Glossary Manager Admin User Guide

Date: 01 September 2016 Version: 1.0.6

For technical support

https://deluxedl3.zendesk.com

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 2 of 41

TABLE OF CONTENTS

(Use ctrl+click on the item in the TOC to quickly jump to that page of the document)

1.0 PURPOSE	3
2.0 APPLICATION	3
3.0 PROCESS OWNER(S)	3
4.0 ASSOCIATED MATERIAL	
5.0 DEFINITIONS	
6.0 USAGE DETAILS	
6.1 INTRODUCTION	
6.1.1 Tool Description	
6.1.3 Forgot Password	
6.1.4 Network Access	
6.1.5 Log In	
6.2 PROJECTS MENU	
6.2.1 The Project List Page	
6.2.2 The New Project Page	
6.2.4 The Edit Project Page	
6.2.5 The Project Master Page (aka Source Setup)	
6.2.6 The Project Permissions Page 🦫	
6.2.7 Adding Language resources window	
6.2.8 Adding Editorial Staff	
6.2.9 Defining Permission Types	21
6.2.10 The Project Glossary Window	
6.2.11 The Translation Language Selection and Add Translation Windows	
6.2.12 The Approve/Reject Language Selection and Approve/Reject Translation Windows . 6.3 SEARCH TERM MENU	
1) Client:	
2) Brand:	
3) Language:	
4) Search Box:	
Enter the applicable data in the field	
5) Search	
6) (Search Results) Glossary List	
1) Add New Translator	
2) Select Translator State	
3) Search for Translators	
4) Translator Actions: Info, Edit, and Trash	
6.5 USERS MENU	
1) Create New User	
Select User State Search the User List	
4) User Actions: Edit, Deactivate, and Log In As User	
·,	

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 3 of 41

6.5.1 Defining Different User Types	37
6.6 MY PROFILE (USER PROFILE) MENU	
6.6.1 User Profile Attributes:	
6.6.2 Change Password:	
6.7 ADMIN MENU	
6.8 HELP MENU	40
7.0 VERSION CONTROL	41

1.0 **PURPOSE**

This DL3 user guide details the functionality of the DL3 Glossary Manager and the application workflow for external and internal users, including project set-up, permission access, and both the translation and approval processes.

This is a living document and will continue to grow as the need arises.

2.0 **APPLICATION**

This user guide supports all users participating in the translation and production of localization content via Deluxe Media's DL3 Glossary Manager.

3.0 **PROCESS OWNER(S)**

If this document seems incorrect/outdated, please contact the below persons for updates:

Role (BU & Dept)	Contact Person	
Product Owner	Technical Ops Manager	
Floduct Owner	(darren.mayoff@bydeluxe.com)	
Glossary Manager Support	https://deluxedl3.zendesk.com glossarymanager@bydeluxe.com	

4.0 ASSOCIATED MATERIAL

N/A

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 4 Of 41	Deluxe	DATE: 9-1-2016	FILE: DL3 300	PAGE: 4 of 41
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5.0 **DEFINITIONS**

Starred Terms: A star which appears in the "Starred" column of the project glossary to signify that the English term occurs in another glossary under the same brand. Click the star icon for a popup window displaying other brand glossaries with the same English term.

Show ALL view: Used to view all sections of a glossary within a single view which is accessed from the glossary under the "Section" dropdown. This is a read-only view of all sections.

Brand: A collection of related projects (ex/ DC, Harry Potter). A project can be associated with multiple brands.

English Unique ID: A unique numerical identifier assigned to each term in a glossary.

Project: The container in which all information to a related glossary is stored.

6.0 **USAGE DETAILS**

6.1 Introduction

6.1.1 Tool Description

Deluxe Media's DL3 Glossary Manager is a terminology management application that stores and manages key names and phrases in a single place, accessible on-line, reducing the risk of inconsistency of translations across various localization workflows.

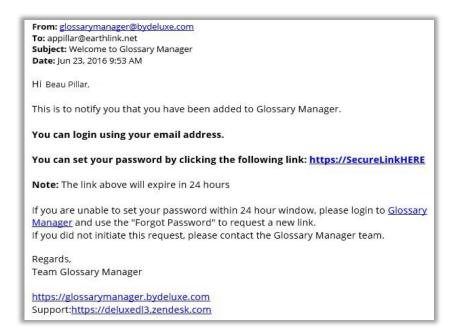
Note: Glossary Manager allows a user's role to be registered as a Super Admin, as distinguished from an Admin. There is no Super Admin user guide. Notes regarding what distinguishes a Super Admin from an Admin can be found throughout this document in this format (**SA Note:** ...)

6.1.2 Welcome Email

In order to access the site, you must acquire login credentials from Deluxe support first. Once your account is created, you will receive an email notification containing the user account and password token (set/reset) information. Upon clicking the link, you'll be taken to the **Create your new Password** window to create a password for your account.

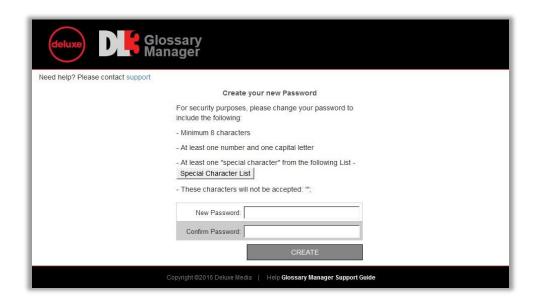
Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 5 of 41

Example of Account Creation Notification email:



6.1.3 Forgot Password

At the login window, click on the **Forgot Password** link and follow the onscreen instructions. You'll receive a password reset email similar to the welcome mail. Follow the password reset instructions. You'll be taken to the same **Create your new Password** window as new users (see below). Follow the onscreen instructions to reset your password. Once completed, you'll be taken to the **Disclaimer** page, and then into the tool.



Deluxe	DATE: 9-1-2016	FILE: DL3 300	PAGE : 6 of 41

6.1.4 Network Access

You can connect to the DL3 Glossary Manager site via internal access through your corporate network or from a Wi-Fi connection at home. The URL for the Glossary manager site is

www.glossarymanager.bydeluxe.com

6.1.5 **Log In**

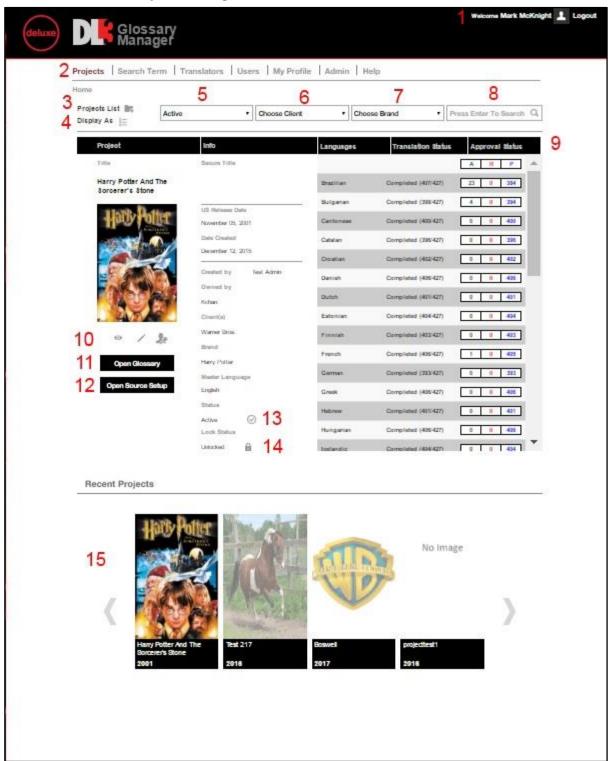


Upon accessing the DL3 **Glossary Manager** website, you'll see the **Log in** page. Enter your username and password and press the **Login** button. If your username and password were entered correctly, you'll be taken to the **Disclaimer** page. After reading the Conditions of Use/Access details, click the **Accept** button. You'll be taken to the **Projects Home** page, which is also the **Projects List** page.

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 7 of 41

6.2 Projects Menu

6.2.1 The Project List Page



Deluxe DATE: 9-1-2016 FILE: DL3 300 P	PAGE : 8 of 41
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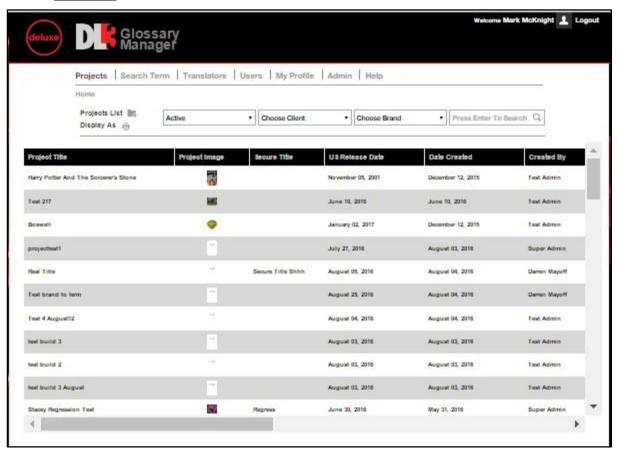
The **Project List** page provides access to all Projects in Glossary Manager.

- Username and Logout: The specific name associated with the logged in user; click Logout to exit the Glossary Manager.
- 2) Main Components: Click the component names across the top to access pages for the other main Glossary Manager components, including the <u>Projects List</u>, <u>Search Term</u>, <u>Translators</u>, <u>Users</u>, <u>My Profile</u>, and <u>Help</u> pages

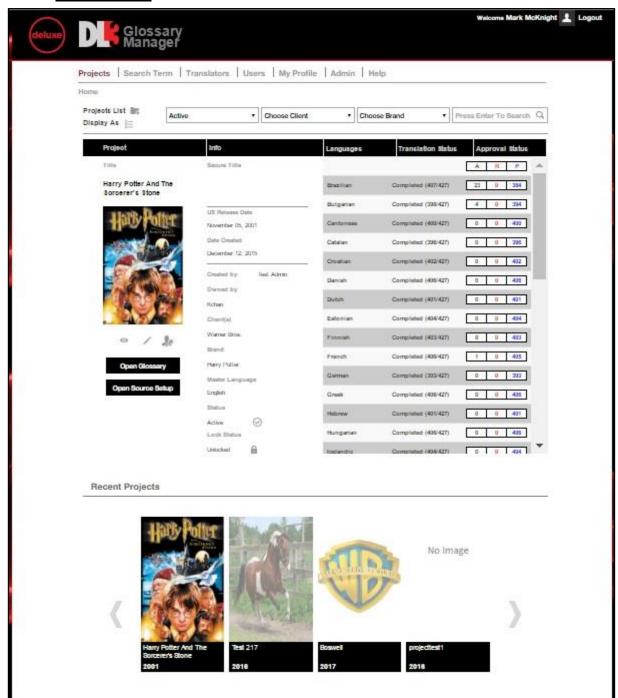
SA Note: The **Admin** component is only visible to Super Admins. Please see the **Admin** section of this document for more information.

- 3) New Project: Click this button to access the <u>New Project</u> page and build a new project in Glossary Manager.
- 4) Display As: Click this button to change your display from list to carousel. Examples below.

List View:

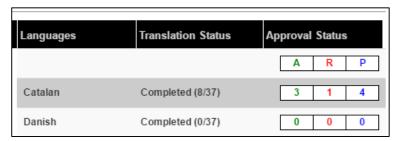


Carousel View:



- 5) Project Status Filter: Use the filter to sort viewable projects by Active, Inactive, or All Projects.
- 6) Project Client Filter: Use the filter and the "sort" arrow to adjust which clients to view.
- 7) Project Brand Filter: Use the filter and the "sort" arrow to adjust which Brand to view.
- 8) Project Search: Use this field to find a specific project in Glossary Manager by keyword.

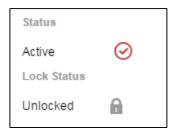
9) Language Status Columns: The Translation Status column indicates the number of terms translated (so far) while the Approval Status column indicates how many terms, of the total that have been translated, are in which status (approved, rejected, or pending).



- 10) Project Info, Edit Project, and Project Permissions: Click the <u>Project Info</u>, <u>Edit Project</u>, and <u>Project Permissions</u> icons to access each of those pages.
- 11) Open Glossary: Click this button to access the Project Glossary page.
- 12) Open Source Setup: Click to open the Source Setup page.



- 13) Active icon: Click to change project status, which affects visibility of the project in the **Project** Status Filter.
- **Project Lock icon:** Click to enable/disable changes to a project. Once a project is locked, it can no longer be edited until it's unlocked.

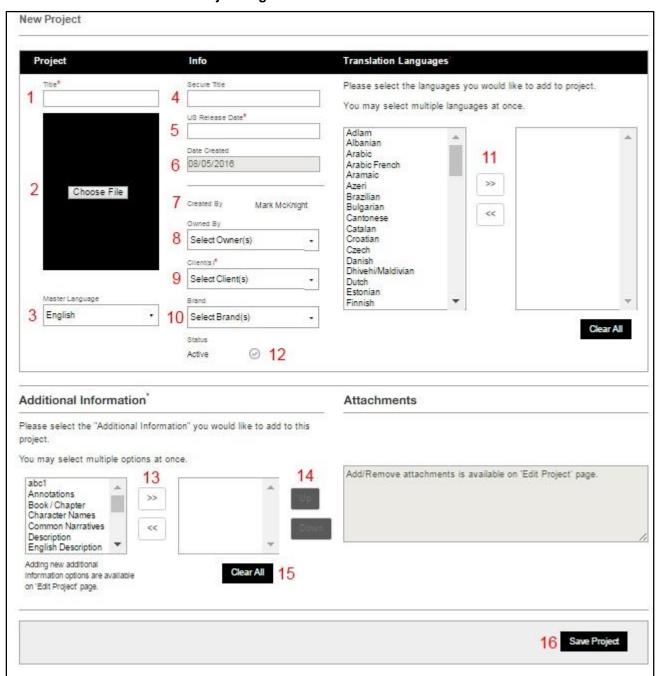


SA Note: The **Project Lock icon** is only available to Super Admins.

Title Carousel (if carousel view is selected): Click a title picture in the carousel of title projects to access the **Project List** page of that title.

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 11 of 41

6.2.2 The New Project Page



- 1) **Title**: In the text field, enter the title of the new project.
- Project Poster Selection: Click the Browse button to browse and select (locally) a project poster.
- 3) Master Language Selection: From the list of languages available in the pulldown select the master language of the project. This refers to the master language of the content (typically English).
- 4) Secure Title: In the text field, if available, enter the secure title for the project.

Note: A secure title will be what's used in the glossary until the film is released. Use this only if an actual security title has been supplied.

- 5) US Release Date: In the text field, enter the date on which the title will be released in the United States.
- 6) Date Created: The date on which the project was created is automatically entered into the text field.
- 7) Created By: Shows which user created the project.
- 8) Owned By: From the pulldown, select the project owner(s).
- 9) Clients: From the pulldown, select the project client(s).
- **10) Brand**: From the pulldown, select the project. brand(s).

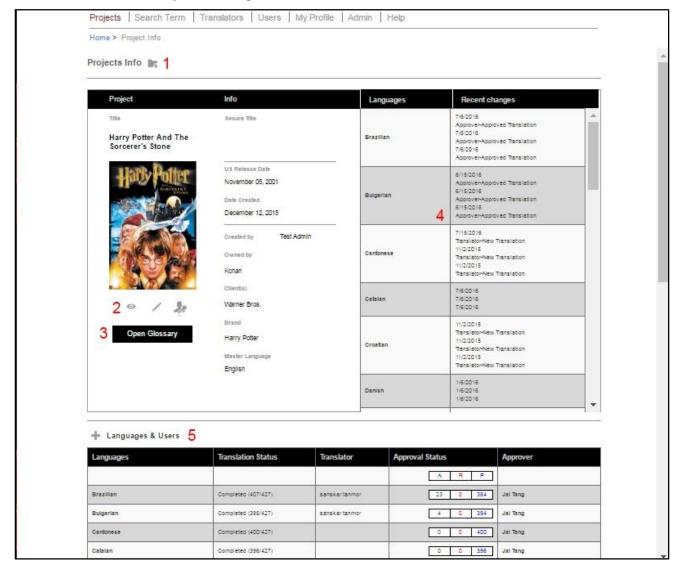
Note: See the Admin section of this document for more information about brands.

- 11) Translation Language Selection: Per the onscreen instructions, from the left, select and add the languages to be translated in this project. From the right, select and remove languages not to be translated in this project.
- 12) **Project Status**: Indicates whether the project is in one of two statuses (active or inactive).
- **Additional Information Selection**: Per the onscreen instructions, from the left, select the additional information to be added to the project. From the right, select and remove additional information *not* to be added to this project.

Note: See the Admin section of this document for more about additional information options.

- 14) Step Up/Down Additional Information List: Click the Up or Down buttons to step up or down the list of additional information options added to the project.
- 15) Clear All: Click the this button to remove all additional information options added to the project.
- 16) Save Project: Once all project creation selections have been made, save the project.

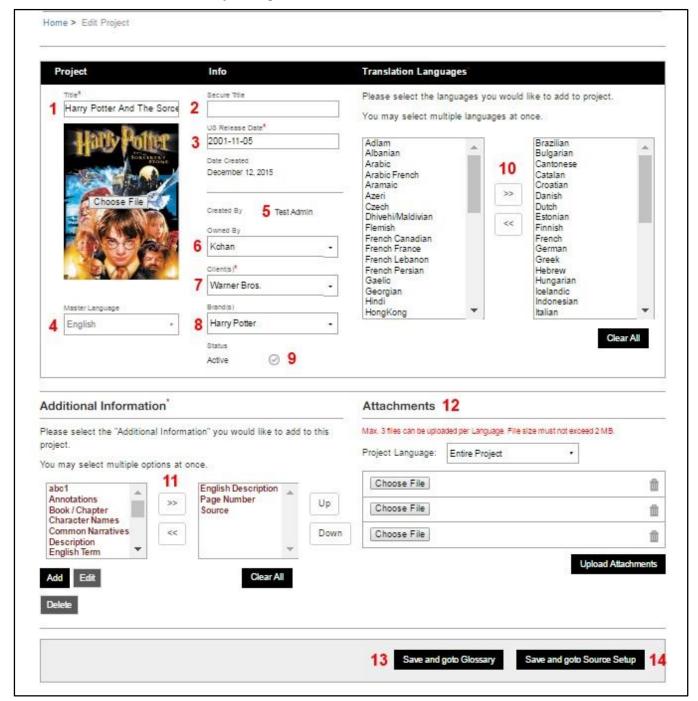
6.2.3 The Project Info Page



Once a project is created, you can use this page to check its overall status.

- New Project: Click this button to access the <u>New Project</u> page and build a new project
- 2) Project Info, Edit Project, and Project Permissions: Click Project Info, Edit Project, and Project Permissions icons to access each of those pages.
- 3) Open Glossary: Click this button to access the Project Glossary page.
- 4) Project Translation List: (Unavailable on the Project List page) Scrollable list of translations associated with the selected project, including dates of recent (real time snapshot) translation status changes.
- 5) Language Translation and Approval Status List: List of translation and translation approval statuses, per language, including names of assigned translators and approvers.

6.2.4 The Edit Project Page



Once a project is created, you can further edit the project details from this page.

- 1) **Title**: Edit the project title.
- 2) Secure Title: Edit or add a secure title to the project.
- 3) US Release Date: Click the calendar icon to select a date.
- 4) Master Language: Edit the master language of the title.

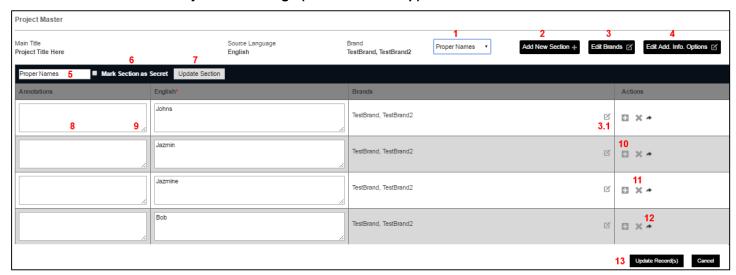
Deluxe DATE: 9-1-2016	FILE: DL3 300	PAGE: 15 of 41
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- 5) Created By: Shows which user created the project.
- 6) Owned By: Edit the project owner(s).
- 7) Client(s): Edit the project client(s).
- **8) Brand**: Edit the name of the project's brand name.
- 9) Project Status: Indicates whether the project is in one of two statuses (active or inactive).
- **Project Language Addition**: From the field on the left, select a language and click the right-facing arrows to add the selected language to the project.
- Additional Information Management: From the field on the left, select the required information and click the right-facing arrows to add the selected information to the project. This displays the default options as such up by the system admin. Click the left-facing arrows to remove from the project.
 - Also, click the **Add**, **Edit**, or **Delete** buttons to create, edit, or remove information existing in the list. By pressing "Add" in this case, you are creating a unique option for this single project. If you want a new option added to the system, please contact the glossary.manager@bydeluxe.com
- **Attachments**: Use to upload (or remove) any attachments (to the entire project or just for a certain language), such as terminology spreadsheets, for the project.

Note: Only Admins can add attachments. From the **Project Language** dropdown, select the **Entire Project** option to add an attachment all translators will see. Alternately, select only a specific language from the dropdown to add an attachment only translators for that specific language will see. See the **Project Glossary** section of this document for information on (translators) downloading attached documents.

- 13) Save and Goto Glossary: Click to save selections and go to the Project Glossary.
- 14) Save and Goto Source Setup: Click to save selections and go to the Project Master page.

6.2.5 The Project Master Page (aka Source Setup)



The source setup page is used to populate the "base" source terms for the glossary. This is typically English, but takes on the language of the project.

1) Section Selection: From the list, select a section to edit.

Note: At least one section must be added before you can select anything

Add New Section: Click to create a new section in the project.



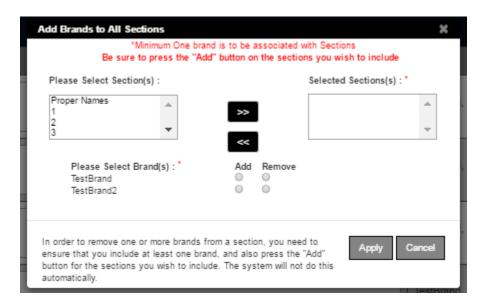
- **2.1)** New Section Name: In the field, type a name for the new section (eg. Character names)
- **2.2) (Optional) Mark Section as Secret**: Place a check in the checkbox to limit section visibility and access to Super Access Translator and/or Approver roles.
- 2.3) Save Section button: Click to save section name and "secret" visibility selections.

Note: New sections must be saved before content can be entered into cells.

- 2.4) Section Content fields: Type applicable content in the field.
- 2.5) Section Content Field Expand tab: Click, hold, and drag to resize field.
- 2.6) Add Term button: Click to add a new term row to the section
- **2.7) Submit**: Click to save section content changes.

Note: Row Rearrangement: Click and hold the top or bottom edge of a row, and then drag up or down to rearrange the order of rows.

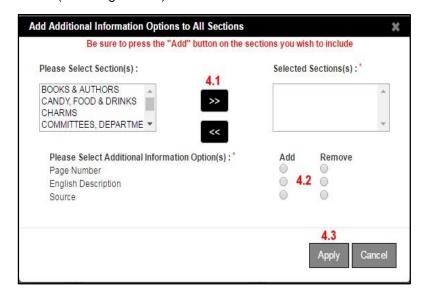
3) Bulk Edit Brands: Click to add/remove brands to the selected sections. This is based on the initial project setup; if the project contained multiple brands, then you can add/remove brands from sections. Brands may be added or removed as required (as long as there is a minimum of one brand per section)



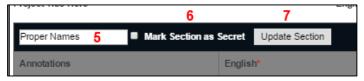
3.1) Edit Brand per term: You can also associate specific terms with specific brands. This can be helpful when your project contains multiple brands, but the term in your section should only be associated to one of those brands.



4) Edit Add. Infor. Options: Users can edit additional information by clicking this button and opening a new window (see image below).



On this screen, the user can choose to select additional information they would like added or removed for various sections on the Project Master page by selecting the desired section(s) (4.1), choosing which additional information they would like to add or remove (4.2) and then clicking "Apply" (4.3)

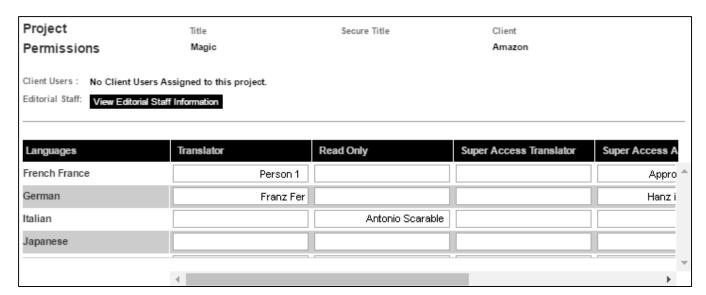


- **Section Name Edit**: Type in the field to edit a section name.
- 6) Mark Section as Secret: Place a check in the checkbox to limit section visibility and access to Super Access Translator and/or Approver roles, as well as client admin and admin.
- 7) **Update Section** button: Click to save section name and "secret" visibility changes.

Note: Only users with appropriate project permissions will be able to see secret terms. These are terms that for security reasons need to be kept secret from most users (such as plot spoilers).

- **Additional Information fields:** This refers to the additional information options which were set at the project level such as annotations, references, etc.
- 9) Section Content Field Expand tab: Click, hold, and drag to resize field.
- **10)** Add New Row button: Click to add a new term to the section.
- **Delete Row button:** Click the x in the row of the term you want to delete.
- **Move Term button:** Click to move a term to another section.
- 13) Update Record(s): Click to save section content changes.

6.2.6 The Project Permissions Page



The **Project Permissions** are used to grant the various user types (translators, approvers, editorial users, etc) access to the project.

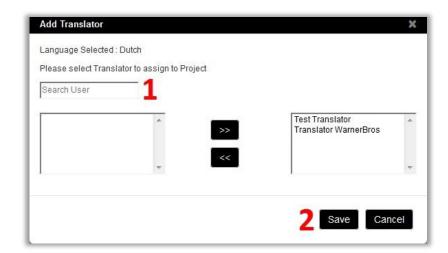
Note: Details on all of the different roles and types can be seen further below in this document.

For languages: Click within a field in the language row to open the **Add Permission to 'Role'** window, where users can be assigned to a project based on language. The list will be filtered by users who have the proper language, client & *skill* associated to their profile

For Editorial staff: Click on the View Editorial Staff Information button to add editorial users who can populate the source setup terms. This list will be filtered by editorial user type who have the proper client associated to their profile.

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 20 of 41

6.2.7 Adding Language resources window



1) Search and Select: Type or scroll to search for a user, and then click the right-facing arrows to add the selected translator as a user who has permission to have translator-role access, to that language, for the project.

Note: Within each section only the appropriate user type will show up in the list. For example, if your project is client "Warner" and you are adding permission for a French translator, you will only see translators who have French and Warner associated to their profiles.

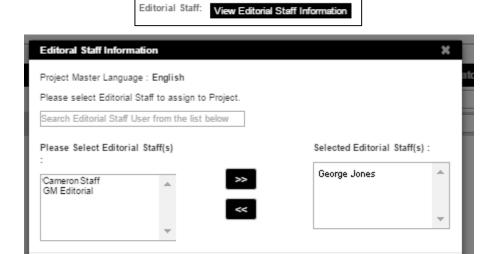
The example above show "Add Translator" but it's same for all language roles

2) Cancel/Save: Click to save or cancel the selections made in step one.

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 21 of 41

6.2.8 Adding Editorial Staff

Adding editorial staff is similar to adding any of the language roles, except instead of clicking in a language row, you click on the **View Editorial Staff button**



6.2.9 **Defining Permission Types**

Below is a brief explanation of what each of the various user permission types refer to.

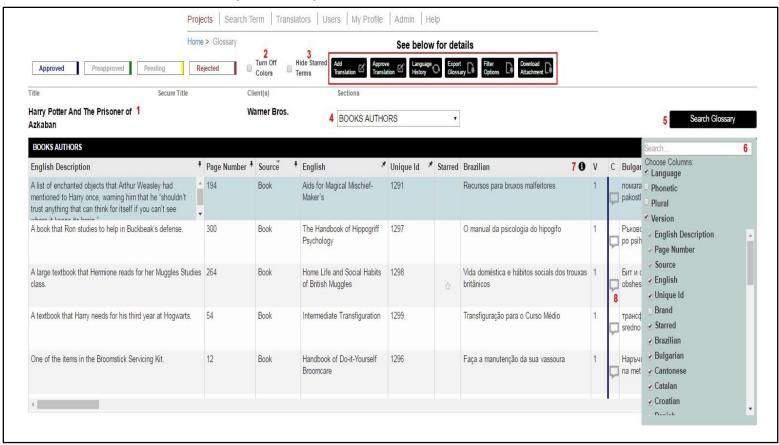
- Editorial Staff: Able to access/populate the "Source Setup" page and the main glossary
- Translator: Able to access the "Add Translation" section of the Glossary based on their client & language combination and add actual translations
- Approver: Able to access the "Add Approval" section of the Glossary based on their client & language combination and approve/reject translations
- Read-only: Applied to a translator, and is only granted access to view the Glossary based on their client & language combination. They cannot add terms. (Only translators will appear in this list)
- Super Access Translator: Applied to a translator who can access and translate the sections marked as "Secret" for security reasons
- Super Access Approver: Applied to an approver who can access and approve the sections marked as "Secret" for security reasons
- Approver as Translator: Applied to an approver when the approver need access to the "Add Translation" section.

Note: Selecting Approver as Translator only grants the user "Add Translation" access. If you also want the user to be the able to be the approver for the project, also add him/her as "Approver".

Cancel

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 22 of 41

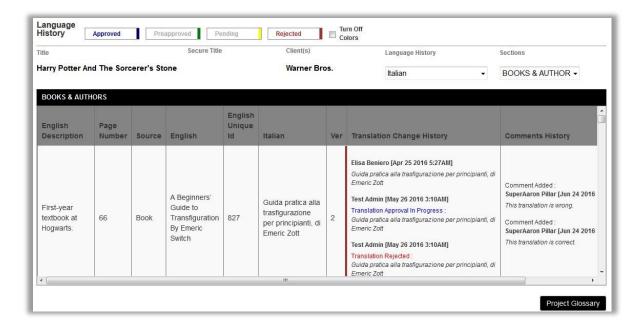
6.2.10 The Project Glossary Window



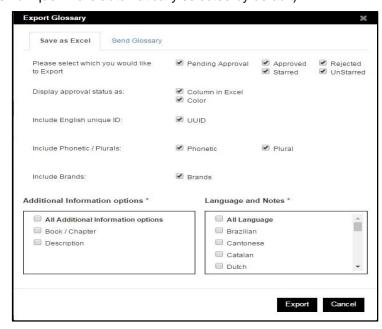


- A) Add Translation: Click to access the <u>Translation Language Selection</u> window and the <u>Add Translation</u> window, where users can add languages for translation to the project, and then commence translation work.
- **B) Approve Translation:** Click to access the Approve Translation window where users can select which languages to approve or reject.

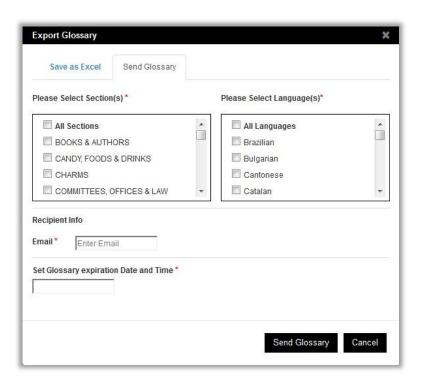
C) Language History: Click the Language History button. From the resulting pulldown, select a language. The Glossary Manager Language History window automatically opens (see example below). Here, users can view, per term (listed in the English column), that language's translation history (included color-coded approval status) and user comments. Click the Project Glossary button to return to the Project Glossary.



D) Export Glossary: Click to access the Export Glossary settings window where users can (Using the Save as Excel tab) Select from title categories, statuses, and specific languages (and their notes) to export as an Excel spreadsheet (all statuses and the English unique ID are automatically selected by default).

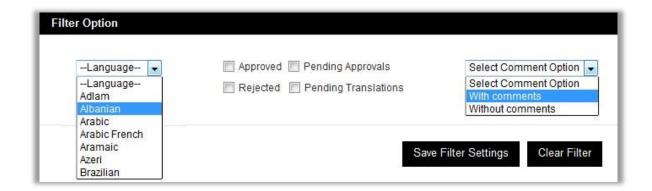


or (Using the **Send Glossary** tab) Send an "expirable," encrypted url (with read-only access) of the currently visible glossary to a user inputted-email address.



E) Filter Options: Click to select glossary window visibility options per language.

Note: Filters remain "on" between sections, and will appear "red" when kept on.



F) Download Attachment: Click to download a glossary-related attachment/file (available only if files were attached to the glossary as accomplished in the **Attachments** section of the **Edit Project** page.



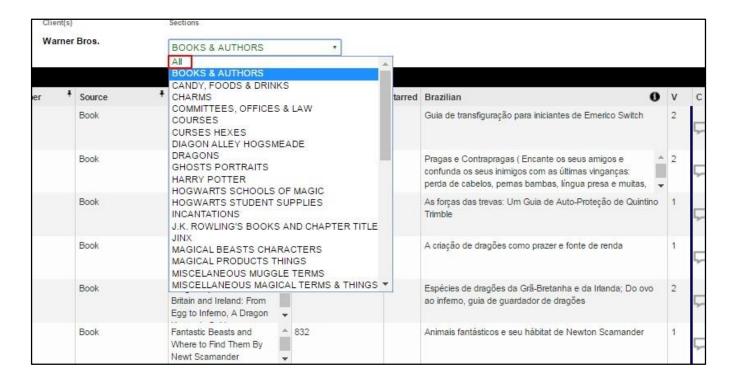
- 1) **Project Title Toggle**: To make more screen space available for glossary visibility, click the project title to toggle the visibility of the various menu items at the top.
- 2) Turn Off Colors: Colored status bars on the right side of the version columns should appear or disappear when a check is placed in the checkbox. Place a check in the checkbox to turn off translation status colors.
- 3) Hide Starred Terms: A star appears in the "S" column to signify that the English term occurs in another glossary under the same brand. Click the star icon for a popup window displaying other brand glossaries with the same English term (see example below).



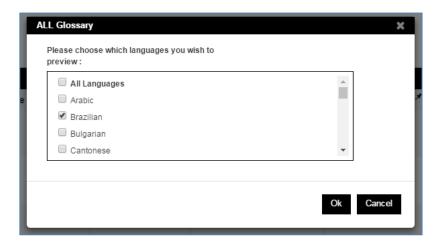
Sections list: To view translation work within a certain section of a project, click in the field, scroll, and select.

Show ALL View:

Used to view **ALL** sections of a glossary within a single view which is accessed from the glossary under the "Section" dropdown. This is a read-only view of ALL sections.

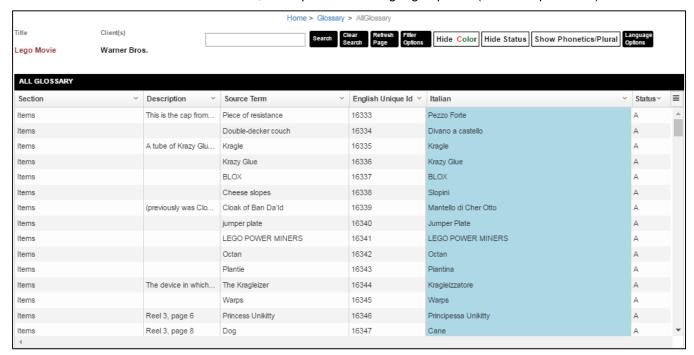


 Users who have multiple languages associated to their profile will be shown a prompt to further define which language(s) they want to see in the ALL Glossary view.



Users with only one language to their profile will not be shown this prompt.

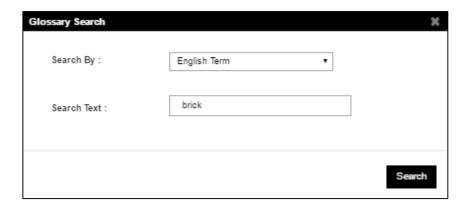
The ALL section glossary has options to hide or sort columns (by clicking the down arrow at the top of each column), a search box, a refresh button, the option to show or hide colors and Status, filter options and Language options (see example below).



The ALL page will auto-refresh every 5 minutes.

Note: In some cases the **ALL** section may take a long time to load, especially when working projects with a large number of source terms.

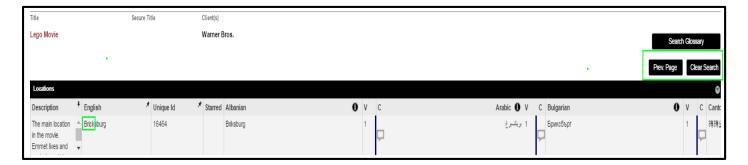
- **Search Glossary:** Click to search *within the glossary* using one of the following options:
 - By English term
 - ➤ This will search for the key English source term
 - > Partial keywords work here
 - By English ID number
 - ➤ This will search by the English source term ID number



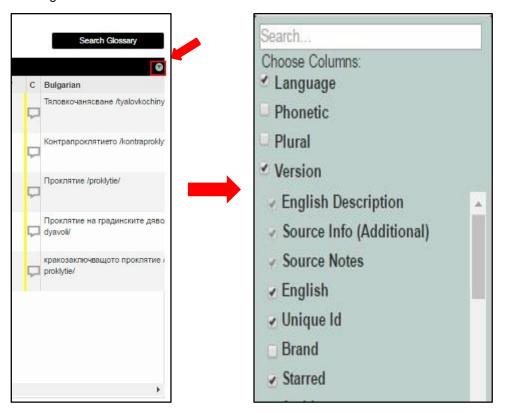
 This will bring up the section list (or lists if term is in multiple sections) for where the searched item can be found



- Select the section you want to check
- Click to Clear your search when done



Column Visibility Selection: Click the downward-facing arrow icon (filter) to access the following functions:



- Column Selection: Add or remove checks in checkboxes next to language, phonetic, plural, version, or starred columns to filter column visibility.
- Phonetic and Plural options
 - o Once exposed, terms can be added the same way as adding a translation.
 - o These terms can also be exported to excel when applicable.

• In the <u>Project Glossary</u> window, certain columns in the list of project translations can be secured (or pinned) to the left by clicking on the pin icon in the applicable column headers. Pinned columns have pin icons pointing directly down. Unpinned columns have pin icons pointing diagonally. Click the pin icons to make adjustments.



- 7) Language Info Page: Click to view language information, including publisher, comments, and if there are any attachments uploaded for this specific language.
- 8) Comments Column: Click the dark caption bubble in any row to view previous user comments for a translation (if comments are present, the bubble will be bolded) or to enter new comments for a translation.

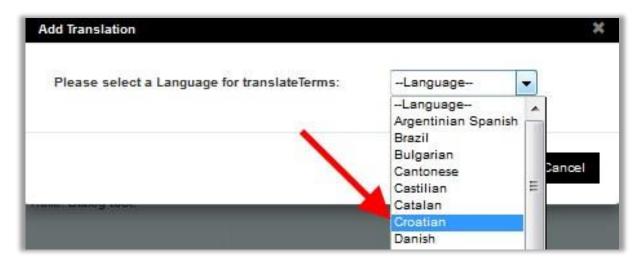


Comments appear in the resulting comments window as seen below.

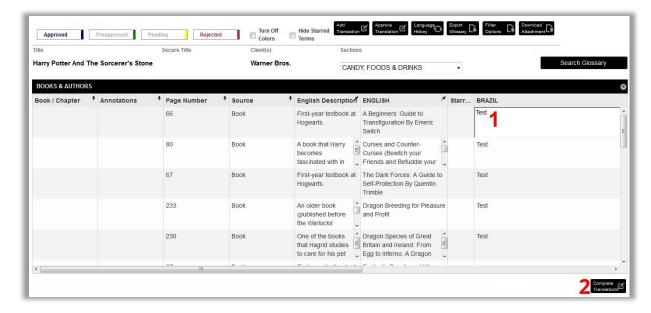


6.2.11 The Translation Language Selection and Add Translation Windows





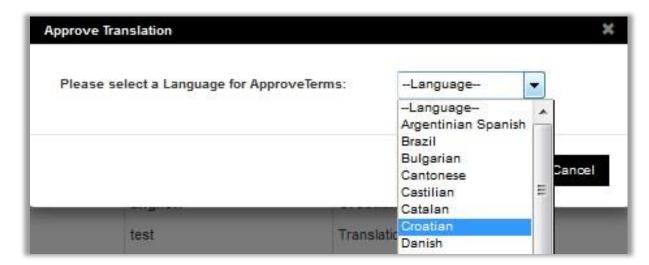
In the language pulldown of the **Translation Language Selection** window, select a language for translation and then click OK.



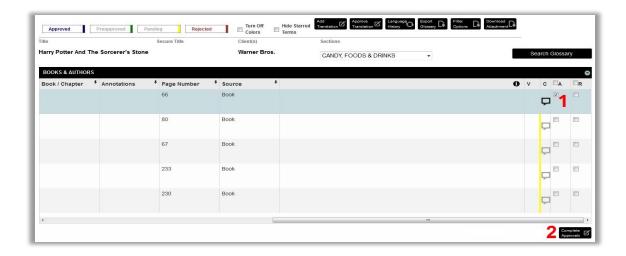
- Translation Field: Double-click in any of the cells under the selected language column to make the cell editable. Add translations into the cells.
- 2) Complete Translations: Once translations are complete for this section, click the Complete Translations button to submit the additions (per section).

6.2.12 The Approve/Reject Language Selection and Approve/Reject Translation Windows





In the **Approve/Reject Language Selection** window, select a language for approval or rejection and then click OK.



- **Approval/Rejection Checkboxes**: Place a check in the "A" (approve) or "R" (reject) column for the selected language (whichever response is appropriate for each translation). You can also check the box next to the "A" or "R" to "Select All".
- 2) Complete Approvals: Once approval or rejection has been selected, click Complete Approvals to submit the choice (per section).

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 33 of 41

6.3 Search Term Menu

The search term tab is used to search across multiple glossaries/projects for specific terms.





1) Client:

Select/enter the appropriate client from the drop down list.

2) Brand:

Select the appropriate brand(s) from the drop down list. Multiple brands can be searched at the same time.

3) Language:

Select/enter the appropriate language from the drop down list.

Currently only available for English

4) Search Box:

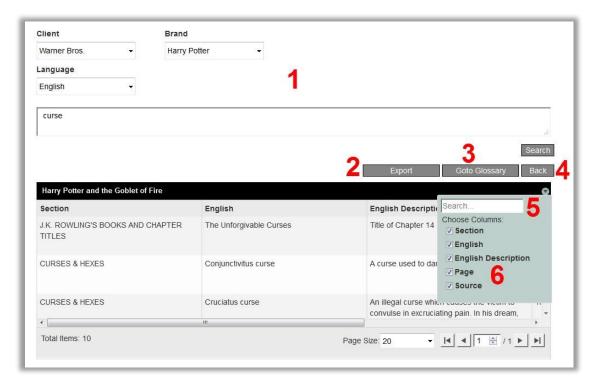
Enter the applicable data in the field.

5) Search

Click Search to return a list of glossaries that include the term entered in the search field.

6) (Search Results) Glossary List

The list of glossaries represents which glossaries the term appears in. Click a glossary hyperlink to see a list of sections in which that term appears (as pictured below)



- 1) **New Search**: Start a new search with the same fields.
- **2) Export**: Click to export the glossary to Excel.
- Goto Glossary: Click to go to the <u>Project Glossary</u> window of the project the list is contained in.
- 4) Back: Click to go back to the list of glossaries the term appears in.
- 5) Click in the **Search** field to search for terms within the list of project sections.
- 6) Choose Columns: Add or remove checks in checkboxes next to column titles to further filter search results.

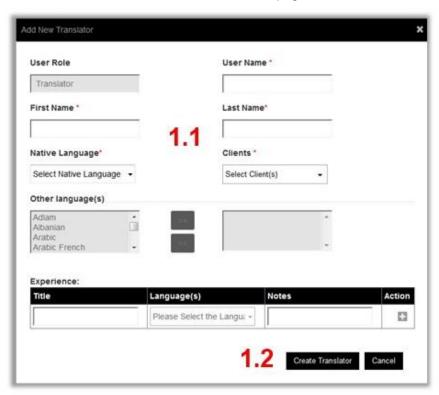
6.4 Translators Menu

This is an admin function to add, edit or view translators within the system



1) Add New Translator

Click to access the **Add New Translator** page.



- 1.1) New Translator Attributes: Enter the applicable data in the fields, including selecting "Other Languages" from the field on the left and adding to the (specific) project field on the right, as well as adding (at the bottom) any additional experience the user may have.
- **1.2)** Create Translator: Click the Create Translator button to save the entered information.
- 2) Select Translator State

Sort the list of translators by their status, either active or inactive. Filtering by 'All Translators' is also available.

3) Search for Translators

In the text field, enter a username, first name, last name, or language(s), to filter the list by the specified attributes.

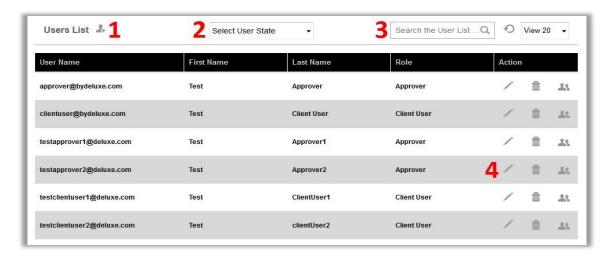
4) Translator Actions: Info, Edit, and Trash

From left to right, click to view user details, edit user details, or delete a user.

Deluxe DATE: 9-1	-2016 FILE: DL3 300	PAGE : 36 of 41
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6.5 Users Menu

This is an admin function to add, edit or view users within the system Details on the user types are described below.



1) Create New User

Click to access the Create New User page.



- **New User Attributes**: Enter the applicable data in the fields.
- Create User: Click the Create User button to save the entered information.

2) Select User State

Select to filter visibility of users between active, inactive, or all.

3) Search the User List

In the text field, enter a username, first name, last name, or role, to filter the list by the specified attributes.

4) User Actions: Edit, Deactivate, and Log In As User

From left to right, click to edit user details, deactivate a user, or to log in as a user (admin only).

6.5.1 **Defining Different User Types**

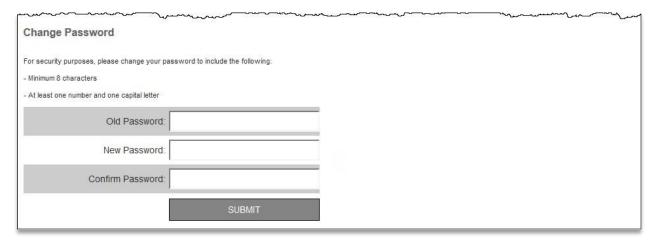
Below is a brief explanation of each of the different user types/roles within the system

- Super Admin granted to development and Support team who can do anything in the system
- Admin Deluxe Coordinators who can create & edit users/translators, setup/edit projects, populate the source setup, assign permission, translate and approve
- Approver A native language speaker who has been selected to approve content in their specific language based on client(s) associated to their profile.
 - They can also translate when given this approver and translator permission
- Translator A native language speaker who has been selected to translate content in their specific language based on client(s) associated to their profile
- Editorial User Typically a Deluxe editorial staff or freelancer who can populate to the source setup page and view the glossary
- Client Admin A client representative who can edit projects, populate the source setup, assign permission to projects, translate and approve within their specific client (for projects assigned to them on their user profile)
 - Note: Client admin cannot see ALL of their projects by default, an admin has assign it to their profiles
 - There is also a "read only" checkbox for client admin profiles, which gives client admin ability to just view the project, but not edit it
- Client User A client representative who can view (not edit) projects, translate and approve within their specific client (for projects assigned to them on their user profile).
 - Note: As above, Client Users need to be granted access to the project on their user profile

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 38 of 41

6.6 My Profile (User Profile) Menu





6.6.1 User Profile Attributes:

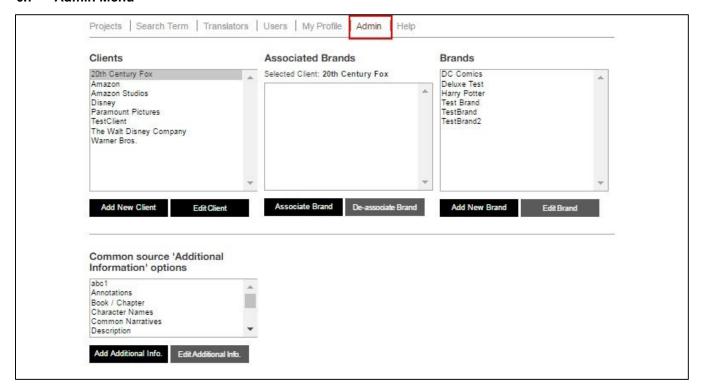
Created when the user account was created.

6.6.2 Change Password:

Enter your old password, enter the desired new password twice, and then click the **Submit** button.

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 39 of 41

6.7 Admin Menu



Only Super Admins can access Glossary Manager's Admin component page. Here, Brands (like Harry Potter, or DC Comics) can be created/edited. Additionally, it is here that Brands can be associated/disassociated with clients.

Additional Information (the way information pertaining to the source term is broken up) is created/edited here as well.

Note: Glossary Manager contains a global list of additional information options which appear in all projects by default. This is the page where options can be added to, or edited within that global list. Additional Information is customizable on a per project basis via the Edit Project page. If you need anything done on the Admin page and you're not a Super Admin, contact glossarymanager@bydeluxe.com)

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 40 of 41

6.8 Help Menu



- Click the Glossary Manager Support Guide hyperlink for instructions on how to access Glossary Manager support.
- 2) Click the Glossary Manager Admin User Guide hyperlink to access the Glossary Manager User Guide.

Deluxe DATE: 9-1-2016 FILE: DL3 300 PAGE: 41 of 41

7.0 **Version Control**

Revision History

Ver No.	Date	Prepared By (Name)	Description/ Reason For Change	Reviewed By (Name)	Approved By (Name)
1.0	02-Aug-2016	Darren Mayoff	First Draft	Mark McKnight	
1.1	08-Aug-2016	Darren Mayoff	Added Phonetic and Plural section / Updated screenshots to reflect changes in appearance of active/inactive glossary and permission setup / Added note on the ability to rearrange rows / added note re: users being associated to more than one client. / Added Multiple brands option / Included "Show All" view section /	Mark McKnight	
1.2	24-Aug-2016	Mark McKnight	Updated Project Master Page image to reflect addition of "Edit Add. Info. Options" button / Added "Edit Add. Info. Options" section and image	Darren Mayoff	
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