

## Standard Work Instruction #19

Revision #08

Date last revised: 05/03/2020

### **Title:** Guidelines For Translators

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#### **ISO 17100-2015 Key Terminology:**

Apex Translations, Inc. is conforming to the requirements of the ISO 17100-2015 quality standards. Under this standard, the terms below have the following meanings:

**Translation production** = **Translation + Revision** (i.e. the revision process is seen as an integral part of the production process)

**Bilingual Editing**, also called **Revision** = comparing a translation for compliance with its source text. Accordingly, ISO 17100-2015 also uses the terms “**Bilingual Editor**” and “**Reviser**”.

**Monolingual Editing**, also called **Reviewing or Review** = checking a translation (or some other text) for subject matter and linguistic correctness in the absence of a source text. Accordingly, ISO 17100-2015 also uses the terms “**Monolingual Editor**” and “**Reviewer**”.

**Proofreading** = final checking process of a text prior to printing, publication, or release.

The instructions in this document summarize general guidelines that must be applied by translators according to ISO 17100-2015 when translating documents for Apex.

Please read carefully and completely and follow meticulously. Thanks!

#### **I. Authorization to proceed**

Please **do not start working** on any projects until you receive an e-mail from us that explicitly states, “Please proceed”, or “Please proceed with this project.” No other wording shall be construed as a legally binding go-ahead from Apex. Without our explicit written go-ahead, you do not have a mandate to proceed with any work, and we cannot pay you if you perform work without a mandate.

#### **II. Communication**

Do not delay your response to our e-mail inquiries. We are often under tight deadlines and we may have to re-assign a project to another translator if we do not receive a timely response from you.

Read your Project Manager's assignment message carefully and follow all instructions provided.

If you have a question or if you feel something needs clarification, ask your Project Manager BEFORE you start translating.

### **III. File naming convention**

Our file names typically have the following ten elements:

1. The Project Number (five digits generated by our Sales DB)
2. The Project Manager Acronym (two capital letters standing for the Project Manager's first letter of his/her first and last name)
3. The File Number (if more than one file; two digits when < 100 files; three digits when > 100 files)
4. The Source Language Acronym (three capital letters or more based on our list of language acronyms)
5. The number "2" (meaning "to" as in "from English **to** German")
6. Target Language Acronym (three capital letters or more based on our list of language acronyms)
7. Translator Acronym Placeholder or Translator Acronym (The placeholder is always "NNNN". The acronym consists of four capital letters representing the first two letters of the translators first and last name.)
8. Reviser Acronym (the acronym consists of four capital letters representing the first two letters of the translators first and last name.)
9. Client File Name (must be preserved as part of our own file name)
10. The File Type Suffix (like .doc, .docx, .pdf etc.)

These elements are all linked by "\_" (underscores). File names should contain only one dot: the one preceding the file type suffix. Do not use hyphens or multiple dots in Apex file names. Multiple dots in file names are often interpreted by anti-virus programs as executable files and thus as virus-suspect and are disabled or eliminated when found as email attachments.

When creating the file name for the target document, the translator should replace the translator acronym placeholder (NNNN) with his/her four-letter translator acronym (all capital letters). Your four-letter translator acronym comprises the first two letters of your first name followed by the first two letters of your last name. Also, delete the Source Language Acronym and the "2" from the file name but leave the target language acronym in place.

As an example, assuming that the project number is "33525", the source file is a .doc document, the project manager's name is "Anna Myers", the translation direction is "English to German", the original file name

from the client is “XY Manual”, the file is file “01” of several files, and the translator’s name is “John Doe”, the source file, which the Project Manager would send to the translator, would be named as follows:

**33525\_AM\_01\_ENG2GER\_NNNN\_XYManual.doc**

Translator removes the part in blue

The underlying formula is:

[Project Number]\_[Project Manager Acronym]\_[File Number]\_[Source Language Acronym]\_[Target Language Acronym]\_[Translator Acronym Placeholder]\_[Client file name].[File Type Suffix]

Once the translator has completed the translation and provided the file type suffix would not change, the translator would return the translation to Apex with the following file name:

**33525\_AM\_01\_GER\_JODO\_XYManual.doc**

Translator removes the part in blue

The underlying formula is:

[Project Number]\_[Project Manager Acronym]\_[File Number]\_[Target Language Acronym]\_[Translator Acronym]\_[Client File Name].[File Type Suffix]

This is the file name with which the file arrives at the reviser’s place. Do not make any other changes to the file name. Do not insert any other elements into the file name. Do not remove anything from the file name except as indicated. Do not use spaces or hyphens in file names. File names must contain only one dot: the one preceding the file suffix. Use only underscores in file names to connect file name elements or contract several words into one word without compromising meaning.

#### **IV. Billable word counts**

We typically use the source word-count as the basis for billing. For double-byte character languages such as Japanese, Chinese, Korean, etc., we use an estimated target word count or agree on a flat fee.

If you disagree with our billable word count you must address this issue before accepting a project and/or starting the translation. Otherwise, we must insist that the word count that is captured in our e-mail to you applies.

#### **V. Translation rates**

By accepting work from Apex you are accepting the rate that you submitted to our Translator/Reviser database. Do not change your rate after accepting a project. When a project is awarded to you, we already made a commitment to the client based on the agreed rate and will not be able to accept any subsequent rate changes. If you are unsure what rate is listed in our database, please look it up at <https://www.apex-translations.com/translator/login.php>, or ask your Project Manager.

## **VI. Project deadlines**

Prior to assigning a revision project, Apex and the translator will agree on a delivery date. Once a deadline has been agreed upon, it must be kept. We pass your delivery commitment on to our client who relies on our commitment. If, due to unforeseen circumstances, a deadline cannot be kept, we expect the translator to let Apex know as soon as he/she realizes that the delivery commitment cannot be met.

In doing so, you should not rely solely on e-mail. E-mails are not always reliable. If you do not hear back from the Project Manager, please call him or her; leave a voice mail for the Project Manager if he/she is not available to take your call.

## **VII. File management**

Do not combine files that are separate in the source files and do not separate files that are combined in the source files without explicit instructions from the Project Manager.

## **VIII. Optical Character Recognition (OCR)**

Do not use OCR to convert non-editable documents into MSW documents unless the document you are scanning has a very basic and simple formatting and layout. OCR-ed documents tend to have a chaotic and uncontrollable formatting structure that makes later editing, correcting, and proofing the target document a frustrating and often impossible task.

Please contact your Project Manager if you feel you cannot meet the formatting requirements indicated in the assignment e-mail so your Project Manager can provide alternatives.

## **IX. Insufficient skills**

If you conclude, after analyzing the source document, that you do not feel comfortable and/or confident to provide a professional translation, you must inform the Project Manager before accepting a project.

If you reject a translation project because you feel that you do not have the linguistic skills, or the subject matter is not a good match to your skills, or there is insufficient time to complete it, we fully understand and would not hold this against you. We prefer you being candid about this rather than being told that you can do the translation and then find out too late that you cannot, or that there will be a delay in delivery.

## **X. Special requirements**

Review the special client requirements and other related information such as reference info/files, Q&A, glossaries, info/files, etc. your Project Manager may have provided in the assignment email.

## **XI. General guidelines for translating documents**

### **Terminological consistency**

In technical, legal, business, or medical texts, terminology should be used as consistently and uniformly as possible. For example, if the term “factory” was used first, it should not be called “plant”, or “manufacturing facility” later. If you discover inconsistent terminology in such texts, you may

- (a) use your best judgment and standardize on the terms that in your opinion are best suited within the given domain or context or
- (b) contact the Project Manager and ask what approach you should take.

By contrast, strict terminological standardization may be counterproductive in marketing or advertising copy or in translations of literature, where a measure of terminological variation and flexibility conveys creativity and artistic capabilities.

### **Signatures**

When translating a signed document, e.g. birth certificates, marriage certificates, permits, contracts, or any other type of documents that includes a handwritten signature, DO NOT take screenshots of the signature nor copy and paste the handwritten signature.

Always put **[signature]** or **/s/** in place of the handwritten signature, and under **[signature]** put whatever the source text says - printed name (not to be translated) or the job title, official title, or the word signature - in the target language.

### **Human/Machine Interface (HMI) or Software terms**

If no instructions regarding the translation of HMI/software terms are provided, the default approach should be to leave these terms in the source language and insert their translation in brackets after each term.

### **Formatting**

The source text formatting should be preserved as much as possible.

If the source text is a fully editable electronic document, the translation is expected to preserve its formatting in the target document 100%.

If the source document is not a fully editable electronic document, we expect the translation to emulate its formatting in your translation as much as possible.

The font size and type should be consistent between the source and target document. For example, Bold and Italic text in the source must also be rendered in bold and Italics in the translation provided this is possible in the script used for the target language. The translator is expected to use a snapshot tool to copy images from the source to target document.

### Localization of graphics

Unless notified differently by your Project Manager, all graphics text (editable or non-editable) should be translated. For text that is part of a graphic that is non-editable, we typically use properly formatted text boxes that overlay the source text, or place a bilingual table below the graphic. If you need guidance in terms of how to handle the translation of text inside graphics or charts, please contact your Project Manager.

### Date and number conventions, registered trademarks, product & brand names, unit conversions, etc.

- (1) In general and ***without any further specific instructions***, always apply the date-writing and number-writing conventions of your target language.

Adhere to the target language conventions for numerals and dates while following the formatting of the source document.

Examples:

GER source: 12. Oktober 2019	to	US ENG target: October 12, 2019
GER source: 12.10.2019	to	US ENG target: 10.12.2019
GER source: 12.10.2019	to	UK ENG target: 12.10.2019
GER source: 12. Okt. 2019	to	UK ENG target: 12 Oct 2019

- (2) In some cases, we receive the ***request to apply ISO 8601*** for dates and times. Always refer to the special instructions provided by your PM.

Date and time values are ordered from the largest to smallest unit of time: year, month (or week), day, hour, minute, second, and fraction of second.

Each date and time value has a fixed number of digits that must be padded with leading zeros.

The separator used between date values (year, month, week, and day) is the hyphen, while the colon is used as the separator between time values (hours, minutes, and seconds).

Examples:

the 6th day of the 1st month of the year 2009 may be written as "**2009-01-06**".

"5 April 1981" may be represented as "**1981-04-05**"

ISO 8601 uses the 24-hour-clock system: the *format* is **[hh]:[mm]:[ss]**.

You can find more information about the International Standard 8601 here:

[https://en.wikipedia.org/wiki/ISO\\_8601](https://en.wikipedia.org/wiki/ISO_8601)

Names, product names, and brand names, as well as any term protected by an "R" or "TM" must not be translated unless specific instructions were given to the contrary.

Units are typically not converted unless requested by Apex.

### Gender-neutral language

We honor both societal change regarding inclusive language and good grammar. For translations of legal documents consider the following: In the past, the masculine pronoun was commonly used in the English language to signify the non-specific "he or she". It is now generally accepted that gender-specific language should only be used for references to persons of one gender or the other, for example in provisions that deal with women taking maternity leave. In all other cases, it should be avoided.

The below guidance is based on the US English language. Other countries or languages should be approached in a similar way, using appropriate techniques that meet modern linguistic recommendations of the particular target language.

Gender-specific words should be replaced with gender-neutral words that have the same meaning, e.g. instead of *congressman* use *member of congress* or *congressional representative*. Consider the following techniques to avoid using a gender-specific pronoun.

#### 1) Instead of using a pronoun, repeat the noun:

Instead of:

*If a judge is satisfied that it is reasonable in the circumstances to do so, he must issue a warrant.*

Consider this:

*If a judge is satisfied that it is reasonable in the circumstances to do so, the judge must issue a warrant.*

**2) Delete unnecessary pronouns:**

*"No Guarantor shall transfer any ~~of his~~ assets...."*

**3) Revise the noun and pronoun to make both plural:** The plural pronoun *their* is gender-neutral.\*\*

Instead of:

*A person elected under subsection (1) holds office until another is elected to replace him, at the first quarterly meeting of the next year or until he is removed from office or vacates it under the by-laws of the corporation.*

Consider this:

*The persons elected under subsection (1) hold office until others are elected to replace them, at the first quarterly meeting of the next year or until they are removed from office or vacate it under the by-laws of the corporation.*

\*\* While this technique works well for most other types of documents, it can create a semantic ambiguity in a contract. Do NOT use this technique when translating contracts.

**4) Use the singular "they" (epicene) and its other grammatical forms ("them", "themselves" and "their") to refer to indefinite pronouns and singular nouns.**

Instead of:

*Every taxpayer shall file his tax return no later than April 30 of the year following the year in which he earned the income on which he is paying taxes.*

Consider this:

*Every taxpayer shall file their tax return no later than April 30 of the year following the year in which they earned the income on which they are paying taxes.*

**5) Replace a possessive pronoun with a definite article:**

Instead of:

*If a notice has been requested under paragraph (1)(b), but the Commissioner receives no such notice, the Commissioner shall so advise the complainant in his report under subsection (2).*

Consider this:

*If a notice has been requested under paragraph (1)(b), but the Commissioner does not receive the notice, the Commissioner shall so advise the complainant in the report under subsection (2).*

**6) Combine Genders**

Instead of:

*This Part applies despite any other law or any custom, contract or arrangement, but nothing in this Part affects any rights or benefits of an employee under any law, custom, contract or arrangement that are more favourable to the employee than his rights or benefits under this Part.*

Consider this:

*This Part applies despite any other law or any custom, contract or arrangement, but nothing in this Part affects any rights or benefits of an employee under any law, custom, contract or arrangement that are more favourable to the employee than his or her rights or benefits under this Part.*

However, "he or she" should not be used if an entity is included in the noun that is followed by the pronouns. Avoid the use of "s/he" as a substitute for a proper pronoun.

**7) Use a neutral word or phrase such as "person", "any person", "every person" or "no person":**

Instead of:

*After the term of a member ends, he may carry out the duties of a member in respect of a matter that was referred to the Commission under subsection 26(4) while he was a member.*

Consider this:

*After a person's term as a member ends, the person may carry out any duties of a member in respect of a matter that was referred to the Commission under subsection 26(4) while the person was a member.*

## Table of contents

MS Word documents: A table of contents (TOC) does not typically need to be translated as the content of the TOC is retrieved from the text body, assuming it is properly structured. Please update the TOC to make sure it updates properly to reflect the pagination of the translated content.

Sometimes it is possible that the TOC in the target file displays differently (or not at all) than the TOC in the source file. This could have multiple reasons. If this is the case, or if the TOC in the target document is not functional, please notify your Project Manager.

PDF documents: Translate the TOC as shown in the PDF document and adjust the page numbers to reflect the pagination of the target files, if different than the source files.

## Excel documents

Never remove the source text or replace the source text with the target text when translating Excel files unless you have been instructed by Apex to do so. The translation usually goes into a specially designated column. If no column has been designated as the target-language column, you need to insert your translation into a separate column anyway, usually into a column to the immediate right of the source text column. Please contact your Project Manager in case of questions.

**IMPORTANT:** If you are translating strings in Excel and find that there is not enough context to be sure about the intended meaning of a string, do not guess. Contact your project manager and ask.

## PowerPoint documents:

Check to make sure formatting is approximately the same as in the source document and all text boxes are present and sized to accommodate all text. Resize and/or reformat, as necessary.

## XII. General Terms and Conditions

If you accept a project from Apex you implicitly also accept our general terms and rules. You also accept that you perform work for hire and that you shall not have any copyright to your translation and that that copyright shall be owned by Apex's client, or the original author of the source text exclusively, as the case



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may be.

Additionally, please download our Operating Policies at [https://www.apex-translations.com/documents/apex\\_policies.pdf](https://www.apex-translations.com/documents/apex_policies.pdf). It contains useful and important information that you need to be aware of prior to accepting a translation project from Apex.