

A Guide to Translation Project Management: Abridged Version

1. Introduction

A 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.

In general terms, the guide aims to:

1. Offer guidance on how an organization can design training in order to consider potential translation requirements
2. Describe in detail how an organization can design and implement an effective translation process.
3. Provide set of best practices to ensure high-quality results.

2. Abridged version of A Guide to Translation Project Management

Description

This abridged version of *A Guide to Translation Project Management* is provided as a quick overview to guide you in the key processes involved in translation. The Guide also includes a set of useful sample checklists and guidelines that can be modified for your particular needs.

This document presents:

1. A summary of the full document titled *A Guide to Translation Project Management*; and
2. All the guidelines and checklists that accompany the main document to facilitate the planning, development and revision of material.

For more details and examples, please refer to the complete Guide, and visit COMET's Translation Resource Center.

Here are some of the tasks to consider when planning the translation of existing training materials:

1. Identify the person or persons who will oversee the translation effort.
2. Identify the financial resources available for your project.
3. Define the scope of the project: identify the materials you would like to make available in translation, and the language(s) involved.
4. Evaluate the source material, and select what actually will be translated.
5. Consider copyright issues.
6. Identify the translation resources that you will use: an agency, freelance translators, members of your organization, or a combination.
7. Create a project plan.
8. Establish a timeline for your translation project.
9. Execute and manage the project.
10. Create a maintenance plan for translated materials.

These tasks are put into context in this document.

Planning the Translation Project

Plan for the need of translation in the early planning stages of developing training material, if possible.

Assemble a team, develop a translation budget, prioritize the materials to be translated, and secure permission from copyright holders before beginning the project.

Analyze the source material during the selection process, to 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, among others.

Review the source text to eliminate issues that might be problematic during translation, and determine what formats will be used to translate. Translation can occur in a variety of 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.

Understand translation technologies that may be used and affect price and quality (machine translation), translation memory, and terminology management software).

Identifying a Translation Team and Additional Resources

Assemble your team early. Choose the services of an agency or assemble your own team of translators (either independent professional translators or qualified staff within your organization). Consider budget, time requirements for managing the process, the availability of a full-time person to manage the process and the existence and availability of in-house resources capable of participating in the process.

Ensure you have people to cover every role (translation, editing and proofreading). While using an agency will require much less in-house management, it will also mean less direct control of

the process and possibly higher costs. Approach the selection of translators, editors and other participants like any hiring decision. It is important not to consider only the rate they charge, but also their experience and expertise, and the quality of their work.

Get recommendations from trusted colleagues, ask for references and work samples (and check them) and conduct phone interviews. Ask for a translation test (though you must have a way to have it evaluated). If you have people qualified to translate within your organization you should evaluate their translation skill as well before assigning them to this type of work.

Subject matter experts (SMEs) are also an important part of the translation team, and can play a key role in quality and terminology control. Involve SMEs in the editing, reviewing and proofreading stages. Translators need to have an excellent command of the source and target language(s). Editors and reviewers need to have an excellent command of the target language, while having a strong command of the source language is an asset.

Supporting the Translation Process

Regular communication during the translation process is fundamental to avoiding problems.

Ensure strong communication between the project manager, the translation team and also among members of the team. Ensure clear communication between the translator, the editor and the subject matter expert. Enable 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 an agency should not impede this process, but requires active participation on your organization's part.

Other important supports for 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 (see Section 3, Accompanying Documents).

Provide appropriate reference materials and supporting terminology management to ensure consistency and high quality. Ensure that the translator creates a glossary of common technical terms that may be repeated in subsequent translation work.

Finally, create a maintenance plan for the translated materials. Plan to update translated materials when the originals are updated.

3. Accompanying Documents

The 12 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. With the exception of *Best Practices for Designing with Adaptation in Mind*, these customizable templates can be adapted to fit the needs of any translation project.

Best Practices for Designing with Adaptation in Mind

This list of strategies can aid in creating training materials designed to facilitate translation. This document will be most useful to writers or instructional designers developing content, or those tasked with adapting content for translation.

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.

Sample 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 presupposed 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 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 this document to create guidelines for translators that 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 this document to create guidelines for editors that suit your specific needs.

When editing, please follow these general guidelines:

- Read the entire translated text 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 this document to create guidelines for proofreaders that 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), punctuation, subscript/superscript, proper accents and special symbols are correct.
- 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 this document to create guidelines for SMEs that suit your specific needs.

A) When editing, please follow these general guidelines:

- Read the entire translated text 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), punctuation, subscript/superscript, proper accents and special symbols are correct.
- 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 document to create a checklist for translators that suits 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 document to create a checklist for editors that suits your specific needs.

Editor's Name _____

Edit finalized on: _____

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

- Read the entire translated text 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 document to create a checklist for proofreaders that suits 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), punctuation, subscript/superscript, proper accents and special symbols are correct.
- 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 document to create a checklist for SMEs that suits 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 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), punctuation, subscript/superscript, proper accents and special symbols are correct.
- 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.