Together with the Best Practice for Terminologists, this handbook sets out the purpose and principles of IATE and can be used as a step-by-step guide on how to input data and update existing entries.

This handbook is revised and updated every 6 months by the interinstitutional IATE Handbook Task Force, composed of representatives of the EU institutions’ terminology coordination services.

Questions and feedback about this handbook are welcome and should be sent by email to DGT-Terminology-Coordination@ec.europa.eu

Language-Specific Annexes:
CS, DA, DE, EN, ET, FI, FR, GA, HR, HU, IT, LT, LV, MT, PL, PT, SK, SL, SV
(The BG, EL, ES, NL and RO annexes are not available yet.)

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1.0 INTRODUCTION

IATE (Inter-Active Terminology for Europe) is a dynamic 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, is not able to detect discrepancies between language versions.

The fact that IATE is available to the public gives freelance translators access to validated terminology. It allows 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 terminologists to receive feedback from external users.

1.1 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. In addition to terms (technical expressions used in a particular subject field), appellations (designations referring to a single object, i.e. proper names) may be entered (see Annex I for definitions of ‘term’ and ‘appellation’). 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 as much information as possible to allow them to judge whether the proposed solution is appropriate and credible. It must also allow other terminologists wishing to work on the entry to delimit the concept clearly, by providing references to the relevant sources consulted.

Multilingualism

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

Please ensure that all terminology work you carry out (including importing data from external sources) complies with 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. It is recommended 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’)
  - appellations (designating 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 a reference that is as reliable as possible and either a clear definition or a context showing how the term is used, 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 an EU area, 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. Changes will appear in the validation queue of the terminologists for the language in question (see Section 6.0 Validation).
- Information must have an added value over documentary databases and the internet. Added value can be, for instance, the addition of a definition or reference, the evaluation of the term, the endorsement of a particular translation, usage warnings, multilingualism, etc.
2.0 OVERVIEW OF STRUCTURE

2.1 Entry Levels

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

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

   Contains meta data (administrative information, collection-related information, management data) and concept-related information (domains, origin, etc.) and applies to all the data in the levels below it. More detailed information on the contents of the LIL can be found in Section 3.1 below.

2. **Language Level (LL)**

   Concerns the concept, but is written in a particular 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 terms on the same record. Ideally it would be placed in the LIL. However, to allow a definition in each language, the definitions in IATE appear in the LL. A definition of the concept as well as any related notes can be found here. This level is discussed in more detail in Section 3.2 below.
3. Term Level (TL)

Concerns a particular term or terms in a particular language. Section 3.3 below contains more detailed information on the TL.

You can only work on one of these levels at a time.

2.2 Buttons found at all Entry Levels

N.B. Some of these may not be available to you (depending on your user rights).

2.2.1 MODIFY

‘Modify’ buttons appear at each level you are authorised to modify when you select ‘Data Manipulation’ > ‘Update Entry’ (shortcut: <ALT> + U). Click on the ‘Modify’ button immediately under the level you wish to work on.

2.2.2 SAVE

When you are creating a new entry, saves and closes the window you are working on and sends you to the next level (no ‘Save and Exit’ button available). When you are updating an existing entry, saves the information you are working on and keeps the Modify mode open. (Shortcut: <ALT> + S).

2.2.3 SAVE AND EXIT

Saves the information and exits the Modify mode of the level you are working on. (Shortcut: <ALT> + X).

2.2.4 EXIT

Exits the Modify mode without saving any changes. (Shortcut: <ALT> + E).

2.2.5 DELETE

After a warning, deletes the whole level opened for modification and any level below: if you delete the Language Level (LL), all terms (TLs) for that language will be deleted; if you delete the Language-Independent Level (LIL), the whole entry will be deleted.

N.B. You can delete the LIL level only if you have rights for all languages present (even those which have been ‘downgraded prior to deletion’).

See Section 8.0 Delete and undelete below for more information.

2.2.6 ADMIN INFO

Displays administrative information about the entry such as when it was created, by whom, and the date on which it was last changed.

In Modify mode, the following fields can be updated:

| Institution | IATE administrators (i.e. central terminology coordination) |
teams) can reassign an entry to another institution.

Confidentiality

The level of confidentiality chosen applies to the current level and all lower levels. See below for more information.

2.2.7 HISTORY

Click to open a new window listing the changes made to that level since the History function was introduced (in early 2010). If you see a blue table header with no information underneath it, this means that no changes have been made to the fields in question since then.

If changes have been made, the table will contain a row for each change made, giving the following information:

<table>
<thead>
<tr>
<th>User</th>
<th>LOGIN (First name SURNAME, INSTITUTION).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Date and time the changes were made.</td>
</tr>
<tr>
<td>Field</td>
<td>Field updated. A dash (-) means either the level or field did not previously exist or the operation was ‘Validate’.</td>
</tr>
<tr>
<td>Operation</td>
<td>Whether the operation was ‘Creation’ of the level and its fields, ‘Update’ of an existing field or ‘Validate’.</td>
</tr>
<tr>
<td>Old Data</td>
<td>The data previously contained in the field. A dash (-) means either the field was previously empty, the level and fields did not previously exist, or the operation was ‘Creation’.</td>
</tr>
</tbody>
</table>

2.3 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 language level (together with all its terms levels), of a term level, or of any reference or note field. At the LIL you can find the confidentiality field under ‘Modify’ > ‘Admin info’, while at the LL and TL it appears on the entry once you have clicked ‘Modify’. The values available are as follows:

<table>
<thead>
<tr>
<th>Public</th>
<th>Default setting and recommended option, unless there are strong reasons to hide the data.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Public</td>
<td>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 Public.)</td>
</tr>
</tbody>
</table>

- Change the default setting from ‘Public’ only where absolutely necessary.
- When making a previously confidential entry public, first make sure that it does not duplicate another entry.
3.0 HOW TO CREATE OR UPDATE AN ENTRY

It is not always necessary to complete every field. The exclamation marks in the margins below highlight key areas to concentrate on, particularly when creating an entry, in order to provide the most essential information needed to make it fit for purpose.

When a terminologist intends to carry out a systematic update of a series of entries, they should inform their central terminology coordination team, who will, where appropriate, inform the central terminology coordination teams of the other institutions.

A function also exists to edit/create entries in batch. For further details on this, please contact your terminology coordination team. Some collections or batches of entries are write-protected on some or on 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 batch. Depending on the level of protection, users can still add synonyms and additional languages if the relevant buttons are available. These entries can be identified by a padlock icon, a grey background and an information tooltip as shown in the screenshot below. Any feedback on these entries can be sent to the institution owner.
3.1 Language-Independent Level (LIL)

When creating entries, users have the choice of selecting ‘Basic’ or ‘Advanced’ mode. Entries created in ‘Basic’ mode will not have a definition, and therefore the entry will have to be revisited as soon as possible for a definition to be added. It is therefore recommended that users select ‘Advanced’ mode. To create an entry in this way, click on ‘Data Manipulation’ > ‘Create Entry’ > ‘Advanced’.

To update, go to the entry in question and click on ‘Data Manipulation’ > ‘Update Entry’ (shortcut: <ALT> + U). This will show ‘Modify’ buttons at each level; these can be used to enter the ‘Modify’ mode.

3.1.1A Domains

- 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 two-, four- or seven-digit codes based on EuroVoc (the EU’s multilingual thesaurus). When looking for the appropriate Domain always try searching for the term itself or related terms in EuroVoc. If the term is not in EuroVoc, choose Domains from the drop-down menus that correspond to where you would logically expect to find the term in question.
- 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 name(s). For example, a ‘hedge’ in the financial context is quite different from a ‘hedge’ in the environmental context. Do not add new domain names which would result in one entry covering more than one concept. Note, however, that the existing domain name(s) may not always be correct, especially in the case of legacy entries (i.e. very old entries that were imported from previous databases).
If you are updating an entry that doesn’t have a domain (or rather, with Domain ‘00 - Domain code not specified’), please add one, but make sure it is relevant to the concept. In case of doubt, contact the terminology coordination team of your institution.

How to Add Domains

- When creating a new entry, a pop-up window should appear automatically (if not, click on ‘Add’).
- Click on the ‘Level 1’ drop-down menu and the list appears. Select an appropriate domain from Level 1 and then, if necessary, from the other levels (the content of these lower-level menus changes according to the domain selected at a higher level). Then click on the ‘OK’ button to the right of the lowest level from which you have selected a domain.
- Levels 1-3 range from general domains (1) to the more specific (3). When you select a second or third-level domain, there is no need to include the higher-level domain.
- Where appropriate, click on ‘Add’ to add further domains.

3.1.1b [DOMAIN] NOTE

- The [Domain] Note field should be completed in English.
- The [Domain] Note gives more specific information on the context in which the concept is used.
- While the first three levels of EuroVoc are used in the Domain field, the descriptors below them (see the EuroVoc site) can be used, in English, in the Domain Note field in IATE. The `<BR>` tag in the Domain Note field can be used to align each descriptor with the associated code to the left (see example below):

In View mode, this appears as:
3.1.2A ORIGINS

- Use whenever a concept is country-specific (or EU-specific). Click on ‘Add’ and select the name of the country (or ‘EU’) from the drop-down menu. Click on ‘OK’.
  e.g.:

3.1.2B [ORIGINS] NOTE

- The [Origins] Note should be completed in English.
- Use to give more specific information on the national origin of a concept.

3.1.3 PROBLEM LANGUAGE

- Click on the drop-down menu to select the Problem Language
- The Problem Language is the anchor to which all the other languages in the entry will be attached. The definitions in the remaining languages should be as similar as possible to that of the Problem Language.
- The Problem Language will usually be the source language of the text in which the term occurred. However, if the object of a concept is country-specific, the Problem Language should be (one of) the language(s) of the country concerned (which should be indicated in the Origins field). For animals and plants, the Problem Language should usually be Latin. For all other concepts, it is usually English, although other languages may be preferable in specific contexts (such as French for certain EU and continental legal concepts).

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1 The Problem Language is also known as the ‘Anchor Language’: see bullet point 2.
• Avoid creating entries without a Problem Language, because the Reliability value of a term in another language is related to the concept in the Problem Language.

3.1.4 PRIMARY ENTRY

Marking an entry as Primary is an indication of overall quality and/or preference among possible duplicates.

• Primary entries which have terms that correspond exactly to your search will appear first among possible duplicates on your hit list of results. They are marked with a star next to the entry number.
• An entry can be made Primary by selecting ‘yes’ from the drop-down menu.
• 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.

It is usually terminology coordinators at central level who mark entries as Primary by adding the primary star at Language-Independent Level during consolidation projects. The use of the ‘Primary’ star should be consistent and moderate. In particular, the star should only be used when minimum quality criteria are met (see How to Select a Primary Entry). Do not mark an entry as Primary simply to show that it is reliable.

N.B. Once an entry has been selected as Primary, the rating can be removed only by IATE administrators.

3.1.5 MANAGEMENT FIELD

The management field 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 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], [Council], etc. (names in the format used by IATE itself) and end with a break tag (<br>).

3.1.6 HISTORICAL FIELD

This is a drop-down menu, used to flag an entry as ‘historical’, thereby indicating that the object to which the entry relates is no longer in use - for example, a body which has ceased to exist or an instrument which has been replaced. The historical flag is displayed as a large ‘H’ next to the entry ID in the hit list, as well as in View mode. When you hover the cursor over the ‘H’, the tooltip ‘Historical’ is displayed. It should not be confused with the ‘obsolete’ evaluation at term level, which is used for individual terms no longer in use.
3.1.7 CROSS-REFERENCES

- It is possible to create a Cross-Reference to another entry in IATE by using the ‘cross-reference’ button. A cross reference added here applies to all languages (if the relationship is language-specific you should use entry-to-entry links at Language Level or Term Level).
- Click on ‘Cross Reference’ and the Language Independent Level > Details window will open. Enter the IATE number of the entry to which you wish to refer and click on the drop-down menu to indicate that the concept on the other entry is ‘Broader’ than, ‘Narrower’ than, ‘Related’ to or an ‘Antonym’ of the concept on the current entry. Click on ‘Add’ and then either enter another cross-reference or click on ‘Save & Exit’.
- You should consider creating a Cross-Reference back to the original entry from the entry you are referring to, e.g. if entry 12345 has a Cross-Reference to 54321 (narrower), consider creating another Cross-Reference on 54321 to 12345 (broader).
- IATE checks that the entries you are referring to exist. If you enter a number which does not correspond to an existing entry, no cross-reference will be created. If you enter more than one cross-reference at the same time, and any of the numbers you enter does not correspond to an existing entry, none of the cross-references will be created (even if the other numbers are correct). No error message will be displayed! However, IATE will not stop you from creating a circular link to the current entry. It is a good idea to click on all new cross-references to make sure they link to the correct entries. N.B. No checks are made when you enter entry-to-entry links in a text field.

3.1.8 COLLECTIONS

Collections can be used to create subsets of data in IATE pertaining to specific projects, subdomains or languages and to simplify the management of such data.

Creating a collection

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2 To help users understand relationships between concepts, and because the cross-reference in the LIL doesn’t show the term the entry is linked to, it is a good idea to repeat information found in the cross-reference at the LL, e.g.: ‘See also: computer-assisted translation (CAT) [ IATE:1144758 ]’. 
Go to Administration > Parameters > Collections

You can create a new Collection by adding a name, which should follow the model below, and a short description in English or French:

INSTITUTION CODE-[LANGUAGE ISO code or BODY code]- NAME

The Collection name should include the identification of the institution; the ISO code for the language (if language-specific) or the body code (if relevant), a short name (including the year (4 digits) if relevant).

Examples of collection names:
COM-FR-BUDGET-2012
COUNCIL-T&D-COUNTRIES
EP - MUL - EP Political bodies
CdT-MUL-REACH&CLP

For interinstitutional collections, the following model should be used: EU-COLLECTION NAME

e.g. EU-TOPONYMY

For collections which are both interinstitutional and language-specific, put the language ISO code after EU-.

e.g. EU-FI-COLLECTION NAME

Finding existing collection names

- Go to Administration > Parameters > Collections
- Enter the name or description of the collection, using the percentage sign to truncate if necessary, e.g. %extrem% will find the collection ‘Council-T&D-EXTREMISTORGANISATIONS’ (NB: the asterisk for truncation doesn’t work here).
- Click on the Search button.

Including an entry in a collection

- Click on the modify button in the LIL of the entry and click on the ‘Collections’ button.
- Enter the name of the collection in the empty Name field (use the % for truncation) or enter all or part of the description in the empty Description field (you do not have to use the % for truncation here).
Click on Search.
Click on Add, and save and exit as usual.

Finding entries that belong to a collection

- Go to Administration > Export > Advanced Export > Export
- Click on ‘Show’ in ‘Extend criteria Show’
- Enter all or part of the collection name (not the description) in the empty text field.
- Click on the ‘Find!’ button. The name of any collections with that name will appear in the empty field below.

- Double click on the one you want to select.
- Tick any other filters to select which entries are to be included in your Excel file.
- To limit the information which will be shown for each entry in the Excel file, click on ‘Show’ in ‘The following fields should be included in the export file Show’, and select the information you want to see.

3.1.9 GRAPHICS

N.B. At the time of writing, the ‘Graphics’ button does not appear when you are creating an entry, but can be accessed via the blue tab after clicking any of the three buttons – ‘Admin Info’, ‘Cross Ref’ or ‘Collections’. In Modify mode the ‘Graphics’ button is displayed next to ‘Collections’.
• Files such as photographs, drawings, maps, etc. in .jpg, .bmp, .png, .emf or .gif format may be included in this field. Up to three graphics files may be added to each entry. Use ‘Search’ to look for a graphics file already present in IATE, or use ‘Upload Graphic File’ to look for and upload a file from your PC. The name of the file, in English, should describe its content.
• Any uploaded image must be free of copyright.

Click on ‘Save’ to proceed to the next level (Language Level - LL)

3.1.10 Printer-Friendly
When working on an existing entry, you may wish to see an overview of the information in all languages. To do this, click on the ‘Printer Friendly’ button. This will open a report screen where the preselected options (Select LL – ‘all’ and Select Report Type – ‘full entry’) will usually contain the information you need. Click on ‘Display Entry’.
3.2 Language Level (LL)

3.2.1 Language
- The first Language on a new entry will automatically be set to the language of the terminologist creating it, or to the Problem Language if one has been selected. If you need to change the language or you are adding a new Language to an existing entry, select from the drop-down menu.
- The language should be set to ‘MUL’ (multilingual) exclusively for codes or signs that are language-independent (e.g. 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 language entries.

3.2.2 Definition
- As a general rule, it is strongly recommended that you provide a clear and concise Definition, 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 Context quotation at Term level.
- The Definition must be equally valid for all the terms included under it; it should also correspond to the definition given in the problem 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 language level 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 problem 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 as guideline the substitution principle: it should be possible to replace the term by the Definition in a text, as illustrated below:

<table>
<thead>
<tr>
<th>Term</th>
<th>earthquake</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition</td>
<td>sudden shaking of the ground caused by the passage of seismic waves through the Earth’s rocks</td>
</tr>
</tbody>
</table>
| Substitution | • The *earthquake* measured 6.5 on the Richter scale.  
• The *sudden shaking of the ground caused by the passage of seismic waves through the Earth’s rocks* measured 6.5 on the Richter scale. |

- 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.

### 3.2.3 [Definition] Reference

This tells the user where the Definition has come from. The source can be more or less ‘credible’: using a definition found on Wikipedia is acceptable, providing it 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-Term 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)]

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

3.2.4 NOTE
Use 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. Can also be used for confidential information (in which case set the level of Confidentiality accordingly).
Indicate the source of the information in the Note field itself. To separate the text and its source, use the paragraph break tag <P> and preface the reference with the word ‘Reference’ (in your own language).

3.2.5 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 problem language term occurred. This can be helpful to the problem language when validating the entry and to other languages when adding their terms to the entry.

3.2.6 OTHER FEATURES AT THE LL

Confidentiality
For restricting access to certain parts of the entry. See above.

Admin info
Contains administrative information on the creation of an entry and changes made at this level - See above.

History
Stores information on changes made to an entry at the LL. See above for more details.
Graphics
Graphics may be used at the LL in the way described above. However, unless the graphic is only relevant to the language in question, it is preferable to add it to the LIL to ensure it is visible to users who may not be looking at your language.

New Lang
Allows you to add a New Language to an existing entry.

New Term
Allows you to add a New Term to an existing language.

Click on ‘Save’ to proceed to the next level (Term Level - TL).

3.3 Term Level (TL)

On the term level, 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 only, and then add subsequent terms by clicking on the New Term button (circled below):

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

The Term ID is the serial number assigned automatically to each term level in a particular language in the order in which they are created. The term ID cannot be changed, and it is not re-used if the term level is deleted. It is used for sorting the terms within a particular Term Group, and for identifying the term section with which a duplicate term entry should be ‘concatenated’ during a Merge operation.

3.3.2 TERM GROUP

Terms that are morphologically related form one Term Group and should therefore be assigned the same number in this field. For example, a full term with the full title of an agreement, a short form with the short title using the same word stems, and an abbreviation all form part of the same Term Group.

Synonyms (not morphologically related) should be in separate Term Groups. The ‘Term Group’ drop-down list may be used to select the order in which groups of terms appear in an entry. Where (some) terms are evaluated, the order should be the following:
- the preferred term(s)
- the non-evaluated term(s)
- the admitted term(s)
- the deprecated term(s)
- the obsolete term(s), in reverse chronological order.

See also Evaluation.

3.3.3 TERM TYPE

Click on the ‘Term Type’ drop-down menu and select from:

<table>
<thead>
<tr>
<th>Term</th>
<th>One word or set of words which designate a defined concept in a particular language, or a name (‘appellation’).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbrev</td>
<td>Abbreviation (acronym, initialism, contraction or truncation), to be written according to the rules applicable in the language in question (capitalisation, punctuation, etc.). If using punctuation, store the abbreviation without punctuation in the Lookup Forms.</td>
</tr>
</tbody>
</table>
| Phrase | For phraseological units that are not ‘terms’ strictly speaking (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 repeatedly occur 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 Context field of the relevant entry.

Phrases should contain no superfluous words. Where full sentences are given, typographical rules should be followed (initial capitals and punctuation), e.g.:

- ‘surseoir à statuer’ (not: ‘Le tribunal sursoit à statuer.’)
- ‘désigner comme plénipotentiaire’ (not: ‘Il s 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. |

| Short Form | 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, e.g.:

- Short form: ‘Vienna Sales Convention’

Terms that contain an abbreviation should also be considered short forms (e.g., ‘nominal GDP’). |

### 3.3.4 Evaluation

- Leave this field blank if the Language Level 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 and fit for use in EU texts. Variant spellings should not be included as deprecated terms, but added to Look-up Forms. |
| 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). |

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.

### 3.3.5 TERM

Only one term should be entered here. A term can adopt different forms (single word, more than one word, formula, acronym, phrasal unit etc.) but must refer to a single concept (as defined in the Problem Language). Break complex expressions combining several concepts down into their constituent parts and create a separate entry for each concept.

- **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 under Grammatical Info.
- To make sure that your term is found in a search for an alternative spelling or a frequently used plural, add these to the Lookup Forms.

**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) as Term group 1 (e.g. Dublin Regulation)
- long title, in its canonical form (i.e. including the number but without the adopting Institution, the date of adoption and other information such as ‘amending…’ or ‘repealing…’) as Term group 2 (e.g. Regulation (EU) No 604/2013 establishing the criteria and mechanisms for determining the Member State responsible for examining an application for international protection lodged in one of the Member States by a third-country national or a stateless person)
- older titles of the same act further down the list with the ‘obsolete’ evaluation, in reverse chronological order.

**Incorrect terms**: Any term entered at Term Level 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 go in the Lookup Forms field (see below).

**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. Explain the situation in the note field and update the entry as soon as possible. It may be helpful to add a mark addressed to your own unit as a reminder.

**Duplicate detection:** If a term you have entered, or the term in a TL you have modified, corresponds to a term that already exists elsewhere in the database, even though it might be referring to a different concept, IATE’s duplicate detection mechanism is triggered. As a result, you will be notified and asked whether you would like to continue or not. You can click on the links to view the duplicate entries:

If you know that your term is not a real duplicate of the one(s) in the other entry/ies, proceed by clicking on Continue. Otherwise, click on Cancel and add your term(s) to the other entry instead.

### 3.3.6 Reliability

- Reliability values (see table below) indicate the match between a particular term and the concept as defined in the Problem Language, as well as the reliability of the sources used.
- Reliability should not be confused with Validation, which is part of the management process.

Choose the level of reliability to assign to the term:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Downgraded prior to deletion</td>
<td>Assigned by a terminologist to indicate that a term can be deleted, e.g. in the context of a consolidation project.</td>
</tr>
<tr>
<td>1</td>
<td>Reliability not verified</td>
<td>Automatically assigned to terms entered by non-native speakers. The code will not change until the reliability is assessed by a user with modification rights for the language (usually a terminologist and native speaker).</td>
</tr>
</tbody>
</table>
| 2    | Minimum reliability                  | Automatically assigned to terms entered or updated by native speakers. Terminologists should change this value to ‘3’ or ‘4’, unless they have doubts as to the reliability of the term because:  
- no relevant sources are available;  
- there are doubts concerning the reliability of the sources used;  
- the term is a neologism and has not been sanctioned by a competent body or source;  
- the sources available, though apparently reliable, present |
<table>
<thead>
<tr>
<th><strong>CODE</strong></th>
<th><strong>TERM</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
</table>
| 3        | Reliable | Manually assigned by a terminologist following a reliability assessment. Reliable terms should satisfy at least one of the following criteria:  
- having been obtained from a trusted source;  
- having been agreed by a representative body of same-language terminologists;  
- being the common designation of the concept in its field.  
This code is usually sufficiently high for a well-researched term.  
**N.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. |
| 4        | Very reliable | Manually assigned following a reliability assessment. Very reliable terms are:  
- well-established and widely accepted by experts as the correct designation, or  
- confirmed by a trusted and authoritative source, in particular a reliable written source.  
Using 4 rather than 3 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). |

### 3.3.7 [TERM] REFERENCE

This demonstrates the reliability of the term in question and should therefore be from an authoritative, credible source. Here, for example, Wikipedia should not be used as a Reference. For guidance on how to reference, please consult the [Types of References](#) section.

### 3.3.8 NOTE

Here you can enter any relevant information related to the term which doesn’t fit into other specific fields, like [Language Usage](#) or [Regional Usage](#) (see below). Indicate the source of the information in the Note field itself. To separate the text and its source, use the paragraph break tag `<P>` and preface the reference with the word ‘Reference’ (in your own language).

**N.B.** Notes about the concept belong at Language Level, not Term Level!

### 3.3.9 CONTEXT

A 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.
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.

3.3.10 CONTEXT REFERENCE
If you have provided a Context, indicate the source, which should be credible. For guidance on how to reference, please consult the Types of References section.

3.3.11 OTHER FEATURES AT THE TL
If you are not already in Create/Modify mode, you will need to go to ‘Data Manipulation’ > ‘Update Entry’ and click on the TL ‘Modify’ button to see some of these.

Language Usage
The following fields are available:

<table>
<thead>
<tr>
<th>Language Usage</th>
<th>For information on the way the term is used, e.g. a term which is always used in the plural.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language Usage Reference</td>
<td>If necessary, indicate the source for information in the Language Usage field. See below for guidance on references.</td>
</tr>
<tr>
<td>Confidentiality</td>
<td>See above for more details.</td>
</tr>
</tbody>
</table>

Customers
Used where different customers use different terms for the same concept, and mainly by services who work for different customers, e.g. the Translation Centre. Either search for and select an existing customer, or create a new one.

Grammatical Info
For information on: Part of Speech; Gender; 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).

Lookup Forms
- Enter any term or spelling variation that you wish to be searchable, but not visible to the common user (common spelling mistakes, alternative spellings, plural or inflected forms, etc.).
- Words in the Lookup Forms may be written in any order. **If there are different terms present, they should be separated by semicolons.** Write the terms in full, not just parts of them.
- If the connection between the visible term and the hidden term (stored in the Lookup Forms) is not immediately obvious, explain the relationship between them (e.g. under Language Usage), so that the user will understand why the system retrieved an entry not containing the search term.

**N.B.** Words stored in the Lookup Forms will not be found if the user has performed an ‘Exact Match’ or ‘Exact String’ search in IATE.
Regional Usage

<table>
<thead>
<tr>
<th>Regional Usage</th>
<th>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)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Usage</td>
<td>Where appropriate, indicate the source of the information in the Regional Usage field. See below for guidance on references.</td>
</tr>
<tr>
<td>Confidentiality</td>
<td>See above for details.</td>
</tr>
</tbody>
</table>

Click on ‘Save and Exit’.

At this stage you should consider adding the equivalent term in at least one other language, as monolingual entries are of very limited use (e.g. it is impossible to find them via Quest). To do this, click on ‘New Lang’ to the right of the screen, just below the LIL.

**4.0 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 Context field, in which your term is inflected, in the plural form, etc.

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; the URL and the date of consultation should be appended to the reference. Try to keep referencing style consistent by following the guidelines below.

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 (e.g. Wikipedia) 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 have several references in the reference field, separate them with a semi-colon (;).

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

**4.1 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 after the link is sufficient.


4.2 Types of References

Try to keep referencing style consistent by following the guidelines below or by following referencing instructions given in the cited source. If you need to use formatting, read first the section on HTML formatting codes for information on their current and future use.

4.2.1 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 layman’s terms.

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, don’t use the full title.
As far as possible, try only to cite internal documents as references if they are available to staff at the other institutions; provide a link if possible (e.g. Council register).

4.2.2. EUR-LEX DOCUMENTS

In order to make the reference concise, you may omit the adopting Institution and date of adoption (unless of particular relevance) as well as other information such as ‘amending…’ or ‘repealing…’. The Celex link follows the title of the document, no date of consultation is required as this is a permanent link, e.g.:


CELEX number 32009D0633

becomes

Decision No 633/2009/EC granting a Community guarantee to the European Investment Bank against losses under loans and loan guarantees for projects outside the Community, CELEX:32009D0633/EN

Use the following structure for EU Court Judgments:
Judgment of the Court in Case [case nr], CELEX:[CELEX number and language]
The parties can be included, if deemed useful.

For details on various CELEX links (consolidated documents, Treaties, etc.), go to Annex II Tips and Tricks

4.2.3. 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. Examples:

Hague Securities Convention, Article 15(2)
International Coffee Agreement 2007, Article 2(1)
Convention implementing the Schengen Agreement, Article 1
Treaty on European Union, Article 3
Wherever possible, such references should be followed by a URL where the text (of the article and/or the full instrument) can be consulted.

4.2.4. Web Pages and Websites

Include at least the following data:

- Title
- Author/Editor (use the corporate author if no individual author or editor is named)
- URL
- [Date of consultation]


If the reference is clearly to a web page, there is no need to write ‘website’

IMPORTANT: *Do not forget to leave a space before and after the URL*, so that IATE will recognise it as a link.

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, e.g.:


There is no need to include ‘Home’ in the breadcrumbs.

For more details, see the Language-Specific Annexes.

4.2.5. Human Sources

Internal

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 that 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: (day/month/year).

The form of the reference is the following:

**Example** 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

**External**

For human sources outside your department, include information which can be used to judge the person’s authority on the subject, i.e. their job title or status (rather than their name), the name of the department and organisation where they work, and the date of consultation, e.g.:

Terminology Coordinator, Terminology Department, UN Office at Geneva [26.8.2003]

**N.B.:** The name of the person may be quoted only if the person so requests, and after receiving permission to do so in writing. See Annex IV to this document for a suggested template.

### 5.0 **Pre-IATE**

Pre-IATE is used to import batches of entries (e.g. glossaries) 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. Terminologists and administrators can change the pre-IATE status of an LL or a TL by ticking the appropriate button:

*Pre-IATE* data do not appear in Public IATE, but are retrieved together with other available data when searches are performed in internal IATE. Internal users may choose to exclude Pre-IATE data by unchecking the ‘Include Pre-IATE results’ box on the Search screen.

Pre-IATE data is identified by a *pre* logo to the right of the term. In the full entry display it can also be identified by a light blue background, as well as by the word PREIATE to the right of the owning institution in the TL or LL header.
If a pre-IATE entry relates to a useful concept not appearing elsewhere in IATE, make any changes needed to the Term Level(s) in your language, your Language Level, and Language-Independent Level, then click on the ‘Pre-IATE No’ radio button for all these levels.

### 6.0 Validation

Validation is a confirmation that a basic check has been performed on an entry, intended to ensure that the entry complies with IATE data entry rules and is therefore fit for release on Public IATE. 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 team’s data. To access the list of terms awaiting validation for your language and your Institution, go to ‘Data Manipulation’ > ‘Validation’ (shortcut: <ALT> + V) and select the term you wish to validate. You can filter by date, type of change, language, author of change, subject domain and entry number by using the drop-down menus. Selecting any one of the terms or definitions in the list will take you to the term or definition to be validated. Unvalidated data which you are authorised to validate is identifiable by the blue ‘Validate’ button underneath (visible in ‘Modify’ mode). Clicking on this button will validate the data, thereby making it visible in public IATE. Please note that, for technical reasons, LL data is always visible in public IATE.

It is possible to validate several items in one go, by checking the relevant boxes in the ‘Multivalidation’ column and then clicking on the ‘Multivalidation’ 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 unvalidated data should be validated as soon as possible.

### 7.0 Consolidation

If you find problems involving several languages or entries from different Institutions, entries with 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 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).

### 7.1 How to Select a Primary Entry

If there are two or more entries for the same concept, one should be selected 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 language-independent level. 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 and particularly 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: collection names, 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 a **Problem Language** indicated and be updated in that language. This is usually EN (or FR), but could be LA (e.g. for plants and animals) or another language (for country-specific concepts). If there is no problem language, add one. If there is no indication that another language should be used, select EN. If in doubt, contact your institution’s terminology coordination team.
8) There must be relevant references for at least the Problem 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 a 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.

7.2 Merging

As an IATE user, you may wish to merge two duplicate entries. Should the entry you want to merge onto another contain only one or two languages for which you have modification rights, you may wish to merge the entries yourself. For more complex merge operations involving more than two languages, you may wish to contact a member of your terminology coordination team, who will look into the matter and merge the entries as appropriate.

To merge one entry onto another, first determine which one you want to keep and which one you want to delete. Then transfer any useful information on the secondary entry to the primary entry using the ‘Merge’ function.

You can access the ‘Merge’ function in two ways:

- Select ‘Merging’ in the ‘Data Manipulation’ menu (shortcut: <ALT> + M), or
- Click on the ‘Merge’ button (at Language Independent Level, on the right, next to the ‘Modify’ button) on one of the entries to be merged. (You must be in ‘Update’ mode. If you aren’t, first click on ‘Update Entry’ on the ‘Data Manipulation’ menu, or use the keyboard shortcut: <ALT> + U.)

The following screen is displayed:

After clicking on the ‘Merge’ button on an entry, its LIL ID will appear as the secondary entry. If it is the primary entry, click on ‘Swap’ to move it to the primary entry field.

Type in the number of the primary entry (and the secondary entry if it isn’t there), and then click on ‘Proceed’.
The next screen shows the primary entry on the left and the secondary entry on the right. For the Language-Independent and Language Levels, there are three options:

<table>
<thead>
<tr>
<th>Keep Primary</th>
<th>The information on the primary entry will be kept.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep Secondary</td>
<td>The information on the secondary entry will be copied to the primary entry, overwriting what was there before.</td>
</tr>
<tr>
<td>Concatenate</td>
<td>The information on the secondary entry will be appended to the information on the primary entry.</td>
</tr>
</tbody>
</table>

For the Term Level, there are two options for the primary entry:

<table>
<thead>
<tr>
<th>Keep</th>
<th>The Term Level will be kept.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>The Term Level will be deleted.</td>
</tr>
</tbody>
</table>

And three options for the secondary entry:

<table>
<thead>
<tr>
<th>Insert</th>
<th>The Term Level will be added to the primary entry as a new Term Level. It will be in Term Group 1 – you might need to change this after completing the Merge operation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concat With</td>
<td>The Term Level will be ‘concatenated’ with an existing Term Level on the primary entry. If you select this option, you must then select the term on the primary entry with which you wish to merge it. Be sure to indicate the Term ID (which appears in red) and not the Term Group! If a field (e.g. Reference or Context) appears on both the primary and the secondary entry, the information on the secondary entry will be appended to the information on the primary entry, separated by a semicolon.</td>
</tr>
<tr>
<td>Ignore</td>
<td>The Term Level will not be copied to the primary entry.</td>
</tr>
</tbody>
</table>

When you have finished, click on ‘Preview’.

Clicking on ‘Preview’ allows you to ‘preview’ the result of your Merge operation. It first displays just the primary entry. Click on ‘Merge’ to display the primary and secondary entries side by side. You can then follow the same procedure to merge another language. When you have finished, click on ‘Complete’ to complete the Merge operation. There is no ‘Cancel’ button. To cancel, simply select another function (e.g. Consultation > Search).

### 8.0 DELETE AND UNDELETE

#### 8.1 Delete

For basic information about the Delete function, go to section 2.2.5.

Deletions of whole entries are mostly done in the context of consolidation, when entries with no added value or entries which have been merged onto a selected primary entry are deleted. Such operations can only be performed by central coordinators with administrator rights. A particular language can be completely deleted from an entry by terminologists with rights for that language. In addition, separate terms and marks can also be deleted.
As a 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 (other entry, lookup + notes of the same entry, etc.). For details, see the checklist applicable to all deletions under section 9.3 Interinstitutional Delete.

Deleted contents, except for marks, can be recovered if necessary (see section 8.2 Undelete below).

### 8.2 Undelete

When an entry, or part of it, is deleted, the deleted content is saved in an apposite repository, much like a computer’s recycle bin, which allows terminologists to reverse any delete operation performed from 9.3.2010 to date. This repository can be accessed by clicking on the ‘Undelete’ submenu, available in the drop-down menu under the ‘Data manipulation’ tab in IATE.

A screen with deleted entries/language sections/terms will then appear. By default, only the deleted items belonging to your institution will appear, but this can be changed by selecting ‘ALL’ from the drop down menu next to ‘For institution’. In addition, other fields at the top of the screen allow users to filter the list of entries/language sections/terms appearing on their ‘undelete’ screen: by date; by language; by user and according to whether they have been deleted by other users within their institution, or otherwise.

Below the parameter filters is the list with columns for the entry number and language, the levels which have been deleted and the respective terms in the next, followed by the owning institution and user who deleted the entry/language section/term. To restore a whole entry, simply click on ‘LIL’. To restore a language section in its entirety, click on ‘LL’ and to restore a deleted term, click on ‘TL’.
9.0 ENTRIES ‘OWNED’ BY OTHER INSTITUTIONS

9.1 Interinstitutional Update

Interinstitutional Update is a feature introduced in 2012 allowing any user to modify any data on another institution’s entry. Data changed at LL and TL will 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 also be avoided to ensure that all new data entered in IATE, in particular those added by institutions other than your own, become visible in public IATE. 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 underneath the one that is already there. 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 for mark or Management field), 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 mark should be added explaining the reasons for doing so. If the term has been downgraded because a better primary entry exists, a mark should be added indicating the number of the primary entry.

- Before deleting a whole Term-Level 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 an IATE mark 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.

### 9.2 Interinstitutional Merge

When performing an interinstitutional merge operation, the IATE user concerned should not only delete the remaining duplicates, but also inform his terminology coordination team that the primary entry selected needs to be checked by native speakers of the languages on that entry. This must be done to ensure that all the terms in all the languages relate to the concept defined in the problem language. As a general rule, post-consolidation clean-up is not the responsibility of the institution owning the primary but the institution of the IATE user performing the merge.

### 9.3 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 (other entry, lookup + notes of 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 on-going project (check management field, collections, management marks);
- 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)
10.0 MARKS

The Mark function is a communication tool that enables IATE users to add information to an entry. This information is visible to all internal users who consult the entry, until the mark is deleted. Marks fall into two main categories and can be used as follows:

- **Action Marks** — to request that colleagues from another language department or institution update, modify, merge and/or delete a particular entry;
- **Information Marks** — to leave information on an entry, as a reminder to yourself and/or to share it with others.

10.1 How to Add Marks

1. Click on the ‘Add Marks’ button at the bottom right of the entry to display this screen:

2. Choose a ‘Type of Mark’ from the drop-down menu to indicate the area in which a modification is needed. The options in bold are available:

<table>
<thead>
<tr>
<th>Action Marks</th>
<th>Form</th>
<th>Information in the wrong field</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Non-standard references</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Incorrect use of formatting</td>
</tr>
<tr>
<td>Content</td>
<td></td>
<td>Problems with references</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(broken links, unreliable,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>outdated), spelling errors,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>suggested definitions, etc.</td>
</tr>
<tr>
<td>Merge/Deletion</td>
<td></td>
<td>For duplicates or entries</td>
</tr>
<tr>
<td></td>
<td></td>
<td>with no added value</td>
</tr>
<tr>
<td>Information Marks</td>
<td>Management</td>
<td>Instructions to update</td>
</tr>
<tr>
<td></td>
<td></td>
<td>references (e.g. after a</td>
</tr>
<tr>
<td></td>
<td></td>
<td>document has been published)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Temporary information about</td>
</tr>
<tr>
<td></td>
<td></td>
<td>any special status the entry</td>
</tr>
<tr>
<td></td>
<td>Pre-IATE</td>
<td>Used to inform terminologists</td>
</tr>
<tr>
<td></td>
<td></td>
<td>that an entry created by the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pre-IATE Macro requires action</td>
</tr>
</tbody>
</table>
3. Enter your comment in the ‘Mark’ field. Marks should be written in English, except for intra-lingual purposes, and should be **concise**. Use standard key words (e.g. ‘internal document’, ‘update’, ‘delete’, ‘merge’) so that users retrieving Marks can narrow their search using the ‘Text’ box (see image No 2 below).

4. In the ‘Addressees’ section select the Institution(s) and Division(s) you wish to send your comment to and click on ‘Add’. Click on ‘Submit Mark’.

Marks are displayed at the bottom of the entry and appear as follows:

```
<table>
<thead>
<tr>
<th>Attached Marks</th>
<th>Add Marks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>From: SAMM/IAN</td>
<td>Institution/Division: COM/EN Department</td>
</tr>
<tr>
<td>Type of Mark: Content</td>
<td></td>
</tr>
<tr>
<td>To: COM/FR Department</td>
<td></td>
</tr>
<tr>
<td>Please update the links in the reference fields.</td>
<td></td>
</tr>
<tr>
<td>Date: 01/03/2011</td>
<td></td>
</tr>
</tbody>
</table>
```

### 10.2 How to Retrieve Marks

To view the Marks for your language, go to ‘Communication’ > ‘Marks’ to display this screen:

Select your filter criteria and then press search. The ‘Text’ box can be used to search for key words. This will retrieve a list of matching marked entries. You can then select the one you wish to work on.

**Once you have performed the action requested in a mark, please delete it.**

### 10.3 Dos and Don’ts of Marks

**Do:**
✓ **Select the type of mark carefully**, differentiating particularly between Action Marks (requiring immediate attention), and Information Marks (requiring action at a later date, or merely providing information).

✓ **Use standard key words** in your text.

✓ **Address Marks to the right recipient** (i.e. the language terminologists of the owning institution, or where more than one language is concerned, the terminology coordination team of the institution\(^3\)).

✓ **Delete** a Mark once you have dealt with it.

✓ **Prefer Marks to emails** where the matter is simple to resolve and not urgent. Marks are generally easier to follow up because only one screen is required. Unlike emails, Marks do not get lost or sent to the wrong person in a language team.

Don’t:

✗ **Use Marks as a discussion forum.**

✗ **Use Marks for urgent matters** (email should be used unless you are sure the addressee is checking marks regularly).

✗ **Use Marks to ask for an opinion.**

11.0 EXPORT

IATE offers an export feature for users having the necessary rights. Users can export batches of entries for use within CAT tools or for data management purposes, like checking the contents of a collection. Data can be exported in Excel format or in a CAT tool compatible format (XML or SDLTB). The data exported can be filtered in different ways (by collection, institution, language, domain, reliability, etc.).

For exports in Excel format, users can select the fields to be exported, while for exports in the CAT tool compatible format the available fields are predefined.

For more information about exporting data from IATE, please contact your central terminology coordination team. IATE also includes a specific Help section on the Export screen with detailed information ('Help?' link at the top right of the page).
Translators and terminologists can also request document-specific, Studio-compatible termbases via the Term Recognition Module (TRM) of IATE (go to ‘Administration’ > ‘Term Recognition’). TRM compares the words of an uploaded source document with the existing terms in IATE and extracts the bilingual hits into tbx, sdtb or csv format.
<table>
<thead>
<tr>
<th><strong>ANNEX I BASIC VOCABULARY</strong>^4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Appellation</strong> (FR: appellation): designation of a concept whose extension is made up of a single object or multiple parts that form a single object</td>
</tr>
</tbody>
</table>
| **Concept** (FR: notion): unit of thought constituted through abstraction on the basis of properties common to a set of objects  
_N.B.: 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** (FR: définition): statement which describes a concept and permits its differentiation from other concepts within a system of concepts |
| **Designation** (FR: désignation): any representation of a concept |
| **Intensional definition** (FR: définition par compréhension): definition based on the [...] set of characteristics which constitutes a concept |
| **Extensional definition** (FR: définition par extension): definition based on the exhaustive enumeration of the objects referred to by the concept, or of the specific concepts at the next level of abstraction |
| **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** (FR: langue de spécialité): 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** (FR: terme): designation of a defined concept in a special language by a linguistic expression  
_N.B.: A term may consist of one or more words [i.e. simple term or complex term] or even contain symbols._ |
| **Terminography** (FR: terminographie): recording, processing and presentation of terminological data acquired by terminological research |
| **Terminology science** (FR: science de la terminologie): scientific study of the concepts and terms found in special languages |
| **Terminology work** (FR: travail terminologique): any activity concerned with the systematization and representation of concepts or with the presentation of terminologies on the basis of established principles and methods |

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⁴ 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
**ANNEX II TIPS AND TRICKS**

**HTML formatting**

HTML tags may be used to format text in several ways. Most come in pairs, and affect the text inserted between the opening and closing tag. They have the following format:

\(<\text{tagname}>\text{ text to be formatted }\)</tagname>

The first tag opens the section of text to be formatted and the second one closes it. It is important to close sections properly to prevent all following text from being formatted.

Here are some examples of HTML tags that may be used in IATE (please note that the HTML tags are not case-sensitive, so you can write them in capital or small letters):

- **bold**: \(<B>\text{ text in bold }\)</B> becomes **text in bold**
- **italics**: \(<I>\text{ text in italics }\)</I> becomes *text in italics*
- **underline**: \(<U>\text{ text underlined }\)</U> becomes _text underlined_ (best avoided to avoid confusion with hyperlinks)
- **superscript**: \(<SUP>\text{ text in superscript }\)</SUP> becomes ^text in superscript^
- **subscript**: \(<SUB>\text{ text in subscript }\)</SUB> becomes ~text in subscript~
- **line break**: \(<BR>\) (this tag appears alone at the place where you want to change lines)
- **paragraph break**: \(<P>\) (this tag appears alone and inserts an entire blank line between paragraphs)
- **horizontal rule**: \(<HR>\) (this tag appears alone and inserts a horizontal rule, useful for separating multiple contexts and context references, or a language-level note and a reference to its source)

Formatted text can make an entry more user-friendly (e.g. indicating the term in bold each time it appears in the Context). In other cases formatting should be used only where necessary (e.g. to obey typographical conventions).

Please note that the HTML formatting for underline \(<U>\), line break \(<BR>\), horizontal rule \<HR> and lists \<LI> will not be supported in IATE 2.

**Celex links**

When using EU law and other public EU documents published in EUR-Lex as a reference, a CELEX link should be used instead of inserting the full URL.

To create a hyperlink to a EUR-Lex document, write CELEX: followed immediately by the CELEX number of the document. It is recommended to point to the specific language version by adding a slash, and the code of the language, e.g.:

• While CELEX:32006R1907 (without language version) will point to the English version of the same document.

Always leave a space before and after the CELEX link, or it will not work.

For **consolidated legislation** (with CELEX numbers starting with ‘0’), the following CELEX links allow creating a hyperlink to the specific EUR-Lex document:

  - advantage: certainty that the term appears in it
  - drawback: users will not know if the term still appears in other subsequent consolidated versions that may have replaced the current one

• While CELEX:02006R1907-20140822 (without language code) will point to the English version of the same specific consolidated version of the REACH Regulation

• Users can also point to the general page with all consolidated versions available by using * after the main CELEX number, e.g. CELEX:02006R1907*
  - advantage: possibility of checking the latest version
  - drawbacks: users will not know in which version the terminologist who entered the link has seen the term, so they should indicate, after the link, which version is being referred to.

For **primary legislation**, please find some examples of CELEX links converted to hyperlinks by IATE:

Consolidated version of the Treaty on the Functioning of the European Union, CELEX:12012E/TXT
Treaty of Lisbon amending the Treaty on European Union and the Treaty establishing the European Community, CELEX:12007L/TXT
Consolidated version of the Treaty on European Union, CELEX:12012M/TXT
Consolidated version of the Treaty establishing the European Atomic Energy Community, CELEX:12012A/TXT
Charter of Fundamental Rights of the European Union, CELEX:12012P/TXT

In all examples above, the TXT part of the link can be changed to your language code for direct access to your language version.

**Entry-to-entry links**

To create a link to another IATE entry, write IATE: followed immediately by the number of the target entry, e.g.:
IATE:1234567

Always leave a space before and after a link, or it will not work. Putting the term in italics or quotation marks can be helpful.
Internal links are also useful in the Definition field (to define a subordinate concept by reference to the superordinate concept), and in Term Level Notes (e.g. to indicate that the term is also used to designate a different concept).

N.B. IATE does not check that the link is valid. As it is easy to enter the wrong number, or even (when working on a group of entries) to make a circular link to the current entry, it is a good idea to click on all links to make sure they work and link to the correct entries.

**Keyboard Shortcuts for IATE**

<table>
<thead>
<tr>
<th>Global Shortcuts</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>Go to Basic Search interface</td>
<td>&lt;ALT&gt; + B</td>
</tr>
<tr>
<td>Go to PseudoSQL Search interface</td>
<td>&lt;ALT&gt; + Q</td>
</tr>
<tr>
<td>Go to last results interface (hit list)</td>
<td>&lt;ALT&gt; + H</td>
</tr>
<tr>
<td>Go to Validation interface</td>
<td>&lt;ALT&gt; + V</td>
</tr>
<tr>
<td>Go to Merge interface</td>
<td>&lt;ALT&gt; + M</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Search Shortcuts</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>Reset</td>
<td>&lt;ALT&gt; + R</td>
</tr>
<tr>
<td>Search (PseudoSQL)</td>
<td>&lt;ALT&gt; + G</td>
</tr>
<tr>
<td>Navigate to next page on the search results interface</td>
<td>&lt;ALT&gt; + N</td>
</tr>
<tr>
<td>Navigate to previous page on the search results interface</td>
<td>&lt;ALT&gt; + P</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data Entry Shortcuts</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>Enter Update Mode</td>
<td>&lt;ALT&gt; + U</td>
</tr>
<tr>
<td>Save</td>
<td>&lt;ALT&gt; + S</td>
</tr>
<tr>
<td>Exit</td>
<td>&lt;ALT&gt; + E</td>
</tr>
<tr>
<td>Save &amp; Exit</td>
<td>&lt;ALT&gt; + X</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other useful shortcuts</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Registered Trademark symbol ®</td>
<td>&lt;ALT&gt; + Numlock + 0174 (with numeric keypad)</td>
</tr>
<tr>
<td>Add Unregistered Trademark symbol ™</td>
<td>&lt;ALT&gt; + Numlock + 0153 (with numeric keypad)</td>
</tr>
</tbody>
</table>
**ANNEX III 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 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 that 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 (before acquiring the permission, the information cannot be inserted into IATE).
- 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. Putting these signs in the term field will interfere with searches, so you should insert them instead in the TL Note field, explaining if necessary that actual usage of the term should always be accompanied by that sign. 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.
ANNEX IV PROCESSING OF PERSONAL DATA

You should avoid entering personal information (names, telephone numbers, e-mail addresses, etc.) into the IATE database. Where personal data is considered indispensable it should be kept to a minimum.

Refer to the section on Types of References > Human Sources for further information on how to reference personal data and what to include, and adhere to the relevant rules applicable to the processing of personal data by European institutions and bodies. Bear in mind that:

1. The person’s consent must be explicit and obtained in written form.
2. Before giving his/her consent, the person must be informed of the following:
   - the type of personal data to be reproduced in IATE;
   - the fact that his/her data will be quoted as a reference in the internal and public versions of IATE;
   - the purposes for which his/her data will be used;
   - the fact that his/her data will remain in the database unless he/she specifically requests that it be removed;
   - his/her right to access and request the modification or deletion of the data recorded.

A template for obtaining permission to use personal data in IATE is provided below. This template should be adapted to your particular circumstances.

---

5 Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community Institutions and bodies and on the free movement of such data.
Template email for obtaining permission to use personal data in IATE

Date:

Dear…..

Following your request [possible specification of means or date, etc.] to be identified as a source of information in the IATE database, please confirm by simple return of this e-mail that the following data about you are correct.

Your confirmatory reply will constitute your consent on the processing of your personal data as described below, as well as acknowledgement of the information received.

**Your data:**
Name:  
Job title:  
Organisation:  
[other]:

**Important information:**

The data provided will be used to indicate you as source for the term(s) you provided/suggested. This data will be visible in the internal version of IATE [and/but not] in the public version of IATE available on the internet at http://iate.europa.eu. The data controller of the IATE database for the [institution] is [name and job title].

Your personal data will be processed in accordance with the relevant rules applicable to the processing of personal data by European institutions and bodies (http://ec.europa.eu/justice/policies/privacy/docs/application/286_en.pdf). In particular, you have the right to access these data and request their modification or erasure at any time. Please note that without your explicit request for deletion, your data will remain in the database for an undetermined period. To exercise any of these rights or request the deletion of your data, please contact us using the present email address or the address [generic IATE email address or other].

You have the right to have recourse to the European Data Protection Supervisor at any time.

Best regards,
ANNEX V – TAXONOMY

The Interinstitutional Taxonomy Group (ITG)
The main task of this group, which comprises four translators - two from the Commission (Arnolds Zubeckis and Gaëlle Clément) and two from the Council (Barbara Turk and Sylvaine Bereder), is to set writing rules for updating Latin and MUL entries (abbreviations) on biological species (fish, animals, plants, micro-organisms, etc.) and to update these rules whenever necessary.

These rules have been approved by the central terminology coordination units of the Commission and of the Council, and should be complied with whenever creating or updating a taxonomic entry (referring to biological species).

The ITG establishes interinstitutional projects to help consolidate the IATE database, with the ultimate aim of having a single entry for each taxon.

The group may be contacted (through any of the above-mentioned members) with regard to the content of all taxonomic entries in IATE by translators from all the EU institutions, but also by drafters, lawyer linguists, and others.

Interinstitutional writing rules for taxonomy entries in IATE: LIL, Latin and MUL
Please note that this is a ‘short’ version. For a more detailed version, see the extended writing rules, which can be accessed via the Interinstitutional Taxonomy Group page on the EurTerm Portal’.

1. BASIC PRINCIPLES
Purpose: correct and consistent translations of EU documents (legal and other).
Taxonomy entries in IATE are fit for that purpose, meaning that for Latin (reference language for taxonomy) the translator will find:
   a) correct information on the valid scientific name (normally the name used in EU legislation)
   b) all relevant information on the (other) name(s) used in EU legislation (whenever this name differs from the valid scientific name)
Whenever necessary, an explanatory note is added.

Content: entries in IATE cover one concept and one concept only, meaning that there will be separate entries for XXX and XXX spp. (see IV. Examples)

Structure: In principle, only 1 term. Additional term field(s) if justified by use in EU legislation
Term Group 1: the scientifically valid name, even if this is not the one used in EU legislation
Term Group 2/3: the name(s) used in EU legislation (with an explanatory note)
Other names: different options: LookupForm, Note, Language Usage.
Sources: Whenever possible, information is taken from the list of recommended web-based taxonomy databases which can be accessed via the EurTerm Portal. For Latin, the list is drawn up and updated by the Interinstitutional Taxonomy Group (ITG).
If no valuable information is found in the recommended sources, look for information in other web-based or printed sources (preferably scientific publications). Whenever relevant: add a note on the fact that the name was not found in the list of recommended sources. Avoid using documents from EU institutions (legislation and internal documents) as main sources for taxonomy.

2. LIL, LATIN, MUL
   I. Language Independent Level
   
   Domain Note: EU Taxonomy (sign that the entry has been updated by the ITG) and EUROVOC descriptor (see Appendix B). NB: The descriptor should be placed on the same line as the domain it comes from.

   Problem language: la

   Collections:
   EU - TAXONOMY: Interinstitutional Taxonomy Group
   EU - TAXONOMYEXAMPLES: Taxonomy models and special cases (only for specific entries defined by the ITG).

   Primary: Yes

   Cross reference: whenever necessary
   Example:
   XXX spp.: cross reference to the documentary entry on XXX and reference to the explanatory entry on spp. (IATE: 923993)
   XXX : cross reference to the entry on XXX spp.
   If possible, link the species entry to the next category up the taxonomic hierarchy (Broader), i.e. entry for Genus. (Links to Narrower categories are also possible, but not as useful).

   When decision taken by Council and COM central terminologies, add:

   Management field: [EU] Taxonomy + ‘title of project’
   So far, we propose 4 types of projects:
   1. [EU] Taxonomy 2011T011P (First project of the ITG, serving as a test for working procedures)
   2. [Council] Taxonomy - Ad hoc updating + year (all Council entries updated according to these new writing rules)
   3. [EU] Taxonomy - Models and special cases (specific problems treated or being treated by the ITG and to be used as examples).

   II. Latin
   Language Level
   
   Note:
   - move institution specific information (Council lists/initials) to Related material
   - insert information on taxonomic rank, except for species. (Example: ‘Taxonomic rank: Family’).
   Only when useful, insert the whole taxonomic hierarchy.
**Term Level**

**Reliability code:**

‘Very reliable – 4’: solidly confirmed information that the scientific name is valid. Criterion: converging sources in the reference list (min. 3).

‘Minimum reliability – 2’: solidly confirmed information that the scientific name is invalid. Mark as ‘deprecated’ (‘Deprecated’ in combination with reliability code 2: note not essential).

‘Reliable – 3’ and
‘Minimum reliability – 2’: just one source or conflicting sources, lack of clear information (in those cases, add an explanatory note).

**Term:**

Write the scientific name in italics at all taxonomic ranks. The initial letter of the scientific name is capitalised, e.g. *Sebastes marinus*.

N.B. ‘spp.’ (referring to species in plural) is not italicised, e.g. *Sebastes* spp.

**Reference:**

Preferably web-based sources from the list of recommended sources.

Mention references according to the citation instructions of the list (followed by link to the exact webpage and the date between brackets - see citation instructions on the Term Portal) or, in case of another source, to the citation instructions of the database or according to the IATE rules for bibliographic references.

Whenever necessary (something out of the ordinary): mention in the *Note*.

**Note:**

- Scientific name + author of the classification/year (as indicated in the database/scientific publication) e.g.: *Amblyraja radiata* (Donovan, 1808)
  - According to the information in the source: add ‘Nomen invalidum’ (when the name is no longer used or inexact) or ‘Nomen dubium’ (name for a taxon which is of unknown or doubtful application)
  - Optional and whenever relevant (for the sake of clarity, for translators, and in view of the follow-up, for terminologists): summary of research history (esp. when reliability code 3 or 2)

**Look-up forms:** *If useful*, insert junior synonyms and variant spellings (homonyms).

For entries concerning a family as a scientific category only (see IV. Examples), insert the FAO code in the look-up forms. (e.g. IATE:785651)

**Language Usage:**

1. By default: unless stated otherwise, the valid name is the name used in EU legislation.
2. Whenever relevant (for the deprecated term or all terms): indicate the state of play in EU legislation and in any other scientific or statistical classification system.

**Evaluation:**

- no evaluation to be added for valid names
- add ‘Deprecated’ for ‘Nomen invalidum’ and often for ‘Nomen dubium’ as well

---

6 For entries recently updated in Council projects, one source is considered to be sufficient (other sources available in paper file for the entry)
III. MUL
In the context of fisheries, **EU legislation uses the FAO 3 alpha code in combination with the Latin name.** Therefore, for names relating to marine organisms always check against the FAO List of Species for Fishery Statistics Purposes (http://www.fao.org/fishery/collection/asfis/en).

**Language Level**
Move institution specific information (Council lists/initials) to Related material.

**Term Level**
Reliability code
‘Very reliable – 4’

Term - abbrev.
insert statistical code, e.g. ‘RJR’ (IATE :785776)

**Reference**

**Note**
‘Statistical code established by FAO for fishery production statistics and used in <b>EU legislation</b> in combination with the Latin name.’

IV. Examples
Typical entry: 785776  
Amblyraja radiata

Entry which does not correspond to a real taxon and x-ref to the actual taxon(s):  
884926  siki  
1588190  Centroscymnus coelolepis  
1858934  Centrophorus squamosus

*Spp. problem:*
Genus + spp. entry 850635  Ammodytes spp.

Documentary entry connected to spp. entry: 3549669  Ammodytes  

923993  spp.  

Entry where scientific sources disagree: 785846  Phynorhombus norvegicus  
Zeugopterus norvegicus
Entries on families (notes change depending on use in EU legislation):

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>785651</td>
<td>Ammodytidae</td>
</tr>
<tr>
<td>910953</td>
<td>Caproidae</td>
</tr>
</tbody>
</table>

Entry for a pathogenic agent (with link to entry 1255908 for the disease):

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>347592</td>
<td>Synchytrium endobioticum</td>
</tr>
</tbody>
</table>

Entry for a tree (with link to entry 1572961 for the fruit):

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>781846</td>
<td>Citrus maxima</td>
</tr>
</tbody>
</table>

Entry for a taxon (*Macrurus rupestris*) which was misspelled in EU legislation:

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1859356</td>
<td>Coryphaenoides rupestris</td>
</tr>
</tbody>
</table>

*(Macrurus rupestris, deprecated)*

Entry for a taxon with two different, accepted, spellings:

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1172528</td>
<td>Martiania hyadesi(i)</td>
</tr>
</tbody>
</table>

Entry with 2 deprecated terms having each a FAO code (but same species), the actual valid scientific name being a third term:

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1859759</td>
<td>Lepidonotothen squamifrons</td>
</tr>
</tbody>
</table>

*(Notothenia squamifrons, Nothothenia kempi)* NOS, NOK
EXAMPLE:

Appendix A

IATE domains and EUROVOC

The domain of each IATE entry should be identified by the most relevant EUROVOC descriptor. If the descriptor is from one of the top three levels of EUROVOC, it appears in the IATE Domain field. If it is from a lower level of EUROVOC, it appears (in English) in the Domain Note field, alongside the corresponding third-level domain.

To find the relevant descriptor, go to EUROVOC and enter the term itself, a simplified form of the term, a synonym, or a slightly more general term, in the ‘Simple search’ field. If you draw a blank, ‘Browse the subject-oriented version’. Do not enter a Latin scientific name. For example, to find the descriptor for Cacoecimorpha pronubana (IATE 1186228), you can enter the term ‘butterfly’, which gives the result ‘MT 5211 natural environment, wildlife, insect’, insect being the descriptor for this species. (See screenshots).

When you find the relevant descriptor, note the following information:

- The four-digit code of the ‘microthesaurus’, e.g. ‘MT 5641 fisheries’ — in IATE, select first-level domain ‘56 – AGRICULTURE, FORESTRY AND FISHERIES’, then second-level domain ‘5641 – Fisheries’.

- The ‘top term’ (displayed in light blue in the simple search hit list and in dark blue in an MT record if you browse) or the broadest term (identified by ‘BT’ followed by the highest number, e.g. ‘BT2’ meaning ‘broader term by two levels’, in the detailed entry for a descriptor), e.g. ‘fishery resources’ — in IATE, once you have selected the second-level domain, display the list of third-level domains and select it from there (e.g. 5641004 – Fishery resources).

- The descriptor itself, e.g. ‘fish’ — in IATE, enter it in the Domain Note field.
Examples:

<table>
<thead>
<tr>
<th>IATE Domain</th>
<th>IATE Domain Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>5641004 – Fishery resources</td>
<td>fish</td>
</tr>
<tr>
<td>5641004 – Fishery resources</td>
<td>crustacean</td>
</tr>
<tr>
<td>5641004 – Fishery resources</td>
<td>mollusc</td>
</tr>
<tr>
<td>5636001 – Forest</td>
<td>tree</td>
</tr>
<tr>
<td>5636001 – Forest</td>
<td>conifer</td>
</tr>
<tr>
<td>5636001 – Forest</td>
<td>deciduous tree</td>
</tr>
<tr>
<td>5626001 – Livestock</td>
<td>cattle</td>
</tr>
<tr>
<td>5626001 – Livestock</td>
<td>equidae</td>
</tr>
<tr>
<td>5626001 – Livestock</td>
<td>goat</td>
</tr>
<tr>
<td>5626001 – Livestock</td>
<td>sheep</td>
</tr>
<tr>
<td>5626001 – Livestock</td>
<td>swine</td>
</tr>
<tr>
<td>6006001 – Cereals</td>
<td>maize</td>
</tr>
<tr>
<td>6006001 – Cereals</td>
<td>oats</td>
</tr>
<tr>
<td>6006001 – Cereals</td>
<td>wheat</td>
</tr>
<tr>
<td>6006002 – Fodder plant</td>
<td>clover</td>
</tr>
<tr>
<td>6006003 – Fruit</td>
<td>grape</td>
</tr>
<tr>
<td>6006004 – Industrial plant</td>
<td>tobacco</td>
</tr>
<tr>
<td>6006005 – Oleaginous plant</td>
<td>olive</td>
</tr>
<tr>
<td>6006006 – Root crop</td>
<td>potato</td>
</tr>
<tr>
<td>6006007 – Textile plant</td>
<td>cotton</td>
</tr>
<tr>
<td>6006008 – Tropical plant</td>
<td>coffee</td>
</tr>
<tr>
<td>6006009 – Vegetable</td>
<td>root vegetable</td>
</tr>
</tbody>
</table>

Example:

**Search and result in Eurovoc:**

![Eurovoc search result](image)

NB: UF means ‘used for’.
On entry 1186228, the IATE domain is therefore 5211005 wildlife (the category wildlife is the third level of the IATE domains), with the descriptor ‘insect’.
# IATE 2

IATE 2 is currently being developed. It will be built on completely new and state-of-the-art technologies that will better cover users’ needs and bring terminology data to the next level, with higher interoperability, more streamlined workflows and more advanced consultation, exploitation and data management by users and machines.

The main goals are:
- providing a tool that is as user-friendly as possible, with a fresh and clear interface and responsive design, and compliant with usability and accessibility standards
- enhancing quality, both on the data side (quality assurance tools and advanced queries and mechanisms for data clean-up) and on the tool side (integrated testing and highest software development standards)
- allowing more efficient terminology work (easier entry creation, updates, advanced data management) and more efficient terminology project management (integrated project management and assignments within IATE)
- centralising communication on terminological data in IATE

IATE 2 will bring many new and improved features and fields. Others will disappear in the interests of simplicity and data integrity. Below is a summary of the main changes that will impact on how data will be stored and give users ideas on how to store data in a way that facilitates the future migration of data from IATE 1 to IATE 2.

## New fields in the data structure:

- multiple references will be stored in separate reference fields
  It is recommended that you use a semi-colon (:) to facilitate the migration of multiple references currently stored in a single field into separate reference fields
- the following fields will have their own reference field: LL Note, TL Note
  It is recommended that you separate the note and its reference with the paragraph mark `<p>` and preface the reference with the word “Reference:” to facilitate migration
- there will be a Collection field at term level
- on top of the existing Management field at Language-Independent Level, there will be a Management field at Language and Term Level
- the Customer field will be converted into an Institution/body field that will indicate that the term is to be used by a particular institution/body. This field will have a reference/note field attached for comments
- Lookup forms will be stored as terms with a term type ‘Lookup’. Users will be able to add a reference, note or other relevant information about the lookup form
  It is recommended that you use a semi-colon (:) to facilitate the migration of multiple lookup forms currently stored in a single field into separate term fields; also, all lookup forms should be written in full, not just parts of them.

## New or improved features:
- a full version of Eurovoc with 6 levels of domains and descriptors will be used. Only the first and second domain levels will include a digit code (2 and 4-digit code respectively). From third to sixth level, no digit code will be included (as per Eurovoc), only the text label of the descriptor.

It is recommended that you continue to put lower-level descriptors in the Domain Note for the time being.

- formatting options will be simplified and the user will be able to apply formatting via a formatting bar, instead of raw html code. Only bold, italics, superscript and subscript will be allowed. Lists will be possible with a simplified listing introduced with ‘-‘.

Paragraph marks will be accepted.

It is recommended that you avoid the following formatting options, which will not be supported in IATE 2: underline, horizontal rule, bulleted or numbered lists. Also, avoid creating footnotes (e.g. using numbers in superscript).

- URLs will be inserted and modified via a URL button which will include a validation of the URL (live or dead link). Hypertext will be allowed via this function.

- EUR-Lex references will be managed via a direct search and insertion from IATE. The title and permanent EUR-Lex URL will be inserted with a single click.

It is recommended that you continue using the CELEX:XXXXXXXXXX/LANG shortcut to facilitate migration.