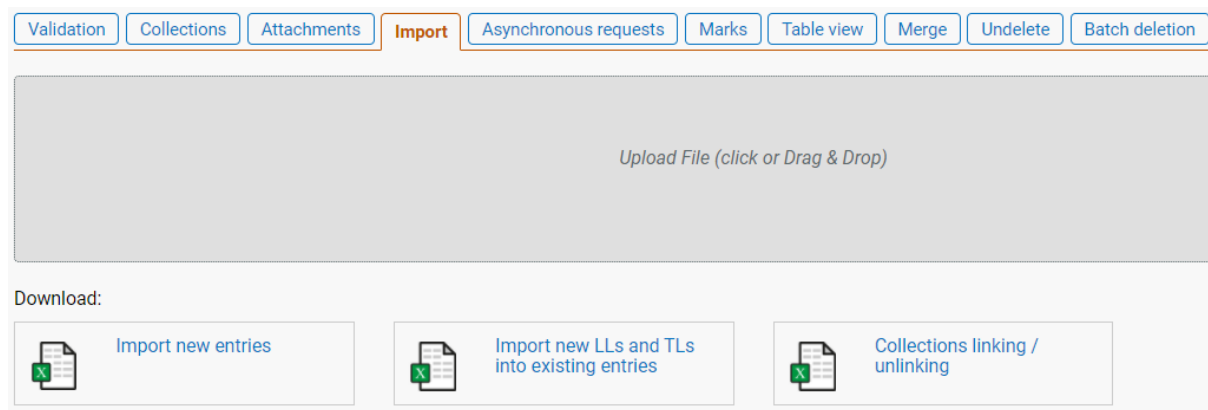
NB: technical columns should not be altered. New LILs, LLs and TLs cannot be added via this procedure.

Permissions apply, which means that if you do not have specific permissions to modify a specific field, the modification will be skipped and the entry marked as failed (a ‘Forbidden’ label will be displayed in the results).

It is recommended that you run batch update operations after core hours (default option) in order to minimise the impact on the performance of the system.

## 28. IMPORT FILE FOR BATCH LINKING OR UNLINKING OF COLLECTIONS (ADMINISTRATORS ONLY)

Users with specific rights can link and/or unlink collections at LIL, LL or TL in batch, using the Excel template available on the ‘Import’ tab of the ‘Management’ menu.



In the Excel file, the user can indicate, using a separate row for each operation:

- the relevant IATE ID, when the operation is to be performed at LIL,
- the relevant IATE ID and the language code, when the operation is to be performed at LL,
- the relevant IATE ID, the language code and the term, when the operation is to be performed at TL.

The user can then upload the Excel file, select the import type ‘Collections linking / unlinking’ from the drop-down menu, and click on ‘Import’. This will allow multiple collections to be linked to or unlinked from the indicated set of entries in one go.

The screenshot shows the 'Import' tab in a software interface. At the top, there is a navigation bar with buttons for 'Validation', 'Collections', 'Attachments', 'Import' (highlighted), 'Asynchronous requests', 'Marks', 'Table view', 'Merge', 'Undelete', and 'Batch deletion'. Below this, there is a form with the following fields: 'Filename:' with the value 'Test\_collection\_batch\_link\_unlink.xlsx'; 'Request name:' with the value 'Test\_collection\_batch\_link\_unlink.xlsx'; and 'Type:' with a dropdown menu set to 'Collections linking / unlinking'. There is also a checkbox for 'Execute after core hours' and two buttons: 'Clear' and 'Import'.

The processing results can be viewed in the ‘Asynchronous requests’ screen.

## 29. IMPORT FILE FOR BATCH CREATION OR UPDATE OF CROSS-REFERENCES (ADMINISTRATORS ONLY)

Users with specific rights can create and/or update cross-references in batch, using the Excel template available on the ‘Import’ tab of the ‘Management’ menu.

In the Excel file, the user can indicate, using a separate row for each operation:

- the source IATE ID,
- the relevant cross-reference type,
- the target IATE ID.

The user can then upload the Excel file, select the import type ‘Import cross-references’ from the drop-down menu, and click on ‘Import’. This will allow multiple cross-references to be created or updated according to the data provided in the import file.

The screenshot shows the 'Import' tab in a software interface. At the top, there is a navigation bar with buttons for 'Validation', 'Collections', 'Attachments', 'Import' (highlighted), 'Asynchronous requests', 'Marks', 'Table view', 'Merge', 'Undelete', and 'Batch deletion'. Below this, there is a form with the following fields: 'Filename:' with the value 'Template\_ImportCrossReferences.xlsx'; 'Request name:' with the value 'Template\_ImportCrossReferences.xlsx'; and 'Type:' with a dropdown menu set to 'Import cross-references'. There is also a checkbox for 'Execute after core hours' and two buttons: 'Clear' and 'Import'. Below the form, there is a 'Download:' section with four options, each with an Excel icon: 'Import new entries', 'Import new LLs and TLs into existing entries', 'Collections linking / unlinking', and 'Import cross-references'.

The processing results can be viewed in the ‘Asynchronous requests’ screen.

NB: existing cross-references can be updated but not deleted in batch.



## 30. DATA MANAGEMENT: TABLE VIEW

The purpose of this table (available from the ‘Management’ menu) is to offer an overview of selected entries in order to facilitate their management (validation monitoring, pre-IATE follow-up, missing languages, etc.). You can load IATE entries in various ways and select (and order) the metadata to be displayed. The available actions and metadata are detailed in a [dedicated section in the Online Help](#), available directly from the ‘Table view’ screen.

The screenshot displays the IATE 'Table view' interface. At the top, there is a navigation bar with the IATE logo and user information. Below it, a menu bar includes options like 'Validation', 'Collections', 'Attachments', 'Import', 'Asynchronous requests', 'Marks', 'Table view', 'Merge', 'Undelete', and 'Batch deletion'. A yellow banner offers to download a manual for the new 'Table view' feature. The main content area shows 'Results 1-92' with a table of entries. Each entry includes an 'Entry ID', 'Domains', 'Term', and 'Languages'. Below the table, there are several action buttons such as 'Remove from table', 'Delete entries from IATE', 'Add to bookmarks', etc. At the bottom, another menu bar is visible, and a 'Print' button is present. A 'Choose and sort columns' panel is also shown, allowing users to drag and drop columns like 'Entry ID', 'Domains', 'Term', and 'Languages' into a desired order.

Entry ID	Domains	Term	Languages
800658	EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ] 52 ENVIRONMENT	European Environment Agency	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, ar, ca, eu, no, ru, tr, uk, zh
915822	EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ] 2841 health [ SOCIAL QUESTIONS ]	European Food Safety Authority	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, bs, is, mk, no, ru, tr, zh
865753	EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ] European Union [ EUROPEAN UNION > European construction ] offence [ LAW > criminal law ] social problem [ SOCIAL QUESTIONS > social affairs ]	European Monitoring Centre for Drugs and Drug Addiction	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, mul, bs, mk, no, sq, sr, tr
932308	Community body [ EUROPEAN UNION > EU institutions and European civil service ] EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ] 6811 chemistry [ INDUSTRY ]	European Chemicals Agency	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, ru, tr, zh
929753	0621 defence [ INTERNATIONAL RELATIONS ] EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ]	European Defence Agency	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, ru, tr, zh
929455	EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ] 2841 health [ SOCIAL QUESTIONS ]	European Centre for Disease Prevention and Control	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, ru, tr, zh
921952	EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ] 4806 transport policy [ TRANSPORT ]	European Maritime Safety Agency	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, ru, tr, zh
941727	EU office or agency [ EUROPEAN UNION > EU institutions and European civil service ]	European Medicines	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, ru, tr, zh

**Choose and sort columns**

Drag and drop columns here in the desired order

- ★ Entry ID
- Domains
- ↓
- Term
- Languages

If you want to print the list of these entries in a simplified and user-friendly format, click on the ‘Print’ button. This will give you a view where you can select your desired languages and a few visualisation options.

Validation Collections Attachments Import Asynchronous requests Marks **Table view** Merge Undelete Batch deletion

Download the manual for the new 'Table view' feature (PDF)

Results 1-71 Expand

<input type="checkbox"/>	<input type="checkbox"/>	Entry ID	Domains	Term	Languages
<input type="checkbox"/>	+	877731	research [ PRODUCTION, TECHNOLOGY AND RESEARCH > research and intellectual property ] 3236 information technology and data processing [ EDUCATION AND COMMUNICATIONS ] 3206 education [ EDUCATION AND COMMUNICATIONS ]	open learning	da, de, en, es, et, fi, fr, ga, it, lv, nl, pl, ro, sk, sl
<input type="checkbox"/>	+	1758301	telecommunications [ EDUCATION AND COMMUNICATIONS > communications > communications systems ] information technology [ EDUCATION AND COMMUNICATIONS > communications > communications industry ]	audioconference	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv
<input type="checkbox"/>	+	3578688	peace [ INTERNATIONAL RELATIONS > international balance ]	rules-based international order	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv
<input type="checkbox"/>	+	3589517	public health [ SOCIAL QUESTIONS > health > health policy > organisation of health care ]	personal protective measure	bg, cs, da, de, el, en, es, et, fi, fr, ga, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv

Remove from table Delete entries from IATE Add to bookmarks Add to watchlist Add to batch attachments operation Add to batch collections operation Add to merge operation

Add to project Validate all

Add entries by ID Add entries from collection Add entries from bookmarks Add entries from file Save IDs to file Export table **Print** Empty table

Source language Show results in

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

Show synonyms  IATE2 logo View  Export IATE ID as plain text  Hide IATE id  Do not add entry hyperlinks

Discard Print

Confidential, raw, preIATE and non-validated data should not be disseminated externally.

**iate** European Union terminology

1

**open learning** activities that either enhance learning opportunities within formal education systems or broaden learning opportunities beyond formal education systems  
D'Auton, S. cited in Wikipedia, [http://en.wikipedia.org/wiki/Open\\_learning](http://en.wikipedia.org/wiki/Open_learning) [23.4.2015]

en open education  
de **offener Unterricht**  
Das Konzept des "open learning" (auch "open education"; dt. "offenes Lernen") bezieht sich auf strukturelle Merkmale des Fernunterrichts. Dieser ist "offen" in zweifachem Sinne: Er ist erstens äußerlich offen, nämlich vor allem hinsichtlich der Lernzeit u. des Lernorts. Er ist zweitens inhaltlich offen, nämlich hinsichtlich des freien Zugangs des Lernenden zu den Lernkursen. Der Schüler bestimmt über die Themen u. Fächer, die Dauer des Unterrichts, die Reihenfolge der Lektionen (Lernschritte), Anzahl u. Dauer der Lernpausen usw. mit.

de offenes Lernen  
fr **apprentissage ouvert**  
apprentissage qui laisse à l'apprenant une certaine flexibilité quant au choix des sujets, du lieu, du rythme et/ou de la méthode utilisée  
Site du Centre européen pour le développement de la formation professionnelle (Cedefop), Office des publications de l'Union européenne, Luxembourg (2014), "Terminologie de la politique européenne d'enseignement et de formation. Une sélection de 130 termes clés" (Deuxième édition), p.1 / 200

2

**audioconference** conference via telephone or internet connection in which participants in different locations speak to each other (i.e. audio signal only, but possibly with other features not available on a conference call)

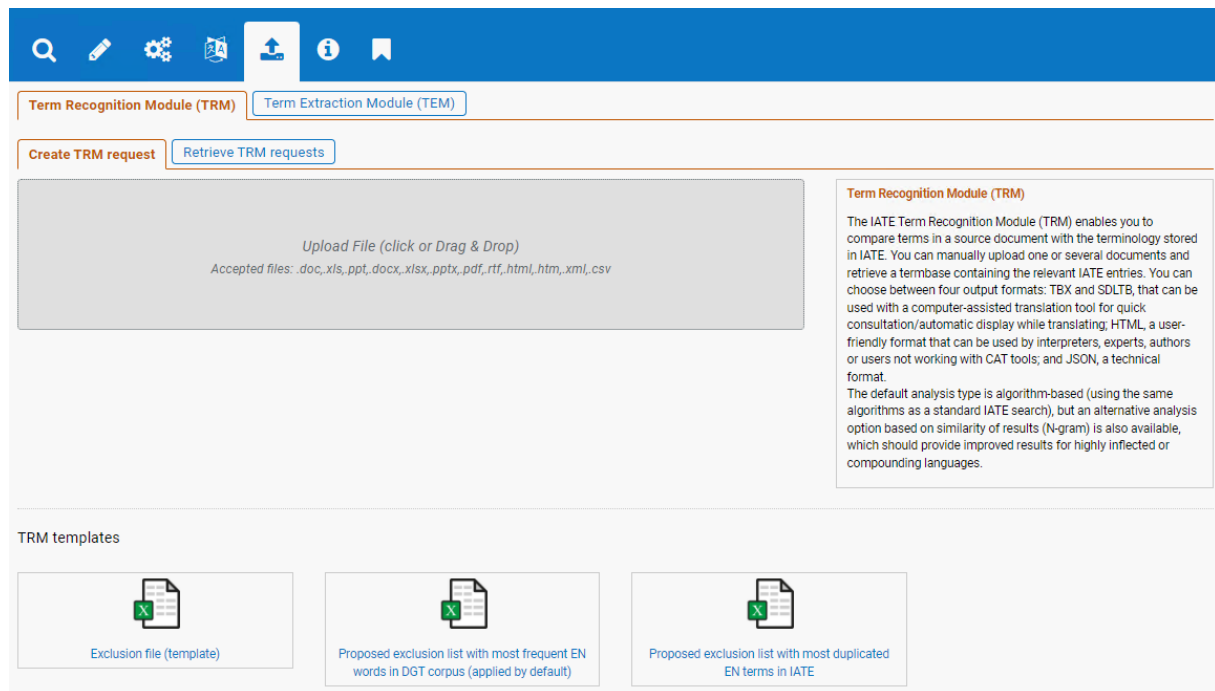
The list of entries displayed in 'Table view' is saved to the temporary local storage of the browser. You can save your lists to a file and retrieve them by clicking on 'Add entries from file'. We advise you to save them regularly so that they are not lost when new versions of IATE are deployed or when you change browser or computer.

## 31. TERM RECOGNITION MODULE (TRM)

The Term Recognition Module (TRM) allows you to compare terms in a given source document with the terminology stored in IATE. You can manually upload one or several documents and retrieve a termbase containing the relevant entries available for that document/those documents.

The requested termbase can be bilingual or monolingual. The target languages supported are all official EU languages, plus IS, NO, RU and TR. In the case of bilingual termbases, you have the option to retrieve results that are only available in the source language but not in the selected target language by switching the selector to ‘Include matches without target’.

The Term Recognition Module accepts documents in all EU official languages. The output format of the extract is either TBX, SDLTB, highlighted HTML or JSON (technical format). It should be noted that SDLTB is not fully compliant with monolingual termbases and produces errors for the time being.



### Creating a request:

- You can upload one or multiple documents in one request (in any EU official language) and retrieve a single termbase for all documents or multiple termbases (one for each document uploaded). The most common editable formats are accepted (Word, Excel, PowerPoint, editable PDF, HTML, XML, CSV).
- A proposed exclusion list containing the EN words which appear most frequently in the DGT corpus, which should not be retrieved as part of the termbase, is uploaded by default with any EN TRM request (including requests coming from the batch task or TRM live plug-ins). This list is also available for consultation under the ‘Create TRM request’ tab. Additionally, it is possible to upload your own exclusion file, using the template available for download at the bottom of the screen. To use this option, you have to upload at least two files. You will then be given the option of marking one of them as an exclusion file. Stemming is applied to the exclusion file, but there are some limitations (plurals or declined forms which do not match the stem will not be detected). You should assign a name to the project and select the target languages and the output format, and you can also apply any necessary filters (no filters are applied by default).
- You can choose the execution time for your request. For larger requests, it is recommended that you choose the option of scheduled execution after core hours (overnight).

- The source language is detected automatically by default, although you can force the selection of a specific source language (i.e. in the case of very short documents, lists of terms, or closely related languages). Non-EU languages are not supported as source languages.

The default analysis type for SDLTB, TBX and JSON output is algorithm-based (same algorithms as used in the standard search), but an experimental analysis option based on similarity of results (N-gram) is also available, which should provide improved results for highly inflected or compounding languages.

If you select HTML output, a default analyser is selected, which you cannot change.

Several filters are available if you need to refine the results. Note that lookup forms are excluded by default from source and target term types. You need to tick the option if you want them to be retrieved.

Entries flagged as ‘historical’ (see also section 12.1.10 Lifecycle) will be automatically excluded from all retrievals.

A pair of filters allows you to include (‘In collection’) or exclude (‘Not in collection’) terms belonging to a certain collection (attached at LIL, LL or TL). You can select as many collections as you need, and the chosen filter will include the entries that are in one or more of the collections, or exclude the entries found in any of those collections.

By default, the LL aggregated field completion score of the target language is set as ‘average to high’, which means that the result does not contain target language sections with only a few fields filled in (score 0 to 2). If you wish to retrieve entries where the target language section is more complete, with several fields filled in, you can select ‘high’ (score 6 to 16). If you want to access any available content, choose ‘all’ (score 0 to 16).

Term Recognition Module (TRM)
Term Extraction Module (TEM)

Create TRM request
Retrieve TRM requests

**Source files**

Eppo\_Consolidated\_Annual\_Activity\_Report\_2022.pdf

Upload File (click or Drag & Drop)

**Request name**

Exclude matches without target
 Do not filter out confidential data
 Execute now

Choose source language

Choose target language

Bulgarian
 Croatian
 Czech
 Danish
 Dutch
 English
 Estonian
 Finnish
 French
 German
 Greek
 Hungarian
 Irish
 Italian
 Latvian
 Lithuanian
 Maltese
 Polish
 Portuguese
 Romanian
 Slovak
 Slovenian
 Spanish
 Swedish
 all

Icelandic
 Norwegian
 Russian
 Turkish
 all

Analysis type:

Output format:

Priority:

Entry confidentiality:

Domains  
*Click to add domains*

In collection

Not in collection

Term type (Source language):  
 abbrev  formula  phrase  short form  
 term  lookup form  appellation  all

Term type (Target language):  
 abbrev  formula  phrase  short form  
 term  lookup form  appellation  all

Evaluation (Target language):  
 Not specified  obsolete  admitted  
 preferred  deprecated  proposed  all

Term validation (Target language):  
 Validated  Not validated  Pre-IATE  all

Minimum reliability (Target language):

LL aggregated completion score (Target language):

Owner (Institution) of target TL:  
Everything except:  
CoR [CdT]  
EUMS [Consilium]  
FL [CdT]  
FL\_SCIG [COM]  
IATE TMN [CdT]  
Swiss Data [COM]  
TAXEUD [COM]

Customer (Target language):  
*Nothing selected*

CANCEL
RESET
CREATE

## Retrieving a request:

This tab shows the status and details of your request (the page needs to be refreshed to have the status updated). Processing should normally take a few minutes. Requests taking longer than 90 minutes to be processed are timed out in order not to create a bottleneck in the system. They will be marked as failed. The recommended alternative is to relaunch the request and select the scheduling option for execution outside core hours, in which case the timeout period is extended to 10 hours.

Term Recognition Module (TRM) Term Extraction Module (TEM)

Create TRM request Retrieve TRM requests



**Source-file-title.docx** Submitted: 22.2.2022 15:22 Submitted 0/2 Completed









<b>Request name:</b>		<b>LL aggregated completion score:</b>	average to high
<b>UID:</b>	4B3F524C6BF8415A8371193A2589A3D8	<b>Term type (Source language):</b>	abbrev formula phrase short form term
<b>Completed:</b>	Pending	<b>Term type (Target language):</b>	abbrev formula phrase short form term
<b>Target language:</b>	de,fr	<b>Owner (Institution) of target TL:</b>	CdT, CJUE, COM, Consilium, ECA, ECB, EESC/COR, EIB, EP, External, ACER [CdT], CEDEFOP [CdT], CEPOL [CdT], Codict [EP], COM Freelance [COM], EASA [CdT], EBA [CdT], ECHA [CdT], EDPS [CdT], EEA [CdT], EFSA [CdT], EIGE [CdT], EIOPA [CdT], EMA [CdT], EMCDDA [CdT], EMSA [CdT], ERA [CdT], ESMA [CdT], EU-OSHA [CdT], EUAA [CdT], EUIPO [CdT], Eurofound [CdT], Eurojust [CdT], Europol [CdT], FRA [CdT], FRONTEX [CdT], IATE [CdT], Subinst [CdT]
<b>Analysis type:</b>	Algorithm-based		
<b>Number of termbases generated:</b>	One termbase for each document		
<b>Output format:</b>	SDLTB		
<b>Source files:</b>			
<b>Filter out confidential data:</b>	No		

Source-file-title.docx

de Submitted  fr Submitted

You can view the details of a request by clicking on the ‘Show more’ button. You can cancel your request at any time by clicking on the red cross.

When results have been retrieved, the status boxes are green and the output files are available for download via the dedicated buttons, either one by one  or all together .

<b>Business and human rights</b>	Submitted: 13/03/2019 18:04:52	<span>Finished</span> <span>24/24 Completed</span>	 
<b>1177820 EN-FR</b>	Submitted: 08/03/2019 14:25:39	<span>Finished</span> <span>1/1 Completed</span>	 
<b>Test</b>	Submitted: 27/02/2019 16:05:46	<span>Finished</span> <span>1/1 Completed</span>	 
<b>Human rights EN</b>	Submitted: 27/02/2019 09:50:39	<span>Finished</span> <span>1/1 Completed</span>	 

**Project name:** Human rights EN

**Completed:** 27.2.2019 10:04

**Target language:** en

**Analysis type:** Algorithm-based


**Number of termbases generated:** One termbase containing all documents

**Output format:** SDLTB

**Project files:**  
EPRS\_BRI(2018)  
630290\_EN\_Religion\_and\_human\_rights.pdf  
EPRS\_BRI(2017)  
614638\_EN\_Migration\_and\_human\_rights.pdf  
EPRS\_BRI(2019)633142\_EN\_Child\_labour.pdf

**Process as sensitive:** No

**Filter out confidential fields:** No

 en Finished

When no results have been retrieved, the status boxes are red, with the indication ‘Failed’.

**test\_errors** Submitted: 26.10.2021 15:51 Finished 0/4 Completed

<b>Request name:</b>	test_errors	<b>LL aggregated completion score:</b>	average to high
<b>UID:</b>	6B90171FC3374F8880E6AF710012D0ED	<b>Term type (Source language):</b>	abbrev formula phrase short form term
<b>Completed:</b>	26.10.2021 16:23	<b>Term type (Target language):</b>	abbrev formula phrase short form term
<b>Target language:</b>	es,fi,fr,it	<b>Owner (Institution) of target TL:</b>	CdT, CJUE, COM, Consilium, ECA, ECB, EESC/COR, EIB, EP, External, ACER [CdT], CEDEFOP [CdT], CEPOL [CdT], Codict [EP], COM Freelance [COM], EASA [CdT], EASO [CdT], EBA [CdT], ECHA [CdT], EDPS [CdT], EEA [CdT], EFSA [CdT], EIGE [CdT], EIOPA [CdT], EMA [CdT], EMCDDA [CdT], EMSA [CdT], ERA [CdT], ESMA [CdT], EU-OSHA [CdT], EUIPO [CdT], Eurofound [CdT], Eurojust [CdT], Europol [CdT], FRA [CdT], FRONTEX [CdT], IATE [CdT]
<b>Analysis type:</b>	Algorithm-based		
<b>Number of termbases generated:</b>	One termbase for each document		
<b>Output format:</b>	SDLTB		
<b>Source files:</b>	Presentation1.pptx		
<b>Process as sensitive:</b>	No		
<b>Filter out confidential data:</b>	Yes		


Presentation1.pptx

**es** Failed  **fi** Failed  **fr** Failed  **it** Failed

In this case, check your source file (particularly the length of the document) and applied filters again, and resubmit the request. You can schedule longer documents or divide them into smaller pieces (maximum 50 pages each) to avoid triggering the 90-minute processing timeout.

If the request still fails, you might need to contact the IATE team for help. In this case, make sure that you copy the error details by clicking on the error itself, and paste them into an email to forward to the IATE team.


Multiple termbases belonging to the same project can be downloaded at the same time (parallel individual downloads).


**NB:** depending on your browser settings, the multiple download might be blocked. In that case, you need to enable the pop-up from the browser. After clicking on the 'Download all' button, click on the red icon  appearing in the address bar. Depending on your preferences, you might also want to make sure that your download settings are not set to 'Ask every time where to save the file before downloading'.

[Create TRM request](#) [Retrieve TRM requests](#)

**testing** CONFIDENTIAL Submitted: 31/1/2019 15:58:57 Finished 2/2 Completed Show less

<b>Project name:</b>	testing
<b>Completed:</b>	31.01.2019 16:06
<b>Target language:</b>	fr
<b>Analysis type:</b>	Algorithm-based
<b>Number of termbases generated:</b>	One termbase for each document
<b>Output format:</b>	TBX
<b>Project files:</b>	ECHA-term LT NA.docx ECHA-term LT CdT.docx
<b>Process as sensitive:</b>	Yes
<b>Filter out confidential fields:</b>	No

ECHA-term LT NA.docx   **fr** Finished

ECHA-term LT CdT.docx   **fr** Finished

If you have used the option 'Cancel on demand' (by clicking on the red cross, as indicated above), results will be retrieved up to the moment of the cancellation, and languages for which termbases have been already retrieved will appear in green, while the unprocessed ones will appear in red, with the indication 'Failed'.

**create-TRM** Submitted: 21.2.2022 20:39 Cancelled 0/2 Completed

Request name:	create TRM	LL aggregated completion score:	average to high
UID:	B4589FBEC004487A72E0131EEE3F3F4	Term type (Source language):	abbrev formula phrase short form term
Completed:	21.2.2022 20:43	Term type (Target language):	abbrev formula phrase short form term
Target language:	fr,mt	Owner (Institution) of target TL:	CdT , CJUE , COM , Consilium , ECA , ECB , EESC/COR , EIB , EP , External , ACER [CdT] , CEDEFOP [CdT] , CEPOL [CdT] , Codict [EP] , COM Freelance [COM] , EASA [CdT] , EBA [CdT] , ECHA [CdT] , EDPS [CdT] , EEA [CdT] , EFSA [CdT] , EIGE [CdT] , EIOPA [CdT] , EMA [CdT] , EMCDDA [CdT] , EMSA [CdT] , ERA [CdT] , ESMA [CdT] , EU-OSHA [CdT] , EUAA [CdT] , EUIPO [CdT] , Eurofound [CdT] , Eurojust [CdT] , Europol [CdT] , FRA [CdT] , FRONTEX [CdT] , IATE [CdT]
Analysis type:	Algorithm-based		
Number of termbases generated:	One termbase for each document		
Output format:	SDLTB		
Source files:	test+export+word.rtf		
Filter out confidential data:	No		

test+export+word.rtf

**fr** Failed  **mt** Failed

Your TRM request has been cancelled on demand.

Your TRM request has been cancelled on demand.

## Highlighted HTML as output format:

The HTML output screen is divided in two sections (see the screenshot below): on the left, the source document is displayed with highlighted matches available in IATE (two highlight colours are used to facilitate the analysis of the results). When you click on a highlighted term, the right section displays the matching IATE entries with the target terms. Metadata like primarity, domain, origin, reliability, evaluation and term reference are also displayed. When you click on the IATE ID, the full entry view is opened in a new tab.

The sorting of results is similar to that in standard search: priority is given to primary entries, maximum reliability across all TLs for the target language, validated target terms and non-lookup matches followed by lookup matches (if selected).

Once it has been downloaded, the highlighted HTML output can be consulted offline.

1 The **EBA benchmark rate** should be **simple**, **easy to use** and **representative**.

The **specification** of the **rate** **by way of a formula** should **ensure that the rate remains representative over time** and should **enable due account** to be taken of **national circumstances**.

The **formula** should be **limited** to a **number** of publicly **available data** **in order to ensure that it is easy to use** and **simple**.

1

The **time periods** for the **underlying rate** should follow the **time periods set out in Annex II to Directive 2014/17/EU** for those **scenarios** where an **external reference rate** is **used** for **calculating the borrowing rate**.

Therefore, the **EBA benchmark rate** should be **based on an underlying rate** for the 20 years before the **ESIS** is provided by the **creditor** to the **consumer**.

1

To be **representative**, the **formula** should **rely on an underlying rate relevant to the Member State** in which the **ESIS** is provided to the **consumer**.

The **underlying rate** should be the **European Central Bank's (ECB) main refinancing rate for Member States having the Euro as their currency**, and the **national Central Bank's refinancing rate (or equivalent national Central rate)** for **other Member States**.

These **rates** will **produce** a **benchmark rate** which is **representative** of the **local mortgage market** and **complete historical data** on those **rates** are **available** for all **Member States**.

However, since **historical data** on the **ECB's main refinancing rate** are only **available** from 1 January 1999, the **earliest start date** of the **historical period** should be set on 1 January 1999.

This **earliest start date** should **apply to ESISs** provided in all **Member States** **in order to ensure that the same historical time period** will be **used** across the **European Union**.

1

The **formula** should **acknowledge** that the **borrowing rate** will **in part reflect funding costs**, which the **refinancing rate** information is a **proxy** for, by also **taking into account the lowest underlying rate** in the preceding 20 years.

1

As the **formula** **forms part of** an illustrative **example**, it is sufficient that **creditors update the underlying rate on an annual basis**.

1

**In order to ensure that, within each Member State, creditors use the same difference between the highest and the lowest values of the underlying rate**, the calculation of the **EBA benchmark rate** should be **done** using the same **reference date** which should be the **first working day** of each year.

1

**In order to ensure that the illustrative examples reflect local circumstances**, the **EBA benchmark rate** should not be **used**, where a **competent authority** has **specified a benchmark rate**, the **benchmark rate** specified in this **decision** should not **apply**.

1

**iate** European Union terminology

3 results found for "benchmark rate"

**1104057**

International finance  
accounting  
exchange policy

taux de change au comptant \*\*\*

Reference: Gloss del termini di finanza IX/2280/83

**1112054**

FINANCE

cours de change au comptant \*\*\*

Reference: Gloss économie BTB, JOCE L 146/1973, Gloss del termini di finanza IX/2280/83

**899421**

FINANCE

taux de référence de l'euro \*\*\*

Reference: COM/97/568/fin

**899421**

FINANCE

taux de référence \*\*

Reference: Proposition.

## Additional information:

- IATE cached data for TRM are updated every three hours (all settings and outputs, except TRM retrievals where n-gram option is selected, in which case the copy used is updated weekly).
- The following data are excluded from the retrievals:
  - o MUL and Latin data



- Two-character words
- Terms which only contain digits or digits with special characters
- Raw entries
- Stopword lists are applied in the term recognition.
- Deprecated, obsolete, not validated, and pre-IATE terms are included by default in the retrievals. Filters are available to exclude them if needed. Lookup forms are excluded by default, but the setting can be changed if needed.
- For termbases to be distributed to freelancers, you should filter out confidential data.
- The HTML output incorporates the results in the resulting HTML file. It can be consulted offline.
- The retrieval files (termbases or HTML) are available to download for 72 hours.

This feature is also available in standalone mode (offline) for processing sensitive documents. Please consult your central terminology service should you need additional information.

## **32. TERM EXTRACTION MODULE (TEM)**

**The Term Extraction Module (TEM)** allows you to extract candidate terms from a document or set of documents, and/or from one or more URLs. It extracts candidate single-word and multi-word terms which appear more frequently in the uploaded corpus than they do in general language. You can also upload an exclusion file with a list of terms that should not be proposed as candidates. Different scores as term specificity, frequency and others are used to rate the candidates according to their relevance. The following languages are currently supported: DE, EN, ES, FR, IT. The module offers two types of extraction: monolingual and bilingual.

### **32.1 Monolingual term extraction**

#### **Create TEM request:**

- You can upload one or multiple monolingual documents in the same request. The most common editable formats are accepted (Word, Excel, PowerPoint, editable PDF, HTML, XML, CSV, etc.). It is also possible to launch an extraction from one or several URLs.
- It is also possible to upload an exclusion file (list of terms that should not be extracted). You can either generate your own exclusion list using the template available for download at the bottom of the screen, or use one of the proposed exclusion lists (most frequent EN words in DGT corpus and most duplicated EN terms in IATE). To use this option, you have to upload at least two files. You will then be given the option of marking one of them as an exclusion file (only one exclusion list can be applied per request). You also have the possibility of applying both proposed exclusion lists automatically (feature only available for English), indicating a threshold:
  - Low: excludes 33 % of the content of the two lists
  - Medium: excludes 66 % of the content of the two lists
  - High: excludes all the content of the two lists.

### Retrieve TEM requests:



This tab shows the status and details of a request (the page needs to be refreshed to have the status updated).

The ‘expand’ icon opens the request details: submission and completion timestamps, request language(s), input file(s) and URL(s), exclusion list (if any).

When you click on the ‘view terms’ icon, or directly on the name of the request, the candidate terms will be displayed in a third tab.

The candidate management screen offers many display options and filters:

- **List view** **Columns** to display the candidates in a list or in columns.
- **Fullscreen** to maximise the number of elements visible on the screen.
- **Alphabetical** **Rank** to sort candidates alphabetically or by rank (by relevance).
- to apply ascending or descending sorting.
- **Results per page** **5** **10** **25** **50** **100** to select the number of candidates to be displayed per page.






-  to view all candidates, candidates without a specified status, or only saved, deleted or excluded ones.
-  to view all types of candidates or only single words or multiple words.

Checking the box beside each candidate term allows you to see the available sample occurrences (up to 20) in the uploaded corpus, together with the candidate term's source file. Once you have made a selection of occurrences, a button enables you to 'view only the selected occurrences'. The selected occurrence will be used as context at entry creation. If nothing is selected, the first occurrence will appear by default. A list of potential duplicates in IATE is provided automatically.

Double-clicking on the candidate term offers the possibility to launch an 'all words' search for the selected words composing the term.

Next to each candidate term, the total number of occurrences indicates how many times the candidate term is present in the provided corpus.

Checking the box beside each candidate enables the applicable actions in the 'Actions' menu. In addition, the actions for each single candidate term can be selected from the contextual menu (right-click) and via shortcuts (as detailed in the contextual menu):

- Unselect all.
- Save/Unsave: to retain/ignore the candidate terms. Saved candidates are indicated by a specific icon  and can be filtered in or out.
- Add to exclusion list: to mark candidate terms as excluded . Excluded candidates can be filtered in or out and exported for reuse in an exclusion list.
- Delete term/Undelete: to mark candidate terms as deleted . Deleted candidates can be filtered in or out.
- Batch search: to run a search by list of terms to find out whether the selected candidate terms already exist in IATE. You can select the matching option for the search, the fields to be exported, and to schedule the batch search request (default). The result will be available from the asynchronous requests list (in the Management menu), where an Excel file can be downloaded . The export will include the terms that are already present in IATE, including all languages and the corresponding metadata (domains, term references, terms in context, context references, note, etc.).
- Create new entry: to create one or more raw entries for one or more candidates. The domain(s) can be defined via the pop-up window. Other fields are set automatically: the term reference is the document name, the term type is 'term' by default, the reliability is set to 2, the part of speech is defined by the TEM engine, the context is either the selected one or the first one. The newly created entry(ies) are accessible by clicking on the pen  icon.
- Add to project: to add the selected candidate terms to the preparatory material table of a terminology project for which you are a coordinator.
- Export: to download a set of candidates. This feature can be used for different purposes as terms to be exported can be filtered (saved, deleted, excluded, all).

## 32.2 Bilingual term extraction

**Bilingual term extraction** is run on parallel documents or URLs, with English as the source or target language. The second language will also be detected automatically. The languages supported are DE, EN, ES, FR, IT.

The screenshot shows the 'Term Extraction Module (TEM)' interface. At the top, there are two tabs: 'Term Recognition Module (TRM)' and 'Term Extraction Module (TEM)'. Below the tabs are two buttons: 'Create TEM request' and 'Retrieve TEM requests'. The main area is divided into several sections:

- Source files:** A box with 'Upload File (click or Drag & Drop)' and a list of accepted files (doc, xls, ppt, docx, xlsx, pptx, pdf, rtf, htm, xml, csv) and accepted languages (de, en, es, fr, it).
- Source URLs:** A text input field with the instruction 'Insert one or more URLs separated by a new line', a 'Clear' button, and an 'Add URLs to TEM project' button.
- Term Extraction Module (TEM):** A text box containing the description: 'The IATE Term Extraction Module (TEM) enables you to extract term candidates from a document, a set of documents and/or one or several URLs. The currently supported languages are DE, EN, ES, FR, IT. You can upload an exclusion file containing a list of terms that should not be proposed as term candidates.'
- Bilingual:** A checkbox labeled 'Bilingual' which is checked.
- Target files:** A box with 'Upload File (click or Drag & Drop)' and a list of accepted files (doc, xls, ppt, docx, xlsx, pptx, pdf, rtf, htm, xml, csv) and accepted languages (de, en, es, fr, it).
- Target URLs:** A text input field with the instruction 'Insert one or more URLs separated by a new line', a 'Clear' button, and an 'Add URLs to TEM project' button.
- Request name:** A text input field.
- Apply automatically exclusion lists (EN):** A dropdown menu with 'None' selected.

At the bottom right, there are three buttons: 'CANCEL', 'RESET', and 'CREATE'.

Bilingual extraction offers the same enhanced management features as those available for monolingual requests (see explanations above).

It proposes pairs of candidate terms and enables the creation of bilingual raw entries.

Please note that sorting options and filtering by single or multiple words are applied to source candidates.

A batch search can only be launched for a selection of source OR target candidate terms.

## 32.3 Data processing

The Term Extraction Module processes corpora submitted by users as follows:

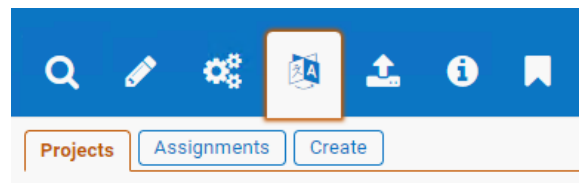
2. Pre-processing (maths rules, tokenization, etc.)
  - The text corpus is extracted into a TXT file.
  - A word tokeniser (UIMA) transforms the text into a list of tokens.
  - A POS tagger (TreeTagger) attributes a syntactic label to each token, and the lemmatiser sets the lemma of each word. TreeTagger uses the English parameter file PENN tagset.
  - Additionally, UIMA stemmer is used to extract the stem form of each word.

- A term spotting process is run to detect which sub-sequences could be term occurrences (multi-word term spotting is done with the help of UIMA tokens regex engine and a list of regex rules on UIMA annotations).
  - A contextualiser is used to produce a context vector for each single-word term.
  - Score calculation on each candidate is run as follows:
    - morphological analysis and splitting single word term when compound;
    - grouping terms with their variants based on:
      1. Prefix compositions.
      2. Native and neoclassical composition.
      3. Syntagmatic variations.
      4. Synonymic rules and dictionary.
      5. Small edition distance.
3. Post-processing (set of custom rules)
- Two-letter standalone tokens are removed (e.g. II, EU, OJ).
  - Tokens that contain only two letters together with other non-words (numbers, punctuation and other tokens such as 24-hour, 31-year-old, etc.) are removed (e.g. 2014/17/EU; 2008/48/EC; p.34).
  - Tokens with the same letter repeated several times are removed (e.g. III).
  - Tokens with @ are removed (e.g. info@easo.europa.com).
  - Tokens with .com are removed (e.g. Shutterstock.com).
  - Candidates with grammatical category adjective (a) or adverb ® are not extracted alone but only in multi-word units.
  - Candidates present in the exclusion file (if the user uploaded one) are not retrieved.

Any feedback will be very welcome to further improve this new module.

### 33. TERMINOLOGY PROJECTS MODULE (TPM)

The Terminology Projects Module (TPM) enables users with the necessary rights to manage terminology projects and related tasks directly in IATE. The TPM is composed of three main tabs:



- **Projects** tab: where all existing projects are gathered and can be accessed. For more details, see section 33.7 Search a project and results.
- **Assignments** tab: where assignees can find the projects for which they have tasks. The usual search filters are available. Clicking on a project name will open the project and will give you access to 'My assigned entries'. For more details, see section 33.9 Internal assignee view.

- **Create** tab: where coordinators can initiate new projects. For more details, see section 33.1 Create a project.

### 33.1 Create a project

Terminology coordinators (whose IATE role is ‘administrator’, ‘terminologist+’ or ‘terminologist’) can create a terminology project in order to manage its lifecycle: store metadata, manage entries and candidates, assign work to internal and external users, and monitor progress and completion.

To create a project, enter the short name (compulsory) and description (optional), and click on ‘Create’. Project names follow the same pattern as collection names (institution, short name and year), and each project must have a unique name.

The screenshot shows a web interface for creating a new project. At the top, there is a blue navigation bar with icons for search, edit, settings, and other functions. Below the navigation bar, there are three tabs: 'Projects', 'Assignments', and 'Create', with 'Create' being the active tab. The main content area is titled 'Create new project' and displays the current project name as 'CDT - - 2022'. There are three input fields: 'Institution' (with a dropdown menu showing 'CDT'), 'Short name' (an empty text box), and 'Year' (with a dropdown menu showing '2022'). Below these fields is a large text area for 'Description'. At the bottom right of the form, there are three buttons: 'CANCEL', 'RESET', and 'CREATE'.

### 33.2 Update a project

Once a project has been created, it can be edited by the author and by any other assigned project coordinators. The edit mode presents a form with the project metadata, which can be updated at any time.

Please note that this form does not contain the project status. The project status is displayed in the top right corner of the main project window, and you can change it manually by clicking on the editing pen. The status of a project can be changed from ‘Draft’ to ‘Ongoing’ when the first assignment is created in the project. The following warning will appear:

## Warning!

You have created an assignment in your TPM project but its status is still 'Draft'. Do you want to change the project status to ongoing?

CANCEL

OK

If you click on 'OK', the project status will change to 'Ongoing'. If you click on 'Cancel', the project status will stay as 'Draft' and the next assignment created will trigger this procedure again.

The free text fields include the usual formatting options. Some of the fields can be multiple. All fields are optional except those related to the project name.

NB: at creation, the project is set as 'not confidential', which means that users from other institutions can view the project details.

NB: if the project's target languages are a combination of all EU languages and some non-EU languages, you should first select all EU languages and save the project, and edit again in order to add the non-EU languages. This avoids the need to tick all EU languages manually.

Projects 
My assignments 
Create 
Ongoing

### CdT-Common Agricultural Policy-2023

Project info 
Edit 
Preparatory material 
Project entries 
Assignments 
External forum 
Internal forum

Discard Save

**Project name:** CDT - Common Agricultural Policy - 2023

\* Institution:  \* Short name:  Year:

Description:

Author: XXXXXXXXXX CdT / Central Terminology ) Creation date: 16.8.2023 17:02:36 Last modification: 22.1.2024 14:36:52

Confidentiality:  Mandatory:  Skip task enabled:  Outsourcing:

Due date:  Project type(s):  Terminology  Term List  Ontology  Nomenclature  Proactive  Post Translation  Consolidation  Cleaning  Document Based  Thematic  Work Programme  Ad Hoc  Not Specified

Launch date:

Interinstitutional file number:  Internal reference:  Background reference:

Source language:  Target language:

Comments:  Project instructions:

EurTerm link:

Related collections: [SCIC-MUL-CAP reform sustainable agriculture \(T00667\) related to subject area SC](#) [IC glossary T00667: CAP reform: sustainable agriculture; cleanup completed](#)

Open expanded search   
Create new collection

Coordinators: XXXXXXXXXX CdT / Central Terminology )

Domain: [1412 Agricultural law and Common Agricultural Policy \(LAW\) \[ LAW \]](#) [common agricultural policy \[ AGRICULTURE, FORESTRY AND FISHERIES > agricultural policy \]](#)

CLOSE Expand all Collapse all

- ▶ 04 POLITICS
- ▶ 08 INTERNATIONAL RELATIONS
- ▶ 10 EUROPEAN UNION
- ▶ 12 LAW
- ▶ 14 LAW (LAW)
- ▶ 16 ECONOMICS
- ▶ 20 TRADE
- ▶ 24 FINANCE
- ▶ 28 SOCIAL QUESTIONS
- ▶ 32 EDUCATION AND COMMUNICATIONS
- ▶ 36 SCIENCE
- ▶ 40 BUSINESS AND COMPETITION
- ▶ 44 EMPLOYMENT AND WORKING CONDITIONS
- ▶ 48 TRANSPORT
- ▶ 52 ENVIRONMENT
- ▶ 56 AGRICULTURE, FORESTRY AND FISHERIES
- ▶ 60 AGRICULTURE, FORESTRY AND FISHERIES

Discard Save



Note that the following fields will not be visible to external collaborators: Coordinators (to be indicated elsewhere, if needed), Project status, Creation date, Last modification, Confidentiality, Mandatory, Due date, Outsourcing, Interinstitutional file number, Internal reference, Target language(s), Comments, Related collections, Related projects and EurTerm link. If none of the other fields are filled in, external collaborators will see the ‘Project info’ tab as empty.

### **33.3      Full project view**

This view shows the entire project.

The ‘**Project info**’ tab displays the project metadata and can be accessed in full only by internal users. A specific ‘Comments’ field is available here to allow communication among the project coordinators only.

The ‘**Preparatory material**’ tab contains a table showing the IATE entries and candidates that are being considered for the project. The ‘**Project entries**’ tab contains the IATE entries selected to be part of the project. From the ‘**Assignments**’ tab, the project coordinator(s) can create tasks and distribute them to language divisions or individual users. In the ‘**External forum**’ tab, discussion threads can be started for communication with external collaborators, while in the ‘**Internal forum**’ communication is possible with internal assignees.

Unless the project is set as confidential, users from other institutions can consult the full project view, but only the author and assigned project coordinators can edit, delete or export it.

Projects
Assignments
Create

**Ongoing**

## CdT-demo project-2022

Project info

Preparatory material

Project entries

Assignments

External forum

Internal forum

---

**Author:** CoordTPM ( CdT / EN )

**Creation date:** 26.4.2022 10:33:10

**Confidentiality:** Not confidential

**Project type(s):** Terminology, Post Translation

**Outsourcing:** Partial

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

**Source language:** en

**Comments:** add comments here for the other project coordinators

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

**Domain:**  
 10 EUROPEAN UNION

**Description:** this is a demo project, all EU languages, partial outsourcing

**Last modification:** 18.1.2023 18:26:46

**Mandatory:** Not Specified

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

**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

Delete project
Export project
Edit

### 33.4 Preparatory material table

Terminology coordinators can gather the IATE entries and/or candidate terms being considered for the project directly in this table by

- adding a list of IDs or a list of candidates,
- adding entries from a collection,
- adding candidates after having run a term extraction, or
- using the ‘Add to project’ option from the results page or the full entry view of an entry.

The entries added to the table can be appended to a project-based watchlist or a collection, and their IDs saved to an Excel file.

Ongoing



CdT-Sustainable development & finance-2023

[Project info](#)
[Preparatory material](#)
[Project entries](#)
[Assignments](#)
[My assigned entries](#)
[External forum](#)
[Internal forum](#)

Results 1-26 [\[Export table\]](#)

☐	#	Entry ID	Owner (LIL)	Domains	Collections	↓	Multilingualism	Term	Duplicates	Related entries	
☐	+	★ 3581944	COM	bond investment policy sustainable development	COM-European Green Deal COM-European Green Deal part 1-2020 EU-GA-WD-2020	en	bg, cs, da, de, el, en, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, it, no, fr	EU Green Bond Standard EU-GBS		3506955 3539178 3599052	
☐	+	★ 3592161	COM	environmental protection climate change policy sustainable development economic instrument for the environment		en	en, bg, cs, da, de, el, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv	environmentally sustainable economic activity	Add new entries	Add new entries	
☐	+	★ 3599575 A RAW	CdT	investment policy sustainable development	COM-European Green Deal	en	en, mt, bg, cs, da, de, el, es, et, fi, fr, ga, hr, hu, it, lt, lv, nl, pl, pt, ro, sk, sl, sv	EU Green Bond	3589062 Eof entries list	Add new entries	
☐	+	Term candidate	-	-	-	en	en, bg, cs, da, de, el, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv	circular material use	Add new entries	Add new entries	
☐	+	★ 3589034	COM	sustainable development	COM-Industrial package M-2020 EU-GA-WD-2020	en	bg, cs, da, de, el, en, es, et, fi, fr, hr, it, lt, lv, mt, nl, pl, pt, sk, sl, sv, ga, hu, ro	sustainable product policy framework	Add new entries	Add new entries	

The ‘Preparatory material’ table, like all the tables in the TPM, is highly configurable, allowing you to:

- rearrange the rows using the sorting icon  (drag and drop mechanism),
- sort by entry ID, anchor language or terms, by clicking on the small arrow next to the column header,
- display/hide and reorder columns using the configuration button . All users have a common set of fields that are displayed by default, but if you set your own configuration it will be kept. To do so, click on your chosen columns in the left-hand box (see screenshot below) and drag them to the right-hand box to display the columns in the table. Then, in the right-hand box, you can drag and drop the items to order them as needed.

Choose and sort columns

Multilingualism   Owner (LIL)   Management note   Cross-references   Definition

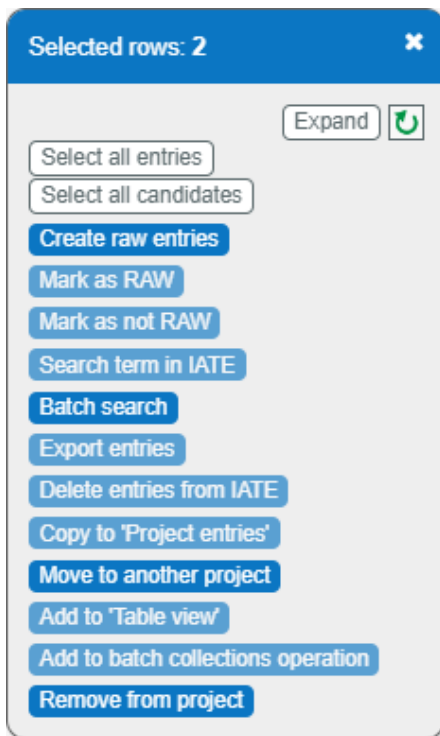
Feedback

Drag and drop columns here in the desired order


Entry ID   Domains   ↓   Term   Languages   Collections   Duplicates

Related entries   Comments

Column width can be also adjusted manually as needed.



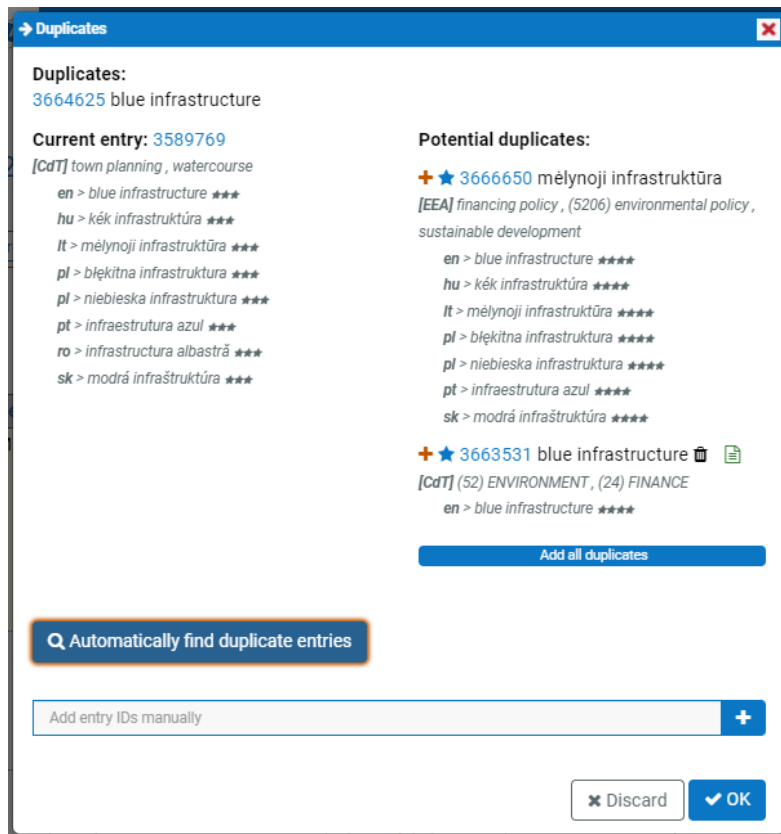
The floating panel offers a list of actions in two different shades of blue. When you tick the box in the first column of a row, you will see which actions are possible for it (deeper blue) and which are not (lighter blue). For example, if you tick a candidate term, you can automatically create a raw entry **Create raw entry** or move it to another project **Move to another project**.

This panel can be closed (as in the screenshot above) and reopened by clicking on the edit  button. You can also move the panel around as needed.

The table is automatically populated with useful information from the corresponding IATE entries, such as term, entry status, LIL owner and management field, domain, language coverage, primary, cross-references and term evaluation, if present. It also includes columns for comments and feedback. The preferred columns can be selected using the configuration button and saved in the user preferences.

The table typically displays terms and other language-specific data (e.g. definitions) in the project's source language. If several source languages have been selected, this data will be displayed in the first of these languages in descending alphabetical order. If the project has no source language, the 'Term' and 'Definition' columns will be preloaded in EN, FR or DE (in that order) unless this information is missing from the entry, in which case no information will be loaded.

The ‘Duplicates’ column offers an advanced mechanism to identify potential duplicates, either by clicking on ‘Automatically find duplicate entries’, or by adding an entry ID manually. An exact match search is run for all terms in all languages on the selected entry and retrieves a list of potential duplicates, sorting them with the entries with more exact matches across languages first. These entries can be added as duplicates + of your current entry, or added to your project 📄 if relevant. If the list of potential duplicates is too long, you can remove entries 🗑️ to shorten the list.



From the table, users with specific rights can delete entries from the IATE database via the dedicated button [Delete entries from IATE](#).

The ‘Related entries’ column offers an automated search for outbound and inbound cross-references for the chosen entry, followed by outbound cross-references on the entries detected as first-level cross-references.

For existing entries, there are direct links to the history, the marks and the preview of each entry. For candidate terms coming from the term extraction module, additional information is also extracted, e.g. the part of speech and a context.

As soon as an IATE entry is added to a project’s preparatory material table, the information that it belongs to that project will be visible in the full entry view via the ‘Related projects’ field at LIL. This field has also been added to the list of fields in ‘Advanced search’, and queries will be able to retrieve entries included in the preparatory material for projects with ‘Draft’ or ‘Ongoing’ status.

### **33.5 Project entries table**

The 'Project entries' table contains all the IATE entries that have been selected for the project (candidate terms are not allowed in this table). The features available are very similar to those under 'Preparatory material' (please see the above section for further explanations on the use of the features).

Once the initial phase of the project is done, entries can be copied from 'Preparatory material' to 'Project entries' using the dedicated button. Once the entries have been copied to 'Project entries', changes are allowed only in the row present in the 'Project entries' table. Updates made in the 'Project entries' table will be automatically reflected in the 'Preparatory material' table. In the 'Preparatory material', the background colour of entries that have been transferred to the 'Project entries' will turn yellow and the text in all columns will be italicised. An entry can be moved back to 'Preparatory material' by clicking on 'Move to preparatory material' or fully removed from a project (both tables simultaneously) by clicking on 'Remove from project'.

As in the preparatory material table, in the full entry view of each entry included in the project entries table, it is possible to display the TPM project to which it belongs by clicking on 'Load TPM info' in the 'Related projects' field at LIL. You can also change your user preferences to have this information loaded automatically.

In 'Advanced search', the entries already added to the project entries table in a TPM can be retrieved irrespective of whether the project status is 'Draft', 'Ongoing', 'Done', 'Suspended' or 'Abandoned'.

### **33.6 Delete a project**

Projects can be deleted by users with specific rights. It is a hard deletion, which means that the project cannot be restored. If you are unsure about deleting a project, you can instead mark its status as 'Abandoned' or 'Suspended'. Then you will be able to come back to it if needed.

### **33.7 Search a project and results**

In the Projects tab, you can access your own projects, your institution's projects, and other institutions' projects (with the exception of those labelled as 'confidential'). Open the expanded search to see all search filters.

By default, the results list shows projects for which you are the author or a coordinator, or for which you or your division have assignments.

Projects My assignments Create

Name  Search in

Internal reference  Status

Type  
 Terminology  Term List  Ontology  Nomenclature  Proactive  Post Translation  Consolidation  Cleaning  Document Based  
 Thematic  Work Programme  Ad Hoc  Not Specified  all


Coordinators  on

RESET Search

Close expanded search

Results 1-6/6 [Export results](#)

Name	Project status	Assignments	Due date	Source language	Target language	Coordinators	Creation date
CdT-Sustainable development & finance-2023	Ongoing	All assignments new: 86% (76) ongoing: 3% (3) done: 10% (9)	30.6.2023	en	bg, cs, da, de, el, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, la, mul	BILASCL ( CdT / Central Terminology )	16.1.2023 16:24:17
CdT-Occupational safety and health terminology-2022	Ongoing	All assignments new: 60% (18) ongoing: 7% (2) done: 33% (10)	20.4.2023	en	bg, cs, da, de, el, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, la, mul	BILASCL ( CdT / Central Terminology ) IATE_TEAM ( IATE / Other )	5.7.2022 16:25:30

Several search filters can be combined, and the results can be sorted by status, due date or creation date, as in the example above. Depending on the columns you choose to display (selectable with the configuration button  or in the user preferences), other sorting options are available (e.g. by the column ‘Mandatory’).

You can monitor project progress in the ‘Assignments’ and ‘Assignments per language’ columns.

Choose and sort columns

Assignments per language Description Author Last modification Confidentiality

Outsourcing Launch date Interinstitutional file number Internal reference Source language

Target language Comments EurTerm link Related collections Domain Related projects

Number of entries

Drag and drop columns here in the desired order

Mandatory Type Project status Project instructions Coordinators Creation date

Due date Assignments

## Export list of projects and project details

After running a search, you can export a list of projects in Excel format. You can choose which metadata to export (from Project info) in the Export pop-up.

Projects Assignments Create

Name  Search in  RESET Search

Results 1-10/12 [Export results](#)

Name	Project status	Due date	Source language	Target language	Coordinators	Creation date
EU-migration test-2022	Ongoing	6.12.2022	en	de, es, fr, ga, pt	CoordTPM ( CdT / EN )	23.11.2022 14:50:35
CdT-new test author-2022	Ongoing				CoordTPM ( CdT / EN )	24.10.2022 13:00:04
CdT-internal-2022	Ongoing		en	ro	CoordTPM ( CdT / EN )	20.10.2022 18:08:28

→ Additional information

\* Name of request

\* Project info fields

<input checked="" type="checkbox"/> Code	<input checked="" type="checkbox"/> Name
<input checked="" type="checkbox"/> Coordinators	<input checked="" type="checkbox"/> Coordinator's institution
<input checked="" type="checkbox"/> Coordinator's division	<input checked="" type="checkbox"/> Description
<input checked="" type="checkbox"/> Interinstitutional file number	<input checked="" type="checkbox"/> Internal reference
<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Project instructions
<input checked="" type="checkbox"/> Background references	<input checked="" type="checkbox"/> EurTerm link
<input checked="" type="checkbox"/> Source language	<input checked="" type="checkbox"/> Target language
<input checked="" type="checkbox"/> Related projects	<input checked="" type="checkbox"/> 'Related projects' comments
<input checked="" type="checkbox"/> Related collections	<input checked="" type="checkbox"/> Domain
<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Mandatory
<input checked="" type="checkbox"/> Type	<input checked="" type="checkbox"/> Outsourcing
<input checked="" type="checkbox"/> Confidentiality	<input checked="" type="checkbox"/> Due date
<input checked="" type="checkbox"/> Creation date	<input checked="" type="checkbox"/> Modification date
<input checked="" type="checkbox"/> all	

Warning! Fields for IATE entries and term candidates are fixed in the export file

Discard Export

You can also export a full project, from either the 'Project info' or the 'Preparatory material' tab, by clicking on 'Export' or 'Export entries'. The export file will contain three tabs:

- project info (columns selected by the user),
- candidate terms (fixed set of columns) from the preparatory material table, and
- IATE entries from the same table (also with a fixed set of columns).

Exports are processed as asynchronous requests and can be retrieved from the 'Asynchronous requests' menu.

Imports are not yet available, but entries and candidates can be loaded easily via lists of IDs and terms.



## 33.8 Assignments

The project author and coordinator(s) can manage assignments in order to allocate tasks to specific divisions or users, to allow them to work on project entries.

The assignments can be created in the ‘Assignments’ tab at project level. Each individual assignment is specific to one project, one language and one assignee (division, internal user or external collaborator).

### Assignment types:

There are two ways to create assignments, depending on whether you wish to assign all project languages or specific project languages:

- **automatic:** assigns all project languages to internal divisions. In this case, the project languages must previously have been set in the Project info tab as target languages.

CdT-EEA sustainable finance-2022

Project info Preparatory material Project entries **Assignments** External forum Internal forum

Group by type Group by language Group by status

Language: all - Automatically assign all project languages to internal divisions Type: For Completion

Assignment instructions: General instructions to all assignees

Due date: 30.06.2022

CANCEL CREATE

- **on demand:** select a specific language and then either the corresponding division in your own institution, or a specific user from any institution or division, including an external collaborator.

CdT-EEA sustainable finance-2022

Project info Preparatory material Project entries **Assignments** External forum Internal forum

Group by type Group by language Group by status

Language: en - English Type: For Completion

Assignment type: Assign to division Division: EN - CdT

Assignment instructions: General instructions to all assignees

Due date: 30.06.2022

CANCEL CREATE

Depending on the assignee selected, assignments are classified as:

- **division assignments:** allocated to the internal divisions of the author’s or coordinator’s own institution. Members of each division will have the possibility to reassign the task to a particular member of the division

(following agreement). The task can be reassigned several times if necessary. Note that in the case of an interinstitutional terminology project, you will not be able to assign tasks to divisions at another institution, only to individual users.

- **user assignments:** allocated to a specific user, from any institution or division, including an external collaborator, in accordance with their working languages. Once the assignment has been created, you cannot change the assignee. If you need to make a change, you will have to delete the original assignment and create a new one with a different assignee.

Note that if a project is confidential, it can be assigned only to divisions or users belonging to the institution which owns the project.

Each assignment will include the following fields:

- language
- assignee
- type of task
- assignment instructions
- assignment deadline.

One task type may appear more than once in the project workflow at different points in time (two assignments can be created for the same language with the same task type).

The project coordinator will have the possibility to monitor the progress of each task in the Assignments screen of the project. For easier follow-up, tasks can be grouped either by type, by language or by status, and can also be filtered by assignee (division or username). It is possible to obtain a detailed list of the assigned entries and their status by language and type by clicking on the ‘Show more’ icon.

CdT-Sustainable development & finance-2023 Ongoing

Project info Preparatory material Project entries **Assignments** My assigned entries External forum Internal forum

Create new assignment

User: BILASCL Collapse all Group by type Group by language Group by status

**For Revision** 1 Assignments ongoing

Language	Assignee	Instructions	Completion	Status	Due date
fr	BILASCL ( CdT )	---	50 %	Ongoing	

Assignment's progress:  
 Done : 3588323 , 3591652  
 Ongoing : 3581944  
 New : 3575948

**For Validation** 1 Assignments done

Language	Assignee	Instructions	Completion	Status	Due date
bg	BILASCL ( CdT )	For validation	100 %	Done	10.5.2023

It is also possible to obtain a general progress overview directly in the list of projects (in the 'Assignments' and 'Assignments per language' columns). See section 33.7 Search a project and results for details.

NB: There are no technical limitations on the editing of ongoing TPM projects, including those with assignments. New entries can be added to a project at any time; if they are added to the 'Project entries' table, they will be automatically added to the existing assignments and counted in the assignment progress. Conversely, entries can be deleted from a project, in which case they will be automatically removed from the relevant tables, assignments and calculations of the assignments' progress. Project titles and other project metadata can be updated, including source and target languages. If entries contained in a project are deleted from IATE, they will remain in the project tables and assignments with a specific 'deleted' label, and will no longer be counted in the assignments' progress.

### 33.9 Internal assignee view


All assignees will have access to their assignments, which can be allocated either to them individually as users or to their division.

Project coordinators who are also assignees will be able to see in the ‘Projects’ tab both projects for which they are coordinators or authors, and projects for which they have assignments allocated to them individually or to their division.

To manage their assignments, assignees can obtain a list of all projects for which they have assignments in the ‘My assignments’ tab. By default, all assignments with all statuses are retrieved, but users can apply specific filters to retrieve only division or personal assignments or assignments with a specific status.

The screenshot shows the 'My assignments' tab in a web application. At the top, there are three tabs: 'Projects', 'My assignments' (selected), and 'Create'. Below the tabs is a search interface with a 'Name' input field, a 'Search in' dropdown menu set to 'All my assignments', and a 'My assignments status' dropdown menu set to 'all'. A blue 'Search' button is on the right. Below the search bar, it says 'Results 1-10/11' and there is an 'Export results' button with a download icon.


Name	Assignments per language	Due date	Source language	Target language	Coordinators	Creation date
CdT-EEA sustainable finance-2023	<b>My division assignments</b> <ul style="list-style-type: none"> <li>• fr new: 20% (1) done: 80% (4)</li> </ul> <b>My personal assignments</b> <ul style="list-style-type: none"> <li>• en new: 20% (1) ongoing: 20% (1) done: 60% (3)</li> </ul>	15.8.2023	en	bg, cs, da, de, el, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, la, mul	BILASCL ( CdT / Central Terminology ) CoordTPM ( CdT / EN )	23.2.2022 15:34:18
EU-Gender equality-2022	<b>My division assignments</b> <ul style="list-style-type: none"> <li>• en new: 100% (3)</li> </ul>	15.12.2022	en	bg, cs, da, de, el, es, et, fi, fr, ga, hr, hu, it, lt, lv, mt, nl, pl, pt, ro, sk, sl, sv, la, mul	Jane_Watson ( CdT / Central Terminology ) CBILAS ( EP / Central Terminology ) Claire Bilas ( CJUE / FR )	5.10.2022 16:06:52


To obtain a detailed overview of the entries assigned, assignee can then click on the relevant project to access the ‘My assigned entries’ tab, which provides direct access to the assignment instructions , task type and due date, as well as to additional information provided by the project coordinator, such as detected duplicates, related entries and other comments.


Ongoing


CdT-Sustainable finance-2023












Project info Preparatory material Project entries Assignments **My assigned entries** External forum Internal forum


Results 1-7 

Change status in bulk New  Reassign in bulk Reassign to me in bulk Unassign in bulk

Filters: new ongoing done skipped Assigned to me Not assigned to me [Export table] Apply my user preferences 

Assignment type: Not specified 

#	Entry ID	Term	Assignments	Assignment notes	Duplicates	Related entries
1	 3582903	en policy effectiveness	<input type="checkbox"/> fr Skip  <input type="checkbox"/> For Completion Due date: 12.12.2023 [ Open a forum discussion (Internal forum) ] Assigned to: CdT/Central Terminology Reassigned to: BILASCL ( CdT / Central Terminology ) [Reassign] [Unassign] <input checked="" type="checkbox"/> fr Skip  <input type="checkbox"/> For Validation Due date: 22.12.2023 [ Open a forum discussion (External forum) ] [ Open a forum discussion (Internal forum) ] Assigned to: BILASCL ( CdT )	fr mes notes personnelles... fr Add notes		  
2	 3582933	en ice loss	<input checked="" type="checkbox"/> fr Done  <input type="checkbox"/> For Completion Due date: 12.12.2023 [ Open a forum discussion (External forum) ] [ Open a forum discussion (Internal forum) ] Assigned to: CdT/Central Terminology [Reassign] [Reassign to me]	fr Add notes fr Add notes	1621398	  

Under each assigned entry, a shortcut enables the user to ‘Open a forum discussion’ with the entry ID and language pre-filled. If a discussion thread is already open, a specific icon  will be displayed.

As with all the TPM tables, the layout of the ‘My assigned entries’ table can be configured and saved in user preferences, and the table itself can be exported.

Assignees have access to some management operations here and can:

- change the assignment status from **New** to **Ongoing**, **Done** or **Skip** (‘Skip’ is only available if enabled by the project coordinator when editing the project), either individually in the task row or in batch, by selecting several tasks  and using the ‘Change status in bulk’ selector,
- **reassign a division assignment** to another member of their own language division, either individually in the task row or in batch by selecting several tasks and using the dedicated buttons to the right (‘Reassign in bulk’ or ‘Reassign to me in bulk’),
- add any useful remarks or comments to the ‘**Assignment notes**’ field, which is visible only to the author of the notes.

Tasks can be filtered based on

- their **status** by unselecting the status(es) to be hidden: **new ongoing done skipped**,
- a direct user assignment (assigned to me) or a general assignment to the division (not assigned to me),
- their assignment type by selecting the type to be displayed (tasks for action, for completion, for feedback, for revision or for validation).

To start working on an entry, the assignee will have to click on the entry ID, which will open the full entry view for editing.

### **33.10 External collaborator view**

External collaborators manage their assignments in the same way internal assignees do: they get their tasks under ‘Assignments’ > ‘My assigned entries’ with direct access to the entries they are supposed to work on. They can only edit their assigned entries via the TPM module; if they open the entries via the search, the entries will be read-only, as for any external user.

External collaborators can only edit their assigned LLs and TLs (LIL is always read-only) and have a reduced view of the entries.

List of fields **hidden** from external collaborators:

- At LIL: management, related projects, confidentiality, entry status, protection;
- At LL: related material, management, confidentiality, protection;
- At TL: management, confidentiality, protection.

Additionally, any field that is set as confidential will not be visible to external collaborators.

List of fields available **in read-only** to external collaborators:

- At LIL: all remaining fields;
- At LL: collections, attachments, owner, preIATE label if applicable;
- At TL: collections, owner, preIATE label if applicable.

For further details, consult the [External Collaborator’s Handbook](#) (also available to external collaborators at the bottom of the ‘Assignments’ table).

### 33.11 Internal forum

In order to make communication easier between the author or project coordinator(s) and the internal project assignees, a forum has been made available. To create a new discussion, you need to insert a title and describe the issue in the text field. It is also possible to indicate whether the discussion is related to a specific entry and/or language. Once a discussion has been created, you can click on its title to open the thread and see its contents.

The screenshot shows the 'Internal forum' tab selected in a navigation bar. Below the navigation bar is a search bar with a search icon and a button labeled 'Open expanded search'. The main form area contains two dropdown menus: 'Related entry' (set to '3582897 ecosystem vulnerability') and 'Related language' (set to 'French'). Below these are two text input fields labeled 'Title' and 'Text'. At the bottom right of the form are 'CANCEL' and 'CREATE' buttons. Below the form, a question is displayed: 'This is my question' with a timestamp '27.7.2022 10:08'. It includes 'Related entry: 3582897 Related language: fr' and 'Explanations...'. The status 'No answers yet' is shown at the bottom right.

An expanded search allows you to extract the discussions of interest to you. Searching by keyword(s) will browse in both title and text fields.


### 33.12 External forum

Project coordinators will be able to see the External forum tab, which is a channel for bilateral communication with external collaborators.

The screenshot shows the 'External forum' tab selected in a navigation bar. Below the navigation bar is a 'Create a new discussion' button and a search bar with a search icon and a button labeled 'Open expanded search'. The main content area shows a question: 'contreras ( CdT / Outsourcing ) > Coordinators' with a timestamp '27.7.2022 11:12'. It includes 'This is my question...' and 'Related entry: 3578675 Related language: de'. Below the question is a large text input field for an answer, with an 'Answer' button at the bottom left.

## 34. NOTIFICATIONS

A notifications engine has been developed, with the first implementation covering notifications for external forum exchanges in the TPM. In upcoming releases, notifications will cover other modules and features as well.

The notification icon is displayed on the right-hand side of the IATE top menu, next to the interface language button. It appears only if the user has received notifications (read or unread). If new notifications are available, an orange blinking dot  will be displayed. Clicking on the bell will display a pop-up containing the 5 latest notifications: the unread messages are displayed first, with the most recent on top. Each notification links to the particular TPM project and specific new thread or reply.

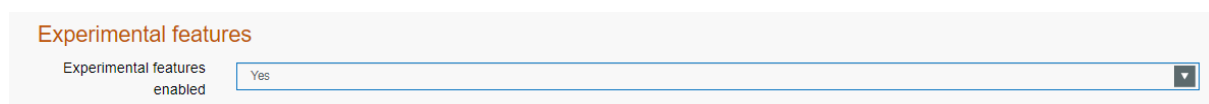
A new 'Notifications' tab has also been added to the user profile screen, where the user can find a full list of their notifications. Unread notifications are kept for 60 days and read notifications are kept for 2 weeks before being deleted.

## 35. EXPERIMENTAL FEATURES

A set of experimental features for testing and evaluation purposes has been made available recently in the production environment. They are intended to support terminology work in the areas of data enrichment and ordinary legislative procedure (OLP) post-adoption terminology checks.

### 35.1 Support for data enrichment (Admins only)

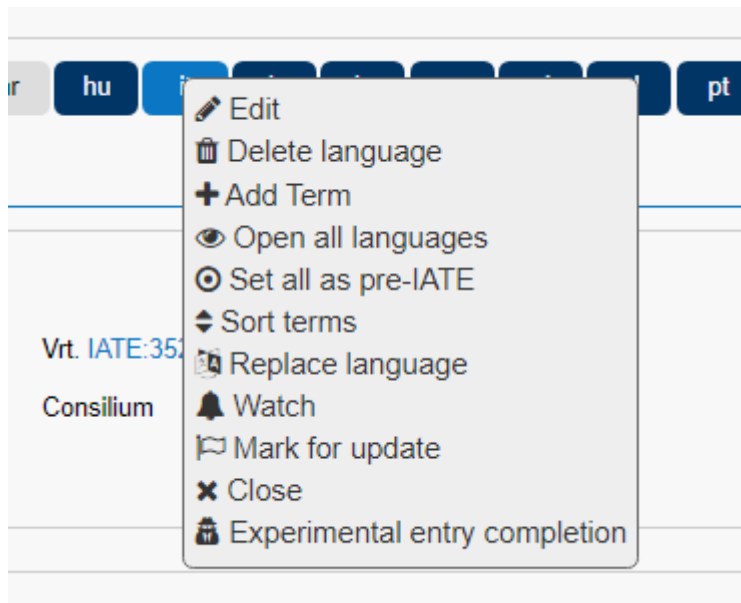
If you have an Administrator role and you wish to test these features, you will need to enable them in your User preferences:



Once enabled, you will have the possibility to test and make use of the following features:

- suggestions for terms in any language by right-clicking on the language in the language bar below the language-independent level, and clicking on 'Experimental entry completion', or selecting the same option in the Quick edit panel.





The suggested terms are:

- retrieved from Wikipedia/Wiktionary; or
- suggested by ChatGPT and verified against EUR-Lex. Only the suggestions found in EUR-Lex (both source and target terms need to be found in the document) are proposed to you at the moment.

The link to the source is provided in both cases (with a bilingual display in the case of EUR-Lex documents) and you can then select which proposed terms you want to use, and click on 'Add the selected terms to the entry' to open the form for creating the new language.

Experimental entry completion
✕

See suggestions to complete the entry in the selected language:

- Energia sostenibile** (*Wikipedia*)  
Source: [https://it.wikipedia.org/wiki/Energia\\_sostenibile](https://it.wikipedia.org/wiki/Energia_sostenibile)
- energia pulita** (*ChatGPT + Eurlex*)  
Source: [REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL on progress of clean energy competitiveness](#)
- energia rinnovabile** (*ChatGPT + Eurlex*)  
Source: [REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL on progress of clean energy competitiveness](#)
- energia verde** (*ChatGPT + Eurlex*)  
Source: [WRITTEN QUESTION E-3782/00 by Erik Meijer \(GUE/NGL\) to the Commission. Price rises for clean electricity as a result of EU competition rules.](#)
- energia sostenibile** (*ChatGPT + Eurlex*)  
Source: [Opinion of the European Committee of the Regions — Implementing the Clean Energy Package: the NECPs as a tool for local and territorial governance approach to climate, active and passive energy](#)

You can check the source of each term by clicking on the link. Select the terms you want to add to the entry and click on 'Add the selected terms to the entry' to open the form for creating the new language:

Discard
Add the selected terms to the entry

It is important to note that responses might be slow or even time out, particularly for AI services, and in some cases may not even be displayed.

➤ support for drafting definitions

Accessible from the entry creation form or the full entry view, the new button in the formatting bar of the Definition field can provide you with additional support whilst drafting your definitions.

Clicking on the button will generate suggestions that are either machine translations of existing definitions in the entry or AI-generated suggestions based on the term, domain and notes if they are not confidential.

You should always verify the content of these suggestions by clicking on 'Verify definition' to confirm that the definition has not been copied from an external source that could be subject to copyright (a search is run in Google). You can add useful proposals to the 'Draft' box, where you can then make any necessary adjustments, before clicking on 'Add' to insert it into the entry.

**Suggestions from TM**

The definitions generated by TM are machine translations from existing definitions in the entry or AI generated suggestions based on the term, domain and notes if not confidential. You should verify the content by clicking on 'Verify definition' to confirm that the definition has not been copied from an external source that could be subject to copyright. You can add useful proposals to the draft box, rework the text and then click on 'Add' to insert it to the field.

Machine translated from other languages | Drafted by ChatGPT

Green energy refers to renewable energy sources that have minimal impact on the environment and produce little to no greenhouse gas emissions.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

Green energy is a term used to describe energy sources that are sustainable and have a lower environmental impact compared to traditional energy sources.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

In the context of environment and energy, green energy refers to clean and renewable energy sources such as solar, wind, and hydroelectric power.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

Green energy is synonymous with clean energy as it pertains to energy sources that are not derived from fossil fuels and do not contribute to climate change.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

Green energy encompasses alternative energy sources that are both environmentally friendly and sustainable in the long term.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

The term green energy specifically refers to energy derived from renewable resources that can be naturally replenished and do not deplete the Earth's finite resources.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

When used in the context of environment and energy, green energy refers to the utilization of renewable and non-polluting energy sources.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

Green energy refers to energy sources that are derived from natural resources and have minimal negative impact on ecosystems or air quality.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

The concept of green energy relates to the generation and use of power through sustainable means, with a focus on reducing carbon emissions and promoting a healthier environment overall.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT

Green energy is often associated with energy efficiency and sustainable practices, emphasizing the use of resources that minimize harm to the environment.  
[Verify definition] [Add to draft] [Remove suggestion] Source: ChatGPT


Draft

Discard Add


It is important to note that responses might be slow or even time out, particularly for AI services, and in some cases may not even be displayed.

Further improvements are foreseen in the short term.

➤ **EUR-Lex context retrieval**

In the entry creation form or in the full entry view, you can retrieve contexts for your term from EUR-Lex by clicking on the new  button in the formatting bar of the Context field. You will be presented with a list of results (the first 10 documents retrieved in EUR-Lex) where you can then expand the sentences which contain your term as an 'exact match'. You can select one or more sentences and insert them as new contexts along with their references.

➤ **Machine translation of existing notes for information purposes**

In the entry creation form or in the full entry view, you can obtain a machine translation of any language level note or term note by clicking on the new  button in the formatting bar of the LL or TL note fields. Translations of anchor language notes are shown first, if there are any, followed by translations of notes written by the other languages on the entry.

### 35.2 Adopted acts and terminology checks

A new 'Post-adoption' feature can be found under the Management menu, where you can select your language and insert either the OLP procedure number or a CELEX number for a non-adopted act. You can do this one by one or by uploading a list of procedure numbers or CELEX numbers in a simple TXT file.

Once the numbers have been added, you can click on 'Search for adopted act' to launch a check against EUR-Lex and establish whether an adopted act is available (with its CELEX number).

CELEX Test

Validation Collections Attachments Import Asynchronous requests Marks Table view Merge Undo Batch deletion Post-adoption

This feature will execute in the current tab, do not close this tab or navigate to other pages while the process is ongoing.

Select a language

Language: en

Add a single procedure number

Year: 2007 Number: 0288

Add

Add a single CELEX number

CELEX number: 32007PC0288

Add

Add acts from a list of procedure numbers and CELEX numbers

Upload File (click or Drag & Drop)

Empty list

Procedure numbers

2007/0288 This procedure has been adopted

Search for adopted act

This can be used as a standalone feature, or as a first step to run a terminology check of a set of entries against the adopted act (via a monolingual TRM request in the background).

To launch the terminology check, you need to click on ‘Open’ next to the document number. This will open the adopted document and provide you with several ways of adding the entries that you want to be checked: you can add entries whose reference fields contain the specific CELEX number, entries from a TPM project, entries from Marks, or entries by inserting a list of entry IDs.

When you click on ‘Launch terminology check’, a monolingual TRM request will be processed in the background against the adopted act, and you will be able to run a check of the terms in the added entries (in the language selected in the previous screen) against the results of the TRM request.

Procedure numbers

2007/0288 ✓ CELEX: 32009L0042 This procedure has been adopted

Procedures marked with a green mark have been adopted. Click on any procedure number to start the post-adoption checks for the selected procedure.

CELEX Test

Validation Collections Attachments Import Asynchronous requests Marks Table view Merge Undo Batch deletion Post-adoption

Empty list Back to form

Add related entries automatically  
Add entries from related marks  
Add entries from a TPM project (propositional material)

Procedure number(s)

2007/0288 ✓ CELEX: 32009L0042 This procedure has been adopted

Procedures marked with a green mark have been adopted. Click on any procedure number to start the post-adoption checks for the selected procedure.

120349

- fish processing ship
- fish-processing vessel
- processing vessel

777046

- transport of goods
- goods transport
- carriage of goods
- movement of goods
- transfer of goods

805359

- transport contract
- contract of carriage

2251137

- waste alert message

3006034

- nationality of the maritime transport operator

Launch terminology check

CELEX: 32009L0042

L\_200914EN10102011.html  
6.6.2009 EN Official Journal of the European Union L 141/29

DIRECTIVE 2009/42/EC OF THE EUROPEAN PARLIAM AND OF THE COUNCIL  
of 6 May 2009  
on statistical returns in respect of carriage of goods and passengers by sea  
(Repealed)

(Text with EEA relevance)

THE EUROPEAN PARLIAM AND THE COUNCIL OF THE EUROPEAN UNION,  
Having regard to the Treaty establishing the European Community, and in particular Article 256(1) thereof,  
Having regard to the proposal from the Commission,  
Acting in accordance with the procedure laid down in Article 251 of the Treaty (1),  
Whereas:

- (1) Council Directive 95/52/EC of 8 December 1995 on statistical returns in respect of carriage of goods and passengers by sea (2) has been substantially amended several times (3). Since further amendments are to be made, it should be recast in the interests of clarity.
- (2) To carry out the tasks entrusted to it in the context of the common maritime transport policy, the Commission (Eurostat) should have at its disposal comparable, reliable, synchronised and regular statistical data on the scale and development of the carriage of goods and passengers by sea in and from the Community, between Member States and for domestic sea transport.
- (3) It is also important for Member States and economic operators to have a good knowledge of the maritime transport market.
- (4) The collection of Community statistical data on a comparable or harmonised basis makes it possible to establish an integrated system providing reliable, consistent and up-to-date information.
- (5) The data on the transport of goods and passengers by sea have to be made compatible between Member States and between the different modes of transport.
- (6) In accordance with the principle of subsidiarity, the creation of common statistical standards enabling harmonised information to be produced can only be tackled efficiently at Community level. Data will be collected in each Member State under the authority of the bodies and institutions in charge of compiling official statistics.
- (7) The measures necessary for the implementation of this Directive should be adopted in accordance with Council Decision 1999/468/EC of 28 June 1999 laying down the procedures for the exercise of implementing powers conferred on the Commission (4).
- (8) In particular, the Commission should be empowered to adopt certain detailed rules for implementing this Directive. Since those measures are of general scope and are designed to amend non-essential elements of the Directive, in so far as by supplementing it with new non-essential elements, they must be adopted in accordance with the regulatory procedure with scrutiny provided for in Article 54 of Decision 1999/468/EC.
- (9) The new elements introduced into this Directive only concern the committee procedures. They therefore do not need to be transposed by the Member States.
- (10) This Directive should be without prejudice to the obligations of the Member States relating to the time limits for transposition into national law of the Directive set out in Annex IX, Part B.

HAVE ADOPTED THIS DIRECTIVE:

Article 1  
Collection of statistical data  
Member States shall collect Community statistics on the carriage of goods and passengers by seagoing vessels calling at ports in their territories.

Article 2  
Definitions

## 36. STATISTICS

IATE includes a statistics module with global and advanced statistics which are updated every night and are available to all internal users. User-specific statistics are also available and are generated on demand (only for own data).

The global statistics offer a selection of quantitative and qualitative indicators regarding the content stored in the IATE database. They can be viewed in graphical format in the ‘Global statistics’ tab and in tabular format in the ‘Tabular view’ tab, from where they can also be exported into Excel.

The qualitative indicators show figures for all IATE data and also for all data excluding pre-IATE, which means that for language data to be counted, the LL should not be set to pre-IATE and at least 1 TL in that LL should not be set to pre-IATE.

**Tip:** Hover your mouse over the title of the global statistic to get more information.


It is possible to hide some of the values shown in the pie charts. You can remove a value by left-clicking on it (either in the colour box or on the text) under the chart. Removed values are shown in strikethrough. If you click on them again, they will reappear in the chart.

Advanced statistics can be found in the ‘Daily statistics’ tab. The figures for the last month are displayed by default, but you can define a specific time range. If you select a daily display, the maximum time range available is one year. The statistics can be viewed as graphs or tables, with detailed or aggregated values, and per day, week or month. The advanced statistics contain detailed search statistics, movements per institution/division (user), movements per object (owner of the data), exports (internal and public ones), TRM standard and TRM live. The statistics for the selected period can be exported in Excel format.

User-specific statistics include creations, modifications, deletions and validations for the selected period and are only available in Excel format.

Some statistics are counted differently in the new IATE (for example, movements, which were counted per level in IATE 1, are counted per field or set of composite fields in the new version). Therefore, statistics as from 25 February 2019 might not be comparable with previous figures.

## 37. TUTORIALS

A ‘Tutorials’ tab is available under the ‘Info’ tab  with a collection of IATE tutorials on different topics. These short videos will quickly help you understand the IATE features they describe.


- IATE data modification
- IATE Term Extraction Module (TEM)
- IATE Term Recognition Module (TRM)
- IATE SDL Term Recognition batch task – plug-in demo

- IATE TRM Terminology Provider – plug-in demo
- IATE Terminology Projects Module (TPM part 1) – demo
- IATE Terminology Projects Module (TPM) – assignee view
- IATE Terminology Projects Module (TPM) for external collaborators

## 38. TEMPLATE REPOSITORY

A collection of all the templates used in IATE to launch batch operations, import data and create TRM or TEM requests.

## 39. DOWNLOADABLES

Located under the ‘Info’ tab , the ‘Downloadables’ page is a space for users with specific rights to store and download large files.

## 40. IATE SEARCH WIDGET

The IATE search widget makes it possible to search for and display multilingual EU terminology from IATE on a website, platform or blog by embedding a piece of code. The widget runs queries on public IATE data and does not require any login.

A set of [templates](#) is available to cover various use cases, showcasing IATE’s look and feel. The IATE search widget is fully customisable to match the design of the site on which it is placed, and the search criteria and labels can be adapted to the target users.

Webmasters can find detailed [documentation](#) on the search widget on the ‘IATE for developers’ screen.

## 41. USER ACCESS CONTROL

Users with specific rights (‘Administrator’ and ‘Super Administrator’ roles) have access to a specific module for managing users’ accounts, roles, permissions and institutions.

Each central terminology service can manage users by creating new user accounts manually, resetting IATE 1 passwords, adding or updating a user’s division, working language(s), and autovalidated language(s), adding alternative roles for users (for testing purposes, for example) and disabling users. The central terminology services can also consult the list of institutions, sub-institutions and their respective divisions, as well as the available standardised roles and the permissions attached to each of them. One or more sub-institutions

can be added to a user belonging to a parent institution in order to give this user the possibility to manage the sub-institutions' data with their parent institution account. This means in practice that a user with a sub-institution assigned in their account will be able to modify/validate/autovalidate/delete/undelete data owned by the specific sub-institution as they would be able to do with data from the parent institution. The movements will be assigned to the user from the parent institution for audit and statistics purposes.

The IATE Support and Development Team can create, modify and remove institutions, sub-institutions and divisions, as well as roles and permissions.

A dedicated manual is available for users with specific permissions.

## **42. ACCESSIBILITY**

IATE complies with the international WCAG 2.0 guidelines, with an AA level of conformance. Keyboard support, colour choice, contrast, size, resizing and other aspects have been implemented according to the guidelines. Compatibility with screen readers has been enhanced for the parts accessible by external users (search, results, full entry view, documentation) as a starting point.

A [list of the main keyboard shortcuts](#) is available on the Info page.

## 43. ANNEX I: BASIC VOCABULARY <sup>1</sup>

**Appellation:** designation of a concept whose extension is made up of a single object or multiple parts that form a single object. The ‘appellation’ term type has been removed. It will be replaced in future with a new LIL field ‘Concept type’ (individual/general). For the time being, individual concepts should be linked to collection EU-MUL-INDIVIDUALCONCEPTS, so that they can be identified and retrieved easily.

**Concept:** unit of thought constituted through abstraction on the basis of properties common to a set of objects

*NB Concepts are not bound to particular languages. They are, however, influenced by the social or cultural background.*

**Context:** text or part of a text in which a term occurs

**Definition:** statement which describes a concept and permits its differentiation from other concepts within a system of concepts

**Designation:** any representation of a concept

**Intensional definition:** definition based on the [...] set of characteristics which constitutes a concept

**Neologism:** term newly coined or recently borrowed from a foreign language or from another subject field

**Note:** statement which provides further information on any part of the terminological record

**Special language:** linguistic subsystem, intended for unambiguous communication in a particular subject field using a terminology and other linguistic means

**Symbol:** designation of a concept by letters, numerals, pictograms or any combination thereof.

**Synonymy:** relation between designations representing only one concept in one language

**Term:** designation of a defined concept in a special language by a linguistic expression

*NB A term may consist of one or more words [i.e. simple term or complex term] or even contain symbols.*

**Terminology work:** any activity concerned with the systematisation and representation of concepts or with the presentation of terminologies on the basis of established principles and methods

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<sup>1</sup> All definitions sourced from ISO 1087:1990 Terminology – Vocabulary, except for 'appellation', for which the definition was sourced from ISO 704:2009 Terminology work - Principles and methods.



## 44. ANNEX II: FORMATTING



### Formatting

IATE offers a WYSIWYG ('what you see is what you get') editor with a formatting bar in each field. This means that you should no longer insert formatting via HTML tags, but use the options in the formatting bar instead. When copying content from external sources into an IATE field, only the allowed formatting will be maintained.

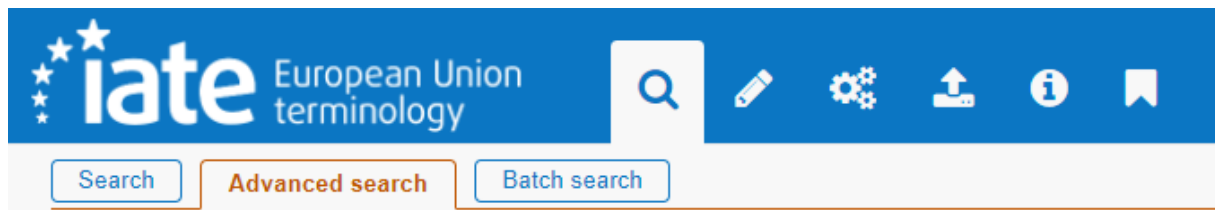


You should only use the allowed formatting options and avoid introducing other formatting, which may be lost or pose problems when exporting data for use in other tools like CAT tools.

Allowed formatting: bold **B**, italics *I*, superscript <sup>x<sup>2</sup></sup>, subscript <sub>x<sub>2</sub></sub>, small text x<sup>2</sup>, hypertext [x<sup>2</sup>](#).

A 'Clear formatting' button  allows you to remove formatting from a text selection in one click. A 'Change capitalisation' button  facilitates the case change, particularly in EUR-Lex titles with full capitalisation.

## 45. ANNEX III: ADVANCED SEARCH



‘Advanced search’ is available for all internal IATE users: administrators, terminologists, translators and basic users.

### Main principles

- Most of the IATE fields are available.
- Possibility to limit results to selected languages.
- Possibility to count the number of entries before running the actual search or export.
- Possibility to obtain results in a hitlist or in an export file, with strict (only the items matching your criteria) or entry view (the whole entry containing a match is returned).
- Asynchronous export: results are not available immediately – which could create timeouts for big queries – but can be retrieved in the ‘Asynchronous requests’ screen.
- Internal users can export up to 5 000 entries, while Administrators can export up to 100 000 entries.

The query consists of individual search criteria, one per row. This is called a ‘rule’. The rule has 3 parts:

- 1) the **IATE data field** you are interested in,
- 2) a suitable **operator**, which varies according to the IATE field you have chosen, and
- 3) a related **parameter**, meaning the content of the IATE field, which can be a number, a date, a value or free text. Depending on the IATE field and the operator you have chosen, you can put either one parameter or several (for example, running a search in several collections).

The first step is to select the data field. Then you will automatically get the suitable operators, and a third field for the number, value, date or free text.

- For fields where the content is taken from a fixed set of values, you will get a drop-down list (e.g. LIL Has language) or a predictive typing feature (e.g. LIL Belongs to collection / LIL Domain).
- For dates, you will get a calendar (e.g. LIL Creation date). Either move with arrows, or insert the date you need: first year, then month and then the day, with hyphens in between.
- For free text fields, just write in the field what you are looking for.
- The LIL Entry ID field allows you to insert a comma-separated list of IATE IDs.

## More about operators

There are three sets of operators, used for different types of data:

- **For preset values:**

in	If you select more than one value, this means ‘or’. So at least one of the values listed is present in the entry.
not in	Use this for excluding a value. If you insert several values, none of them is present in the entry.
all	If you select more than one value, this means ‘and’. So all values listed must be present in the entry (but not exclusively – there can be other values as well).
only	For Domains, Collections and Language: having exclusively the selected value(s) and nothing else.

- **For dates:**

greater than	After the selected date
greater than or equal to	On or after the selected date
less than	Before the selected date
less than or equal to	On or before the selected date
equal to	Only the selected date
between	From the first selected date to the second date (including the start and end dates)

- **For free text fields:**

Exact match	The field contains all the text written here and in the same order.
Partial string	Retrieves results containing the string inserted in the search field within a longer string. The string does not need to be full words.
Is empty	The field does not contain anything (or only includes ‘---’, which is the value used for mandatory fields which were empty in IATE 1).
Is not empty	The field contains a value, whatever that value is (excluding ‘---’, which is considered as an empty value).
Regular expression	Allows you to run more advanced searches using a specific regular expression syntax. You can find some examples at the end of the document and more detailed information here: <a href="https://www.elastic.co/guide/en/elasticsearch/reference/current/regexp-syntax.html">https://www.elastic.co/guide/en/elasticsearch/reference/current/regexp-syntax.html</a>

## More about IATE fields available


Advanced search covers an almost complete list of fields.


They are organised by levels, LIL – LL – TL, and within the levels, they are sorted **alphabetically**.


Note that some fields with the same name are available at different levels, such as owner, creation date and modification date, so make sure you pick the correct one.



## More about queries

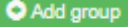
A query can have as many criteria (rules) as needed.

To add additional rules, use the button: 

To delete a rule, use the button: 

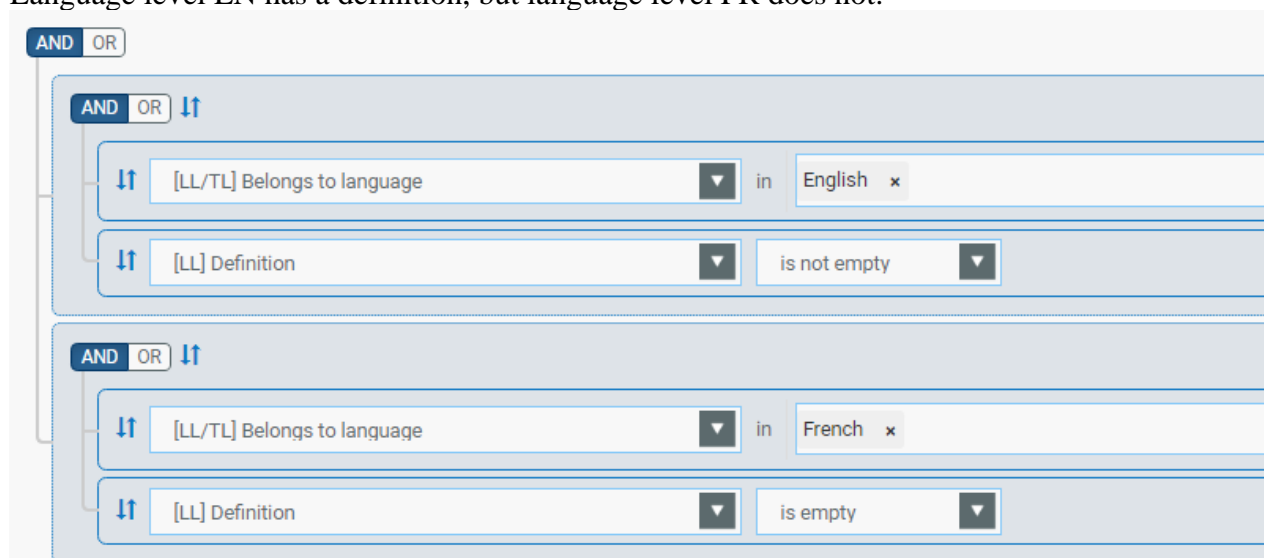
You can clear the whole query by pressing 

Rules are combined in two different ways:  means that all criteria (all rules) must be met, and  means that it is enough that just one of the criteria is met.

When building a query, it is also important to understand **how to use groups** (). A group is a set of several criteria that are all applied together. It's an independent subpart of the main query. You can also think of it as a segment in parentheses. Groups can be useful when you are looking for something in a specific language, to make sure that the selected values apply only to that specific language, by adding the criteria **LL/TL Belongs to language** and then the rules you need in this same group.

Example:

Language level EN has a definition, but language level FR does not.



The screenshot shows a query builder interface with two main groups connected by an AND operator. Each group has its own AND/OR selector and a sort icon. The first group is for English and contains two rules: '[LL/TL] Belongs to language' in English and '[LL] Definition' is not empty. The second group is for French and contains two rules: '[LL/TL] Belongs to language' in French and '[LL] Definition' is empty.

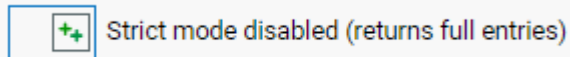
## Language selection

In addition to the rules, you can select which languages should be included in the results. This is an additional filter applied to the query. By default, all available EU languages are shown

(blue means displayed and white means not displayed). If you wish to see results in certain languages only, click on those languages in the language bar (for non-EU languages, click on the ‘See more’ icon).

Please note that RESET clears everything, including the language selection.

## What is ‘strict mode’?



‘Strict mode disabled’ gives you the full content of the IATE entries matching your query. For example, if you are looking for deprecated terms in Latin within a specific collection, and you select to retrieve only Latin, you will get a list of entries belonging to that collection and the whole Latin LL where at least one TL is deprecated (that is, you will also retrieve non-deprecated synonyms).

See example of the query and the first three results:

Results 1-10 / 92

★ 785468	life sciences [SCIENCE > natural and applied sciences] fisheries (5641) [AGRICULTURE, FORESTRY AND FISHERIES]	Council	1
↓ la	<i>Alosa alosa</i> ★★★★★	Council	
	<i>Clupea alosa</i> deprecated ★★★★★	Council	
	Redirected from: <i>vulgaris</i>		
	<i>Alausa vulgaris</i> ★★★	COM	
★ 3570395	life sciences [SCIENCE > natural and applied sciences] fisheries (5641) [AGRICULTURE, FORESTRY AND FISHERIES]	COM	2
↓ la	<i>Patella aspera</i> ★★★★★	COM	
	<i>Patella ulyssiponensis aspera</i> deprecated ★★	COM	
★ 3541052	life sciences [SCIENCE > natural and applied sciences] wildlife [ENVIRONMENT > natural environment] fisheries (5641) [AGRICULTURE, FORESTRY AND FISHERIES]	COM	3
↓ la	<i>Notocanthus chemnitzii</i> ★★★★★	COM	
	Redirected from: <i>Notocanthus chemnitzii</i>		
	<i>Notocanthus chemnitzii</i> deprecated ★★	COM	

If you want to see only items fully matching your query (deprecated TLs), then you should enable the Strict mode.



Strict mode enabled (returns only matching rows in an entry)

The retrieved data for the same query would be as follows:

Results 1-10 / 92

★ 785468	life sciences [SCIENCE > natural and applied sciences] fisheries (5641) [AGRICULTURE, FORESTRY AND FISHERIES]	Council
↓ la	<i>Clupea alosa</i> deprecated	★★★★
		Council
★ 3570395	life sciences [SCIENCE > natural and applied sciences] fisheries (5641) [AGRICULTURE, FORESTRY AND FISHERIES]	COM
↓ la	<i>Patella ulyssiponensis aspera</i> deprecated	★★
		COM
★ 3541052	life sciences [SCIENCE > natural and applied sciences] wildlife [ENVIRONMENT > natural environment] fisheries (5641) [AGRICULTURE, FORESTRY AND FISHERIES]	COM
↓ la	<i>Notocanthus chemnitzii</i> deprecated	★★★
		COM

NB: In strict mode, the language selection bar is disabled. Any specific language selection needs to be incorporated in the query.

## Retrieval of results

You can retrieve results in three ways: COUNT (number of entries), SEARCH (hitlist) or EXPORT (Excel, TBX, SDLTB, SDLTB light).

Count

gives you the number of entries that fulfil your search criteria. This is very useful in estimating whether you have built your query correctly.

NB: it is not possible to stop the count function.

Search

is a normal search, where you get a hitlist as a result. You could use this to check whether you get what you are looking for and to work on the entries individually.

Export

prepares a separate file with the resulting entries. You can choose between three formats: XLS, TBX and SDLTB (full or light).

NB: If these buttons are not working, it means that your query has a free text field open for editing. Leave that field by moving the cursor somewhere else in the screen.

## More information on export outputs

For TBX and SDLTB the field selection is fixed:

Entry level: Entry ID, Domain, Primary value

Language level: Language code, Definition, Language note


Term level: Term, Reliability, Evaluation, Term reference, Term note, Institution owner of the term level

SDLTB light contains fewer fields:

Entry level: Entry ID, Domain, Primary value

Language level: Language code

Term level: Term, Reliability, Evaluation, Term reference, Institution owner of the term level

By default, the XLS export file will contain all available fields, but you can select the fields to be included in the file by clicking on  [Export all fields](#). A form will be displayed with all the available fields that can be exported (LIL Entry ID being mandatory).

Number of entries: 57565

Name of request

Fields to export

LIL

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Entry ID     | <input type="checkbox"/> Management                 |
| <input type="checkbox"/> Lifecycle               | <input type="checkbox"/> Primaryity                 |
| <input type="checkbox"/> Protection              | <input type="checkbox"/> Confidentiality            |
| <input type="checkbox"/> Origin                  | <input type="checkbox"/> Origin note                |
| <input type="checkbox"/> Note                    | <input type="checkbox"/> Note reference             |
| <input type="checkbox"/> Domain                  | <input type="checkbox"/> Domain note                |
| <input type="checkbox"/> Collections             | <input type="checkbox"/> Creation date              |
| <input type="checkbox"/> Modification date       | <input type="checkbox"/> Owner                      |
| <input type="checkbox"/> Legacy ID               | <input type="checkbox"/> Legacy database            |
| <input type="checkbox"/> Entry status            | <input type="checkbox"/> Related projects           |
| <input type="checkbox"/> Cross-references (Type) | <input type="checkbox"/> Cross-references (IATE ID) |

LL

- |  |   |
|--|---|
| <input type="checkbox"/> Language        | <input type="checkbox"/> Anchor language      |
| <input type="checkbox"/> Protection      | <input type="checkbox"/> Validation           |
| <input type="checkbox"/> Management      | <input type="checkbox"/> Related material     |
| <input type="checkbox"/> Note            | <input type="checkbox"/> Note reference       |
| <input type="checkbox"/> Definition      | <input type="checkbox"/> Definition reference |
| <input type="checkbox"/> Creation date   | <input type="checkbox"/> Modification date    |
| <input type="checkbox"/> Owner           | <input type="checkbox"/> Collections          |
| <input type="checkbox"/> Confidentiality |   |

TL

- |   |   |
|---|---|
| <input type="checkbox"/> Protection               | <input type="checkbox"/> Validation               |
| <input type="checkbox"/> Evaluation               | <input type="checkbox"/> Reliability              |
| <input type="checkbox"/> Display order            | <input type="checkbox"/> Customer                 |
| <input type="checkbox"/> Customer note            | <input type="checkbox"/> Number                   |
| <input type="checkbox"/> Gender                   | <input type="checkbox"/> Part of speech           |
| <input type="checkbox"/> Management               | <input type="checkbox"/> Regional usage           |
| <input type="checkbox"/> Regional usage reference | <input type="checkbox"/> Note                     |
| <input type="checkbox"/> Note reference           | <input type="checkbox"/> Term type                |
| <input type="checkbox"/> Term                     | <input type="checkbox"/> Term reference           |
| <input type="checkbox"/> Language usage           | <input type="checkbox"/> Language usage reference |
| <input type="checkbox"/> Term in context          | <input type="checkbox"/> Context reference        |
| <input type="checkbox"/> Collections              | <input type="checkbox"/> Creation date            |
| <input type="checkbox"/> Modification date        | <input type="checkbox"/> Owner                    |
| <input type="checkbox"/> Legacy ID                | <input type="checkbox"/> Legacy database          |
| <input type="checkbox"/> Confidentiality          |   |


Technical info (Export for batch update)

Output format





Export only selected fields







### Launching the request


You must give a name to your request. When you click on , the export request will be generated and the following message will be displayed at the top of the screen:

Your export request has been registered. You'll be able to download your files under Management > Asynchronous requests as soon as they have been processed.

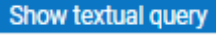
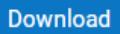
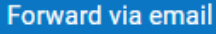


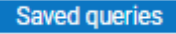
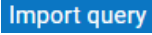
Go to the ‘Management’ menu  and open the ‘Asynchronous requests’ tab  to find your export file. It will not take long to get the results.

- If the status is , wait a while and use the ‘Refresh’ button  or F5 if needed.
- When the status is , download the file by clicking on this button . The way to open the file depends on the browser.
- If the status is , click on this icon  to see what went wrong.

You can see the details of your query by clicking on the  button: your query (technical format), the fields you have selected for export, and the output format. You can also relaunch your query from here or copy the textual query and paste it in the Advanced Search – Import query for rerunning it and saving it, as explained below.

### Reusing or sharing queries

The last 10 queries are automatically saved under ‘Last queries’. You can save frequently used queries for a longer period. After building your query, press . Give your query a name and save it directly in IATE, or store it elsewhere by clicking either on  or on .

You will find your saved query under . You can reuse it by selecting it and pressing .

### Tips on a few useful IATE fields

#### **LIL LEVEL**

**LIL Belongs to collection:** very useful field for termbases. The drop-down list is not complete, given the high number of collections, but you can find a collection by writing its name in the empty cell. This field can be used together with the ‘Collection type’ field.

**DOMAINS:** If you want to search only for entries with the exact domain that you select here, use **LIL Domain exact**. If you want to search for entries with that domain or any of its subdomains, use **LIL Domain with existing subdomains**. Please note that the drop-down list is just a short excerpt of EuroVoc domains, and not really useful as it is. Check in EuroVoc or with the basic search mode first, to find the domain you want to use. The only way to find the domain here is to write the keywords in the empty box.

**LIL Entry ID:** you can insert a long comma-separated list of entry numbers here, maximum 5 000 LIL IDs at a time.

**LIL Has language:** means that the entry contains a specific language. Do not confuse with LL/TL belongs to language, which is used to target your search to a certain language.

**LIL Primarity:** whether an entry is a primary or not (yes – no).

## LANGUAGE LEVEL

Whenever you search for something **in LL or TL, specify the language** with the rule **LL/TL Belongs to language!** Otherwise you might get the warning:

**Warning!** You did not specify a language. Are you sure you want to run the search in all languages?

If you don't use this rule, the search is targeted to all EU languages (non-EU languages are excluded to optimise the query).

So, with the following query, you will get entries where the definition reference of the English part has 'Collins' and where the English part was created after 1 January 2018.

The screenshot shows a search query builder interface with three rules defined:

- Rule 1: [LL/TL] Belongs to language in English
- Rule 2: [LL] Definition reference Partial string Collins
- Rule 3: [LL] Creation date greater than 2018-01-01

Without the rule **LL/TL Belongs to language**, the search will find all entries where any language fulfils the criteria on definition references and LL creation date.

## Examples of common queries

1. Export based on a collection, containing only terms with reliability 3 and 4 in English – strict match

The screenshot shows a search query builder interface with three rules defined:

- Rule 1: [LIL] Belongs to collection in EU-MUL-GLOSSONYMY
- Rule 2: [LL/TL] Belongs to language in English
- Rule 3: [TL] Reliability in reliable, very reliable

Additional interface elements include:

- Buttons: + Add rule, + Add group, Delete rule (for each rule)
- Checkbox: Strict mode enabled (returns only matching rows in an entry)
- Buttons: RESET, Count, Export, Search

2. My language (DE) missing from a collection. Visualisation of results in the available EU languages.

AND OR + Add rule + Add group

↑↓ [LIL] Belongs to collection in EU-MUL-GLOSSONYMY ✖ Delete rule

↑↓ [LIL] Has language not in German ✖ Delete rule

• Show results in ▲

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 ★

Strict mode disabled (returns full entries)

3. Entries in a certain domain containing both EN and HR. Visualisation limited to those languages as well.

AND OR + Add rule + Add group

↑↓ [LIL] Domain (including subdomains) in 24 FINANCE ✖ Delete rule

↑↓ [LIL] Has language all English Croatian ✖ Delete rule

• Show results in ▲

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 ★

Strict mode disabled (returns full entries)

4. Entries in a certain domain containing either Finnish or Swedish (or both of them), excluding terms from certain institutions/bodies. Visualisation of all available languages in the entry.

AND OR + Add rule + Add group

↑↓ [LIL] Domain (including subdomains) in 24 FINANCE ✖ Delete rule

↑↓ [LIL] Has language in Finnish Swedish ✖ Delete rule

↑↓ [TL] Owner not in ECB ✖ Delete rule

• Show results in ▲

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 ★

Strict mode disabled (returns full entries)

5. Primary entries where a particular language is missing (FR). Visualisation of all available languages in the entry.

AND OR + Add rule + Add group

↑↓ [LIL] Primarity in Yes ✖ Delete rule

↑↓ [LIL] Has language not in French ✖ Delete rule

• Show results in ▲

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 ★

Strict mode disabled (returns full entries)

6. Terms (TL) created in a certain time period by COM users in a particular language (EN). Strict visualisation (only those terms will be retrieved, not their synonyms belonging to other users or having been created outside the selected period).

AND OR + Add rule + Add group

1. [LL/TL] Belongs to language in English x Delete rule

2. [TL] Creation date between 2019-08-01 2019-08-31 x Delete rule

3. [TL] Owner in COM x Delete rule

Strict mode enabled (returns only matching rows in an entry)

7. LLs created after a certain date by Council users in a particular language (ES). Visualisation of full content of the entries in Spanish and English.

AND OR + Add rule + Add group

1. [LL/TL] Belongs to language in Spanish x Delete rule

2. [LIL] Creation date greater than 2019-07-01 x Delete rule

3. [LIL] Owner in Consilium x Delete rule

Show results in **en** es et fi fr ga hr hu it lt lv mt nl pl pt ro sk sl sv la mul

Strict mode disabled (returns full entries)

8. Entries where a particular language is the anchor language (EN) and this language does not have a definition. Visualisation of EN LLs.

AND OR + Add rule + Add group

1. [LIL] Anchor language in English x Delete rule

2. [LL/TL] Belongs to language in English x Delete rule

3. [LL] Definition is empty x Delete rule

Show results in **en** es et fi fr ga hr hu it lt lv mt nl pl pt ro sk sl sv la mul

Strict mode disabled (returns full entries)

9. Particular language (DA) TLs with reliability 1 or 2. Visualisation of Danish language (non-strict, all terms under DA will be displayed).

AND OR + Add rule + Add group

1. [LL/TL] Belongs to language in Danish x Delete rule

2. [TL] Reliability in minimum reliability x reliability not verified x Delete rule

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

Strict mode disabled (returns full entries)

10. Entries having a certain text in term reference fields of a certain language (BG). Strict visualisation, only those BG TLs will be retrieved.

AND OR + Add rule + Add group

[TL] Term reference  Partial string  ✖ Delete rule

[LL/TL] Belongs to language  ✖ Delete rule

Strict mode enabled (returns only matching rows in an entry)

## Examples of regular expressions

Begins with 'e', ends with 'n'	<code>e.*n</code>
Begins with 'e', ends with 'n' with maximum 1 letter in the middle	<code>e.?n</code>
Begins with 'e', ends with 'c' with 2 letters in the middle	<code>e(?:.){2}c</code>
Begins with 'european'	<code>european.*</code>
Contains a word that ends with 'e' followed by a word that starts with 'd'	<code>.*e d.*</code>
Begins with a word that begins with 'e', ends with 'n' with 6 letters in the middle	<code>e(?:.){6}n.*</code>
Contains 'europe'	<code>.*europe.*</code>
Contains the word 'viral' or 'virus'	<code>.*vir(al us).*</code>
Contains the word 'italy' or 'france'	<code>.*(italy france).*</code>
Contains both 'belgium' and 'luxembourg', in this order	<code>.*belgium.*luxembourg.*</code>
Contains both 'spain' and 'germany' in any order	<code>.*(spain.*germany germany.*spain).*</code>
contains two times the word 'europe' in it (and starts with Europe)	<code>(europe.*){2}</code>
Contains two times the word 'europe' in it (either at the beginning or not)	<code>.*(europe.*){2}</code>
Contains 'france' or 'italy' (either both, or one of them repeated)	<code>.*((france italy).*){2}</code>
Contains a number	<code>.*[0-9].*</code>
Does not contain a number	<code>[^0-9]</code>
Contains a number with at least 2-digits	<code>.*([0-9]){2}.*</code>
Is composed by a character which is not a number, followed by a number, followed by a character which is not a number	<code>[^0-9]([0-9])[^0-9]</code>

Contains only one number, with exactly 3-digits	$[^0-9]^*([0-9])\{3\}[^0-9]^*$
Contains only numbers	$[0-9]^*$

## 46. ANNEX IV: INTELLECTUAL PROPERTY RIGHTS (IPR)

**Adhere to copyright rules at all times. A precautionary approach is recommended since copyright laws are not always clear. The principles set out below should help you.**

### The basics

- Words and terms in themselves are not subject to copyright. Entering a term in the database and indicating its source is fine. However, taking significant quantities of terms from the same source might give rise to problems.
- Always check legal notices – copyright notice, copyright clause and any other legal disclaimer. In published sources, you can find this information, as a rule, on the back of the title page, in the foreword or even on the back page; on webpages on the home page.
- Material in the *public domain* is freely available for use, i.e. most material published by public bodies and, generally speaking, any material published more than 70 years ago (from the death of the author, from the publication etc.), does not cause a problem, but do check legal notices.
- Text drafted by staff is ‘own material’ and free from copyright problems. The text is protected by copyright, but copyright belongs to the EU.
- Similarly, text based on a particular reference, but re-worded or summarised by the terminologist is ‘own material’; it is also subject to EU copyright, but you should indicate that your text is ‘based on:[...]’. See Types of References > Human Sources.
- Where the source text is protected by copyright, be careful with reproduction (full copying) of all the text or long parts of it, as for this you would need the authorisation of the copyright holder. You can use very short extracts as quotations, as long as you adhere to copyright rules. Be careful and use the three-step test explained below.
- Copyright law is established on a national level. Generally, the copyright laws of Belgium or Luxembourg apply to our work. These laws are quite restrictive. Don’t rely on exceptions established in other jurisdictions (for example, the *fair dealings* exception applicable in the UK and the *fair use* exception applicable in the US) without consulting a lawyer.

### In practice

- Where possible, draft your own material.
- Try to use material free from copyright restrictions (in the public domain, where use is permitted by Creative Commons or any other licence).
- Try to use primary references rather than secondary sources.
- Check and follow information given on copyright (e.g. a copyright clause and notice on a website or published material).
- Remember graphics and photos are subject to the same copyright restrictions as text.
- When quoting, keep the length to a minimum and clearly identify the source.
- Avoid using the same source extensively, or, if you need to, obtain written permission from the copyright holder (the information cannot be inserted into IATE until you have obtained permission).
- Caution is advised with words that form a trademark (e.g. UFED - Universal Forensic Extraction Device; HDMI - High Definition Multimedia Interface, etc.). Reproducing trademarks as terms is subject to legally binding restrictions. The reproduction of a

trademark in IATE should not give the impression that it constitutes the generic name of the goods or services for which the trademark is registered and should always be accompanied by any indication that is used by the owner of the trademark (™ for unregistered trademark and ® for a registered trademark). You can use the following shortcuts: ™ is <ALT> + Numlock + 0153, and ® is <ALT> + Numlock + 0174. Add the term without the sign as a lookup form. Use links to the trademark owner's website, if needed.

### **Quantification in quotations**

A basic problem is when and how much of a work you are allowed to quote without risking copyright infringement. Regulation of quotation in national copyright laws varies from country to country. Most countries do not establish precise limits on what is acceptable, leaving it to the courts to examine matters on a case-by-case basis. Case law in this area is also scant. It is therefore not possible to set percentages or amounts of material you can quote. The bottom line is that 'free' reproduction must stand the so-called 'three-step test', according to which 1) there must be a stipulation in law providing for such reproduction in certain special cases, 2) such reproduction must not conflict with a normal exploitation of the work, and 3) such reproduction must not unreasonably prejudice the legitimate interests of the copyright holder.

Common sense should ultimately guide you in assessing the amount of material that you may legitimately quote from a copyright-protected source. If in doubt, refrain from quoting or ask the copyright holder for written permission to reproduce the material you would like to use.



## 47. ANNEX V: TAXONOMY

### The Interinstitutional Taxonomy Group (ITG)

The main task of this group, which comprises six translators – three from the Commission (Nikolai Chernev, Gaëlle Clément and Arnolds Žubeckis), two from the Council (Sylvaine Bereder and Barbara Turk) and one from the European Parliament (Egle Staskuniene) – is to set writing rules for updating Latin and MUL entries (abbreviations) on biological species (fish, animals, plants, micro-organisms, etc.) in IATE and update these rules whenever necessary.

These rules have been approved by the central terminology coordination units of the Commission, the Council and the Parliament, and should be complied with whenever creating or updating a taxonomic entry (i.e. an entry identifying a biological species or group of species and its position in a hierarchical classification system).

The [ITxG](#) helps consolidate the IATE database, with the ultimate aim of having a single entry for each taxon.

The group may be contacted with regard to the content of any taxonomic entries in IATE by translators from any of the EU institutions, but also by drafters, lawyer linguists, and others. Members of the group may be contacted individually by e-mail or phone or, preferably, by writing to the functional mailboxes

[DGT-TAXONOMY@ec.europa.eu](mailto:DGT-TAXONOMY@ec.europa.eu) and [ling.taxonomy@consilium.europa.eu](mailto:ling.taxonomy@consilium.europa.eu) .

**NB: You will find in [annex C](#) a list of all entries given as examples in these writing rules. These examples can serve as a guide for your work.**

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### Interinstitutional writing rules for taxonomy entries in IATE 2

(Language-Independent Level, Latin and MUL)

#### 1. BASIC PRINCIPLES

- *Purpose:* to facilitate the *correct* and *consistent* translation of EU documents. Taxonomy entries in IATE are meant to be 'fit-for-purpose', meaning that, in the Latin part of the entry (Latin is used as the reference language for taxonomy, with The International Code of Virus Classification and Nomenclature allowing for non-Latinized names at species level), the translator will find:
  - (a) correct information on the accepted scientific name (normally the name used in EU legislation); and
  - (b) all relevant information on any other name(s) used in EU legislation<sup>2</sup> (where these differ from the accepted scientific name).

---

<sup>2</sup> For various reasons, a certain number of IATE entries still contain names of taxa which have never been used in EU documents.

- *Content*: entries in IATE must cover one concept only, meaning that there should be an entry for species 'XXX' and a separate entry for 'XXX spp.'<sup>3</sup> (cf. p. 5, notes concerning 'spp.')
- *Structure*: in principle, an entry should contain only one term. Additional term field(s) are justified if the terms included have also been used in EU legislation<sup>4</sup>.

First displayed term: the scientifically accepted name, whether the one used in EU legislation or not;

Subsequent terms: the name(s) used in EU legislation if not the scientifically accepted name (or names), along with a language usage note (see examples pp. 6 and 7, under 'Language usage');

Other names: different approaches can be used for these, e.g. they can be inserted as a term type 'lookup form' along with relevant information in the Term 'Note' or 'Language Usage' fields (see pp. 6 and 7 concerning the 'Lookup Forms' and 'Language Usage' fields)

- *Sources*: Whenever possible, information about a taxon is taken from the [list of recommended web-based taxonomic databases](#). For Latin, the list is drawn up and updated by the Interinstitutional Taxonomy Group (ITxG)<sup>5</sup>.

If no useful information is found in the recommended sources, look for information in other web-based or print sources (preferably scientific publications).

Avoid using EU documents (legislation and internal documents) as primary sources for taxonomic entries.

## 2. LIL, LATIN, MUL<sup>6</sup>

### I. Language-Independent Level (LIL)

*Domains*<sup>7</sup>: follow the instructions for the project you are working on<sup>8</sup>, but note that at least **two** domains should be present on any entry (except virus entries): 'life sciences' and 'wildlife', or a subdomain of each of these.

<sup>3</sup> Consideration must be given to how the term is used in EU legislation (for example, the use of a *genus* name by itself in EU legislation is extremely rare). Generally, a documentary entry is in LA only and is created for a genus name appearing by itself ('XXX'), whereas a complete entry (in multiple languages) is created for 'XXX spp.', with a cross-reference to the entry explaining the abbreviation 'spp.' (entry 923993) and a cross-reference to the entry, created for documentary purposes, containing only the genus name in LA.

Examples include *Ammodytes* spp. (entry 850635), with a cross-reference to entry 923993 and to *Ammodytes* (entry 3549669).

<sup>4</sup> E.g. entry 785776.

<sup>5</sup> The latest version was published in September 2018.

<sup>6</sup> See example in Annex A (entry 785776)

<sup>7</sup> For tips to find the right domain in Eurovoc, see annex B.

<sup>8</sup> In project '[EU] Taxonomy - 2011T011P': 'life sciences' and 'fisheries (5641)'.

For example, you should always add 'Plant taxonomy' or 'Animal taxonomy'<sup>9</sup>, depending on the species<sup>10</sup>. As these are subdomains of 'Life sciences', you do not also need to add 'Life sciences'.<sup>11</sup>

For fish, also add the subdomain 'fish'.

The domains are easily searchable in IATE 2 by typing the relevant name (for ex. 'crustacean' or 'insect') in the search field. If you use a second- or third-level domain, do not add the relevant higher-level domain, i. e. there should be no cascading of domains. For example, if you choose to add the domain 'fishery resources', do not also add the domain 'AGRICULTURE, FORESTRY AND FISHERIES (56)' or 'fisheries (5641)'.<sup>12</sup>

In IATE 2, it is not possible to add a Domain Note (these still show up in entries transferred from IATE 1, but there is no 'Note' field at this level in IATE 2).<sup>13</sup>

As bacteria<sup>14</sup>, fungi<sup>15</sup> and algae<sup>16</sup> are separate kingdoms and therefore do not fall under either 'Animal taxonomy' or 'Plant taxonomy', these domains must not be added to entries for taxa in those kingdoms (see section 3. II).

Viruses do not constitute a kingdom. The mandatory domains for entries on them should therefore be 'life sciences' and 'disease vector'.<sup>17</sup>

*Anchor language:* la

*Collections:* add the entry to one or more of the following collections as required<sup>18</sup>:

EU-LA-TAXONOMY, with the description 'Interinstitutional Taxonomy Group' (this collection contains all taxonomic entries updated/created in accordance with these writing rules)

EU-LA-TAXONOMY\_EXAMPLES, with the description 'Taxonomy models and special cases' (only specific entries chosen by the ITxG are added to this collection).

EU-LA-TAXONOMY\_LA\_ONLY, with the description 'Entry for documentary purposes: only in Latin'.

EU-LA-TAXONOMY\_LA\_EMPTY, with the description 'No Latin on this entry'.

EU-LA-TAXONOMY\_SPP, with the description 'Entries concerning a group of species within the same genus (spp.)'.

---

<sup>9</sup> See entry 785808, *Zeus faber*.

<sup>10</sup> NB: On general entries concerning taxonomic categories, such as 'species', 'genus', etc., please add the domains 'Animal taxonomy' and 'Plant taxonomy'. (see entry 1624114, 'species').

<sup>11</sup> In IATE 2, all higher domains than the one used for the entry will appear in brackets. Ex: animal taxonomy [ "SCIENCE" > "natural and applied sciences" > "life sciences" > "biology" > "zoology" ]

<sup>12</sup> In IATE 2, there is no numbering available for the 3<sup>rd</sup> level (equivalent to Eurovoc descriptors in IATE 1), only for domains (the 1<sup>st</sup> level) and subdomains (the 2<sup>nd</sup> level).

<sup>13</sup> For pests, use the domain 'pest': see entry 1897851, *Anoplophora glabripennis*.

<sup>14</sup> See entry 1495695, Bacteria.

<sup>15</sup> See entry 1478720, Fungi.

<sup>16</sup> See entry 3578870, *Phaeophyceae*.

<sup>17</sup> See entry 2232048, *White spot syndrome virus*.

<sup>18</sup> Council taxonomists must always add taxonomic entries they work on to the collection Consilium-LA-TAXA.

*Primary*: to mark an entry as a primary, right-click the entry number and choose 'Set as primary'.

*Cross reference*: add cross-references whenever necessary.

Examples:

Entries in the form of 'XXX spp.' are cross-referenced to the documentary entry for 'XXX' and a reference added to the explanatory entry for 'spp.' (entry 923993).

Entries in the form 'XXX' are cross-referenced to the entry for 'XXX spp.'.

If possible, link an entry for a species to the category immediately above it in the taxonomic hierarchy ('Broader'), i.e. the entry for the genus. (Links to 'Narrower' categories are also possible, but generally not as useful for EU translation purposes).

*Management field*: This is to be left blank, except in cases where a decision is taken jointly by the terminology coordination units of the Council and the Commission to initiate a taxonomy project. In those cases, add '[EU] Taxonomy {title of project}'<sup>19</sup>.

The additions made to the management field by the central terminology services cannot be edited by taxonomists and are to be left as they are.

## II. Latin

### *Language level*

*Note*: when creating or updating a Note at this level, do the following:


- delete any institution-specific information (Council lists/initials)<sup>20</sup>;
- insert the taxonomic rank of the taxon for which the entry is being created, **even if it is a species**, in Latin, and add a link to the relevant entry. (Example: 'Taxonomic rank: [family](#).'<sup>21 22</sup>).

Insert all higher-level taxa relevant to the taxon forming the subject of the entry (thus showing the place of the taxon in the broader taxonomic hierarchy) only if you consider it useful<sup>23</sup>.

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<sup>19</sup> Whenever the {} brackets appear in this document, they should be removed (and their content replaced with the relevant information) when the note/comment is added in IATE.

<sup>20</sup> Example: JCLat (JAN89); AV(MAI06).

<sup>21</sup> To insert a hyperlink to another IATE entry, you need to know the number of the IATE entry you wish to point towards. Highlight the term on which you want to add the hyperlink, click on the hyperlink icon () (—), select 'Entry-to-entry link' and type in the number of the other entry. The link will be added automatically.

<sup>22</sup> See entry 3571216, *Ammodytidae*.

<sup>23</sup> Example: Regnum: *Animalia*  
Phylum: *Chordata*  
Subphylum: *Vertebrata*  
Superclassis: *Osteichthyes*  
Classis: *Actinopterygii*  
Subclassis: *Neopterygii*  
Infraclassis: *Teleostei*  
Superordo: *Ostariophysii*  
Ordo: *Cypriniformes*  
Superfamilia: *Cyprinoidea*

Insert information to record when the taxon's taxonomic rank or name changes<sup>24</sup>; add cross-references at LIL as appropriate;

- For all entries in the collection EU-LA-TAXONOMY\_LA\_EMPTY, add the following Definition 'Note':

**'DO NOT add LA to this entry.'**

{Add a short explanation here as to why there should be no Latin}.<sup>25</sup>

- For all entries in the collection EU-LA-TAXONOMY\_LA\_ONLY<sup>26</sup>, add the following Definition 'Note' for fisheries (i.e. to entries for the name of a genus which has a corresponding entry with 'spp. '):

'Taxonomic rank: [genus](#)' (with entry-to-entry hyperlink).

Entry for documentary purposes relating to the scientific category {*insert name of the relevant genus in italics*}.

**Other languages do not need to be included on this entry**, as EU legislation usually refers to the statistical category {*insert name of the genus in italics here, along with a IATE hyperlink to the entry for the genus name followed by spp.*} spp. ' '.<sup>27</sup>

- **For 'spp.'**<sup>28</sup> **entries with an FAO statistical code**

'Statistical category established by the FAO for fishery production statistics.

For the scientific category, see {*insert genus name in italics with an entry-to-entry hyperlink here, which links to the entry for the relevant genus*} (taxonomic rank: [genus](#)).<sup>29 30</sup>

- When using italics for taxa from the Zoological nomenclature<sup>31</sup> above the rank of genus, add the following definition note about use of italics:

'According to the International Code of Zoological Nomenclature, the scientific names of taxa belonging to the taxonomic rank of genus or below should be rendered in a font different from that used in the rest of the text. These names are usually written in italics. For the names of taxa belonging to higher ranks, however, the Code states that italics should not be used. Nevertheless, in most EU

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Familia: *Cyprinidae*  
Genus: *Hypophthalmichthys*  
Species: *Hypophthalmichthys nobilis*

<sup>24</sup> See entry 785771, *Dipturus batis*.

<sup>25</sup> See entry 3562342, Western bluefin tuna or 884926, siki.

<sup>26</sup> To create a single-language entry in IATE 2, click on the pencil, select 'Full mode' ('Quick mode' won't work), right-click on the words 'Target language', click on the icon in front of 'Remove column'.

<sup>27</sup> See entry 3549669, *Ammodytes*. NB: Even if other languages are added to the entry in question, the entry needs to be kept in the 'LA only' collection to enable searches for documentary entries created in connection with an 'spp.' entry.

<sup>28</sup> Please note that in EU legislation, this is written 'spp.', but in the FAO ASFIS list there is no full stop (spp).

<sup>29</sup> The actual note will appear as in entry 850635: 'For the scientific category, see [Ammodytes](#) (taxonomic rank: genus).'

<sup>30</sup> See entry 3549669 (*Ammodytes*).

<sup>31</sup> Link to the zoological code.

documents (except where a strict adherence to the Code is required), the accepted practice is to italicise names in these higher ranks as well.<sup>32</sup>

- By convention, we do not use upper-case characters for taxons in EU legislation, but in some specific cases, they might be necessary anyway. In such cases, please add the following definition note:

'By convention we do not recommend capitalisation of all characters for the highest taxa (i.e. classis, orders or even family) in IATE despite the usage in some of the EU legislation, the ASFIS list or in other databases or scientific sources.'<sup>33</sup>

### ***Term Level***

#### ***Reliability codes:***

For taxa of **any rank**, where there is a **minimum of three independent sources** from the list of recommended sources,

add the reliability code **'Very reliable – ★★★★★'**.

If the taxon under consideration is at a **rank below that of 'species'** (e.g. it is a subspecies or a variety of plant, or a subspecies or morph of an animal) **and sources do not agree** on the scientific name,

add the reliability code **'Reliable – ★★★'**.<sup>34</sup>

If

(a) the taxon is **ranked as a species or higher** and **sources do not agree** on the scientific name;

OR

(b) the taxon is of **any rank**, but there is **only one source** of evidence for the scientific name;

OR

(c) the taxon is of **any rank**, but there is **reliable evidence** that the scientific name in question is **not-accepted**,

add the reliability code **'Minimum reliability – ★★'**.

***Term:***

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<sup>32</sup> The following hemihomonyms, when they relate to the Code of Zoological Nomenclature, must never be italicised (since, in their italicised form, they exist in other nomenclatures as different taxa): Anisoptera, Articulata, Ascoidea, Coccoidea, Echinacea, Furnariidae, Lestoidea, Lichina, Melasina, Oligochaeta, Patellina, Pholidota, Polyphaga, Proboscidea, Pterygota, Raphiinae, Trichiuridae. The family Delphinidae can also be italicised or not, depending on the case:

a) the family Delphinidae is not italicised when following the legislative requirement to comply with the standard references for nomenclature contained in Annex VIII to [32006R0865](#) in order to indicate the scientific names of taxa.

b) the family Delphinidae is italicised in some cases where there is no formal requirement to comply with the zoological nomenclature, e.g. in the fisheries legislation (e.g. [32007R0520](#)).

<sup>33</sup> For example, we suggest Phaeophyceae (instead of PHAEOPHYCEAE in the ASFIS list) or Columbiformes (as opposed to COLUMBIFORMES in [32006R0865](#)) or Margaritidae (instead of MEGAPERIDAE in the [Bulletin of Zoological Nomenclature 79 \(15 October 2022\) ISSN 2057-0570](#)).

<sup>34</sup> E.g. in the case of *Vicia faba* var. *faba* and *Vicia faba* subsp. *faba* (entry 771231), scientific sources do not agree on the accepted name.

Add both terms to the entry, one as first displayed term and the other as second displayed term, and mark them both with the code 'Reliable – ★★★'.

By convention, most Latin names should be written in italics and without capitals, except for the initial letter of the scientific name, e.g. *Sebastes marinus*.

N.B. 'spp.' (referring to several species included in a higher rank, usually genus or family) is not italicised, e.g. *Sebastes* spp.

If necessary, add an explanatory language note about the use of italics and/or upper-case letters (see section II, Language Level, *Note*, above).

#### *Reference:*

Use web-based sources, preferably those on the list of [recommended sources](#).

Cite references in accordance with the citation instructions given in the list (followed by link to the *exact* web page; see citation instructions on EurTerm) or, where a source not on the list of recommended sources is used, in accordance with the citation instructions given for the relevant database or with the IATE rules on bibliographic references.

Whenever necessary (i.e. if you find something out of the ordinary), make mention of this in the Term 'Note' field.

#### *Note:*

- In this field, include the 'scientific name' + 'author of the classification, year' (as indicated in a relevant database/scientific publication) here.  
e.g.: *Amblyraja radiata* (Donovan, 1808)
- If relevant (i.e. for the sake of clarity, to help translators and assist terminologists when following up the entry), summarise the steps you took in your research (esp. by way of further explanation as to why the reliability codes ★★★ or ★★ were used).

#### **For 'spp.' entries with an FAO statistical code**

'This term is used in **EU legislation** in combination with the FAO statistical code (MUL on this entry).

#### **For entries where the taxonomic rank is a family**

Depending on the case, use one of the following notes:

- (a) 'Scientific category'.<sup>35</sup>
- (b) 'Both a scientific and a statistical category.'

In **EU legislation**, {*insert family name in italics*} is usually combined with the statistical code from the FAO ASFIS list (MUL on this entry).<sup>36</sup>

#### *Lookup forms:*

Use the term type "lookup form" for terms which:

- (a) have been added at Term Level but have subsequently been found to be junior synonyms, i.e. enough evidence is obtained for the terms to be evaluated as "Deprecated"

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<sup>35</sup> The term in Latin does not have a corresponding FAO code in the ASFIS list; see entry 3571627 (*Pennatulidae*).

<sup>36</sup> See entry 910953 (*Caproidae*).

AND

(b) cannot be found in EUR-Lex (i.e. are not used in EU legislation).

These often include misspellings of the scientifically accepted name. Add a corresponding note in the "Language Usage" field.

**Example of a 'Language Usage' note for 'Deprecated' terms labelled as 'Lookup Forms':**

'The term {*insert relevant term in italics*}, which is not accepted, has never been used in **EU legislation**'.<sup>37</sup>

OR

(c) are used in EU legislation/proposals/documents, but are misspellings of the scientifically accepted term.

*Language Usage:*

1. By default, unless otherwise stated, the accepted name is the name used in EU legislation.
2. Whenever relevant (for the deprecated term or for all terms), indicate the frequency of usage of the term in EU legislation and in any other scientific or statistical classification system.

Here are some suggestions for standard phrases, to be used/adapted in the light of the specific situation:

**For species in general:**

'In **EU legislation**, this term, which is the scientifically accepted name, is the most prevalent.'<sup>38</sup>

'In **EU legislation**, this term, which is not a scientifically accepted name, is used (very/extremely) rarely.'<sup>39</sup>

'This term, which is not a scientifically accepted name, is used in the ASFIS list of species (FAO).

It is used very rarely in EU documents, and is never used in **EU legislation**.'<sup>40</sup>

'This term, which is not a scientifically accepted name, has also been used in recent **EU legislation** {it is recommended to add the CELEX number of the legislation here,

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<sup>37</sup> See entry 785808 (*Zeus faber*).

<sup>38</sup> See entry 785776 (*Amblyraja radiata*).

<sup>39</sup> See entry 785471 (*Engraulis encrasicolus*).

<sup>40</sup> See entry 785771 (*Dipturus batis*).



along with the relevant link} (add the date on which the relevant EU legislation was consulted).<sup>41</sup>

'In **EU legislation**, this term has sometimes been misspelled as {add misspelling}'.<sup>42</sup>

### **For subspecies in general:**

'The recommended abbreviation for 'subspecies', to be used for plants, bacteria, fungi and algae, is **subsp.**<sup>43</sup>, but this abbreviation is not used for animal names.'

### **For 'spp.' entries:**

For a concept denoted by a term in the form 'XXX spp.', insert the following Term 'Note':

'For the meaning of 'spp.' in **EU legislation**, see [923993](#) {add an entry-to-entry hyperlink here, which links to entry 923993}'.<sup>44</sup>

### **For entries concerning marine organisms with the taxonomic rank of family and included on the FAO ASFIS list:**

Insert a note :

'The combination {*insert family name*} and the corresponding code {**insert FAO code**} established by the FAO for fishery production statistics has not been used in **EU legislation** up until now (insert date on which EU legislation was consulted)'.<sup>45</sup>

### *Evaluation:*

- do not insert an evaluation for accepted names;
- insert 'Deprecated' for a term which is clearly not a scientifically accepted name.

## III. MUL

In the context of fisheries, EU legislation uses the FAO 3-alpha code in combination with the Latin name. Therefore always check names relating to marine organisms against the FAO List of Species for Fishery Statistics Purposes (<http://www.fao.org/fishery/collection/asfis/en>)<sup>46</sup>.

### *Language Level*

Delete any institution-specific information (Council lists/initials).

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<sup>41</sup> See entry 785693 (*Micromesistius poutassou*).

<sup>42</sup> See entry 785487 (*Dicentrarchus labrax*).

<sup>43</sup> See entry 1624378 (subspecies).

<sup>44</sup> See entry 850635 (*Ammodytes* spp.).

<sup>45</sup> See entry 3571216 (*Ammodytidae*).

<sup>46</sup> Also called the 'ASFIS list'. The list is updated in February each year (but published a couple of months after that).

**Do not** add a definition.<sup>47</sup>

*Note*

**For entries where the taxonomic rank is a family:**

(both a scientific and a statistical category)

Add the following note:

**'NB:** In the ASFIS list, this 3-alpha code refers only to those species of the family not mentioned elsewhere on the list (i.e. it does not necessarily cover all species in the family).<sup>48</sup>

**For MUL codes referring to several families:**

Always add an explanatory note.<sup>49</sup>

On these entries, the Domains 'Animal taxonomy' or 'Plant taxonomy' should not be used as, strictly speaking, these are not taxonomic entries. However, the entry should be added to the collection EU-LA-TAXONOMY (and, where Council taxonomists work on the entry, also to the collection Consilium-LA-TAXA), as these entries are linked to actual taxonomic entries.

*Term Level*

*Reliability code*

Insert the code 'Very reliable – ★★★★★' on this entry.

*Term - abbrev.*

Insert the statistical code, e.g. 'RJR'.<sup>50</sup>

*Reference*

'FAO, Aquatic Sciences and Fisheries Information System - ASFIS List of Species for Fishery Statistics Purposes, February {insert year}, {insert as link: <http://www.fao.org/fishery/collection/asfis/en>}'

*Note*

'Statistical code established by the FAO for fishery production statistics and used in **EU legislation** in combination with the Latin name.'

If you don't have time to check how the code is used in EU legislation (i.e. by looking in EUR-Lex), add only the first part of the sentence:

'Statistical code established by the FAO for fishery production statistics.'

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<sup>47</sup> A true taxonomical definition would be too technical to be useful for the general user.

<sup>48</sup> See 3571216 (*Ammodytidae*).

<sup>49</sup> See the related IATE entries 3571999 (*Loliginidae*), 3571866 (*Ommastrephidae*) and 3572000 (*Loliginidae*, *Ommastrephidae*). Other, slightly different examples are: 3574748 (*Otariidae*), 785740 (*Phocidae*) and 3572495 (*Otariidae*, *Phocidae*).

<sup>50</sup> See entry 785776 (*Amblyraja radiata*, RJR).

If the code hasn't been used in EU legislation, replace this Note with the following:

'This statistical code, established by the FAO for fishery production statistics, has not been used in **EU legislation** yet. (add the date on which the EU legislation was consulted)'

### 3. SPECIFIC CATEGORIES OF ENTRIES

#### I. Trees and fruits (or other plant products)

There should always be two distinct entries, one for the tree/plant and one for the fruit (or other product, e.g. root) of that tree/plant.<sup>51</sup>

The Latin term should be included **ONLY** on the entry for the tree/plant, and Latin should always be the anchor language for that entry.

**For the entry concerning the fruit**, the anchor language will usually be EN (or FR). Add this entry to the collection EU-LA-TAXONOMY\_LA\_EMPTY, as well as the following 'Language Level Note':

'Please do not add LA to this entry.'

This entry concerns the fruit. Latin should only be added to the entry concerning the plant/tree bearing the fruit, cf. {insert name of plant/tree with an entry-to-entry hyperlink here, which links to the entry for the relevant plant/tree }.

The term field **MUST** remain empty.'

NB: The Domain should be 'Plant product' (under no circumstances should 'Animal taxonomy' or 'Plant taxonomy' be used).

The two entries should be cross-referenced to each other.

#### II. Pathogenic agents and diseases

There should always be two distinct entries, one for the pathogenic agent (virus or bacterium) and one for the disease.<sup>52</sup>

The Latin term should be included **ONLY** on the entry for the pathogenic agent and Latin should always be the anchor language for that entry.

For entries concerning **bacteria** and **fungi**, the 'Domain' should under no circumstances be 'Animal taxonomy' or 'Plant taxonomy', as bacteria and fungi are separate from these two taxonomic kingdoms. For these, the 'Domain' should be 'microorganism'.<sup>53</sup>

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<sup>51</sup> See entries 781846 (*Citrus maxima*, tree) and 1572961 (pummelo, fruit) or 1202009 (*Zingiber officinale*, plant) and 771640 (ginger, edible root).

<sup>52</sup> See entries 347592 (*Synchytrium endobioticum*) and 1255908 (potato wart disease).

<sup>53</sup> This solution has been adopted because there is no Eurovoc domain for 'bacteria'. The entry should nevertheless be added to the collection 'EU-LA-TAXONOMY'. See entry 3547730 (*Ralstonia solanacearum*).

Depending on the case, add a 'part of' cross reference to the IATE entry for Bacteria ([1495695](#)) or Fungi ([1478720](#)) or Virus ([1121657](#)).

Add the following note at Language Level:

**For Fungi:** 'Fungi constitute a separate taxonomic kingdom from animals and plants.'<sup>54</sup>

**For Bacteria:** 'Depending on which classification system is used, Bacteria are considered as a kingdom or a domain (this latter rank is also known as 'superkingdom' or 'superregnum' in a classification system with three domains). In the three-domain system, the other two domains are Archaea and Eukaryota. Bacteria are considered to be separate from the animal and plant kingdoms.'

**For Viruses:** 'This is the [virus species name](#). It is the [scientific name](#) of the species. It begins with a capital letter and the entire name must be italicised. It should not be confused with the [virus name](#), which may be more commonly used and known, begins with a capital letter only when the first word is a proper noun, and is never italicised.' See also pp. 2 and 3, section 2.I., 'Domains'.

For the entry concerning the disease, the anchor language will usually be EN (or FR). Add this entry to the collection EU-LA-TAXONOMY\_LA\_EMPTY, as well as the following 'Language Level Note':

**DO NOT add LA to this entry.**

This entry concerns the disease. Latin should only be added to the entry concerning the pathogenic agent causing the disease, cf. {insert name of the agent with an entry-to-entry hyperlink here, which links to the entry for the relevant name}.'

The two entries should be cross-referenced to each other.

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<sup>54</sup> See entries 347592 (*Synchytrium endobioticum*) or 3578868 (*Agaricus bisporus*).

# ANNEX A

## EXAMPLE:

★ IATE ID: 785776

**Domain:** fish [ AGRICULTURE, FORESTRY AND FISHERIES > fisheries > fishery resources ]  
wildlife [ ENVIRONMENT > natural environment ]  
animal taxonomy [ SCIENCE > natural and applied sciences > life sciences > biology > zoology ]

**Primary:** Primary

**Anchor language:** la

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

↓ la mul

**Definition:**

**Collections:** Consilium

**Owner:** Consilium

**Definition:**

**Collections:** Consilium

**Owner:** Consilium

**Term:** **Amblyraja radiata**

\* Term reference: - Integrated Taxonomic Information System on-line database (ITIS), *Amblyraja radiata* (1.1.2023)

Term reference: - Froese, R. and D. Pauly, Editors. 2023. FishBase (11.1.2023), World Wide Web electronic publication ( 09/2023 )

Term type: term

Reliability: \*\*\*\*

Note: *Amblyraja radiata* (Donovan, 1808)

Language usage: In EU legislation, this term, which is the scientifically accepted name, is the most prevalent (17.2023).

**Collections:**

**Owner:** Consilium

**Abbrev:** **RJR**

\* Term reference: FAO, Aquatic Sciences and Fisheries Information System - ASFIS List of Species for Fishery Statistics Purposes, Feb. 2022 (11.1.2023)

Term type: abbrev

Reliability: \*\*\*\*

Note: Statistical code established by the FAO for fishery production statistics and used in EU legislation in combination with the Latin name.

Language usage: In the ASFIS list, this code corresponds to the scientific name *Raja radiata*, which is not accepted.

**Collections:**

**Owner:** Consilium

**Term:** **Raja radiata**

\* Term reference: - Integrated Taxonomic Information System on-line database (ITIS), *Raja radiata* (1.1.2023)

Term reference: - Froese, R. and D. Pauly, Editors. 2023. FishBase, World Wide Web electronic publication ( 05/2018 ), Synonymys (11.1.2023)

Term type: term

Reliability: \*\*

Evaluation: **Deprecated**

Note: *Raja radiata* Donovan, 1808.

Language usage: This term, which is not a scientifically accepted name, was still used in the 2020 ASFIS list of species (FAO), but it has been corrected in the 2022 ASFIS list. It has been used very rarely in EU legislation, the latest occurrence was in CELEX:32010D0093, but it has also been used recently in Council Regulation (EU) 2021/52.

**Collections:**

**Owner:** Consilium

## ANNEX B

### EUROVOC domains

The domain of each IATE entry should be the most relevant EUROVOC subdomain (referred to as a 'descriptor' in the previous version of IATE).

In IATE 2, all Eurovoc domains and subdomains are searchable. If you add a lower-level Eurovoc domain (for example, 'insect'), all the higher-level domains will be indicated automatically (see entry 1186228: **insect** [ "ENVIRONMENT" > "natural environment" > "wildlife" > "animal life" ]).

If one of the higher domains (in this case, for example 'wildlife') is already on the entry, you should delete it to avoid the cascading of domains, as this is not considered good practice.

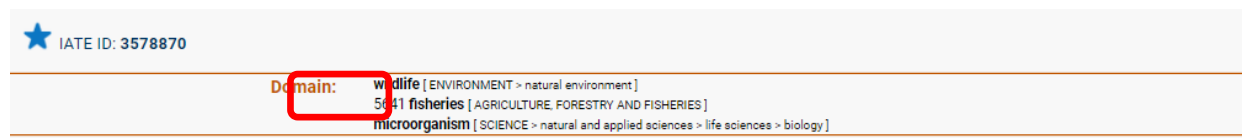
IATE 2 will issue an alert when cascading occurs.

To find the relevant subdomain, enter the term, a simplified form of the term, a synonym or a slightly more general term in the domain field and click 'Search' or 'Enter'. If this produces no results, you can 'Expand all'. Do not enter a Latin scientific name. For example, to find the subdomain for *Cacoecimorpha pronubana* (entry 1186228), you can enter the term 'butterfly', which gives the result 'insect'; 'insect' is therefore the EUROVOC subdomain to use for this species. (See also screenshots below).

Examples of IATE subdomains are 'mollusc', 'conifer', 'cattle', 'oats', 'clover', 'grape', 'tobacco', 'potato', 'coffee', etc.

Example: **Search for a domain in IATE 2:**

1. Right-click on the word “Domain”, click on Edit:



2. The domain field will open:



3. Type in your search, for example: butterfly.

4. The result of your search will appear as follows:

The screenshot shows a search interface for the term 'butterfly'. At the top left, there is a blue star icon followed by the text 'IATE ID: 3578870'. Below this, a section titled '+ Domain:' lists three categories: 'wildlife [ ENVIRONMENT > natural environment ]', '5641 fisheries [ AGRICULTURE, FORESTRY AND FISHERIES ]', and 'microorganism [ SCIENCE > natural and applied sciences > life sciences > biology ]'. A search input field contains the text 'butterfly'. Below the input field, a hierarchical tree structure is displayed. The root is '52 ENVIRONMENT', which is expanded to show '5211 natural environment', which is further expanded to show 'wildlife', which is expanded to show 'animal life', which is expanded to show 'insect (butterfly)'. The 'insect (butterfly)' entry is highlighted with a red rectangular box.

'Butterfly' is in brackets because the actual subdomain is 'insect' (the term 'butterfly' will not appear in the domains). You can now select the domain by clicking on it.

On entry 1186228, one of the IATE domains is therefore:  
**insect** [ENVIRONMENT > natural environment > wildlife > animal life].

## ANNEX C

### EXAMPLES (TO BE USED TO GUIDE YOUR WORK)

**NB**: the explanatory notes on these entries are particularly important!

<u>Typical entry</u>	<a href="#">785776</a>	<i>Amblyraja radiata</i>
<u>Entry which does not correspond to a real taxon and containing a cross-reference to the real taxon(s)</u>	<a href="#">884926</a> <a href="#">1588190</a> <a href="#">1858934</a>	siki <i>Centroscyrnus coelolepis</i> <i>Centrophorus squamosus</i>
<u>'Spp.' problem (always 2 entries + link to the third)</u>		
'Genus + spp.' entry	<a href="#">850635</a>	<i>Ammodytes</i> spp.
Documentary entry connected to 'spp.' entry: (to be included in the collection EU-LA-TAXONOMY_LA_ONLY)	<a href="#">3549669</a>	<i>Ammodytes</i>
general 'spp.' entry (always a cross-reference in the genus+spp entry)	<a href="#">923993</a>	spp.
<u>Entry containing taxa about which scientific sources disagree</u>	<a href="#">3511420</a>	<i>Scymnodon squamulosus</i> <i>Zameus squamulosus</i>
<u>Entries on families (notes change depending on use of the terms in EU legislation)</u>	<a href="#">3571216</a> <a href="#">910953</a>	<i>Ammodytidae</i> <i>Caproidae</i>
<u>Entry on a pathogenic agent (with a link to the entry on the disease)</u>	<a href="#">347592</a> <a href="#">1255908</a>	<i>Synchytrium endobioticum</i> potato wart disease
<u>Entry on a bacterium (with a link to the entry on the disease)</u>	<a href="#">3591405</a> <a href="#">885081</a>	<i>Ralstonia solanacearum</i> potato brown rot
<u>Entry on a tree (with link to the entry on the fruit)</u>	<a href="#">781846</a> <a href="#">1572961</a>	<i>Citrus maxima</i> pomelo
<u>Entry on a plant (with a link to the entry on the edible root; this is similar to tree/fruit entries)</u>	<a href="#">1202009</a> <a href="#">771640</a>	<i>Zingiber officinale</i> ginger
<u>Entry on a taxon (<i>Macrurus rupestris</i>) which was misspelled in EU legislation</u>	<a href="#">1859356</a>	<i>Coryphaenoides rupestris</i> ( <i>Macrurus rupestris</i> , deprecated)

Entry on a taxon with two different but accepted spellings



[1172528](#) *Martialia hyadesi(i)*

Entry containing two deprecated terms, each having a FAO code (but referring to the same species), the actual scientifically accepted name being a third term:

[1859759](#) *Lepidonotothen squamifrons*  
(*Notothenia squamifrons*, *Nothothenia kempfi*) NOS, NOK

Entry demonstrating changes to the classification of a taxon

[785771](#) *Dipturus batis*

Entries where taxonomic sources disagree on the accepted term for a synonym

[790470](#) *Sebastes norvegicus*  
[919697](#) *Serranus scriba*

Entry containing two unreliable names not used in EU legislation (one having been left on the entry as a term, the other having been moved to 'look-up')

[785808](#) *Zeus Faber*

Entries on taxonomic ranks

[907850](#) family  
[1624378](#) subspecies

Entry containing a term with reliability code 3

[771231](#) *Vicia faba* var. *faba*

Entries containing MUL codes referring to several families and connected entries

[3571999](#) *Loliginidae*  
[3571866](#) *Ommastrephidae*  
[3572000](#) *Loliginidae, Ommastrephidae*

or (slightly different from these)

[3574748](#) *Otariidae*  
[785740](#) *Phocidae*  
[3572495](#) *Otariidae, Phocidae*

Entry on a species with a link to subgenus

[1185169](#) *Dociostaurus maroccanus*  
[1225011](#) subgenus

Entry on a virus with part of its name in English (with a cross-reference to the hypernym<sup>55</sup> 'virus')

[2232048](#) *White spot syndrome virus*  
[1121657](#) Virus

Entry on a bacterium (with a cross-reference to the higher taxonomic rank Bacteria)

[3578869](#) *Escherichia coli*  
[1495695](#) Bacteria

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<sup>55</sup> Hypernym = a word with a broad meaning [constituting](#) a category into which words with more specific meanings fall; a [superordinate](#). For example, colour is a hypernym of red.

Entries on specific fungi (with a cross-reference to the higher taxonomic rank Fungi)

	<a href="#">347592</a>	<i>Synchytrium endobioticum</i>
	<a href="#">3578868</a>	<i>Agaricus bisporus</i>
	<a href="#">1478720</a>	Fungi
<u>Entry on algae</u>	<a href="#">3578870</a>	<i>Phaeophyceae</i>
<u>Entry on coral</u>	<a href="#">1264442</a>	<i>Lophelia pertusa</i>