How to manage your Translation Projects

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Translation of the French book:
Comment gérer vos projets de traduction
Nancy Matis
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Note of the author:
Some minor changes or additions have been made to the original content, for example adjusting or adding options appearing in the most recent versions of some software programs mentioned. However, most of the references have been left as in the original French paper book.

Disclaimer:
Although the author and the translation team have done their utmost in attempting to achieve complete accuracy of the content in the English version of this book, they assume no responsibility for errors or omissions. The reader should use this information, tailoring its use to their own situation, at their own risk.

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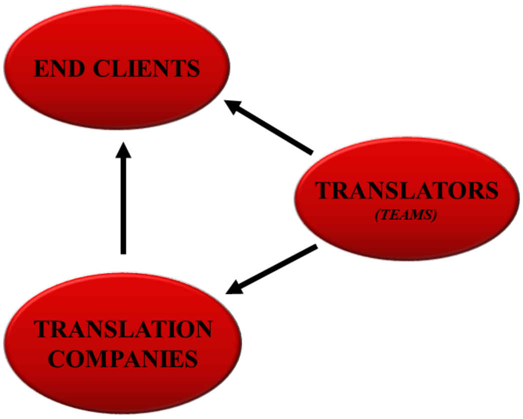
INTRODUCTION

Whether it is the translator, reviser or project manager, each person working on a translation project is responsible for managing their work in one regard or another. Translation is not simply just a question of translating a document; there are a number of other tasks that also need to be carried out – administrative ones being some of them.

The aim of this book is to explore how a translation project is managed at each stage of its life cycle. It has been written essentially from the perspective of a project manager working in a translation company. However, we will also endeavour to place the spotlight somewhat on the management work carried out by a specific participant in the process – the freelance translator.

In approaching the subject from a project life cycle point of view, we will be able to analyse the multiplicity of the tasks that are carried out by a project manager, along with the role of the various participants. It will also enable us to catch a glimpse of different types of translation project, with varying levels of complexity.

Before getting straight to the heart of the matter, it is worth, first of all, spending a little time to portray the three main groups of project participant to whom we will be referring throughout the book. The aim here is not to offer a comprehensive view of the translation market, simply a succinct description of the three main groups of private sector professionals[1].



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[1] We will not really talk about the world of employed translators working in the translation departments of private companies. We also do not intend to cover the translation departments of public or community bodies such as the Directorate-General for Translation of the European Commission, which employs hundreds of translators alone.

More…

III. Identification and base analysis of a translation project

The analysis of a project can be in depth or otherwise, depending on various criteria.

If the project is sent by an existing client and its confirmation is almost guaranteed, a complete analysis will be carried out.

In certain cases, it may be that the client only requires an idea of the costs involved with a potential project and the proposed turnaround time. A cursory analysis can therefore suffice to provide an appropriate response. Sometimes this is not based on actual files sent by the client, instead certain data is provided such as the number of words to be translated, together with the number of pages to be handled for the target languages in question.

This type of quick analysis can also take place at the canvassing stage. Based on certain data, the sales person can quickly provide an estimate to the prospective client.

A prospect does not necessarily imply a cursory analysis. On the contrary, in certain cases, the targeted potential client may be very important for the agency. In the case of a request for quotation[2], comprehensive information on the translation company profile, its working procedures and, of course, on the budgetary proposals is often required. In such situations, an in-depth analysis, accompanied by a proposal folder, can often involve several days of work.

The preliminary analysis stages of a translation project aim to determine:

- The type of project at hand
- Its various components
- The production stages
- The necessary resources

1. Project types

The project type is often communicated by the client themselves; however it is usually very easily identified. Several kinds can be presented and we have opted to divide them into four main groups.

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[2] The English acronyms RFP (Request for Proposal) and RFQ (Request for Quotation) are very commonly used.

A. "Documentation" Projects

These projects have very variable degrees of complexity; the deliverable parts are usually the documents along with any DTP that may or may not be required.

In the more straightforward cases, it will involve text that is presented in a word processing application such as Microsoft Word® [3], without any formatting required, much less illustrations. Sometimes these are very short, as in the contents of an email for example, other times they are more voluminous, as in the case of a contract consisting of several dozen pages. They are generally sent by the client via email, however in certain cases, they can also be transmitted by fax or even sometimes directly on paper.

In the more complex cases, the project will comprise much more technical texts requiring DTP with the help of specially designed programs or perhaps a program such as Microsoft Word® where the advanced formatting and design features are used. These may include brochures outlining the features of a piece of software, including various complex illustrations or even relatively bulky user manuals, detailing processes or the use of a product (IT procedures, printer manuals, medical compendiums, automotive manuals, etc.). Despite the fact that they are generally sent via email, this type of document may also need to be transferred by more complex means such as FTP sites due to their size[4].

B. "Software" Projects

This type of project involves the localisation[5] of a piece of software and any material that accompanies it including user manuals, help files, marketing brochures, licences, CD covers, etc.

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[3] The majority of examples cited in this book will make reference to the Microsoft Office® suite. However, the procedures are equally applicable to other pieces of software and software suites, as in, for example, the free and open productivity suite Open Office.

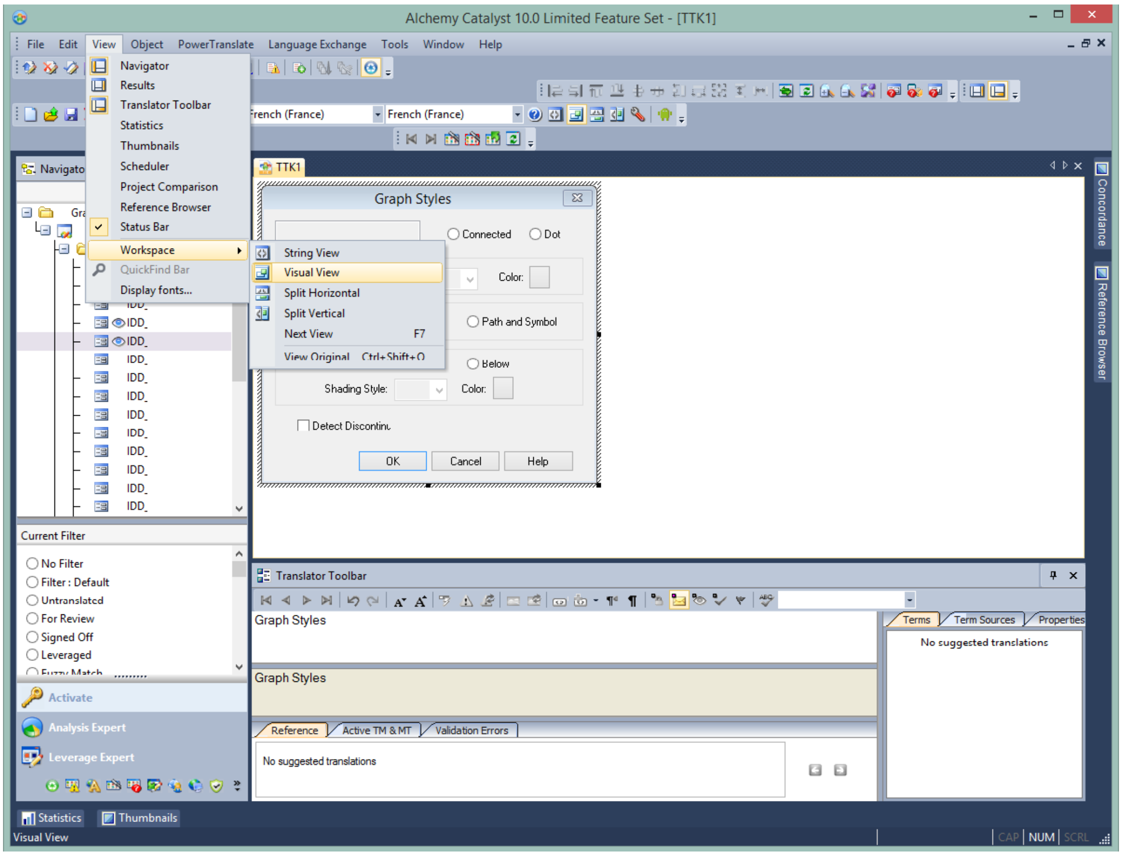
[4] Some messaging systems will not process emails that exceed a given number of megabytes, whereas it is relatively straightforward to send several hundred megabytes via an FTP site (File Transfer Protocol).

[5] The term 'software localisation' covers the translation of the items that appear onscreen, as well as any cultural and technical adaptations required for its comprehension, use and operation in the target language. This involves applying number conventions to currencies (currency in Euros as opposed to Dollars for instance), time and date formats ("3PM, 02/15/2014" converted to "15:00, 15/02/2014" in some target languages), as well as the symbols for all types of local characters, measurements, etc.

Once again, these projects can be very succinct and consist simply of a few interface strings to be translated using a text editor. An example of these is given below:

```
IDD_DIALOG_SPA_AR DIALOGEX 0, 0, 376, 207
STYLE WS_CHILD | WS_CAPTION
CAPTION "Create Array"
FONT 8, "MS Sans Serif", 0, 0, 0x1
BEGIN
   GROUPBOX        "Available Disks",IDC_STATIC,3,16,166,129
   PUSHBUTTON      "Add",IDC_ADD,172,60,29,19
   LTEXT           "Please specify a name:",IDC_STATIC,6,171,129,8
END
```
[6]

It may also be necessary to use specific software localisation tools that allow the interface to be displayed "nearly" as is. Below is an example of the translation environment offered by the software Alchemy CATALYST[7].


Alchemy Catalyst 10.0 Limited Feature Set - [TTK1]
File
Edit
View
Object
PowerTranslate
Language Exchange
Tools
Window
Help
Navigator
Results
Translator Toolbar
Statistics
Thumbnails
Scheduler
Project Comparison
Reference Browser
Status Bar
Workspace
QuickFind Bar
Display fonts...
String View
Visual View
Split Horizontal
Split Vertical
Next View F7
View Original Ctrl+Shift+O
French (France)
French (France)
TTK1
Graph Styles
Connected
Dot
Color:
Path and Symbol
Below
Shading Style:
Color:
Detect Discontinu
OK
Cancel
Help
Concordance
Reference Browser
Current Filter
No Filter
Filter : Default
Untranslated
For Review
Signed Off
Leveraged
Fuzzy Match
Activate
Analysis Expert
Leverage Expert
Translator Toolbar
Graph Styles
Graph Styles
Terms
Term Sources
Properties
No suggested translations
Reference
Active TM & MT
Validation Errors
No suggested translations
Statistics
Thumbnails
Visual View
CAP
NUM
SCRL

---

[6] Only the strings "Create Array", "Available Disks", "Add" and "Please specify a name" have to be translated in this extract. The rest consists of the software code and must not be changed by the translator.

[7] See: http://www.alchemysoftware.ie/products/alchemy_catalyst.html

More…

IV. Producing a quotation

In order to be able to produce a quotation, it is important first of all to have an understanding of the project components and the various stages required to complete it. The volumes per component for the various tasks to be carried out then have to be ascertained along with the price to apply to each.

1. Volumes

In general, we try to use units that are most easily quantified. These units are directly linked to the production tasks in question and we will explore four different unit types below: words, pages, illustrations and hours.

A. Linguistic tasks

The volume units that can be used for a text to be translated or revised are the character, word, line or page. The most commonly used unit for pricing today seems to be the word. In point of fact, whether we are dealing with documents, online help, software, a website or multimedia animations, it is easier and more accurate to count the words to be translated than the other units cited above. Moreover, the majority of computer assisted translation tools provide analyses based predominantly on words.

In addition to this, it is also worth noting that in the main, the word counts are carried out on source words as opposed to the post-translation target words. Some translation companies who do not have these tools sometimes still provide quotations based on the target word count. In this case, they use expansion ratios to enable them to estimate the number of target words from the actual number of source words contained in the source text. For example, it is fair to say that a text translated into French will have around 20% more words than the English source text.

Although characters, lines and pages are becoming increasingly less common as units for quantifying a text to be translated, they might still be used for some quotations. In general, a line is considered to consist of 55 to 60 characters (depending on whether spaces are included or not) or eight to ten words. As for pages, they generally contain between 30 and 40 lines or between 250 and 400 words.

Finally, we would also like to mention glossary work. In certain cases, this is also priced per word, however some agencies prefer to quantify the work based on the number of glossary entries[8] or even the number of hours of work involved.

When making reference to the translation of a text during the course of this book, we will always be quantifying it in terms of source words.

B. DTP

In order to carry out desktop publishing work on documents, it is necessary to know how many pages are to be handled. Their complexity can vary depending on the program used and also the illustrations contained in the documents.

It is very important to make the difference, on the one hand, between the text that requires translation and is quantified in terms of characters, words, lines and pages and, on the other hand, the translated document that requires formatting and desktop publishing. This task is usually priced in accordance with the number of source pages.

C. Illustrations

As part of the quotation process, it is also important to count any illustrations that require work. Illustrations that do not contain any text and do not require any type of work (like colour adaptation for instance) need not be included in the quotation.

It is essential to establish a difference between the various types of illustration that require localisation work however. Firstly, it is worth counting any illustrations containing text that is easily accessible, consisting, for example, of text layers. It is then necessary to identify any illustrations that require touch-up work. Finally, the number of screenshots that may need to be localised will have to be ascertained. These three types of illustration can also have varying degrees of difficulty. A breakdown should therefore be made for each category, differentiating the simple illustrations from complex, or even very complex ones.

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[8] A glossary entry can consist of a single word or several words.

D. Other technical and linguistic tasks

The other production stages listed in the previous section are generally difficult to quantify in terms of units such as words, pages or illustrations. In fact, the compilation of a software program, adaptation of a website, localisation of multimedia animations, their testing or debugging cannot easily be expressed in these units.

They are therefore quoted in hours. However, the calculation of hours necessary for a given task is often problematic and can be subject to discussion. For example, a translation agency may judge that a given task requires 40 hours of work while another estimates that it will require 80. Equally, a client may accept to pay for 20 hours for a certain task whereas another will categorically refuse. It is therefore vital not to exaggerate the number of hours involved when calculating a price for tasks that cannot be quantified in any other way. Under-estimating the number of hours necessary, on the other hand, might eat into the profitability of localisation projects and may even lead to financial losses for the translation company. The finalisation of a quotation must therefore take into account the various factors that can have an influence on the number of hours to invoice, including the difficulty of the task envisaged, the level of quality required by the client, the resources required for the project, etc.

We would also like to highlight the fact that certain tasks are rarely included in the quotation. For example, the various forms of quality assurance incorporated in the production process are often not indicated as such. Clients generally feel that translation companies should perform these production stages in order to guarantee the quality required and that the cost of this should be covered in their overall production costs.

2. Pricing

Most translation companies make price grids available to their project managers. The unit prices included are set in accordance with various criteria, which can also be used by freelance translators to determine their own rates.

More…

- In accordance with the tasks to be carried out. The client then has direct access to the total cost of each task, excluding the project management. They can then decide against one or more tasks. For example, if the localisation of the screenshots below are deleted, the total price is reduced.

Target language	**Components**	**Tasks**	**Quantity**	**Unit**	**Unit Price**	**Price/Task**
Spanish	Online help	Translation	12,896	Rep. & 100%	€0.0567	€730.77
Spanish	Online help	Translation	54,387	Fuzzy	€0.1133	€6,163.86
Spanish	Online help	Translation	57,257	New	€0.1700	€9,733.69
Swedish	Online help	Translation	18,465	Rep. & 100%	€0.0833	€1,538.75
Swedish	Online help	Translation	34,285	Fuzzy	€0.1667	€5,714.17
Swedish	Online help	Translation	71,790	New	€0.2500	€17,947.50
Sub-total for the translation						€41,828.74
Spanish	Online help	Illustrations (standard)	30	Illustrations	€7.0000	€210.00
Swedish	Online help	Illustrations (standard)	30	Illustrations	€10.0000	€300.00
Sub-total for (standard) illustrations						€510.00
Spanish	Online help	Illustrations (screenshots)	25	Screenshots	€6.0000	€150.00
Swedish	Online help	Illustrations (screenshots)	25	Screenshots	€8.0000	€200.00
Sub-total for screenshots						€350.00
Spanish	Online help	Compilation/ testing/debug	76.5	Hours	€40.0000	€3,060.00
Swedish	Online help	Compilation/ testing/debug	76.5	Hours	€45.0000	€3,442.50
Sub-total for compilation/testing/debugging						€6,502.50
Sub-total for the tasks						€49,191.24
PM			5%			€2,459.56
Combined total						**€51,650.80**

C. Example of a quotation for a full software localisation project into a single language

Description

- Translation company: Nancy Matis SPRL
- Client company: MachterSoft & Co
- Product: **SoftALL99**
- Files to be localised:
  - Complete software localisation project with .RC files to be translated
  - Online help in CHM format; HTML source files
  - Documentation in Adobe InDesign® format
- Source language: English
- Target language: French
- Approximate volumes (to be checked through TM analysis on reception of the files):
  - 18,000 new words for the software, no repetitions and no leveraging at all from the TM
  - 70,000 words for the help files, including 20% repetitions
  - 40,000 words for the documentation, including 30% repetitions
  - No illustrations in the help files or the documentation
- Sales prices for this project as extrapolated from the price grid:
  - 0.18 Euro/standard word
  - 11 Euros/page
  - 35 Euros/hour
- Additional comments:
  - With regards to the technical stages linked to the localised software, the client has requested that the translation agency take charge of two testing and two debugging phases. The client will carry out the various compilation stages.
  - A 7.5% fee is payable for project management services.

More…

V. Devising the project schedule

Each project, in principle, comes with a deadline. This may be set by the client and, where necessary, may be adapted depending on the availability of the sub-contractor. Conversely, it may be set by the translation company when the client requests an estimate of the time required to bring the translation project to its conclusion. In this case, the client will either accept the delivery date proposed or will voice any concerns they may have.

1. The purpose of the schedule

It is always desirable to establish a schedule for carrying out the project, whatever the circumstances. It must be drawn up in such a way that the turnaround time is neither too long, nor too short. Clients are indeed at liberty to consider proposals from several translation companies. Therefore, in the case of several proposals of a similar budget, they will generally opt for the closest delivery date. However, in proposing an extremely short, almost unreasonable deadline, not only do you risk scaring the client off (they may question the methods used to carry out a project in three days that should normally take 20), but you also place the entire project in danger of failing. It is then essential, for any project, to ensure that the deadline that has been requested or proposed is met, whilst observing the instructions provided and guaranteeing the level of quality required.

A schedule is usually expressed in terms of working days. The week-ends and holidays must therefore be taken into account in order to be excluded from the calculation. Difficulties may arise when drawing up schedules for multilingual projects covering regions where the non-working days are different. For example, the Christmas period often sees a slowing down in activity in translation companies in the west, whereas in China this occurs more during the period corresponding to the Chinese New Year. This should definitely be checked for each region involved before accepting or proposing a schedule for a multilingual project.

A separate schedule is normally drawn up for each project. Each component forms a subdivision and time necessary for completing the various related production tasks is estimated. The analysis stage affords accurate identification of each project production stage and is therefore an essential part of the process.

2. Metrics

In order to calculate the number of working days for each of the project stages, the productivity averages for each task outlined in the previous section, called “metrics”, can be used. These measurements are averages and may vary from agency to agency and also from one project to another, even one resource to another. The project managers must therefore be fully up to speed on current averages in their company before going ahead with the project scheduling.

For the schedules proposed in this section, we will use again the metrics presented in the section on quotations. We have summarised them here in table form.

More…

C. Example of a schedule for a freelance translator with three projects to work on at the same time

Description

- Let us take the example of a freelance translator working for several translation companies who receives three different offers to work on projects and would like to accept them all. The three projects have French as the source language and English as target language. The translator takes charge solely of the translation stage. The receipt and delivery dates are set by the translation companies. It is then important to check the possibility of carrying out these projects at the same time.

More…

VI. The project launch

Once the project terms and working methods have been accepted by the client, particularly the price and schedule, work can normally begin. In the case of recurrent projects, official approval of the quotation for each new project is not always necessary. In this instance, the translation company is generally partnered with the client via a contract, which may or may not stipulate the rules for proceeding with the project launch stage. The relationship of trust that exists between the translation company and the client saves time from there on in and also allows the production phases to start sooner.

The project launch stage is closely linked to the analysis stage of the project. If the preliminary analysis that has enabled to identify the type of project, its components, the various stages and the resources to be allocated has been carried out in detail, it is perfectly feasible that the work can start on the project immediately.

If, however, this analysis has only been carried out for quickly sending a quotation and a schedule to the client, the project manager must then examine the project in detail to ensure that they have all the elements required for it to go ahead. It is even possible that the project quotation or the schedule has to be modified as a result.

1. Resources

The time that transpires between analysing the resources required for the project and the actual project launch can sometimes be quite long. If, for example, a client requests a quotation for a project but only approves it a month later, the teams that were lined up for the project at the analysis stage may have accepted other work and may therefore no longer be available at the time that the client sends the files.

Moreover, when a translation company analyses a project in order to produce a quotation or schedule, it does not always rally the necessary resources immediately, given the fact that a submitted quotation does not necessarily lead to a project go-ahead.

Also, no advance warning is given by the client for a large number of projects that must be started immediately, which means that the translation company is not always able to contact and “reserve” its suppliers in advance.

More…

VII. Monitoring the project

As a general rule, once the project has been launched, it is not simply a case of waiting until production has finished, hoping that everything has gone to plan. In most cases, even more so when the project is complex and involves a large number of people working on it, project monitoring is essential. The project manager can implement various measures for this purpose.

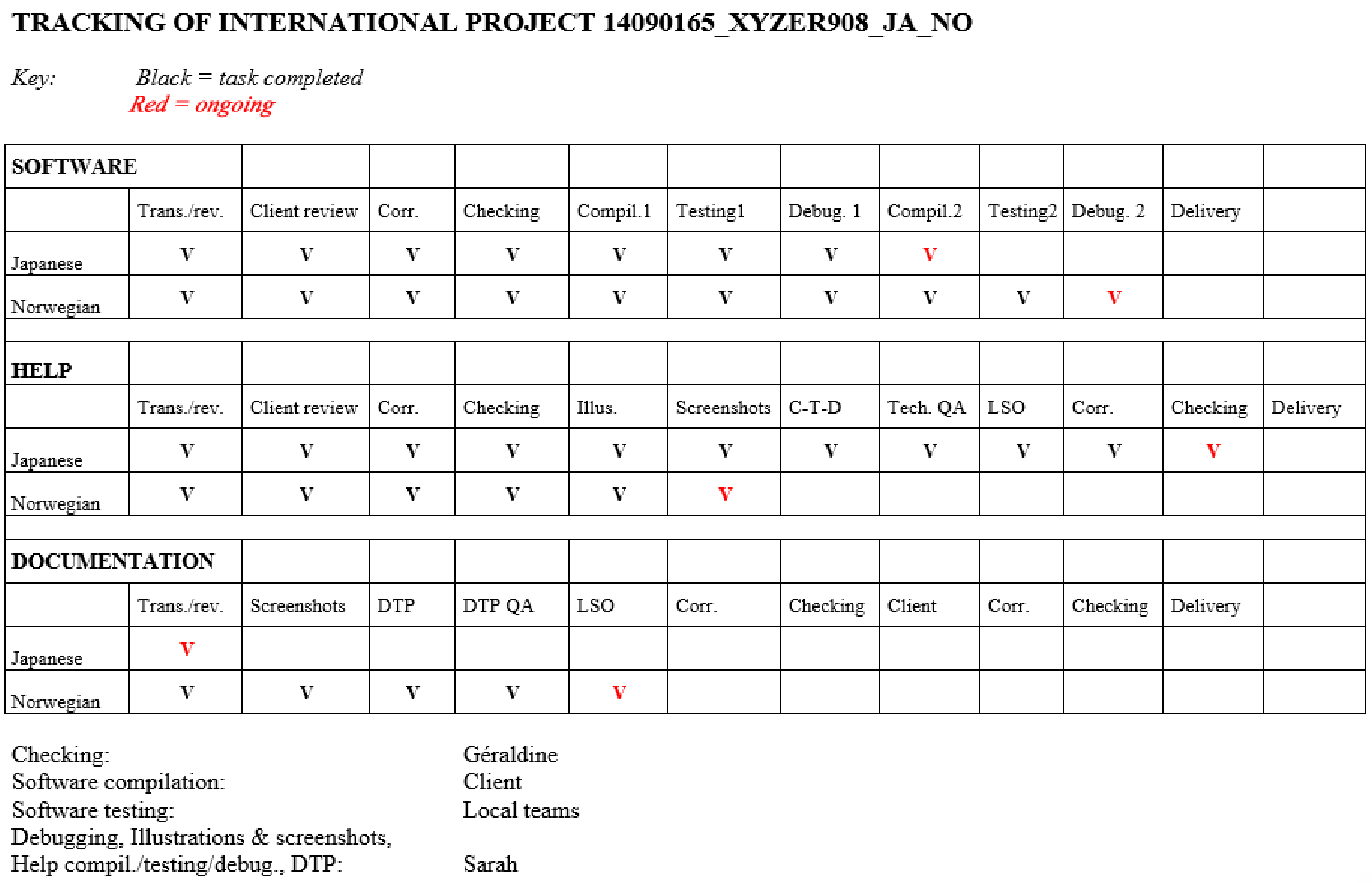
It goes without saying that for a very small project, for example one that concerns a single file to be delivered the next day, or even the same day, it might not be necessary to make use of all of these measures, at least not in the same way as with a large-scale long-term project. Indeed, when project managers are in charge of a large number of “small” projects, they frequently choose to monitor the projects as a group, which enables them to gather together all the information and have a global view of all their projects.

1. Communication

One of the first points to confirm after a project has begun is that everyone involved has confirmed their participation and, if necessary, that they have received the various e-mails and material sent to them. In certain cases, because of IT issues (for example, faults with e-mail or transfer media) or even difficulties with managing e-mails, there is a risk that files to be processed do not arrive at the correct destination and, consequently, are not processed. If the project manager fails to check with each project member that everything is in order, they risk having to face a sizeable problem, namely becoming aware that certain files have never been processed by the designated people and all this at the end of the relevant stage of the project or even at the end of the project itself. Asking everyone to confirm receipt of the various e-mails and files as well as if respecting the requested delivery dates is feasible and checking with members of the project team who have not followed this instruction that this is simply due to an oversight on their part will usually ensure that the project runs according to plan. The project manager could also set up the read receipt feature in their electronic mail program for all e-mails received by recipients. In the absence of confirmation via e-mail, the project manager may also call the various participants from whom no confirmation has been received, to check whether certain tasks need to be reallocated or whether the people concerned have actually begun their work.

More…

Tracking file for an international project consisting of a manual, a help module and a software program



TRACKING OF INTERNATIONAL PROJECT 14090165_XYZER908_JA_NO

Key: *Black = task completed*
Red = ongoing

SOFTWARE												
	Trans./rev.	Client review	Corr.	Checking	Compil.1	Testing1	Debug. 1	Compil.2	Testing2	Debug. 2	Delivery	
Japanese	V	V	V	V	V	V	V	V				
Norwegian	V	V	V	V	V	V	V	V	V	V		
HELP												
	Trans./rev.	Client review	Corr.	Checking	Illus.	Screenshots	C-T-D	Tech. QA	LSO	Corr.	Checking	Delivery
Japanese	V	V	V	V	V	V	V	V	V	V	V	
Norwegian	V	V	V	V	V	V						
DOCUMENTATION												
	Trans./rev.	Screenshots	DTP	DTP QA	LSO	Corr.	Checking	Client	Corr.	Checking	Delivery	
Japanese	V											
Norwegian	V	V	V	V	V							

Checking:	Géraldine
Software compilation:	Client
Software testing:	Local teams
Debugging, Illustrations & screenshots, Help compil./testing/debug., DTP:	Sarah

More…

VIII. Project completion

A project is generally deemed to be complete when the final files are delivered to the end client. However, there are a number of tasks associated with this essential stage, some of which are applicable to each project (for example, invoicing) and others which are only applicable to specific projects (such as compiling a “post-mortem”).

1. Checking the files

Before delivering the final files to the client, the project manager needs to undertake various checks. These will depend on various factors, including the complexity of the project, the people involved, the client’s requirements, the degree of the project manager’s involvement in production stages, their expertise, etc.

In all cases, it will be essential to check that all the files to be delivered are present and that the client’s instructions have been followed. Opening the files will also enable a quick check to be made to ensure that they are the latest version and in the target language. In fact, in their haste to deliver, some project participants can sometimes select the wrong files and send the source files they received at the start of the project, rather than the target files. Revisers can also make the mistake of returning the original translated files received from the project manager a few days before, instead of sending them their revised version. A quick check of the files delivered is therefore essential[9].

Some projects are subject to linguistic and/or technical QA (brief or detailed) before moving into their final phase. These steps are intended to guarantee project quality. However, they are not always scheduled.

If there has been no quality assurance step in a project and if, on receipt of the files, the project manager suspects a quality issue, they may, if time permits, undertake a QA themselves or delegate this task to a qualified participant. This final linguistic or technical check will either serve to reassure the project manager that the files are of a suitable quality or encourage them to make the necessary amendments to these files, so that they satisfy the client’s requirements.

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[9] The date of the files received is still a good indicator. However, it is not always sufficient to ensure that this is the latest version of the document. Some project managers will ask project participants, for example, to always compress their files and add their initials to the end of the compressed file name.

More…