

Document Preparation:

“Prepping a Document”

What is prepping?

In general, prepping means preparing and monitoring a job for and through the production process:

- Translation;
- Revision;
- Proofreading;
- DTP;
- Graphics;
- Signoff and delivery;

to ensure that these individual steps in the production process run as quickly, smoothly and economically as possible from the outset, and that the final product meets the client’s expectations.

More specifically, prepping may be divided into two major phases: prepping and monitoring.

Prepping means preparing the job before it goes to the translator and thence on through the production flow; it involves:

- carefully examining the document;
- spotting potential problems;
- investigating/researching possible solutions;
- providing oral and/or written guidelines to the people who will perform the individual steps in the production process.

Prepping is thus the first step in a quality assurance program.

Why prep?

For roughly 2/3 of its jobs, GSDTI at present relies on freelance translators. These people are (sometimes non-specialists), called upon to translate and edit texts on a wide variety of subjects, from documents, letters, and speeches of the President of the World Bank, to Operational Policies/Bank Procedures for the World Bank and IFC; and reports on institutional products such as lending instruments.

Experience shows that a freelance translator who has worked with us for a number of years and/or has a knack for research and access to specialized dictionaries can produce an

acceptable technical translation. *Prepping here may be minimal.*

When the finished job must be of *publication quality* (flawless in form, content and effect in the target language, with no hint that it is a translation,) the freelance translator needs all the help he or she can get. *Prepping is absolutely critical in these cases. Multilingual jobs* require careful prepping, primarily to ensure *cross-language consistency* in the final product.

Who preps?

There can be many people involved in prepping. Pre-referencing or referencing is part of prepping and is being done by the Terminology Group. They examine the document with an eye toward those terms or subject matter that will pose problems for anyone down the line. He or she is research-oriented and resourceful in preventing such problems.

A major part of the prepping process, however, falls onto the project coordinator. He or she has a good “phoneside” manner; and is able to intelligently and diplomatically discuss points with clients. The prepper is able to formulate clear, succinct definitions, explanations and instructions.

If you are the prepping project coordinator, this is what you do:

Prepping procedure

Basic steps

The prepping procedure consists of seven basic steps:

1. Assemble backup materials
2. Read through document
3. Note potential problems
4. Research Problems
5. Key (if appropriate)
6. Formulate instructions
7. Hold project personnel meeting

Step 1

Assemble backup materials

Backup materials include any materials that relate to the document to be translated and contain information that will help expedite the production process.

Examples of backup are:

- ❑ Previous jobs done by [the World Bank](#) on the same subject, either for the same customer or another customer. Identify these through ISYS and copy the files into the project folder.
- ❑ Ex: Materials provided by client: brochures, photos, glossaries, illustrations, reference materials.

The Project Coordinator usually asks the customer to provide whatever backup s/he has; however, few customers fully understand what we mean by backup or realize how critical it is to us, hence you as the project coordinator may have to elicit more backup from the customer in your contact with him/her.

Step 2

Read through the document

Have at hand:

- ❑ the *document* to be translated;
- ❑ *backup* material, if any;

- the *job sheet*.

Your action:

Read through the document and jobsheet and refer to backup where appropriate, asking yourself the following questions:

- Who wrote this?
 - a professional editor;
 - a task manager;
 - a lawyer, etc.
- To whom is it addressed?
 - Internal World Bank users;
 - Bank clients;
 - Clients of Bank clients, etc.
- What is the category of the document?
 - Legal agreement;
 - Report (Annual, World Development, Poverty Reduction, Strategy, etc.)
 - Correspondence, etc.
- What is the purpose of the document ?
 - Information;
 - Assessment, evaluation
 - Planning, etc.
- What is the quality level required?
 - publication quality;
 - operational quality;
 - for information only.
- In what form will it be delivered?
 - File format;
 - Formatting required?;
 - Email or disk, etc.
- Which translator(s)/editor(s) have been assigned to the project?
 - regular freelance category B;
 - regular freelance category A;
 - in-house translator.

- What are the implications of the time frame on the above?
 - “They want it WHEN?” etc.

Most people know the answers to these questions by osmosis in a few minutes without really concentrating on them. It is a fact, however, that many projects have been handicapped from the start by failure of the translator to be clear on one or more of them. The prepper must be absolutely clear on all these points in order to formulate his or her instructions.

Step 3

Note potential problems

In Step 3 you will be noting items which are likely to slow or frustrate the translator, revisor, proofreader, formatter, typesetter or graphics person in their work, i.e., *potential problems*.

In a perfect world, each of the above persons solves these problems on his or her own initiative. In the real world they often cannot or will not, for a variety of reasons.

As project coordinator, you must examine the document through the eyes of each person involved in the production process, and your first goal is to ensure that each can complete his or her task in a way that makes the job easier for everyone else down the line.

Prepper’s Law No. 1
Get it right the first time!

Translator The translator is your first and main target, the most critical person in the chain. S/he is the first person to work on the job (after you!) and bears primary responsibility *for the quality of its entire content*. What the translator produces sets the pace for everyone else.

Basic parameters:

Assuming that the translation is from English into another language, among the things the translator must know, and you must tell him or her, are:

- is this for publication or for operational purposes?
- What is the target country?
- Is there a particular format to be used?
- Which items, if any, are to be left in English?
- Are conversions of units of measure required?
- How are abbreviations to be handled?
- How are certain proper names pronounced?

Have at hand:

- ❑ a Xerox copy of the document to be translated;
- ❑ the job sheet;
- ❑ backup material;
- ❑ something to write notes on (notebook, blank Word document).

Your action:

- ❑ Circle any conversion, abbreviation and possible English-only items on your xerox of the document;
- ❑ Check the job sheet for any other client requirements or requests;
- ❑ Check the backup material for possible precedents;
- ❑ Jot down any unsolved items to research or bring up when you contact the client during Step 4.

Translator's aids

Unless a translator is a total “pro” with a large library of specialized dictionaries, extraordinary resourcefulness and career-level dedication to the profession, he or she usually needs more help than we have traditionally thought. For example, with regard to:

1. **Alphabetized lists:**

Translation documents often contain alphabetized lists such as:

- Lists of products or services;
- Glossaries;
- Indexes.

2. **Typographic style:**

Foreign languages have their own rules and conventions about such things as punctuation, capitalization and format. Curiously, many translators forget their native language's practices in this regard, and assume that their translation should follow the typographic style of the source (English-language) document. Some examples:

- In titles and headings, most European languages initial-capitalize only the first word and any proper noun thereafter. In U.S. publishing practice this is called “down style” – it is the style of the headings in this booklet. English/American schools teach “up style” i.e., “capitalize every noun, adjective, verb, or any word of four or more letters....”

- French requires a space before and after a colon.
- For the decimal point, most countries use a comma where we use a period and vice versa.
- Different languages have different rules and usage conventions concerning accent marks on capital letters.

Also, again due to the fact that the translation will be handled by many persons unfamiliar with the language, the translator should be instructed never to make end-of-line word breaks (hyphenations.) Outside typesetters always prefer copy without end-of-line hyphenations

3. Modifier strings

This may seem like a surprising item to bring up in a prepping context: The single most common error made by from-English translators (even very fine ones) is misinterpretation of modifier strings. These are strings of adjectives and adjectival nouns which precede one or more nouns.

Examples:

- **Standard size bed pillows:* are these standard size pillows for beds or Pillows for standard-size beds?
- *High volume and high velocity fluid flow conditions:* is *high volume* one item and *high velocity fluid flow conditions* a separate item or are the *fluid flow conditions* characterized by both *high volume* and *high velocity*?

In the Romance languages, where adjectives generally follow their nouns, the precise meanings of such phrases must be clear to the translator. Native speakers of English have a developed sensitivity to modifier strings, at least moreso than most persons to whom English is a second language.

Modifier strings are treacherous, in that even editors who are native speakers of English often fail to catch mistranslations of them unless they are working very slowly and painstakingly

4. Items irrelevant to target readership

These include references to U.S. government regulations, industrial standards, trademarks, legal statements such as disclaimers and warranties, which may not be applicable in the target country.

5. Specialized terminology

Most translations involve words and expressions peculiar to a particular field or world. These range from ephemeral buzzwords (“bottom line,” “we wrote the book on...,” “down the pipeline,” “cost effective”) to high-tech terms (“draw-redraw extrusions,” “cumulative preference share,” “noninvasive pacing capture threshold.”) All but top professional translators need help on these, and a project’s coordinator’s failure to recognize this fact and make appropriate

provisions is extremely risky.

Your action:

1. Make a note of all cases where the above 5 points are relevant, preferably lumping them together under the particular category.
2. Save mention of “alphabetized lists,” “typographic style,” and “modifier strings” for Step 6, “Formulate instructions.” If it is a matter of clarification of the meaning of “modifier strings,” you may list them according to item 3 below.
3. List “items irrelevant to target readership,” “specialized terminology,” and, if appropriate, “modifier strings,” for researching (Step 4.)

Reviser The reviser is defined as a native speaker of the source language who has excellent knowledge of the target language. As such, the project coordinator’s instructions to the translator apply equally to the editor.

Proofreader The proofreader’s task is to check such things as spelling, capitalization, end-of-line breaks (in typeset copy,) etc., the “cosmetics” of the job. He or she is not an editor, i.e., is strictly speaking, not responsible for content, although there have been many cases where the proofreader has in passing caught important items overlooked by both the translator and the editor.

When the translation and editing have been done on paper, the proofreader proofs the final output against the last editorial revision.

When the translation and editing have been done on a word processor screen, the proofreader must also have native-equivalent knowledge of the language, since he or she has no hard draft to compare it with.

Your instructions regarding alphabetized lists and typographic style are addressed equally to the translator, editor and proofreader.

DTP / Graphics **Your responsibilities in the case of jobs to be typeset involve close consultation with the typesetter and graphic artist on matters of speccing and formatting. These are reflected in your instructions to the translator and in your keying (see Step 5.)**

For example, if you note that the space allotted for a phrase, paragraph or section is particularly “tight” on a printed form, and the customer cannot or will not approve the usual remedies for language growth such as smaller pointsize or reduced leading, you indicate this to the translator with a request to make his or her translation as short as possible, or abbreviate if unavoidable.

Step 4**Researching problems**

Having completed Step 3, you now have before you a copy of the document to be translated that is “marked up,” i.e. all its problem items have been flagged; you have circled or highlighted such items as:

- Abbreviations,
- known and unknown
- Items possibly requiring conversion
- Items possibly remaining in English
- Unknown technical terms
- Items useful in U.S. documents but possibly irrelevant in the target country
- Modifier strings
- Items irrelevant to target readership
- Specialized terminology.
- If the document contains specialized, technical terminology, and you are using a freelance translator, then it is safest to implement:

Prepper’s Law No. 2
If you don’t understand it,
chances are your translator
won’t either!

Your action

- Begin your research with resources close at hand:
- Backup material
- Library
- Fellow staff members, in-house staff

When you have exhausted the above, some more radical steps may be required (long-distance calls to embassies, technical institutions, etc.)

Calling the Client

Now it is time to call the client (the “Requester” listed on the job sheet.)It is impossible to give absolute rules concerning a client call, since the personality chemistry of the prepper and the Client is unpredictable. Here are a few general guidelines:

- Check with the Contracts Officer about the advisability of the call and for any information or impressions they have as to the personality, desires, awareness and likely mood of the client.

- Do your homework before you call; if you have been successful and thorough in your research up to the call, you should have general familiarity with his product or service, the abbreviations and terminology typical of the World Bank or his business or industry – at least enough to impress him/her that he’s talking to someone generally knowledgeable and interested in producing an excellent job for him/her.
- Have your questions ready in written form.
- Use basic diplomacy – make your questions brief, polite and clear.
- After the call, immediately review the answers you have jotted down and if, as is usually the case, you have scribbled them in a personal “shorthand,” write them out fully!
- Confirm the results of the phone call with the Client in writing per email.

Step 5 Keying

Keying means marking each part of a document with an identifying number or letter “key,” which the translator carries over into his translation. It is time-consuming, a commonly underestimated cost item. The keys serve several important functions:

- Means of matching all parts of the translation with the corresponding parts of the original. This is especially important to typesetters and graphics people who do not know both languages. It enables them to plan their typographic specifications, their layout, etc.
- Precautionary measure which helps guide the translator, editor and proofreader through complicatedly arranged copy, thus preventing omissions.

Keys should be used as sparingly as possible. If a job is to be typeset and pasted up, too many unnecessary key numbers or letters “get in the way.” Sometimes you have to compromise.

Your action

- Use circled numbers, although if this creates confusion with “built-in: index numbers in the text, letters may be used instead.
- Use an erasable medium (e.g., #2 pencil) – so you can go back after you have missed a number or letter!
- If the job is to be typeset and the original copy uses a great variety of fonts and typesized, it is best to key each word, line or section which initiates a new typographic style: this indicates to the typesetter (who doesn’t understand the text)

where to code in the proper specifications, and automatically distinguishes between titles, headings, hanging indent paragraphs, etc.

- In charts, distinguish between charts where horizontally arranged items are separated by lines, and those that are not. If there are lines, key each “compartment.” If no lines, give one key number to the whole line.
- In illustrations with callouts, key in a clockwise direction, beginning at upper left of the illustration (11 o’clock).

Step 6

Formulate instructions

Your written instructions to translators and editors should be to-the-point, succinct and well organized, moving from the general to the specific. In the case of most jobs, the instructions memo should be no longer than one page.

Begin by checking the instructions given by the Client on the Work sheet. Then add your own instructions based on your research (including the client call.)

All translation “How to” books recommend that the translator read through the entire document so that the or she can answer the basic questions listed under Step 2. In practice, only a few of the most conscientious freelancers do so. This means that the prepper will be doing everybody a favor by giving a short introduction to the job, describing the document’s content and purpose, and stressing the relative requirements in terms of quality, format, etc.

Your action:

Write a memorandum-type header indicating the date, distribution and identification of the job (work order number, client’s name, languages involved).

- Write the brief Introductions mentioned above.
- Write a section entitled Format, in which you list, point by point, all instructions having to deal with typographic style.
- Write a section entitled Terminology, in which you explain the specialized terms you have clarified in your research.

Step 7

Hold project meeting

While this step is often not practicable for smaller jobs, it should be implemented whenever possible, and in the case of major projects (i.e.

Annual Report, World Development Report, etc.) is absolutely essential.

Your action

Call a meeting of the personnel involved in the job, and

- Describe the project.
- Distribute the job to the translators.
- Hold a question-and-answer session.
- If possible, orally restate the high points of your written instructions.

Under particularly (though admittedly rare) “luxury” conditions, it may be possible to invite the customer or his representative to attend the meeting and make a presentation of the product or service dealt with in the project. Such presentations have been known to ignite interest and enthusiasm for the job among personnel involved, as well as impress the customer with GSDTI’s thoroughness.