Delivering MultiTerm 1.1.3

User Manual

Document version 1.0

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1 Introduction

The plugin allows you to add server-based termbases as local, (optional) project-specific termbases to project packages in Trados Studio. It searches the source documents for used terms and adds them to the project-specific termbase. It is also possible to apply filters at entry and field level.

The configuration can be saved and added to project templates, for example. This allows you to automate the creation of the project termbase when creating projects.

In combination with the quickTerm module, it is also possible to use offline workflows (e.g., term requests). However, this module must be installed and licensed separately.

2 Installation

2.1 System Requirements

Before installing the plug-in, make sure that your system meets the following requirements:

- SDL Trados Studio 2019, 2021, or 2022
- SDL MultiTerm 2019, 2021, or 2022
- Microsoft .NET Framework 4.8

2.2 Installation

a) Start the installer.

b) Select which installation type is to be used.

⇨ The plugin will now be installed.

NOTICE

Installing while Studio is running

You can install the plugin even if Studio is running. For an update / upgrade, however, Studio first has to be closed.

2.3 Licensing

The following licensing options are available for the plugin:

- Single desktop license

  In this case, activation is performed on the workstation where the license will be used.
- Network license (also called floating or concurrent license) with a certain number of users accessing the application at the same time from several clients

  In this case the license file is stored on a network share which is accessible by all client PCs. The license is not checked out until you first use the plugin after starting Studio.
- Demo version

  After installation, the plugin runs in 30 day full-featured trial mode. After that, the trial will expire. The application then has to be activated.

NOTICE

Resetting licenses

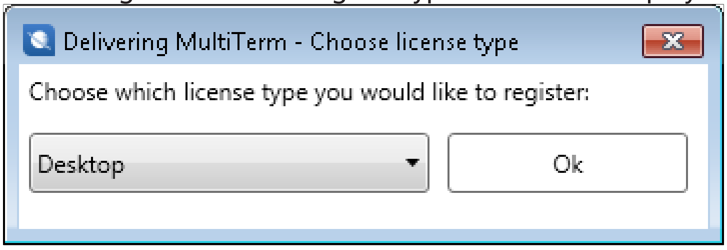
Sometimes you cannot access an already installed application anymore, for example because your hardware failed, and you want to install the product on a new system. In this case, we can reset your user license and enable you to use it again for a new installation. However, we will only reset your license up to two times per year.

2.3.1 Registering a Single Desktop License

To register the plugin, proceed as follows:

a) Click on "Register product" in the "Add-Ins" tab of Studio.

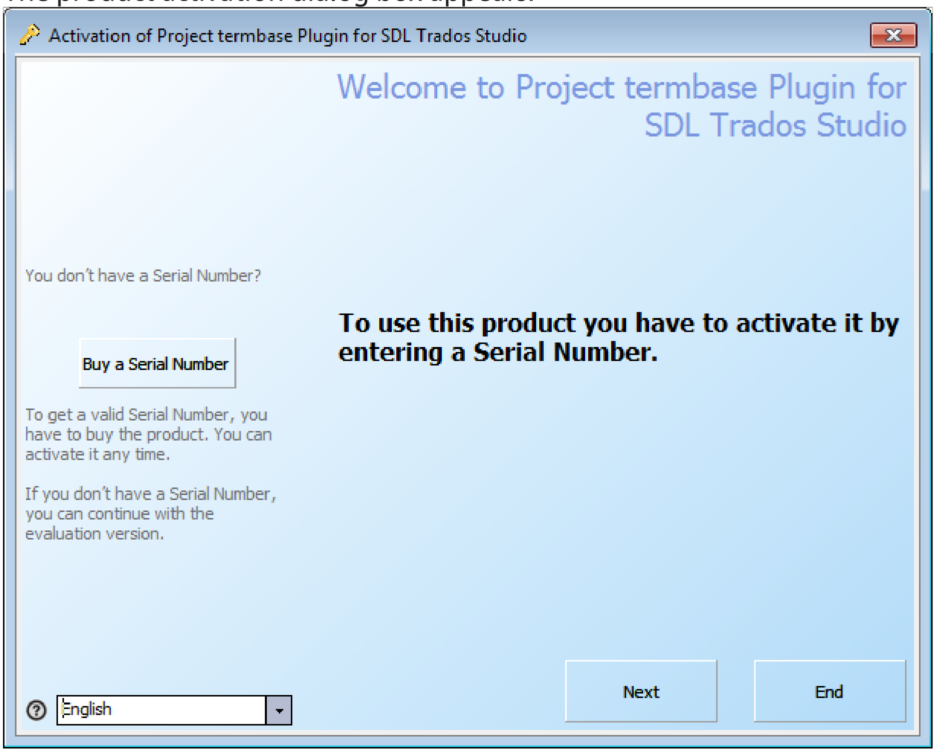
⇨ The dialog box for selecting the type of license is displayed:



a) Select the "Desktop" license type.

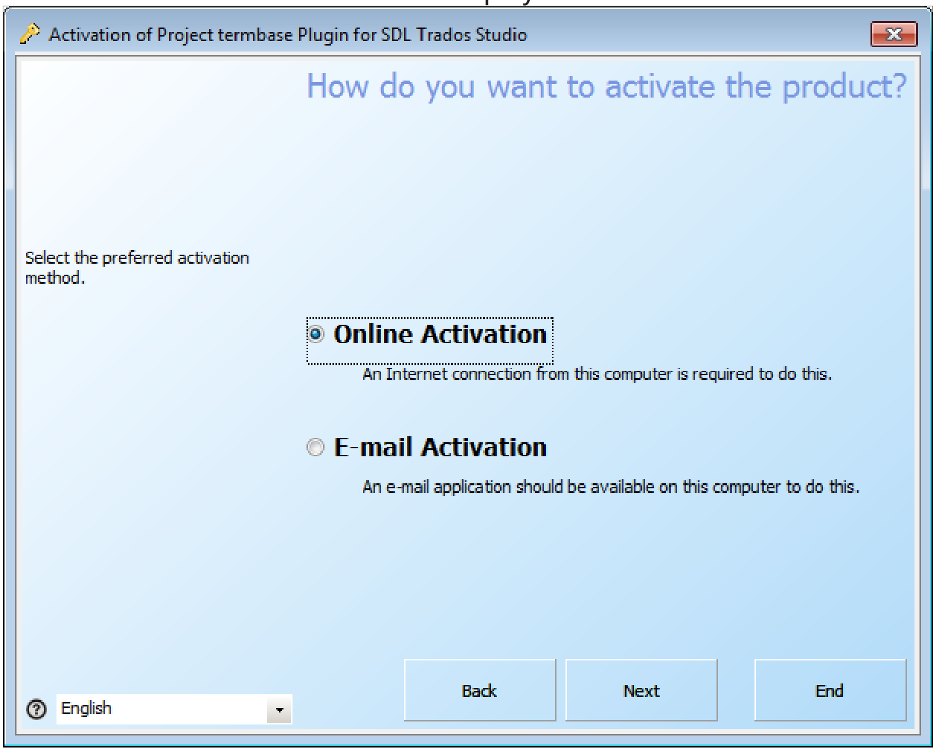
a) Click on "OK".

⇨ The product activation dialog box appears:



b) Click on "Next".

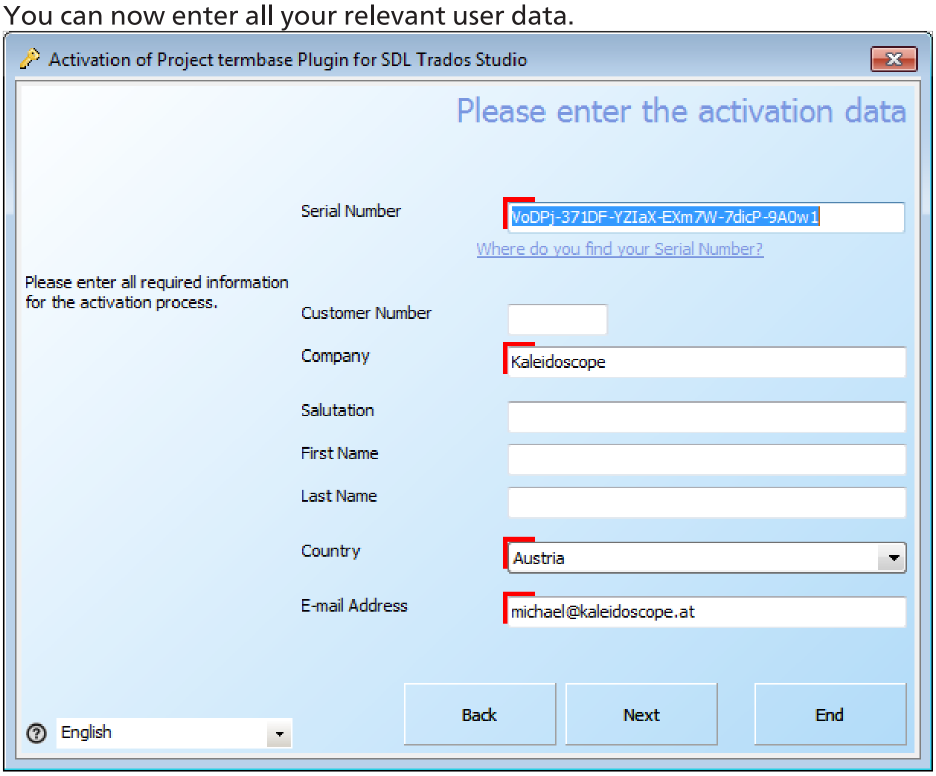
⇨ A selection of activation methods is displayed.



c) Choose the desired method.

d) Click on "Next".

⇨ You can now enter all your relevant user data.

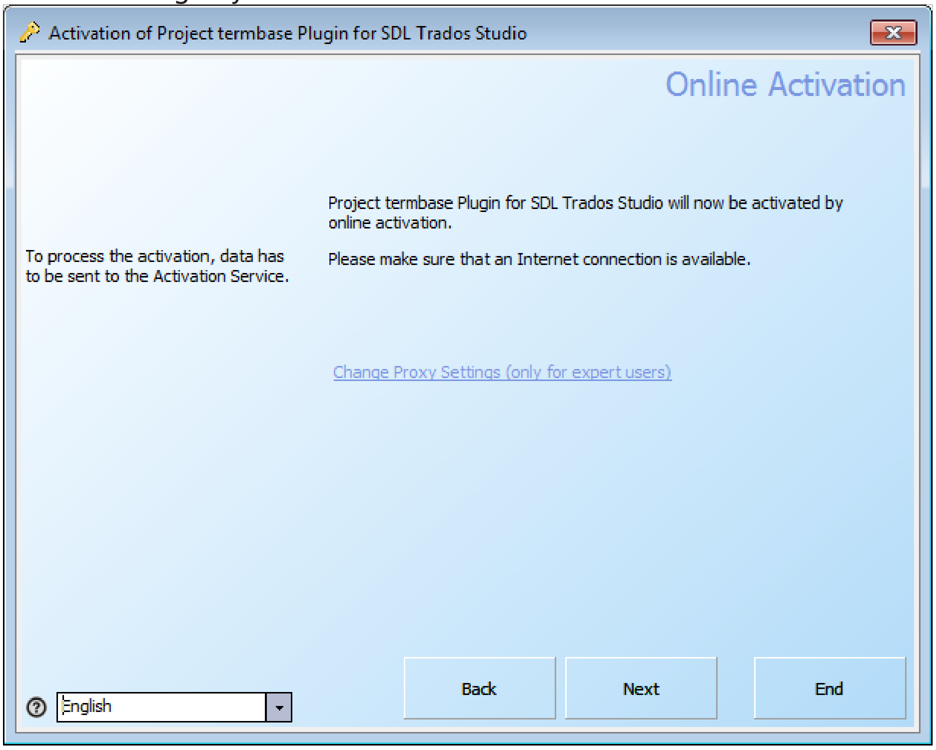


e) Enter your serial number.

f) Complete the fields "Company", "Country", and "E-Mail Address" as a minimum.

g) Click on "Next".

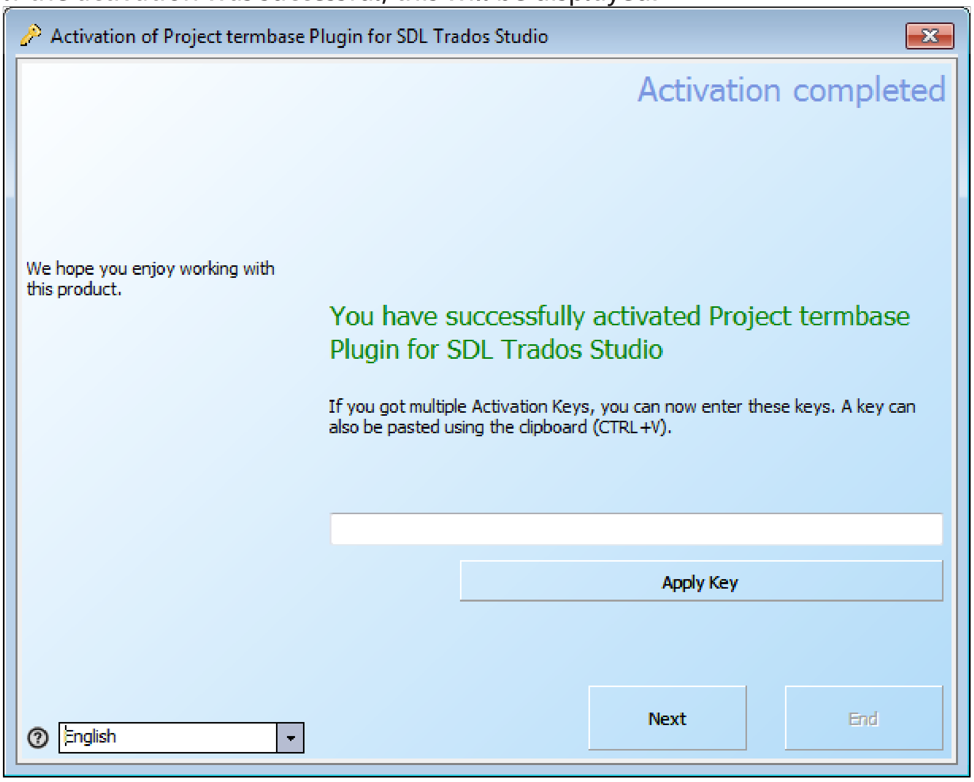
⇨ The connection dialog is now displayed. Note that you can change the connection settings if you need to.



h) Click on "Next".

⇨ The application will now connect with our licensing server and activate your product.

i) If the activation was successful, this will be displayed:



j) If you have received activation keys in addition to your serial number, then you can activate additional features such as the auto-update feature. To do so, enter the key in the respective field displayed and click on "Add key".

k) Click on "Next".

⇨ The application is now fully activated.

2.3.2 Registering a Network License

Preparation

To prepare the plugin for the network license, proceed as follows:

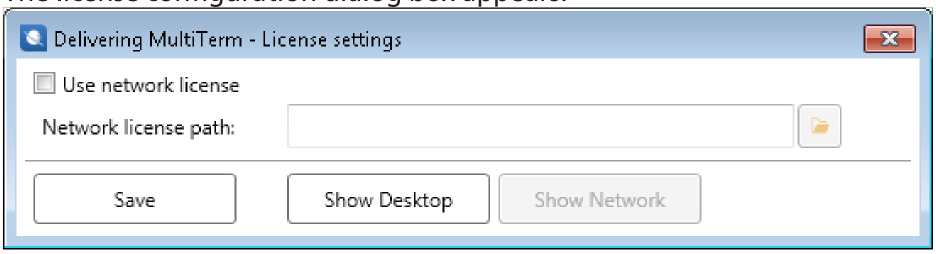
NOTICE

Copying the license file

If this is the first time you are licensing the plugin in your company, copy the license file from "C:\ProgramData\Kaleidoscope\DeliveringMultiTerm" to a network path that is accessible by all users.

a) Click on "Show license..." in the "Add-Ins" tab of Studio.

⇨ The license configuration dialog box appears:



b) Select the "Use network license" option

c) In the "Network license path" field, select the network path that contains the license file.

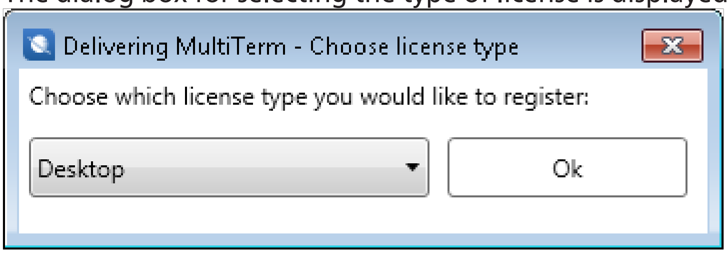
d) Click on "Save".

Registration

To register the plugin, proceed as follows:

a) Click on "Register product" in the "Add-Ins" tab of Studio.

⇨ The dialog box for selecting the type of license is displayed:

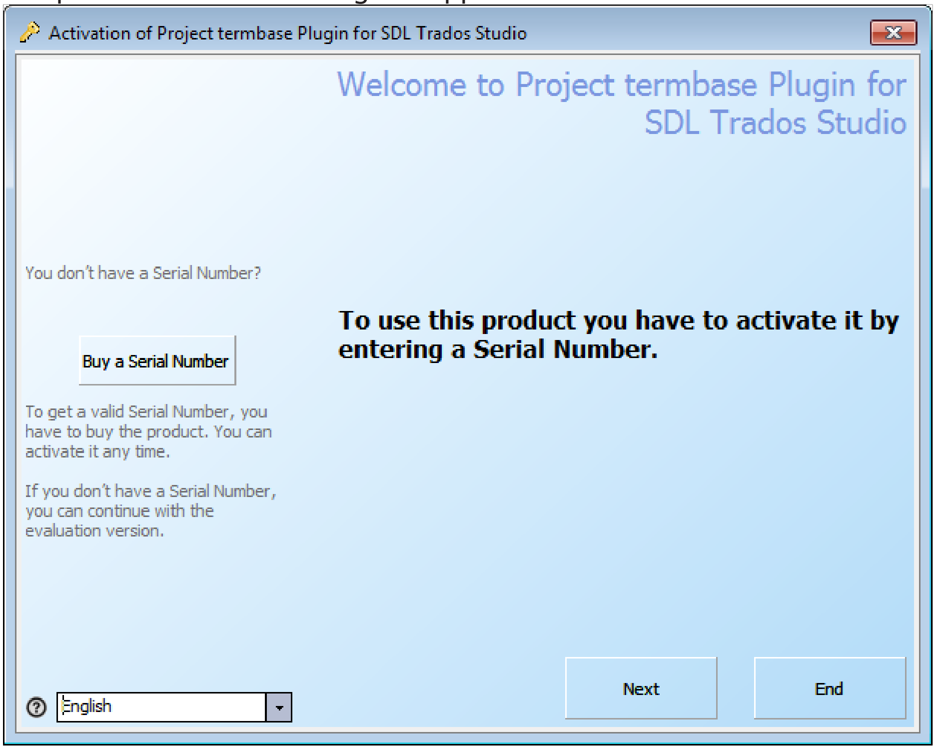


a) Select the "Network" license type.

b) Click on "OK".

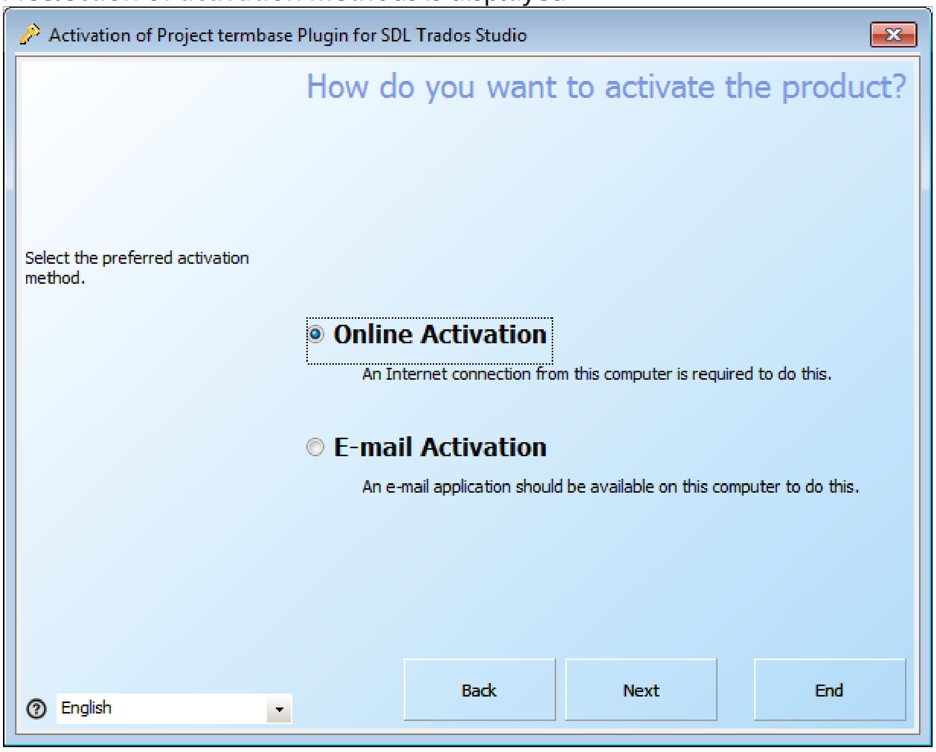
a) Click on "OK".

⇨ The product activation dialog box appears:



b) Click on "Next".

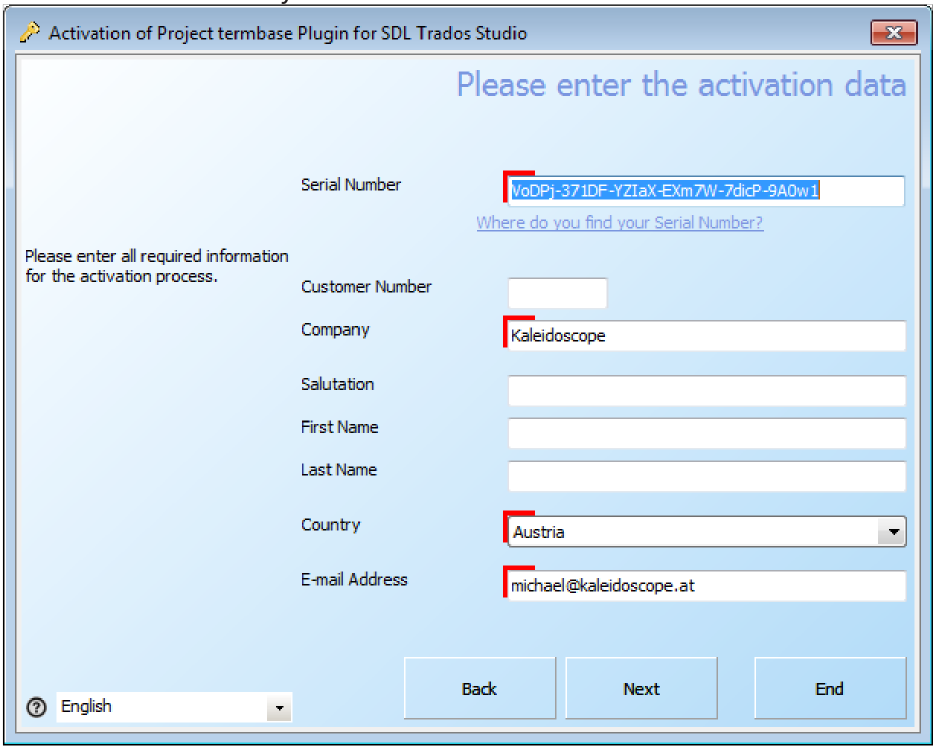
⇨ A selection of activation methods is displayed.



c) Choose the desired method.

d) Click on "Next".

⇨ You can now enter all your relevant user data.

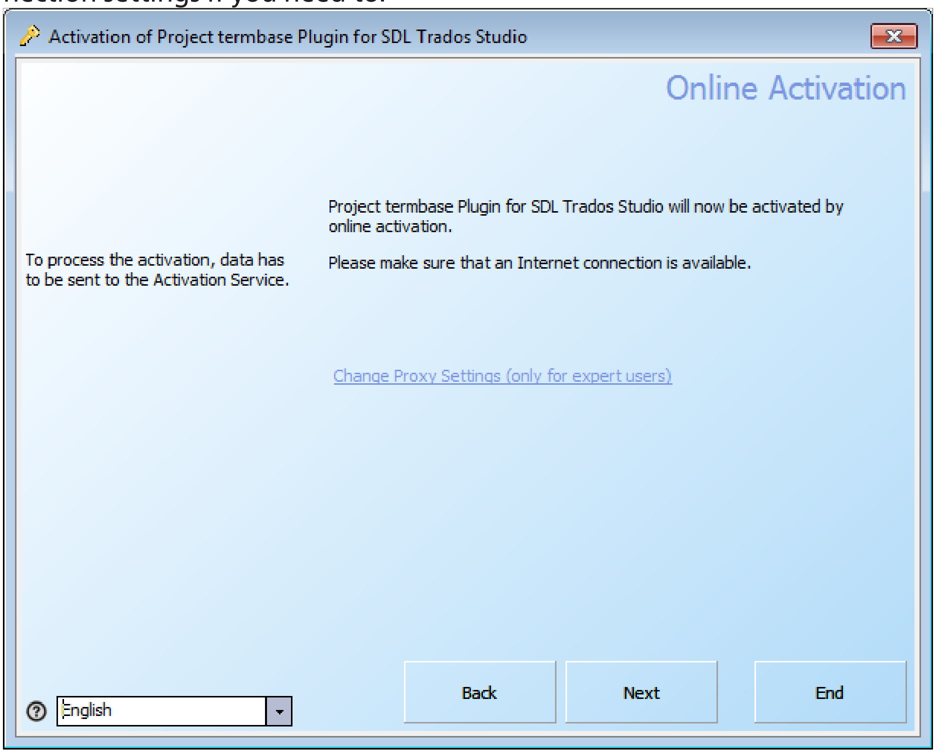


e) Enter your serial number.

f) Complete the fields "Company", "Country", and "E-Mail Address" as a minimum.

g) Click on "Next".

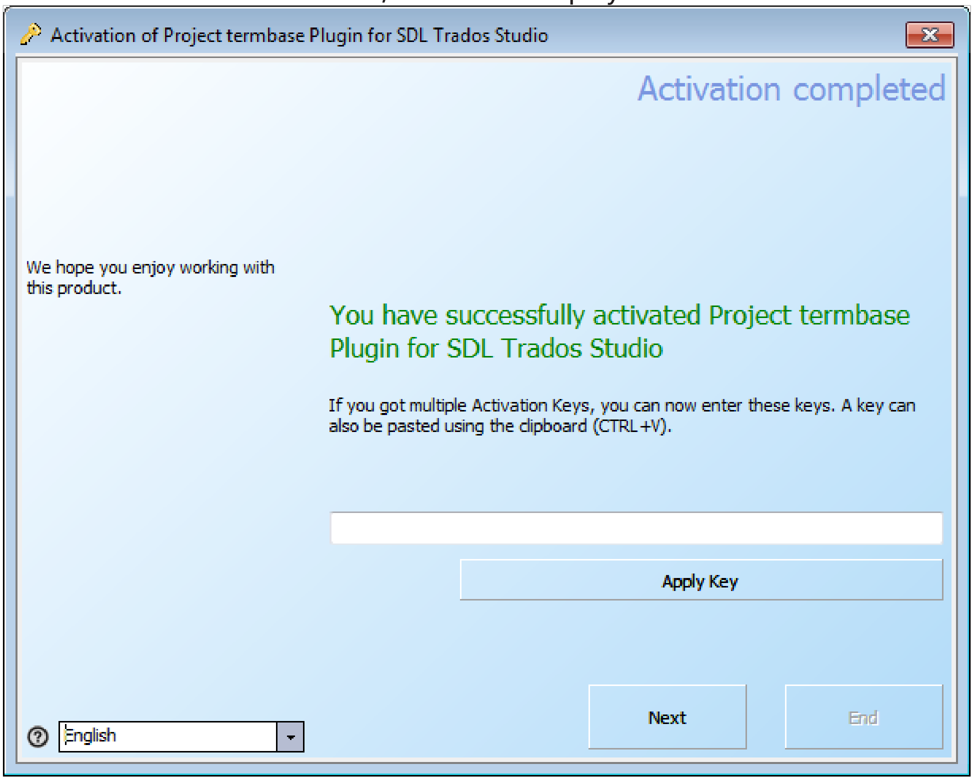
⇨ The connection dialog is now displayed. Note that you can change the connection settings if you need to.



h) Click on "Next".

⇨ The application will now connect with our licensing server and activate your product.

i) If the activation was successful, this will be displayed:



j) If you have received activation keys in addition to your serial number, then you can activate additional features such as the auto-update feature. To do so, enter the key in the respective field displayed and click on "Add key".

k) Click on "Next".

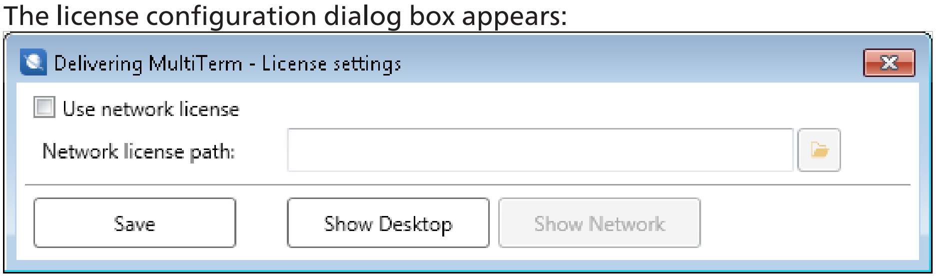
⇨ The application is now fully activated.

2.3.3 Activating the Auto-Update Feature

You may only use the auto-update feature if you have purchased a support and maintenance contract for the product. In this case, you will have received an activation key from Kaleidoscope. If you have not already used the activation key during the initial registration, you can now apply it as follows:

a) Click on "Show license..." in the "Add-Ins" tab of Studio.

⇨ The license configuration dialog box appears:



b) Depending on your license, click on "Show Desktop" or "Show Network".

⇨ The "License Viewer" dialog box appears.

c) Click on "Activation Key".

⇨ A dialog will open, prompting you to enter your activation key.

d) Enter the key you have received from Kaleidoscope.
e) Click on "OK".
   ⇨ A message will appear, telling you that the key has been applied successfully.
f) Click on "OK".
   ⇨ The "auto-update" feature is now licensed.
g) Leave the License Viewer by clicking on "Close".
   ⇨ The auto-update feature is now available.

2.3.4 Transferring a License

In order to transfer the license from one system to another, proceed as follows:

a) Click on "Show license..." in the "Add-Ins" tab of Studio.
   ⇨ The license configuration dialog box appears.
b) Depending on your license, click on "Show Desktop" or "Show Network".
   ⇨ The "License Viewer" dialog box appears.
a) Click on "Transfer License".
   ⇨ The deactivation dialog is now displayed.
b) Click on "Deactivate now".
   ⇨ The "Transfer License" dialog box appears.
c) Click on "Next".
   ⇨ The application will now connect to the license server and return the serial number.
d) Close the current application.
e) Use the original serial number to register the application on the new machine. Any activation keys that have been applied are automatically transferred too.

2.3.5 Offline Activation

If you cannot use online activation via the internet on your machine, you can also perform an offline activation:

✓ You have already received the serial number for the product you want to activate.

a) In the registration wizard, select "E-Mail Activation".
b) Click on "Next".
c) Enter the serial number, your name, company name, and your e-mail-address.
d) Click on "Next".
   ⇨ The registration wizard now generates an e-mail to Kaleidoscope containing the necessary data.
e) Send this e-mail to Kaleidoscope (the e-mail address is pre-filled).
   ⇨ Kaleidoscope will generate an activation key and e-mail it to you.
f) Restart the application to be activated and click the "Activate" button.
   ⇨ You will see an input field for an activation key.
g) Enter the key you have received from Kaleidoscope.

h) Click on "Apply key".

⇨ The activation key is applied.

i) Click on "Next".

⇨ The application is now fully activated.

NOTICE

Offline activation without pre-installed e-mail client

If no e-mail client is installed on the respective computer, you will receive an error message when you attempt to generate the e-mail. Ignore it and proceed as follows instead:
Close the activation wizard and click the "Details" button in the Settings area of the application. In the "License Viewer" dialog that opens, open the "Installation Codes" section and send a screenshot of the dialog box including the serial number used to "licensing@kaleidoscope.at".

3 Configuration

All dialogs of the plug-in can be opened via keyboard shortcuts. Please follow the steps in the Trados Studio documentation to enable this.

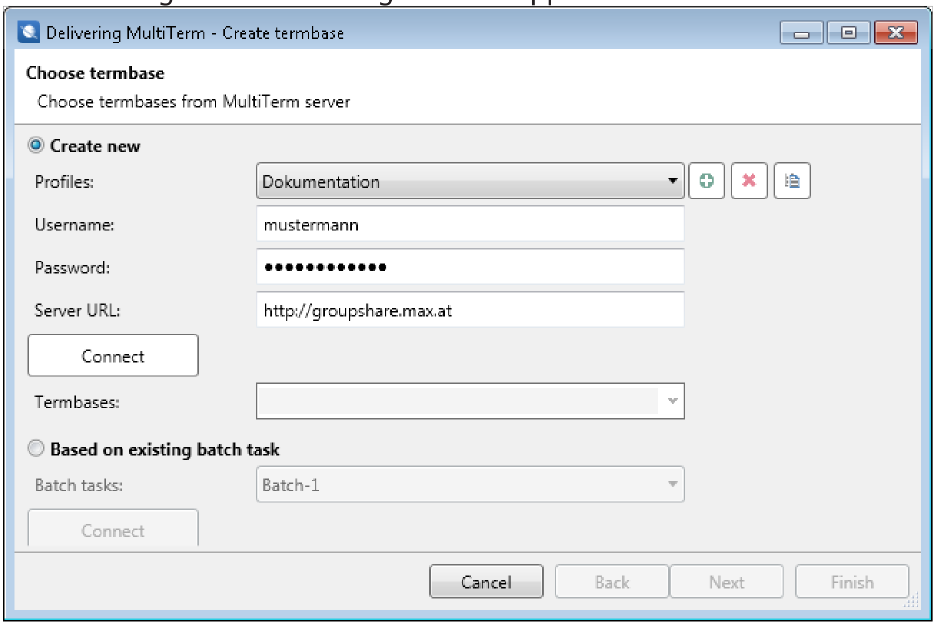
4 Use

4.1 Creating a Project Termbase

To create a project termbase, proceed as follows:

a) Click on "Create project termbase" in the "Add-Ins" tab of SDL Trados Studio or type the keyboard shortcut you have assigned in your installation (see Configuration [▶ 14]).

⇨ The "Creating termbase" dialog box now appears.



a) Select whether you want to create a project termbase without presets ("New") or use an existing batch task as a basis ("Based on existing batch task").

If you selected "New", proceed as follows:

a) **MultiTerm server**: Enter the connection data for your MultiTerm server (username, password, and server URL), or select a previously saved batch task. **Local termbase**: Select "Use local MultiTerm" or select a previously saved batch task.

b) Click on "Connect".

⇨ The plugin now connects to the MultiTerm server and reads all termbases available for the given user login.

c) Select the termbases you want to include in the project termbase (if you are using a stored batch task, this step is skipped).

⇨ The selected termbases are now added to the list of termbases.

If you selected "Based on existing batch task", proceed as follows:

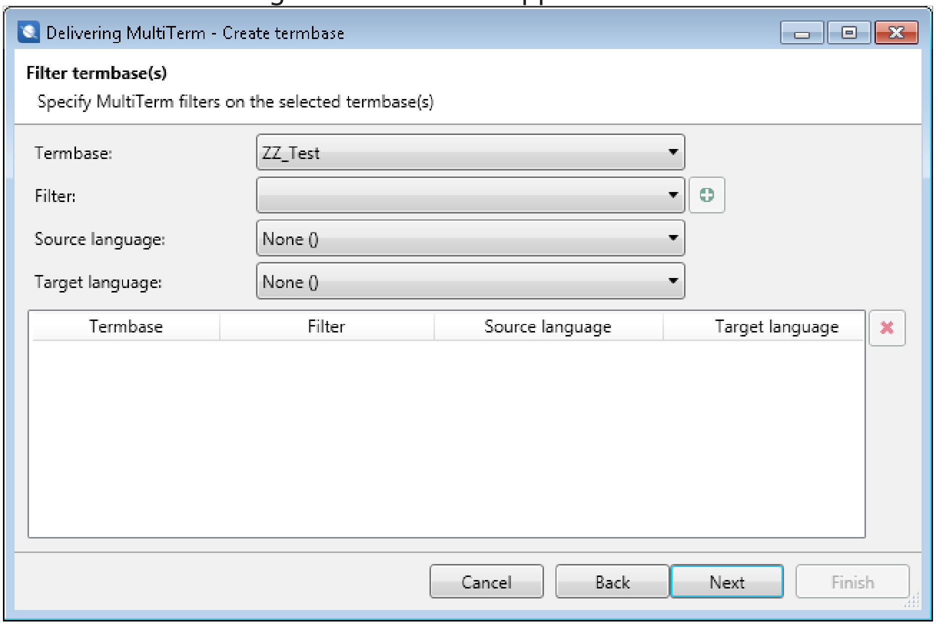
a) Select the batch task you want to use as the basis for creating the project termbase.

b) Click on "Connect".

⇨ The plugin now connects to the MultiTerm server and reads all the required information.

a) Click on "Next".

⇨ The screen for filtering termbase entries appears.



If you click "Back", you will lose all the data previously entered in this screen.

b) Select the termbase for which you want to add the filter.

c) Then select which filter you want to apply to the selected termbase.

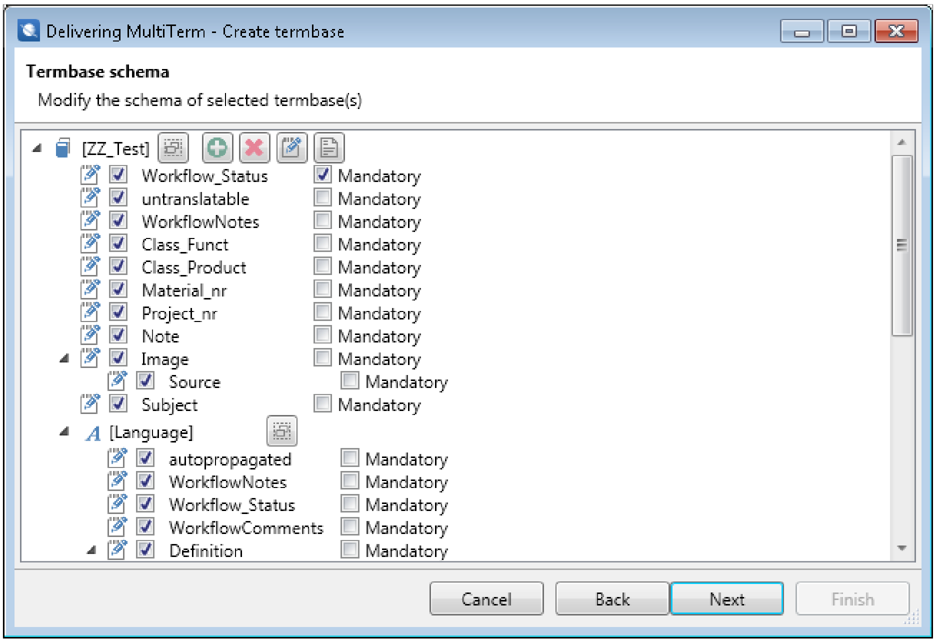
d) If the source and/or target languages are required for this filter, then select them accordingly.

e) Click on the button  to add the filter.

⇨ The filter has been added and will be used when creating the project termbase.

a) Click on "Next".

⇨ The screen for filtering termbase fields appears. This page shows the project termbase structure that has been generated by combining the structure of all selected termbases into one.



b) If you have saved a schema from a previous project termbase, you can load it by clicking on .

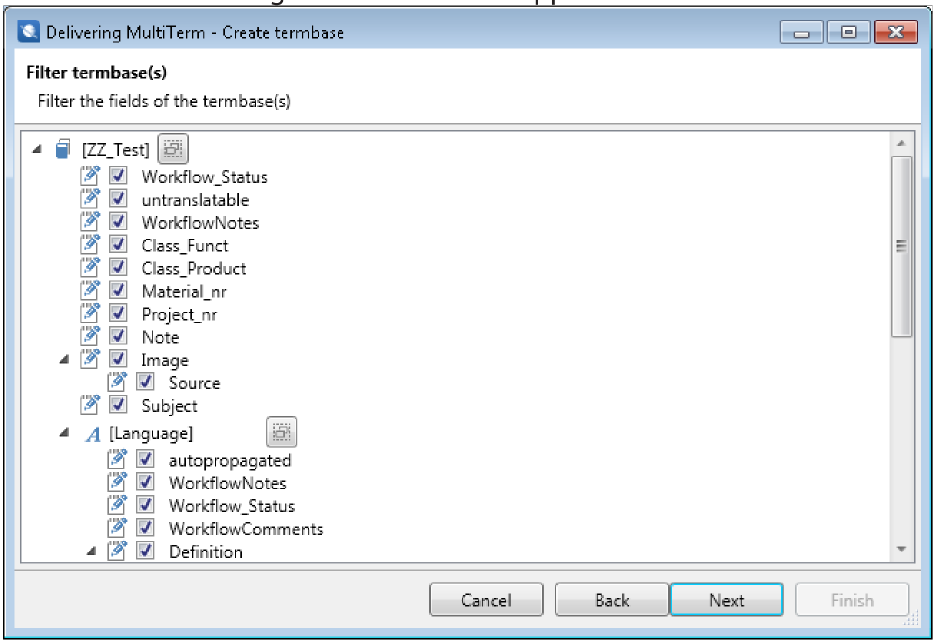
c) Deactivate all fields which you do not want to include in the project termbase. You can select all fields at once by clicking on .

d) In addition, you can define which fields should be mandatory fields in the termbase.

e) You can now save the current configuration as a schema by clicking on . You can also delete a previously saved schema with or rename it with .

a) Click on "Next".

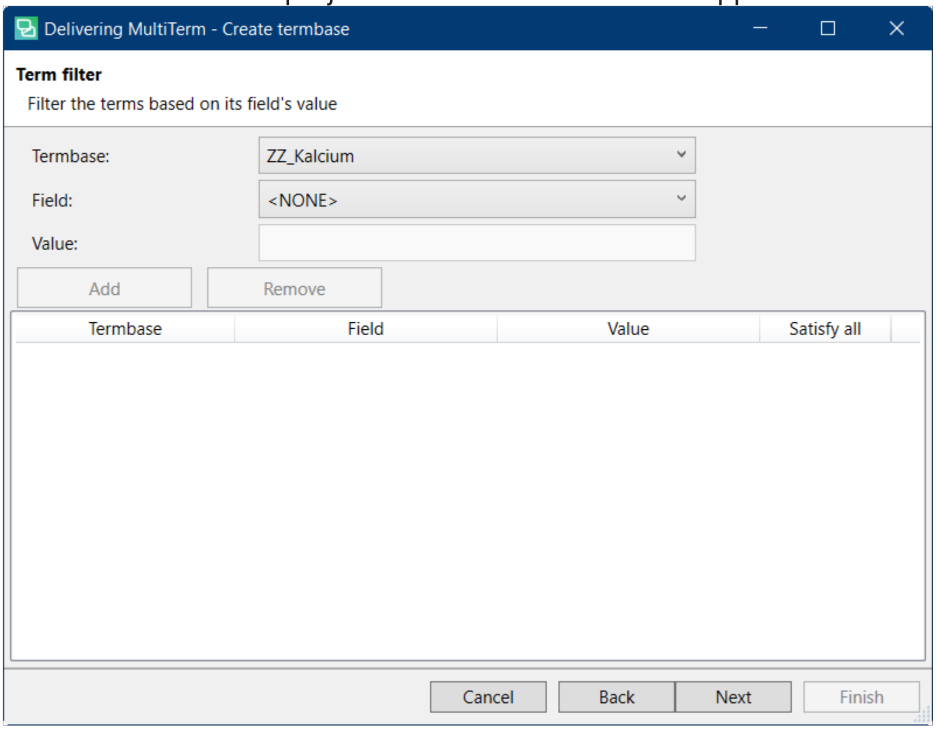
⇨ The screen for filtering termbase content appears.



b) Here you can select which fields should be filled in the project termbase. You can select all fields at once by clicking on .
If you do not change anything in this setting, then the project termbase will have the same content as the source termbase.

a) Click on "Next".

⇨ The next screen of the project termbase creation wizard appears.



b) Select the termbases for which you want to create a term filter.

c) Select the field which will serve as a filter criterion.

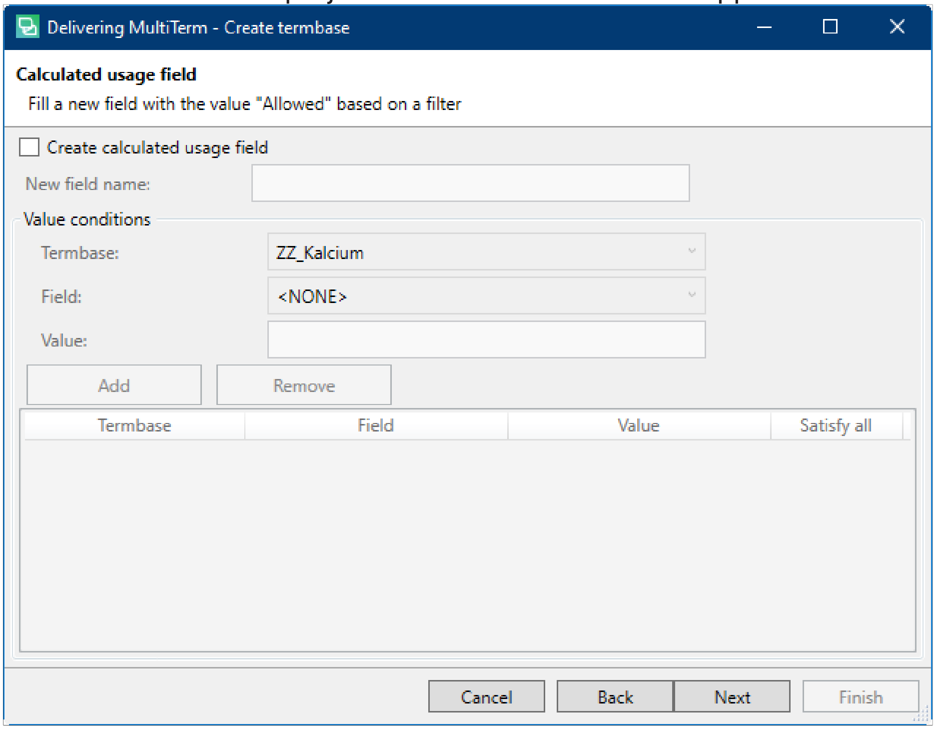
d) Select the respective field value which you want to filter by.

e) Click on the "Add" button to add the term filter.

f) You can then decide whether only one filter criterion has to be met to add the term to the project termbase, or all criteria have to be met.

a) Click on "Next".

⇨ The next screen of the project termbase creation wizard appears.



Here you can define a usage field that is calculated based on filter conditions. The calculated field is automatically added to the configuration with the values "Allowed" and "Forbidden".

b) Enable the option "Create calculated usage field" to add a usage field.

c) Enter the name of the calculated usage field.

d) Select the field which will serve as a filter criterion.

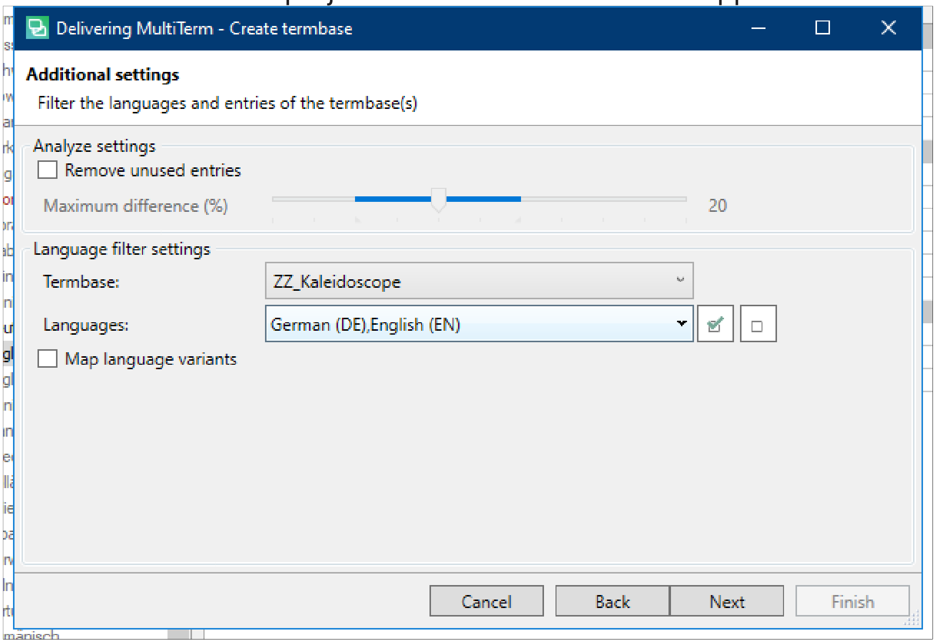
e) Select the respective field value which you want to filter by.

f) Click on the "Add" button to add the term filter.

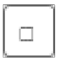
g) You can then decide whether only one filter criterion of a termbase or all criteria have to be met to define the respective term as "Allowed".

a) Click on "Next".

⇨ The next screen of the project termbase creation wizard appears.



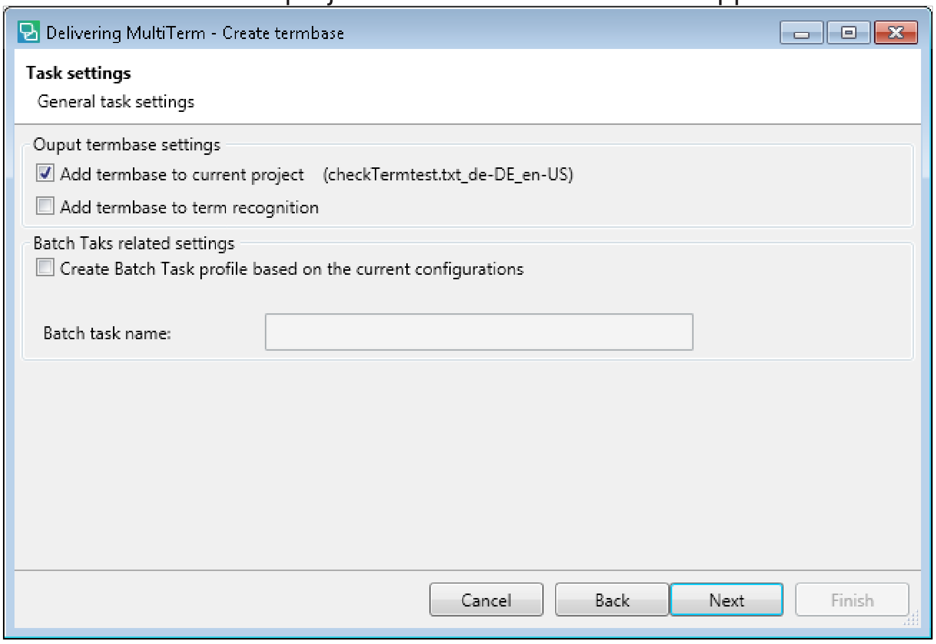
b) Select the "Remove unused entries" option to reduce the scope of the termbase to those entries that are required in the current project.
If necessary, adjust the maximum difference setting to include more or fewer similar matches.
NOTICE! If no matching entry is found, the entire termbase is included.

c) You can select which languages you want to include in the project termbase.
Click the  and  buttons to select or deselect all languages of the respective termbase.

d) Select "Map language variants" (available only if at least one language with a language variant is selected as the language to be included) if you want to use multiple language variants within a termbase or if you want to include multiple termbases with different language variants. After selecting the option, a list of language groups appears where you can choose whether to keep the language variants or to which language variant you want to assign the language group.

a) Click on "Next".

⇨ The next screen of the project termbase creation wizard appears.



b) Select "Add termbase to current project" (this option is only available if a project is selected) to save the project termbase in the current project folder or select a directory in which the termbase should be stored (this folder will be opened automatically after the termbase has been created).

c) Select "Add termbase to term recognition" if you want to use the project termbase as a source for the Studio term recognition feature in the current project.
This option is only available if the "Add termbase to current project" option is selected.

d) Change the storage location of the project termbase if desired (only possible if the option "Add termbase to current project" is not enabled).

e) Change the termbase name if desired (only possible if the option "Add termbase to current project" is not enabled).

f) Select "Create Batch Task profile based on the current configurations" to be able to reuse the settings in a batch task (e.g., in a project template).

g) Specify a name for the batch task (only visible if the "Create Batch Task profile based on the current configurations" option is enabled).

h) Select the stylesheet you want to use for the termbase browser. If you have an online connection to quickTerm, then all stylesheets assigned to the quick-Term user are displayed. Otherwise only the base stylesheet is available.
This option is only available if the quickTerm module has been licensed.

i) Select "Include Concept Maps in offline workflows" to pass quickTerm's concept maps along into the offline workflow.
This option is only available if the quickTerm module has been licensed.

j) Select "Show notification fields" in order to have the translator enter their name, e-mail, or phone number. Simply select the fields you want to be mandatory.
This option is only available if the quickTerm module has been licensed.

a) Click on "Next".

⇨ The project termbase will now be created and a confirmation dialog will be shown.

See also

Configuration [14]

4.1.1 Profiles

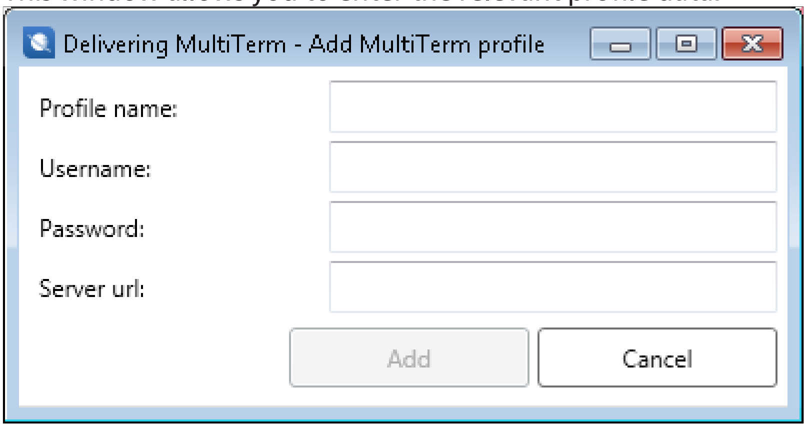
You can store connection data in a profile. This is particularly useful for project managers who need several different connections as part of their project work. Once you have stored a profile, you can load it by selecting it in the "Profile" drop-down. The data of this profile will be imported into the current connection settings dialog.

Creating a New Profile

To create a new profile, proceed as follows:

a) Click on the button to open the profile editor window.

⇨ This window allows you to enter the relevant profile data:



b) Enter your required information for this profile.

c) Then click on "Add" to add this new profile.

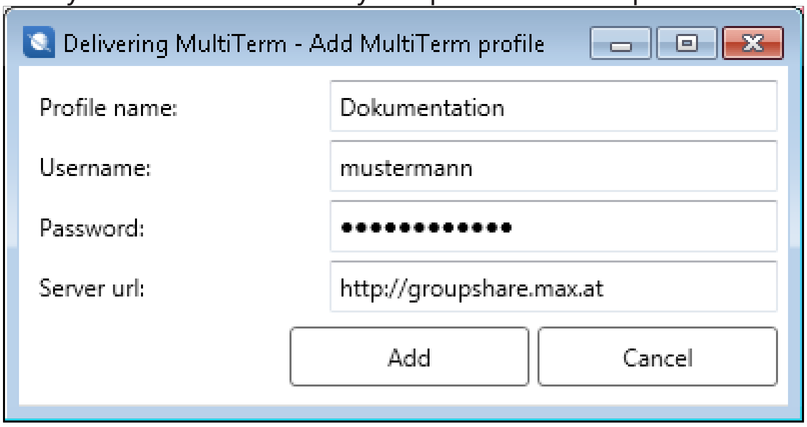
⇨ The profile has been added.

Saving Connection Data You Have Already Entered as a New Profile

To create a new profile, proceed as follows:

a) Click on the button to open the profile editor window.

⇨ This window allows you to enter the relevant profile data. The connection data you had entered already is copied into the respective fields. :



b) Enter a name for the new profile.

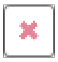
c) Then click on "Add" to add this new profile.

⇨ The profile has been added.

Deleting an Existing Profile

To delete an existing profile, proceed as follows:

a) Select the profile you want to delete from the drop-down list.

b) Click on the  button to delete the selected profile.

⇨ The profile has been deleted.

4.2 Batch Task

If the creation of a project termbase has been saved as a batch task, it can be re-used when creating a project in Studio. To do so, select the "Custom" task sequence or create a new task sequence when creating a project in Studio. Add the "Delivering MultiTerm – Create project termbase" task to it. Then select the profile you want to use in the batch task.

NOTICE

Project Creation

Please check the SDL Trados Studio documentation on how to create projects and use tasks and task sequences.

4.3 Including the Termbase in the Project Package

The project termbase is added as a reference file to project packages by default. If you need more information on this, please refer to the Trados Studio instructions (including file-based resources).

5 Trademarks

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Impressum

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