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Introduction

This section discusses tools that support survey translation, including:

- Standard reference sources:
  - Dictionaries, thesauri, and other hardcopy reference materials
  - Internet and Web-based reference materials
- Standard aids:
  - Checklists
  - Listservs and newsgroups
- Standard translator procedures, such as consistency procedures
- Templates for the translation process and translation output
- Technological support, such as translator software:
  - Translation Memory (TM)
  - Terminology and Alignment tools
  - Concordances
  - Tools supporting the entire translation workflow
- A description of various translation tools (see Appendix A).

Increasingly, large-scale international survey translation efforts for multinational, multicultural, or multiregional sur which we refer to as '3MC' surveys, combine source document production with that of translated versions. The sour then entered into a content management system which anticipates the needs and documentation of later production s other languages . In order to be more inclusive, the guidelines following do not assume such a system; they do, how include consideration of the technological components that would be available in an integrated document productio management system .

Tools and aids for translation can be provided by the translation project coordinator or can be a normal part of a tran own toolkit. Who provides what may vary by project. A project might, for example, require translators to use projec specific software to produce translations, as is the case with the Survey on Health, Ageing and Retirement in Europ (SHARE) . Translation aids can also be developed using Translation: Overview, Appendix A to help translators iden common missteps.

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Guidelines

1. Identify relevant materials and tools; provide them to translators; and instruct, as necessary, translators a translation team members on their use.

Rationale

The more relevant the information and support that competent translators receive, the better they can meet the needs project. Other translation team members should also know about the tools and materials used in developing the tran Depending on project organization, they will also need to use some of the tools (e.g., templates).

Procedural steps

1.1 Consider the following materials:

1.1.1 The website (intranet and/or Internet) of the survey project, if it provides background information and documentation of the project.

1.1.2 The entire questionnaire, even if only parts of it require translation. This enables translators to:

- See the context in which the parts to be translated belong.
- Plan for consistency.

1.1.3 Any available sections already translated that have been vetted for quality.

- This contributes to consistency.
- Material not yet vetted for quality may also be provided, but must be considered for re-use with great c

1.1.4 A bilingual glossary for any terms or phrases whose translation has already been established.

- This helps to ensure compliance with required translations and promotes consistency.
- It supports the review and copyediting phases.

1.1.5 A style sheet guide, if relevant, detailing how to treat standard components of the source text (e.g., for use of bolding and italics).

1.1.6 Tracking documents that list major recurring elements and their location.

- These can be produced automatically as part of a content management system, and can be created durin development of the source questionnaire. Project coordinators would set the parameters for what shoul included.
- They may also be part of translation software.
- In modestly funded projects, tracking documents can be developed manually.

1.1.7 Quality checklists, created for each country's final copy-editing effort. Include frequent or likely overs the checklist (e.g., "Check the order of answer categories"). As an example, see the European Social Sur (ESS) Translation Quality Checklist .

1.2 Consider translation tools. A distinction should be made between translation software readily available on t market—that is, not specifically designed for questionnaire translation—and tools that are specifically develo survey translation needs. Appendix A describes in detail both types of translation tools.

Lessons learned

1.1 If existing translated material that has not been vetted for quality is made available to translators, coordinat decide whether the translators will be able to assess its quality accurately. These issues may also arise when t access 'parallel texts' (e.g., texts from other surveys) in the target language. These parallel texts might include similar questions, or include translations for standard components such as response scales. Researchers need t aware that existing translations may not be appropriate for their new purposes.

1.2 The purpose of various tools and procedures called for in survey research may not be self-evident to those i in translation production; the translation staff may need to be briefed regarding their purpose and use.

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2. Provide translators and others involved in the translation with documentation tools and specifications and them to use them.

Rationale

Documentation is part of the translation quality assurance and control framework at local and general project levels. Providing thorough documentation of decisions, problems, and adaptations at each step of the translation process gu enhances subsequent steps. Documentation tools and specifications can ensure that each participating unit provides systematic and comparable documentation.

If the project uses a text content management system, translation documentation may be part of the development of source document.

Procedural steps

2.1 Clearly identify what requires translation and what does not.

2.1.1 Some work platforms allow the user to freeze sections that should not be translated.

2.2 Produce translation templates that align source text segments, target text fields, and comments fields (see Translation: Overview, Appendix A).

2.2.1 Questions, instructions, and response scales are examples of obvious source text segments.

2.2.2 Subdivisions in the template, at least to sentence level, are often useful.

2.2.3 A simple MS Word or Excel table, produced manually, may suffice (an example of an Excel-based ten the Translation and Verification Follow-up Form (TVFF), is presented in Translation: Overview, Appenc

2.2.4 Translation software and content management systems may produce templates automatically.

2.3 Develop translation aids using Translation: Overview, Appendix C to help translators identify common mis

2.4 Provide instructions for translators and any other users on how to use the templates and how to document. F example, clearly explain the kinds of information expected in any comments field (see the example of the 'ES Verification Instructions' that also contain a section explaining the use of the TVFF).

2.5 Hold meetings to merge template inputs. Since individual team members fill their templates, this allows the compare options, notes, or comments (see Translation: Overview).

2.6 Pass final output from one phase on in a modified template for the next phase of work.

Lessons learned

2.1 The following issues apply in particular to the manual production of templates:

2.1.1 The manual production of templates, including the source text, is labor-intensive and calls for care. In cases, it may be the only option. As relevant, budget for the time and effort to produce translation templa manually. Involve at least two suitable people with adequate bilingual proficiency and proofreading skill final proofreading effort (one reading out, the other checking).

2.1.2 Remember to check layout and format issues, not just wording.

2.1.3 Working between different source versions of a question and different translated versions within or acı languages can be complicated. Any version control requires a tracking system to identify which element or do differ across versions.

2.1.4 Although, ideally, template production should begin after the source text is finalized, this may not alw feasible. If production of the templates starts prior to source text finalization, a tracking system for versi control of templates is essential to check modifications at either the source or target text levels.

2.1.5 A procedure and protocol for alerting locations or teams to changes in either source documents or tran requirements is needed. For example, in a centrally organized project, the source text may be modified a templates have been sent out to translating locations (countries). Locations need to be able to recognize unambiguously what needs to be changed and then incorporate those changes into their templates (or at l their translations). In the ESS 'alert' system, for example, both the source questionnaire and the translati template (that is, the TVFF) get updated and sent to all participating national teams as soon as an alert (t the announcement of a change in the already finalized source questionnaire) has been issued.

2.1.6 Remember that copy-and-paste mistakes occur frequently. Technology (e.g., use of translation memor or may not make such errors more likely.

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3. Provide translators with appropriate task instructions and briefing.

Rationale

Provision of appropriate briefing and instructions helps translators and other team members understand what is requ them.

Procedural steps

(See Translation: Team.)

Lessons learned

3.1 Provide for adequate training not only on the translation procedures to be followed, but also on the translati templates, and especially tools, to be used. The more complex and demanding these are, the more elaborate th training activities need to be. These can, for instance, consist in webtraining, in-personal training or presentati easy-to-use written training material. As an example, the ESS lays out its translation strategies in its Translati Guidelines (i.e., see), and the translation template (the TVFF) and its use are described in detail in a separate Verification Instructions document (see ESS Round 7 Verification Instructions).

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4. Consider networking translation teams within the project.

Rationale

Consultation within a language family can be helpful for all. Consultation across language families can also be of be since some generic issues are shared by rather diverse languages and cultures. Although research on this is sparse, r work suggests that a reasonably wide range of languages and cultures face similar translation challenges .

Procedural steps

4.1 Decide how collaboration between teams sharing one language or translating into similar language groups i organized.

4.1.1 If it is to be documented, decide on the template and detail required.

4.1.2 Official collaboration and official documentation help to unify practices across and within projects.

4.2 Set up a protocol and schedule for sharing experiences or solutions and documenting these. Procedures desc Translation: Shared Language Harmonization may be useful.

Lessons learned

4.1 The publication of collaborative benefits, procedures, and successful outputs experienced within one transla group (that is, the teams translating into one ‘shared language’) may inspire other groups that have not consid such collaboration. This argues strongly for documentation of work undertaken, even if it is not an official pro requirement.

4.2 Even if the languages they produce translations for differ considerably from one another, researchers may fi numerous common difficulties in translating out of the source language . In general, to the extent possible, an collaboration between national teams/different locations may be useful.

4.3 If researchers fielding in different regional forms of a 'shared' language do not collaborate, many difference versions may result that could otherwise have been avoided (see Translation: Shared Language Harmonizatio

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5. Make tools a deliberate part of the quality assurance and control framework for developing and checking t translated questionnaire. If possible, integrate this development with that of the source questionnaire.

Rationale

Tools make it easier to check that procedures are implemented, and facilitate checking the quality of outputs at vario stages of translation production.

Procedural steps

5.1 Determine the translation production budget and the budget available for tools of various kinds.

5.2 Identify tools of value for the procedures to be undertaken, and identify outlay for each of these. A number are identified in the present section; more are discussed in Appendix A.

5.3 Obtain or create tools to be used for the translation procedures.

5.4 Train those using the tools on their use well in advance; monitor performance as appropriate, and refresh tra needed from time to time.

Lessons learned

5.1 Tools need not be expensive and technologically sophisticated in order to work.

5.2 Some tools will be familiar and seen as standard aids by the translating team, while others may be unfamili briefing and instructions will foster proper and more extensive use of tools.

5.3 It is useful to point out the risks associated with tools as well as their advantages (e.g., 'copy-and-paste' can useful, but can also go wrong).

5.4 Multilingual projects should investigate management systems which manage both source questionnaire development and translation development. An example of an integrated tool for questionnaire translation and workflow is the Translation Management Tool (see Appendix A).

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References

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