

A Guide to Translation Project Management

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Preface

This *Guide to Translation Project Management* provides a set of written guidelines meant to assist organizations around the world wishing to produce quality translations. Although it was designed primarily as a resource for National Meteorological and Hydrological Services (NMHSs) interested in translating instructional materials to support their training and professional development efforts, the general concepts are relevant to any agency or organization desiring to distribute information in other languages.

Translation is a complex endeavor, requiring the active collaboration of multiple participants in order to produce a quality product. This guide explains the process involved, describes some possible pitfalls and ways to avoid them, and offers guidance in creating a translation team, including the selection of a translation company or independent translators. It also touches on aspects such as translation and distribution formats, rates, tools, resources, and best practices that can contribute to a good outcome. Finally, the guide includes sample checklists, guidelines and instruction sheets that can be customized for use in various stages of the translation process.

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1.0.0 Defining Translation

1.1.0 Why Do We Translate?

Transferring information —scientific, philosophical, literary, commercial, political, artistic— across linguistic barriers is an important and necessary component of the human endeavor. For information providers, translation expands the number of people who can access the information, allowing it to reach an audience that would otherwise not benefit from it.

Today, translation is more widespread and accessible than ever before. Translation efforts can be organized in creative ways: organizations with larger budgets may choose to hire a translation company or independent professional translators to handle all of their translation needs; organizations with smaller budgets, or with subject matter that is not familiar to many translators, may decide to combine the services of professional translators with the skills of existing staff members; finally, organizations with a pool of expert volunteers may opt to include their services in the process. Whatever your budget and translation needs, there are ways to make it work.

1.2.0 Defining Translation

Translation is an activity, a product, and a process. As an *activity*, translation is a complex act that requires close reading of a text in the source language, understanding its meaning, and creating an equivalent text in the target language. The word “translation” also refers to the *product* of this activity: the final target language text that will be published or distributed. Although this document will touch on these aspects of translating, we will focus primarily on the process of creating a translation, using this definition:

Translation is the process of conveying a written source language text clearly, completely, accurately, and appropriately in a target language.

The term *process* refers to the steps or stages that a translator and/or a group of translators follow to produce a quality translation. Our definition also describes some particular qualities a translation should possess in order to be “good”. In other words, it should be:

- *Well-written*: Proper grammar and spelling, appropriate use of terminology, and clear expression of concepts are common to all good writing.
- *Accurate*: Various factors can lead to inaccuracy in a translation, such as incorrect interpretation of the source text, inappropriate or incorrect terminology choices, and omission or addition of key concepts in the target text.
- *Complete*: Missing concepts, missing sentences, missing words, missing symbols all contribute to a translation not being complete.
- *Appropriate*: The translation should be appropriate for the audience that will use it, and for the context in which it will be used, taking into consideration cultural aspects.

Note that the following do not constitute translation, though they may be part of the process:

- A simple substitution of words from one language to another: Translation is a complex act that requires close reading of the source text in order to understand its meaning and render it appropriately into the target language.

- Automatic/machine translation: Machine translation is a tool that can be used in the translation process, but it cannot, at least with current technology, produce a translation that meets the criteria for accuracy and appropriateness that we would expect of a professionally translated text.
- Summarizing or paraphrasing: While these activities can be useful ways to convey information across languages, they are not, strictly speaking, translation.
- Interpreting: Although related, translation is different and should be distinguished from interpreting, which involves conveying the spoken word from one language to another.

As a translation buyer, you will also look at translation as a product, or as a professional service, and thus you will have certain expectations as to its quality. However, it differs from most other products and services in one fundamental respect: without knowing both the source and target languages, you cannot fully evaluate the quality of a translation. A translation can be accurate, but poorly written in the target language. A translation can be beautifully written, while failing to accurately convey the meaning of the source text. By being directly involved in the translation process and with the people who participate in it, you will be able to understand and trust the final product to a greater degree. As an educated consumer, you may avoid unpleasant surprises later.

1.3.0 Who Can Benefit from Translation?

Almost any organization can benefit from translation. People learn better and retain information more effectively in their own language, and providing materials in the reader's native tongue will probably result in greater understanding and better learning outcomes. Translation can help organizations that work in languages that are not widely spoken around the world, that serve a public that speaks a second language, or that do not have the financial resources to develop their own materials to meet their training needs.

Translation can be a very cost-effective investment, when it is done well. Often, the cost of developing effective training on any topic in your own language will be far greater than the cost of producing a high-quality translation of an existing foreign language lesson.

This *Guide to Translation Project Management* is designed to increase your understanding of the translation process, to assist you in managing a project to develop training materials through translation, and to help you avoid some possible pitfalls. While it specifically aims to help National Meteorological and Hydrological Services (NMHSs) use translation to meet their workforce training needs, the general concepts presented can be useful to any agency or organization needing to make information available in other languages.

1.4.0 Understanding the Translation Process

While a single person can translate a text for informational purposes, it generally takes multiple participants to produce a quality, final translation for publication or distribution. Translation is also a multi-step process, involving some iteration and redundancy. We can break this process down into a series of general steps:

1. *Translation*: The first phase of the translation process involves creating the initial target language text. It generally works best to have a single translator or a small, collaborative team of translators translate all the material. Most (although not all) professional translators

work into their native language only. A translator who is also an expert in the field is ideal, but may not always be easy to find. In these cases, review by an expert in the field is strongly recommended as part of the Editing/Revising step. The translation stage can require a lot of research. It is also the time when a bilingual glossary may be created, problems are identified, and content questions are addressed.

2. *Editing/Revising*: Editing involves checking the translation thoroughly against the original in order to eliminate any possible errors, ambiguities, and omissions. All changes in terminology need to be made consistently throughout the text, and in the project glossary. This step is often performed by a translator who works in the same language pair as the original translator. However, it may be beneficial to have the text checked by a native speaker of the source language, who may be able to spot errors due to the translator's misinterpretation of the source text. If the original translator was not an expert in the field, use an expert target-language reviewer with good writing skills, even if he or she is not a professional translator.
3. *Proofreading*: This final quality assurance step serves to smooth out the writing, correct any minor punctuation and style details, and run a final spelling check. At this point, it should not be necessary to consult the source text except for clarification. The proofreader should have excellent native command of the target language and should be familiar with the style guidelines being used for the document.
4. *Maintenance*: While not an inherent part of the process of translation, this step is important to avoid the material becoming obsolete. Updates to the original material should trigger the update of any translated versions. Simple updates may be handled by one translator, but more complex updates with extensive changes or rewriting may call for editing/revising, and proofreading.

It is worth noting that professional translators typically perform the first three steps themselves before presenting their work to the editor or reviewer, who will likely repeat steps 2 and 3.

Related Links

Translation: Getting it Right. A guide to buying translation

http://www.atanet.org/publications/Getting_it_right.pdf

COMET's Translation resource Center:

https://www.meted.ucar.edu/training_module.php?id=1293

1.5.0 Summary

Translation is the process of conveying a written source language text clearly, completely, accurately, and appropriately in a target language. Translation allows information to be transferred across languages, expanding accessibility of the information. The translation process involves translation, editing, and proofreading. Training programs at NMHSs may be able to use translation as a cost-effective means to expand their training program's offerings.

2.0.0 Planning a Translation Project

Here are some of the tasks that should be part of your translation project:

1. Identify the person or persons who will oversee the translation effort.
2. Define the scope of the project: identify the materials for translation and the language(s) involved, evaluate the source material contents and technical characteristics (file types, accessibility, format, etc.).
3. Budgeting: Identify the financial resources available for your project.
4. Consider copyright issues.
5. Identify resources: a translation company, freelance translators, members of your organization, or a combination.
6. Create a project plan.
7. Establish a timeline.
8. Execute and manage the project.
9. Create a maintenance plan for the translated materials.

We will consider the first four points in this section, and turn to the others in later sections.

2.1.0 Identify a Project Lead or Team

Translation management must be tailored to the size of the organization and its resources. Oversight may range from simple handoff to a translation company (sometimes known as a *language service provider*, or LSP), to complete involvement in selecting translators, editors and reviewers, and managing the entire project. Appointing appropriate staff skilled in organizing and managing complex processes will be essential for the development of a successful in-house translation program.

2.2.0 Define the Scope of the Project

From the outset, it will be important to identify the specific needs your organization wishes to address through translation (for example, supporting aeronautical meteorologist training, meteorological observer training, or a continuing professional development program), and to set realistic goals to meet these needs within your specific budget. One of the key aspects of this task will be assessing the materials to be translated: to assure that they are best suited to meet your current training needs, and that they also have a high chance of remaining relevant for a long period of time.

2.2.1 What Really Needs to Be Translated?

Organizations must be efficient and smart in deciding which materials to translate. Depending on your organization's needs, not all materials may require full, precise translation. Careful analysis of the original can reveal parts that can be shortened or omitted from the translation, thus reducing the amount of work involved, and, ultimately, the cost of translation.

For example, you may have permission to translate a lesson on a specific scientific concept that also contains text or graphics that are not needed for your purposes, such as the history of the group that developed the original document, or historical overviews that may not be relevant to your audience. In these cases, you may decide to summarize, or perhaps to omit those sections entirely.

As pointed out earlier, summarizing is really not translation. However, a target language summary of a document (for example, the results of a study) can be useful to convey certain specific information. If you choose to adopt this strategy, you should ensure that the person in charge of producing the summary is qualified to read the source text and summarize it in the target language.

In some cases, a summary of a document, lesson, or other material may be useful to make certain decisions. For example, when identifying documents as potential candidates for full translation, you might want a brief description of the content in order to decide whether the material actually matches your needs. This strategy can help those involved in the selection process make more informed decisions about what to translate and avoid the cost of translating irrelevant material.

2.2.2 Source Materials

The selection of source materials for translation requires careful consideration of various aspects besides their relevance, such as quality, effectiveness, usability, and format. Evaluating your instructional needs will be an important part of the selection process. You will want to involve the people in charge of training in your organization in making this determination and in identifying relevant materials that will convey the concepts you need to present effectively.

Whenever possible, the linguistic quality of the materials should also be evaluated before deciding whether to translate them. A well-written document that presents concepts clearly and concisely will be easier to translate than one that is written in a verbose, convoluted style. A poorly written original may take longer to translate, and the final product may reflect the weak quality of the source text. If you have control of the original, reviewing the text for any improvement or simplification prior to translation may be a good option.

If your organization develops its own materials, it might consider an approach to writing that facilitates and supports later translation or adaptation. Consistent use of terminology, clear writing that avoids slang and cultural references, the use of examples from multiple geographical locations, and consistent use of international units, are some approaches that can make the source text easier to translate.

2.2.3 Format types and considerations

We can consider format in two different ways:

- *Delivery format:* This refers to how the material is presented to the end user. For example, a textbook, a web-based lesson, a presentation, or perhaps a webinar. All of these delivery formats will present their own challenges, and will have to be handled in a particular way for translation.
- *Translation format:* How the content will be handled during the translation process. For a webinar, for example, the format might be a simple text file containing the transcription of the lesson. In the case of a web-based lesson, the format might be an HTML file.

Formats vary widely. Most prepared instructional materials are initially developed as text and then formatted for use or distribution, either in printed or electronic form. This is often true of narrated lessons that start out as scripts, although this is not always the case; in live lectures or webinars, the presenter delivers the content orally, but without a set script.

By definition, translators work with text, the written word. The formats used in the translation process can also vary, most often as a function of the delivery format. The translator's capabilities are also a factor: for example, all translators work with word processing files, but some may not be able to work with HTML files.

Access to source files is an important consideration. Distribution-friendly formats such as PDFs are difficult for translators to work with; the process will be much easier with the source files such as MS Word, Excel, etc. This is also true of the graphics that accompany the text: producing translated images will be much easier if the original source graphic files containing the text layers are available. Obtaining the source files will help streamline the translation process.

These are some general format considerations:

- Avoid formats that impose word or page length limits based on the source language text, such as windows or buttons that are sized to the original and don't allow for expansion. Text created in English often takes up less space than the equivalent text in another language, such as German or Spanish.
- Choose materials that are available as text, or in a format that can be easily converted without requiring specialized programs.
- Locate the source files, if necessary by requesting them from the organization that developed the original materials.
- Consider whether you have the resources available to extract text for translation from programs such as Adobe Flash, which are not translation-friendly, or to work with graphics, or audio files.
- Consider the formats you and your translators can work with. Most translators today use tools that allow them to work in a wide range of formats, but not all have access to specialized programs. For example, if you have HTML files, but your translator only works in MS Word, you have to figure out how to convert HTML to MS Word format.
- Don't assume that your translator or other participants will be able to work with file formats other than MS Word: ask before the project begins.
- Consider whether any graphics or animations contain text. Graphics with captions, legends or explanations require special handling, the use of graphics software, and access to graphic source files.
- Consider the impact of narration or other audio. If the translated product will be narrated, these materials may require a considerable amount of processing and resources, which will increase the cost and time required to produce the final translated product. For example, you will need to either obtain the script for the source audio files, or have them transcribed, then translated, and then re-recorded in the target language.
- Consider cloud-based software options. Many software vendors now offer relatively inexpensive access to sophisticated cloud-based programs. Depending on your budget, for a fairly modest fee you may be able to provide translators access to specialized tools, and perhaps even some training on how to use them.

2.2.4 Audio

Lessons presented as recorded narrations and webinars can be appealing, but require much more processing to produce in translation.

Recording the material in the target language will always involve additional work and resources, such as contracting voice talent, producing and processing audio tracks, and incorporating them into the final delivery format of the lesson. Whether these activities are handled in-house or contracted out, they can add up to significant costs.

One cost-cutting option is to provide the transcript and, if possible, include Closed Captioning. Some cloud-based video hosting tools, such as YouTube, provide Closed Captioning functionality.

2.2.5 Graphics and Animations

Many training materials include illustrations, animations, and other graphic elements that contain embedded text. Commonly used image formats in lessons and presentations (such as .jpg, .png, and .gif files) do not contain editable text layers. Access to source files in a format that preserves the text layers and allows them to be edited with a graphics program, like Adobe Photoshop, will facilitate the process of creating target language versions of graphics. When source files are not available, in most cases it will still be possible to layer translated text on the image, though the process will be more time consuming, and the quality of the final graphic may not be optimal.

Animations present additional challenges. As an animation unfolds, callouts or explanations may appear at different moments, or each frame may contain slight differences in text, as can occur with animations of data products. Animations should be evaluated before translation to identify any technical or text-related issues that may need to be addressed.

Generally, unless the translator is willing and able to work directly in a graphic or animation format—something that is not common in the industry—you will need to devise a strategy for handling graphics. One possible approach consists of compiling a document with a screen shot of each visual and having the translator type below each graphic or animation every text element it contains.

The translator and the person actually producing the target language graphics will have to be particularly vigilant to avoid introducing errors, especially when placing text on graphics or animations.

One way to reduce the time and costs involved in producing foreign language graphics or animations is to leave them in the original language, and provide translations or explanations, either in the translated text or as explanatory captions below each item.

Consider these aspects related to handling any graphics and animations included in the materials you will translate:

- Do you have source files for the graphics and animations?
- Can your translators or translation company work in graphics programs, such as Photoshop, or Flash? What costs will be involved?

- Consider cloud-based software options. Many software vendors, such as Adobe and Microsoft, now offer relatively inexpensive access to cloud-based programs. Depending on your budget, for a fairly low fee you may be able to provide translators access to specialized tools to work in graphics.
- How will you send graphics to be translated? How should the graphics text be returned to you?
- Can you create target language versions of the images or animations in-house?
- Do you have permission to use and modify copyrighted graphics?
- Whenever possible, choose graphics with little or no overlaid text and keep any explanatory text separate.
- Choose graphics with text that obscures as little of the image as possible.
- Take the physical length of the text into account, a particular issue in graphics, where space is often limited. While reducing font size or vertical spacing can help accommodate longer text, be aware of possible readability issues.
- Avoid graphics that are culturally sensitive. Images can represent different things in different cultures. Even colors can have different meanings to different people. (For example red is considered unlucky in Korea and purple is a sign of mourning in Thailand.)

2.2.6 Delivery Format

The presentation of the translated material can take many forms. It can be as simple as generating a PDF file and providing a link on a web page, or as complex as creating an entire interactive website. Most of the time, you will probably maintain the format used in the original material. However, you may decide that altering the delivery format due to technical or other issues is warranted. For example: you need to translate a lesson that is structured as a website, but only have limited technical resources or budget. Rather than converting the HTML site to Word and then having to reconstruct the website, you may decide to distribute it as a PDF file.

2.2.7 Translation Technologies

Two widely available technologies are often used in translation: *machine translation*, and *translation memory*.

Machine Translation (MT) uses computers to generate a target language version of a source text automatically. Google Translate and Babelfish are the two machine translation engines that most people are aware of, but many others are available. Machine translation is very fast, but computers lack the human ability to understand context, infer meaning, decipher obscure writing, or detect errors in the original. While raw MT output can convey the approximate meaning of a simple text, no automated system can currently produce results acceptable for publication without human intervention. MT can be a good option when you simply need to get the basic meaning of a document.

Translation Memory (TM), also referred to as Computer-Assisted Translation (CAT), can “recycle” previously translated text to find matches between previous translations and the current one. TM software can also store glossaries in electronic format and alert the translator when a glossary item appears. Unlike MT, the translator actually produces the translated text in the program, which stores pairs of segments (usually sentences) in a database. When the

software detects an appropriate match to a stored segment, it presents it to the translator. The translator can accept it or correct it. The use of this type of specialized software is widespread among professional translators, and contributes to improving productivity, consistency and quality. It can also reduce the cost of translation when the source language contains a lot of repetition, or when updating previously translated content.

TM technology is available in specialized translation software packages (e.g., SDL Trados Studio, MemoQ, Wordfast) that perform a variety of tasks designed for professional translators and project managers, including file format conversion, and terminology management functions. Most TM software today also allows the user to connect to MT engines, which can feed the automatic translation to them for post-editing.

Another widely available tool is specialized terminology software. In its simplest form, this software maintains a database of term correspondences between two languages (sometimes referred to as a *termbase*) which can be queried on demand or automatically from within TM software, or used as a standalone tool. Terminology management should be considered an integral part of the translation process, independently of how it is handled and by whom. For additional information see section 4.0.0., *Supporting the Translation Process*.

Knowing whether the translators or translation company you work with utilize these tools can be important. For example, if the text you wish to translate contains often-repeated sentences, you may be able to benefit from the use of TM in the form of lower costs, since you would pay only once for the translation of identical segments appearing multiple times in the text. TM software can also provide savings when updating previously translated text: an existing translation memory can speed up the update process by quickly retrieving unchanged segments and flagging new and changed segments, thus reducing the amount of content that needs to be translated for the update.

2.3.0 Budget and Rates

The cost of translation services (translation, editing and proofreading) is often calculated based on the number of words in the source language text. Since the final word count of the target text is unknown at the outset, using the source word count ensures that charges will be easy to understand and calculate up front. Although word count is the most common metric used to charge for translation, some languages traditionally are charged based on other criteria. Some translators may also charge by the hour or by the project.

Rates in today's freelance translation market vary considerably, depending on a number of factors:

- Translator experience and specialization: Experienced translators who specialize in certain fields often charge higher rates.
- Complexity of the material: A specialized, technical text may cost more than more general content.
- Volume: A translator may be willing to apply a discount for a large project.
- Language combination: Some language combinations command higher rates than others, depending on how common they are or how much competition exists in that language pair.

- Turnaround time: Rush work will probably cost more.
- Translator location: Translators located in some parts of the world may charge lower rates.

As a general rule, translation companies charge more than freelance translators. Translation companies' rates are also quite variable, based on the same factors and on the management overhead involved. It is difficult to get information about translation companies' rates without actually getting a quote for a specific project.

Work that cannot be quantified by the word is charged by the hour, and some editors and proofreaders may also charge by the hour. Some tasks that are often quoted by the hour include: glossary development, special research beyond what is normal in the translation process, extensive number conversions, developing graphic callouts, formatting beyond simple copy fitting, translating directly in graphics files, etc. Most freelancers also have a minimum charge for very small projects, usually based on their hourly rate.

To calculate the cost of translation you need the word count of the source materials (which can be obtained easily in most word processors and other types of software), and a per-word rate from each participant in the process. Remember to account for the rate for each task. For example, suppose you need to determine the cost of a translation project from English to Spanish involving 10,000 source words. You contact several translators and settle on three quotes: a translator specialized in the field who charges 4.5 apples per word, an experienced editor recommended by a colleague, at 1.5 apples per word and a proofreader at 0.5 apples per word. Now add the three rates, and then multiply the total rate of 6.5 apples per word by the source word count to calculate the total cost, which in this case will be 65,000.00 apples. Work charged by the hour and any additional services provided by the team will have to be added to the calculation.

Do not hesitate to ask translators and translation agencies what is included in the rate they quote (it may not include any formatting), and about their quality assurance process. Some translators may quote a rate that includes translation, editing, and even proofreading. In this case, make sure that each of the tasks will be performed by an appropriately skilled person. Depending on your location and that of the translator, take into account the possible impact of currency exchange.

An experienced translator will usually want to see at least a sample of the material before quoting a firm rate. Consider the difference between translating a simple 100-word letter, and a list of 100 industry-specific acronyms, which probably will require many hours of research. A professional translator faced with such a document will probably quote by the hour, rather than by the word.

Consider these factors regarding rates:

- Type of text: Is it a simple, straightforward text or a highly technical document? Higher rates are usually applied for technical translation requiring research.
- Do you require special formatting? You might have to pay extra for complex tables, graphs, images, etc.

- Translator’s experience and specialization: It might be worth paying higher rates for an experienced translator, who might save you time and resources at the revision stage.
- Do you require editing by a subject matter expert?
- Language pairs: You might have to pay more for less common language combinations.
- Urgency: Expect to pay a rush fee for delivery within a short time frame.

On average, translation can progress at 300-400 words per hour, editing at 600-800 words per hour, and proofreading at 1500-2000 words per hour. This means that a translator can usually produce about 2500 words in an eight-hour work day, whereas the editor could review about twice as many words in the same amount of time. These are rough estimates, and freelancers may also have to manage more than one project at a time, so translation may require more time than the estimates listed above. When planning the process, unless you have to meet a firm deadline, allow as much time as is reasonably possible for each step and include some buffer for any delays that might occur.

Related Links

Translation Pricing – How does it work?

<http://www.nwiglobal.com/blog/translation-pricing-how-does-it-work/>

Translation: Buying a non-commodity

http://www.atanet.org/docs/translation_buying_guide.pdf

2.4.0 Copyrights

If the translation involves materials not belonging to your organization, you will have to consider copyright implications. Under most countries’ copyright laws (including the United States), a translation is considered a derivative work of the original, and a translation cannot be produced without the consent of the original document’s copyright holder. Some organizations have very liberal copyright rules, which allow for free use of their materials for non-commercial purposes, including the production of translated versions of their lessons. This is not the case with every author and you should secure any needed copyright permissions before producing a translated version of any text or graphic not belonging to your organization.

2.5.0 Summary

Proper preparation and good management of the project will be key to its success. Assembling an appropriate team, developing a translation budget, assessing the materials to be translated, and securing permission from copyright holders will be important considerations before beginning the project. A good analysis of the source material will aid in the selection process, and avoid translating unnecessary text. The cost of translation work is usually calculated based on the source word count. Translation rates can be highly variable, depending on factors such as language combination and complexity of the material. Review of the source text can eliminate issues that might be problematic during translation, and help to determine what formats will be used to translate. Translation can occur in different formats, and the translated text can then be used to produce a variety of formats for delivery of the content to the end user. Materials with graphic or audio components require special attention, and more resources. Translation technologies to be aware of are machine translation, translation memory, and terminology management software.

3.0.0 Assembling a Translation Team

Early on, you will need to make a fundamental choice: rely on the services of a translation company, or assemble your own team of translators, either independent professional translators or qualified staff within your organization. Many factors will come into play, such as budget, time requirements, the availability of someone to manage the process, the existence of in-house resources capable of contributing to the process, etc.

While managing a translation project on your own is a viable option, a do-it-yourself approach to the actual translation can quickly lead to problems. Being bilingual does not automatically bestow the title of translator or interpreter, especially when dealing with specialized materials. Fundamentally, translation is about understanding the source document, understanding the subject matter, and writing well. Not everyone has this skill set, especially while simultaneously recreating the source text in the target language; even an expert on the topic with good fluency in the source language can end up producing a poor translation.

Assemble your team early and make sure you have someone capable to cover every role (translation, edit, review, subject matter queries, etc.). It's a good idea to approach the process of selecting a translator or a translation company as you might the hiring of an employee. Get recommendations from trusted colleagues, ask for references and a portfolio, conduct phone interviews, and perhaps ask for a translation test. You may have people qualified to translate within your organization, but you should be prepared to evaluate their translation skills before assigning them to this type of work.

3.1.0 In-House Talent

As you make decisions about the team you will put together, keep in mind the skills available to you within your organization. You may be able to handle many tasks in-house, perhaps much of the process, and reduce the cost of your translation project. For example, the expert on tropical meteorology on your staff, a native speaker of French, may not be able or willing to translate your document into French, but you may be able to enlist her as a subject matter expert (SME) to review the translation provided by a qualified professional translator. Other tasks related to the translation process that may be handled in-house are management tasks, formatting, and production of target language graphics.

3.2.0 Translation Companies

As is the case with most service providers, translation companies vary greatly in size and in the type and scope of the services they offer. Some organizations may have access to an institutional translation service. If yours does not, private translation companies abound, ranging from boutique shops, to mid-size companies able to handle translation into several languages, and large, multinational companies capable of handling all aspects of the translation process, including more technical tasks, such as formatting and functional testing.

These are some useful considerations for selecting a translation company:

- **Size and type of translation company:** You may be more comfortable with a smaller, local company that provides more personalized attention, or a larger organization, capable of handling a more complex project. Ask colleagues in other organizations who have had experience with translation for recommendations. Search the databases of

professional translation organizations, such as the American Translators Association (ATA; <http://atanet.org/>) for possible candidates.

- Translator selection and qualifications: Ask if the translation company will identify translators skilled in your field. Ask for translators' resumes, which will aid in assessing their qualifications.
- Quality Assurance (QA): Does the translation company have a QA process in place?
- Cost: Get quotes from several translation companies, and understand what is included in the charges.
- Deliverables: Will you require fully formatted, functional files, or will you only want the translated text, and handle the publishing aspect on your own?
- Project scope and deadlines: Can the translation company handle the volume of translation that will be involved within the time frame you require?

3.3.0 Freelance Translators

Contracting with independent, freelance translators directly may result in lower costs. One advantage of dealing directly with translators, especially if you retain them over time, is that they will become familiar with the terminology, style, and processes used in your organization.

Depending on the size of the project, the number of languages, the volume of text to translate, and other factors, you may require a dedicated project manager. This may or may not be cost effective compared to using a translation company, which will relieve your organization of tasks such as identifying translators and handling file exchanges and deliveries. Note also that the quality of work performed by translation companies may vary, depending on the availability of translators at the time of your request.

If your budget is limited, you may decide to assess the linguistic capabilities of staff within your organization who may have the skills to play a role in the translation process. Documenting and updating this information on internal and external resources will be useful in identifying translators and subject matter experts (SMEs) best suited to specific tasks and subjects. (For more on SMEs see section 3.4.0. *Subject Matter Experts*.)

A note about volunteers: Volunteers can be a great asset for any organization, but one must also recognize that their skill level and ability to meet deadlines can vary considerably. It's understandably tempting to hand your project over to translators who will work for free. Keep in mind, however, that willingness and generosity do not make an expert. Just as there's a huge difference between someone who sings in a community choir and an opera star, there's a tremendous difference between a well-meaning bilingual person and a professional translator with the experience and the linguistic and research skills that are needed to produce an optimal translation. You should check a volunteer's qualifications and ability, perhaps with a test, to ensure he or she will be able to produce a good product.

Many translators and translation companies can handle a variety of texts, and some may actually specialize in particular fields or types of documents. Larger private or institutional agencies may have access to large pools of translators, some of whom may be specialists in the subject matter you are dealing with.

In some cases, there may not be any professional translators available in your field and language combinations. If this is the case, and you are unable to assign the translation to a specialist, you may decide to have the translated documents reviewed for style and accurate terminology by a subject matter expert (SME), perhaps within your organization, who should at least be proficient in the target language.

Similarly to any writing project, it is desirable to have several different people review a translation, but budget constraints may force you to cut corners; the proofreading step, the third and often final “set of eyes” before publication, is a common casualty. If you have no choice, it is better to put the resources at your disposal into producing a great edited translation, skipping the proof, rather than cutting on the cost of translation (this is, after all, the foundation) or of a good edit pass (key for catching errors and improving translation style and terminology).

Some useful considerations for selecting translators:

- Selection: Get recommendations from any translators you know or from colleagues in other organizations who have worked with translators. Search the databases of national or local professional translator associations to find possible candidates.
- Professionals: Choose experienced, professional translators.
- Native speaker of source or target language: Find native speakers of the target language for translation; assigning the editing step to a native speaker of the source language may contribute to the quality of the final product.
- Field of expertise: If possible, look for translators skilled in your field, or a similar one.
- Qualifications: Ask for translators' resumes, experience, and samples of their work, all of which will aid you in assessing their qualifications. If you have access to someone qualified to evaluate a sample translation, you might select a short passage representative of the material that will be translated to use as a test. Though many translators will not agree to an uncompensated test, the cost of paying for a short (~250 words) test would be minimal.
- Teamwork: Are translators willing to work in a distributed team, perhaps alternating the role of translator and editor?
- Assign the fewest number of people possible to any one task. For example, it is better for one person to translate an entire document or series of related documents. If two translators are used, a single editor should review the text in order to unify style and terminology and maintain internal consistency.
- Formats: Can the translators work comfortably with your files types?
- Cost: Get quotes from several translators, and understand what the charges include.
- Quality: What are their quality control practices?
- Deliverables: Will they be able to maintain the original formatting?
- Project scope and deadlines: Can they handle the volume of translation that will be involved within your time frame?
- Recordkeeping: Keep and maintain records on translators for future reference.

Related link

Wikipedia List of translators and interpreter associations:

https://en.wikipedia.org/wiki/List_of_translators_and_interpreters_associations

3.4.0 Subject Matter Experts

Subject matter experts (SMEs) able to work in the target language can be a valuable resource during the translation process and you should enlist their participation early in the project. Subject matter experts familiar with the correct technical or scientific terminology and style in the target language can contribute to a final translation of the highest quality. Ideally, a subject matter expert should not be doing the translation itself (he or she may not be a skilled writer), but should be involved in glossary development, and the editing/revising and proofreading steps.

These are some useful considerations for selecting SMEs:

- **Qualifications:** Choose experienced SMEs that are familiar with the scientific and technical terms involved in your translation project.
- **Formats:** Can the SMEs work comfortably with your files?
- **Time:** Are they available? Check with the managers of the SMEs to ensure that the work you require can be completed within your deadlines.
- **Recordkeeping:** Keep and maintain records on the linguistic profiles of your SMEs, and the documents they have revised/edited and proofread, for future reference.
- **Clear expectations:** What is expected of the SME? Just terminological work? Input on the content? Grammar corrections? It is best to define this person's role accurately, and not to overextend the scope of his/her involvement.

3.5.0 Summary

Assembling a good translation team is fundamental to ensuring a good outcome for the process. One key decision will be whether to manage the translation process in-house, or through a translation company. While using a translation company will involve much less management overhead, it will also mean less direct control of the process and possibly higher costs. The selection of translators, editors, SMEs, and other participants in the process should be approached like any hiring decision. It is important not to consider only the rate they charge, but their experience, expertise, and the quality of their work.

4.0.0 Supporting the Translation Process

During any complex endeavor, such as a translation effort, proper planning, careful selection of resources and awareness of possible pitfalls will help you avoid many problems.

4.1.0 Communication

While many factors can impact the translation process, ensuring good communication is key to keeping things running smoothly. Because several people or entities are involved, there will be multiple lines of communication, and the more these are kept open, the better for the translation project.

For example, if you contract two translators and a subject matter expert to produce the French version of an English website, you will need to communicate with each of them initially to set up the project and agree on a contract, deadlines, roles, rates, and other expectations. You will then need to send the files out for translation. At each step along the process, when you receive files you will have to pass them on to the person assigned to the next step, always with proper instructions.

One way to simplify this is to introduce all the members of the French translation team from the outset, so that everyone knows everyone else and the role they will play. If you provide them with a common set of instructions (see the sample *Translation Instructions Template*), each person will be able to simply forward the files to the person assigned to the next step in the process, keeping you informed at the same time.

Creating a sense of team has the additional benefit of stimulating communication between the various people involved. Communication between the translator and the editor is particularly important. The editor should be able to discuss with the translator any questions he or she may have about the decisions made in the translation step, as well as issues of terminology and style. Some translators will insist on having the opportunity to review and approve changes.

Over the course of the project, each person involved may have questions about the content. Asking questions is the mark of a good translator, and you should not be surprised to receive requests for clarification of obscure or complex passages in the text, or even pointing out errors in the original; indeed, you should expect and welcome them, as they can only lead to a better product, and often contribute to correcting or improving the original as well. Ideally, you will have access to the author(s), who will be able to answer questions, clear up any doubts, and perhaps correct or amend the original. If your organization did not create the material, you may have to try to contact the author(s) to get the explanations you need. If that is not possible, you may have to turn to a subject matter expert to obtain an answer.

If you are thinking of using a translation company, you should be aware of the possible impact on communications. The translation company will act as intermediary between you and the translators. The project manager assigned to your account will contract translators, transfer files at each step, and field questions not directly related to the material.

The translation company's project manager will also collect questions from translators, pass them on to you, and then forward your answers to the translation team. Depending on its management style and relationship with translators, the translation company may allow direct communication between you, and the translators working on your project. However, this is by no

means the norm, and this factor may hinder open communication between the author and the translator, important for a quality outcome. It's a good idea to establish a point person to address content issues and provide timely answers to the team. Ideally, this would be the person who created the content, but it could be someone who can contact the author or who has good knowledge of the text or subject matter.

When working directly with translators, you can set up a simple form (a table in MS Word, or an Excel spreadsheet, for example) to track questions and answers, and their implementation. If you are translating the same material in multiple languages, this list should be common to all the translation teams, as the answers to questions raised by one translator in one language may be applicable to all the other languages as well. See the sample *Translation Q&A Template*, which also contains some tips for translators on how to ask questions.

Finally, everyone should communicate clearly and promptly about delays or any other issues that could affect the rest of the team. If you are working with internal resources, and your deadline is flexible, this may be less of an issue, but delays in the delivery of files and schedule changes can be problematic for everyone managing several clients and projects at once.

4.2.0 Project Documentation

The translation process will progress more smoothly if guided by a project plan. In addition, instructions need to be communicated clearly to everyone involved. The process can be supported further by providing guidelines for all roles, and simple ways to check that all tasks and checks are performed.

4.2.1 General Translation Guidelines

You may find it useful to develop a document with general guidelines for translation that will be followed within your organization, especially if you expect to handle multiple translation projects over time. This document should clearly define the individual steps and roles that comprise a translation project, including project management, translation, and file handling.

This document could also be used to record solutions to problems encountered, general ideas on improving the process, successful workflows, and any other information that will be useful in managing translation and translation projects in the future.

4.2.2 Specific Role Guidelines

You might also find it helpful to have a set of specific guidelines for each step or role in the translation process that can be shared with the project team. These can serve to remind participants of your expectations, and of the quality control process. See the accompanying guideline sheets for translators, editors, proofreaders and subject matter experts that you can adapt to your needs, at the end of this document.

4.2.3 Project Plan

A project plan can be a useful management tool for a translation project. This document should detail how different aspects of the project will be handled, including information such as languages involved, files to be translated, steps in the project, project timeline, participants' roles and responsibilities, and other pertinent information. The project plan should fit your needs, and its complexity can vary from project to project, but it will probably include at least some of the following information:

- *Roles and responsibilities:* Include the person in charge of managing the project, and all parties involved in evaluating or reviewing source or target materials, creating and modifying files, fielding questions, etc.
- *Scope:* Determine what materials will be translated, the languages involved, what deliverables will be needed, and a timeline.
- *Tasks:* Detail the tasks that will be performed, with an estimate of the time required to complete them. Besides translation, edit and proof, allow for expert reviews, and for the time needed to format files and produce target language graphics.
- *Risks:* Identify anything that could negatively impact the outcome of the project.

4.2.4 Project Instructions

It's important to provide specific instructions to all participants in the project. Instructions should present relevant and useful information in a clear, concise, and systematic manner. You may decide to create one document with instructions for all participants in the project, or individual instructions for each task or stage in the process (see the *Translation Instructions Template*).

4.2.5 Checklists

Checklists can help to ensure that critical tasks are performed or tracked, and that key requirements are met. Checklists should be short, clear and simple to use. They can be used to track the execution of a series or sequence of tasks, or simply to confirm that listed actions or checks were performed.

It is useful to have a specific checklist for each step or role in the translation process (project management, translation, edit, review, proofreading, etc.). These can be distributed to the person in charge of the appropriate step. You may decide to ask for the sheet to be returned to you with the boxes checked and the date it was finalized. The *Supporting Documents* section lists sample checklists for translators, editors, proofreaders and subject matter experts.

4.2.6 Reference Materials

Generally, professional translators will have access to many kinds of reference materials (printed and electronic dictionaries, web-based glossaries, grammars, etc.), but not necessarily to subject-specific terminology lists. Those participating in the process within your organization may not have any reference materials specific to translation, but may have other useful knowledge or information. For example, previously translated lessons, websites in the source language with good information on the subject matter, monolingual or bilingual glossaries and reference books, especially in electronic format, can all be good resources.

4.2.7 Language Style Guides

Many organizations involved in translation create language-specific style guides to distribute to their translators. These guides can vary considerable in scope, from simple guidelines to detailed reference manuals on grammar and style.

Related links

WMO English Style Guide:

http://www.wmo.int/pages/prog/lsp/documents/WMO_Style_Guide_2014_en.pdf

WMO Spanish Style Guide:

https://www.wmo.int/pages/prog/lsp/documents/GUIADEESTILO_diciembre_2013.pdf

United Nations Editorial Manual Online:

<http://dd.dgacm.org/editorialmanual/>

4.2.8 Glossaries

Glossary development is a normal activity for translators. It is important to support the translator with terminology management, especially if he or she is not a specialist in the specific subject field covered by the materials. Be sure to provide any available reference materials, such as specialized dictionaries, glossaries, and terminology lists. Source language glossaries can be just as useful as bilingual terminology lists. Previously translated text that can help to identify terms and maintain terminological and stylistic consistency can also be valuable resources for translation.

If you have identified a SME for your project, ask about his or her willingness to field terminology questions. This will likely result in a better translation, since decisions about terminology can be made in the early stages of the process, thus reducing the number of terminology-related corrections that might be necessary later. This may also speed up the translation process by reducing the number of questions submitted by the translator. For example, the SME might help the translator with questions about acronyms and unusual terms that are used in your organization.

Many international and local professional organizations maintain and publish official dictionaries and terminology lists. Translators will work to identify such resources, but if you are aware of any, providing them at the outset will be very helpful, especially the primary resources your organization relies on. Note that in Chapter 16 of the English *WMO Style Guide* (see the link above) you will find links to the terminology databases of various United Nations agencies and other international organizations.

Even if you already have a bilingual list of terms available for the language pair you are working with, developing, maintaining and updating a project glossary should be an integral part of the translation process. As your translation program grows, this will become an important resource for future projects.

- Ensure that all participants have access to common terminology lists, answers to questions, and other reference materials.
- Consider creating a common glossary of terms to standardize terminology used within your organization. Make sure it is distributed widely within your organization, and ask staff members to contribute new and relevant terms.
- Ask a member of the translation team to maintain, correct, and update the project glossary with new terms.
- Make sure the final glossary list is part of the deliverables you receive at the end of the project.

Related Links

IPCC Glossary (available in Arabic, Chinese, English, French, Russian and Spanish):

http://www.ipcc.ch/publications_and_data/publications_and_data_glossary.shtml

METEOTERM, a database of WMO terminology in English, Arabic, Chinese, French, Russian and Spanish, including the International Meteorological Vocabulary, the International Glossary of Hydrology and other terms:

http://www.wmo.int/pages/prog/lsp/meteoterm_wmo_en.html

TERMIUM Plus

<http://www.btb.termiumplus.gc.ca/tpv2alpha/alpha-eng.html?lang=eng&index=alt>

UNTERM: The United Nations Terminology Database:

<http://unterm.un.org/UNTERM/portal/welcome>

Glossary section in COMET's Translation Resource Center:

<http://courses.comet.ucar.edu/course/view.php?id=181#section-3>

4.3.0 Summary

Proactively supporting the translation process is fundamental to avoid problems. One key aspect is communication: between the project manager and the translation team, but also among members of the team. It's particularly important to have clear communication between the translator, the editor, and the subject matter expert. Also important is the ability for the translation team to communicate with the author of the material or someone able to answer any questions that will undoubtedly arise during the translation process. The use of a translation company should not impede this process, but may require active participation on the project manager's part. Other important aspects to support the translation process are proper documentation, including general translation guidelines for your organization, guidelines for each role in the translation process, a project plan, project- and role-specific instructions, and checklists for various tasks and processes. Finally, providing appropriate reference materials and supporting terminology management can help ensure consistency and high quality.

5.0.0 Supporting Documents

The 11 documents provided in this final section of the guide were designed as a starting point for creating the documentation needed to support the translation process. These customizable templates can be adapted to fit the needs of any translation project.

Translation Project Tracking Sheet

Translation Instructions Template

Translation Q&A Tracking Sheet

These three templates can be easily adapted to track the movement of files and completion of steps in the translation process, provide instructions, and elicit and track questions throughout the project. As with all the supporting documents attached to this guide, we encourage you to adapt them to fit the needs of your particular translation project and team.

Guidelines for Translators

Guidelines for Editors

Guidelines for Proofreaders

Guidelines for Subject Matter Experts

These four sets of guidelines are specific to each step in the translation process. The guideline documents will help you set your expectations for the work being performed by listing the specific tasks or procedures that have to be addressed at each step.

Checklist for Translators

Checklist for Editors

Checklist for Proofreaders

Checklist for Subject Matter Experts

These checklists —also specific to the various steps in the translation process— are a reminder of the actions or tasks that need to be performed during each step in the translation process. The checklists can be used as an aid to make sure certain tasks were performed, and should be customized as needed.

Related Links

COMET's Translation resource Center:

https://www.meted.ucar.edu/training_module.php?id=1293

Translation Project Tracking Sheet

Project name: _____ Language combination: _____

Project Manager: _____

Project start date: _____

Description

This tracking sheet should be completed by the translation manager or the person responsible for handling the translation workflow.

- | | |
|--|-------------|
| <input type="checkbox"/> Documents sent to translation | Date: _____ |
| <input type="checkbox"/> Graphics text returned from translation | Date: _____ |
| <input type="checkbox"/> Graphics text sent for target language graphics preparation | Date: _____ |
| <input type="checkbox"/> Target language graphics ready | Date: _____ |
| <input type="checkbox"/> Document returned from translation | Date: _____ |
| <input type="checkbox"/> Translated document and graphics sent to edit | Date: _____ |
| <input type="checkbox"/> Document returned from edit | Date: _____ |
| <input type="checkbox"/> Document sent to review | Date: _____ |
| <input type="checkbox"/> Document returned from review | Date: _____ |

Project Notes

The tracking sheet could also be used for project notes, including any problems that arose during the various stages, how they were resolved, and by whom, what worked, what didn't.

Translation Instructions Template

Project name: _____ Language combination: _____

Project Manager: _____

Project start date: _____

Project description

Include here a general description of the project, including target audience (examples: college level students; operational meteorologists), target locale (country or language variation, such as Latin America, Canadian French, etc.). *Example: You will be translating a lesson on tropical cyclone intensity from English into Spanish. The material targets experienced tropical forecasters, and presupposes knowledge of the content...*

Team description

Role	Team member name	Contact information (email)
Project Manager		
Translator		
Editor		
Proofreader		
SME		

Files for translation

List here all the files that will be translated, including formats and naming conventions. It can be useful to ask each participant to rename their files to identify the step performed, and perhaps who performed it. Note that in these examples the original file name is preserved. For example:

1. File sent to translation: textfile.doc
2. File returned from Spanish translation: textfile_es_dpr.doc (es = Spanish; dpr = translator's initials). This file will be sent to the editor.
3. File returned from the editor: textfile_es_edt_Torres.doc (es = Spanish; edt = edit; Torres = editor's last name).

Special guidelines

Include here any special instructions regarding the files. For example, specific do-not-translate guidelines (for example, terms that should remain in the source language), specific file handling instructions (for example: for HTML files, please be sure to translate all <alt> tag text, coded text to ignore, etc.).

Reference material

Include any support material you can provide in the source language that could be useful to the translators (for example, a specific glossary in the field), or any existing support material in the target language (for example, a previous translation, or related content).

Translation instructions

Include here any instructions specific to the translation step. For example, deadline for delivering translated files and instructions for transferring them to the project manager and the editor, point of contact for questions, glossary instructions, translation guidelines, etc.

Editing instructions

Include here any instructions specific to the edit step. For example, deadline for delivering edited files and instructions for transferring them to the project manager and the proofreader, point of contact for questions, editing guidelines, guidelines for communication with the translator, etc.

Proofreading instructions

Include here any instructions specific to the proofreading step. For example, deadline for delivering final files and instructions for transferring them to the project manager, point of contact for questions, proofreading guidelines, guidelines for communication with the translator and/or editor, etc.

Translation Q&A Template

Project name: _____

Language: _____

Project Manager: _____

Tips for asking questions and eliciting good answers:

- Be specific. Provide the passage involved and explain clearly the nature of your question or doubt.
- If you don't need any explanations, try to formulate a yes or no question. If you need an explanation, ask for it: *Could you explain...?*
- Highlight or bold any terms involved in your question. If a word seems to be missing, highlight the words surrounding it.
- If a passage can be interpreted multiple ways, provide examples of at least two possible readings, and ask which is correct, and/or for clarification.
- If you are reasonably sure you know the answer, suggest it, and ask: *Is this correct?*
- When the usage of a particular term is obscure, or when a term seems to be little-used jargon, you can ask: *Could another term be used?*
- If you have a reasonable idea or suggestion to clear up a confusing passage, go ahead and provide it, and ask: *Is it correct?*
- Sometimes, it is useful to paraphrase your understanding of a concept, and ask: *This is my current interpretation... is it correct?*

#	Date	File name and section	Question	Response	Resolved by/Date
1					
2					
3					
4					
...					

Guidelines for Translators

Modify these guidelines to suit your specific needs.

When translating, please follow these general guidelines:

- Translate all text, including any localizable text in HTML code (keywords, error messages, prompts, etc.) and all relevant text in graphics, being consistent in terminology and style.
- Your audience is *[include a description of the audience, for example: an educated, professional public; please translate in a clear, concise manner, at a level appropriate for professionals in their field, but still accessible to lay native speakers of the language.]*
- Follow correct grammar, punctuation, and capitalization conventions for your language.
- Choose terminology that is as “neutral” and “standard” as possible.
- Make sure to match the format of the original text: use the same font and point size, bolding, italics, color, etc.
- Use any glossary that may have been provided. Research new terminology, and keep a separate glossary of new terms for the current project.
- Choose appropriate terminology for the field and context. When more than one term is widely used in the field, it is acceptable to introduce both, at least on first mention.
- Use terminology consistently.
- Translate interface items consistently. Some of these may have been collected in available project glossaries.
- Make sure that repeated headings and section names are translated consistently.
- Make all necessary conversions to metric units.
- Ask questions. If something is not clear, you will not be able to translate it. At times, this may also help us clarify the original. Keep a list numbering the questions and identifying the location of the suspect term or passage so the appropriate person may investigate and answer.
- Report any errors you find in the source text.
- Review your translation carefully after completing the translation.
- Spell-check the text before delivering the translation.

Guidelines for Editors

Modify these guidelines to suit your specific needs.

When editing, please follow these general guidelines:

- Read the entire translated text word for word against the source text.
- Check all terminology against the glossaries.
- Check that references to menus, commands, buttons and messages match (including abbreviations).
- Check for stylistic accuracy and consistency.
- Check for correct grammar and spelling.
- Check punctuation, accent marks, and proper use of capital letters.
- Check acronym translations.
- Check charts, tables and figures for completeness and accuracy.
- Check proper localization/conversion of measurements (e.g. decimal commas).
- Check that country-specific statements have been localized (as much as possible).
- Check Q&A file and ensure answers have been implemented.
- Make global changes carefully, especially when they can affect agreement.
- Keep a list of additional questions and pass them on to the project manager.
- Spell-check the text before delivering the translation.
- Update glossary with changes/corrections, and additional terms.

Guidelines for Proofreaders

Modify these guidelines to suit your specific needs.

When proofreading, please follow these general guidelines:

- Proofread the entire text carefully.
- Check against the source text only when clarification is needed.
- Check for readability, punctuation, subscript/superscript, proper accents and special symbols.
- Check graphics in context (i.e.: correct graphic, terminology matches text), and point out any problems related to legibility, text position, punctuation, subscript/superscript, proper accents and special symbols.
- Check that no bullets/paragraphs are missing (by counting).
- For websites, check links 1-level deep: click link, make sure it jumps to the correct page, and then return to the original page.
- Check functionality of every link, button, dropdown, text field.
- Make sure external links work properly, and lead to a localized page, if possible.
- Spell-check the text before delivering the final files.

Guidelines for Subject Matter Experts (SMEs)

Modify these guidelines to suit your specific needs.

A) When editing, please follow these general guidelines:

- Read the entire translated text word for word against the source text.
- Check all terminology against the glossaries, making sure it is appropriate for the subject matter.
- Check that references to menus, commands, buttons and messages match (including abbreviations).
- Check for stylistic accuracy and consistency.
- Check for correct grammar and spelling.
- Check punctuation, accent marks, and proper use of capital letters.
- Check acronym translations.
- Check charts, tables and figures for completeness and accuracy.
- Check proper localization/conversion of measurements (e.g. decimal commas).
- Check that country-specific statements have been localized (as much as possible).
- Check Q&A file and ensure answers have been implemented.
- Make global changes carefully, especially when they can affect agreement.
- Keep a list of additional questions and pass them on to the project manager.
- Spell-check the text before delivering the translation.
- Update glossary with changes/corrections, and additional terms.

B) When proofreading, please follow these general guidelines:

- Proofread the entire text carefully.
- Check against the source text only when clarification is needed.
- Check for readability, punctuation, subscript/superscript, proper accents and special symbols.
- Check graphics in context (i.e.: correct graphic, terminology matches text), and point out any problems related to legibility, text position, punctuation, subscript/superscript, proper accents and special symbols.
- Check that no bullets/paragraphs are missing (by counting).
- For websites, check links 1-level deep: click link, make sure it jumps to the correct page, and then return to the original page.
- Check functionality of every link, button, dropdown, text field.
- Make sure external links work properly, and lead to a localized page, if possible.
- Spell-check the text before delivering the final files.

Checklist for Translators

Modify this checklist to suit your specific needs.

Translator's Name: _____

Translation finalized on: _____

Before turning in your translation, please check that:

- All text was translated completely, including any localizable text in HTML code (keywords, error messages, prompts, etc.)
- All text in graphics was translated, and is consistent in terminology and style with the text.
- Checked for correct grammar, punctuation, and capitalization.
- You used the project glossary, and kept a list of new terms for the project.
- You used terminology consistently.
- Interface items are translated consistently.
- Repeated headings and section names are translated consistently.
- All necessary conversions were made.
- You compiled a list of questions, and made any changes according to the answers provided.
- You review your translation carefully after completing it.
- You spell-checked the text before delivering the translation.

Checklist for Editors

Modify this checklist to suit your specific needs.

Editor's Name: _____

Edit finalized on: _____

Before turning in the edited files, please check that you:

- Read the entire translated text word for word against the source text.
- Checked all terminology against the glossaries.
- Checked for stylistic accuracy and consistency.
- Checked for correct grammar and spelling.
- Checked punctuation, accent marks, and proper use of capital letters.
- Checked all acronym translations.
- Checked charts, tables and figures for completeness and accuracy.
- Checked proper localization/conversion of measurements (e.g. decimal commas).
- Checked the Q&A file and ensured answers have been implemented.
- Kept a list of additional questions and passed them on to the project manager.
- Spell-checked the text before delivering the translation.
- Updated glossary with changes/corrections, and additional terms.

Checklist for Proofreaders

Modify this checklist to suit your specific needs.

Proofreader's Name: _____

Proofreading finalized on: _____

Before turning in the proofread files, please check that you:

- Proofread the entire text carefully.
- Checked for readability, punctuation, subscript/superscript, proper accents and special symbols, proper decimals, proper notation.
- Checked graphics in context (i.e.: correct graphic, terminology matches text), and point out any problems related to legibility, text position, punctuation, subscript/superscript, proper accents and special symbols.
- Checked that no bullets/paragraphs are missing (by counting).
- Checked functionality of every link, button, dropdown, text field.
- Made sure external links work properly, and lead to a localized page, if possible.
- Performed a final spell check.

Checklist for Subject Matter Experts (SMEs)

Modify this checklist to suit your specific needs.

Reviewer's Name: _____

Review finalized on: _____

A) Before turning in the edited files, please check that you:

- Read the entire translated text word for word against the source text.
- Checked all terminology against the glossaries.
- Checked that all terminology is appropriate for the field.
- Checked for stylistic accuracy and consistency.
- Checked for correct grammar and spelling.
- Checked punctuation, accent marks, and proper use of capital letters.
- Checked all acronym translations.
- Checked charts, tables and figures for completeness and accuracy.
- Checked proper localization/conversion of measurements (e.g. decimal commas).
- Checked the Q&A file and ensured answers have been implemented.
- Kept a list of additional questions and passed them on to the project manager.
- Spell-checked the text before delivering the translation.
- Updated glossary with changes/corrections, and additional terms.

B) Before turning in the proofread files, please check that you:

- Proofread the entire text carefully.
- Checked for readability, punctuation, subscript/superscript, proper accents and special symbols, proper decimals, proper notation.
- Checked graphics in context (i.e.: correct graphic, terminology matches text), and point out any problems related to legibility, text position, punctuation, subscript/superscript, proper accents and special symbols.
- Checked that no bullets/paragraphs are missing (by counting).
- Checked functionality of every link, button, dropdown, text field.
- Made sure external links work properly, and lead to a localized page, if possible.
- Performed a final spell check.