

Development of management package for translators in translation management

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Summary

This paper examines some of the problems of day-to-day management and control of work passing through a busy translation office, aspects which are common to both translation companies and internal translation departments, such as maintenance of "client" and "supplier" databases, production of printed papers, statistics and control of "work in progress". It then passes on to consider some of the solutions available.

One specific solution, developed by Peter Barber over a number of years in close collaboration with Bruce Carroll, a computer consultant, is the Electronic Translations Manager (ETM). ETM is a standalone or network computer program written by specialists for specialists, with the aim of minimising the repetition and routine drudgery of job and data handling. In addition to "job" management, ETM manages the "client" and "supplier" databases, and merges data from all areas to provide instant information on the current and historical status of work. These data, when suitably merged, also provide a wealth of statistical reports.

Introduction - generalities and definitions

The first thing I need to do is to set the scene and the ground rules for the terminology I shall be using. Translation is a strange profession in that - apart from any other reasons that may come to your minds - the only thing that we have in common is the actual task of translation. We work with different source and target languages, in different directions, and with different subject fields. So it is with translation managers, people whose job it is to organise the doing of the work, keep track of clients and suppliers and their details, and provide the paperwork and statistical records that are generated by the passage of work through the system.

Some of you work in translation departments, others are in translation companies. It is not important to make a distinction, for we all form part of a processing chain, receiving work from someone, giving it to

someone to do, monitoring the progress of the work and from time to time producing data on what has been happening.

There are various words used to signify the 'work-giver' (and that is one of them, a contrived generic term that betrays its German origin). Many of you, particularly those working within large companies or organisations, will want to talk of 'requesters' (this one comes from French). Some will prefer the term 'customer', but, exercising my right of privilege in choosing my own term, I shall refer to them all as 'clients'.

Similarly, there is a choice of term to identify the person or organisation which carries out the work. In this context, since the work may involve many things other than translation, we shall call them 'suppliers'.

Running very quickly through the sequence of events, therefore, a client comes to you with a request to carry out a 'job', the progress of which is recorded in a 'job history'; the job may consist of a number of parts, which we shall call 'tasks' and within each task are different 'worktypes', carried out by different types of 'supplier', who may be called upon to do their work in 'batches'.

I shall introduce other terms at the appropriate point in the presentation, again with a definition of how I am using it in this context.

What we shall do now is take a closer look at the three essential areas of information that concern us, as translation managers. Incidentally, this term may be new to you, but the concept is not a new one. Some three or four years ago, now, I promoted within the ITI the idea of introducing a new grade of member, the Translation Manager, with an Associate grade for the less-experienced. The criteria for membership were well-defined and, in fact, pretty strict - not an easy entry. The suggestion was enthusiastically endorsed by the Corporate Members of ITI, and by the Admissions Committee and Council, but rejected by, in my opinion, a short-sighted membership at the AGM when it was put to them for approval. However, I digress, and have little enough time for the theme as it is.

We shall look at the sort of detail we need to know about our clients and about our suppliers. We shall then pass on to look at the information needing recording about each job that passes through and, finally, consider some of the ways in which the data can be used, both during and after the event.

The objective of the exercise is to show how readily the operation can be computerised, how much more efficient it can make our work, and I shall look, in very broad terms, at how this might be done. My own program, which is obviously at the back of all this thinking, will have a brief moment of exposure at the end, to show one way of implementing

a solution. Putting it at the end means that I cannot be accused of blatant self-promotion since time will probably run out and I shall have to stop talking before I reach that point. You can always talk to me about it outside, or later.

Clients

The things we need to know about our clients are, of course specific to our needs, and this is where it starts to be a little difficult to generalise. I shall try to make my list as full as possible, without claiming to include everything, and ask you to ignore any items that are not relevant to your own set-up. Also, I give the list in a reasonably logical order of importance, although some people may attach greater importance to certain things than I do; again, I ask you to look at the overall principle rather than argue about which is more important.

My natural sequence is based on that of a translation company; a translation department will have less need to know, for example, the company name of the client, although I know of a number of instances where, because the department also serves a number of subsidiary companies within a large organisation, it is essential to know the client company name for internal records and billing purposes.

A typical record will contain:

Company name, address, telephone number, facsimile number, modem number

Invoice address, if different from the work address

Contact name or names, and job titles, with separate telephone numbers and fax numbers of each contact, if they have a direct-dial number or a local fax within their area, as distinct from the main company numbers.

A salesman will normally want to keep a lot of notes about each client, snippets of information that may one day come in useful, or just be good background information (like names of children, hobbies and so on). For the most part, we have no need to keep that sort of detail, but, let us say, a memo field will be useful, for any non-compartmented data.

Most clients will have specific standing instructions about how their work is to be presented, how it is to be sent to them, how many copies, layout, typeface, and maybe even specific vocabulary.

Some clients negotiate or are offered special rates; this needs to be noted, in order to be consistent and also to avoid loss of goodwill through failing to observe agreed rates.

This is all we generally need to record about our clients. However, there is one other aspect worth building into the record, and that is a history of work done for any given client; done or being done, so that you can go to the client record and find out what work is in hand for them, or identify work done in the past in case there is a need to refer back at some future date.

Apart from the recently introduced need to know the client's VAT number, but only if you are dealing with clients located in another EEC country, only more two things need to be incorporated to make the record complete:

A unique ID number, to eliminate any problems of identity - no computer-based system could hope to provide meaningful data without a unique record identity;

The date of last update, or when the record was created; apart from knowing how old the record is, it is also very useful in keeping track of price changes.

Let us now move quickly on to Suppliers.

Suppliers

Not surprisingly, much of the information needed for clients applies also to suppliers:

Company name (not always relevant, although many individual freelance translators also have a business name)

Supplier's name, address, telephone, fax and modem numbers

What do they do? - are they translators, typesetters, couriers, and so on

What equipment do they have, in particular, details of their office hardware - PC or not, what size diskettes, what software (and also what version), whether they have a fax or modem, the type of printer. There may be other items of specific interest, but these are the main ones.

What is their normal target language (definition: the language into which they normally work. I refuse to get involved in debate over whether we should consider mother tongue or language of habitual use in this context - it is an argument worthy of 20 minutes at least, on its own account).

Source language(s) - from which they normally work, preferably with some indication of level of competence

Subject fields. This will be highly specific to your own operation, since you will not be interested in suppliers (meaning, for the most part, translators and, possibly, interpreters) and you will almost certainly have

your own subject list.

We shall need the usual comment area for all the useful bits of information we gather, or notes about our suppliers. Bear in mind, however, the need to register the existence of your database. In the UK, this has to be done with the Data Protection Registrar, and anybody listed in your database has a right to see their entry. Incidentally, prosecutions by the Registrar for failure to register very often come from checking up whether a request for details and forms has been followed by an application.

More important than this, though, are two other areas: we listed 'work done or in hand' under clients, and this is even more important to include for our suppliers

I have deliberately saved the most important - in operational terms - until last, and that is the prices the supplier charges, bearing in mind that there will be a number of subsets of information, depending on the worktype (translation, revision, typesetting, artwork, and so on) and the language or language pair involved; there may be an influence as a result of subject or urgency. It is also important to note the basis (lines, words of source language, computer target language words, etc.) and the currency.

For both supplier and client, it is essential to note the date of the record creation or change, particularly when it comes to rates. As an illustration of how useful this can be, I recall one translator telling me that he was increasing his charges - fair enough, one expects prices to increase periodically, and the amount was not significant or unacceptable in itself ,, until I looked at his record and the history of price increases: he had done the same thing twice in the previous six months, and back-tracked swiftly when I not only told him the dates but the previous and new rates. So, if history is important, do not delete or overwrite such data, but copy it to some form of archive record - the memo field could well be used for this, for example.

So far, I would imagine that there is little over which we might have any difference of opinion. We now pass on to an imaginary situation in which a client places an order with us.

Jobs

Our client sends us a job, let us say it is a typical text to be translated from English into French, Italian, German and Spanish - a regular diet of FIGS, you might say, and a common requirement in the UK.

What do we need to know about it? A series of questions: who? what? why? when? how? and maybe where? or whither?

Who is the client and the client contact - together with the details of name, address and all the details we noted when looking at the client, earlier.

In our system, this is when we first use our unique references to identify and create the particular job: client order number, our job number, client and supplier IDs.

What is the job - describe the requirement, in this case a text into four languages, maybe a brochure for publication, with translation and typesetting. It may well have special conditions attached, like a type specification, or instructions to send the typescript to the client's local agents for approval before setting.

We received it today. When is it wanted and how important is that date? It might simply be an agreed timing for no particular need, or it might be as specific as, for example 'not later than 2 p.m. or I shall miss my plane' In any case, bearing in mind that we are looking at computerising the whole process, you cannot avoid setting some form of delivery date, even if it is only an arbitrary internal date, otherwise you cannot do anything about progress reporting (how can a job be late in such a circumstance?)

To achieve client's required delivery, we must also consider when the job needs to be sent, and how it must be sent in order to arrive on time.

Finally, at this level, have we quoted a price for doing the job? It is only too easy for this little bit of information to be forgotten at the end of the job, and I have no doubt that many of you have first-hand experience of jobs which have been done and invoiced, totally forgetting the quotation. The result is a certain degree of annoyance on the part of the client, and justifiably so, because it is just as much a term of the contract as any delivery commitment and just as serious a breach as late delivery, although much more easily remedied.

I said 'at this level' because this is all what I would describe as 'top-level information' relating to the job as a whole, and not to any specific part of it.

Task

The next level I defined earlier as a 'task'. In this context, a task may be either one of a number of documents, a series of which comprises a job, or one of a number of languages into which the document which constitutes the job has to be translated. Undoubtedly, there are other

ways of breaking the job process into levels or components, but this is one which has withstood the test of time and of practical application.

In essence, not much detail needs to be controlled at this level, merely the task ID and the language pair or document ID, as applicable. As usual, it is advantageous to be able to put text-form notes or comments.

Worktype

The next level is the interesting one, the worktype, for it is the one where all the detail is entered:

- translation
- checking
- word-processing
- proof-reading
- correction
- checking-off corrections
- type mark-up ready for setting
- typesetting
- proof-reading
- correction of type-setting galleys
- artwork, if appropriate
- courier, assuming, for the example, that a special courier is needed for delivery to client. It may even be that several couriers are needed, for delivery to and collection from the translator and type-setter, all of which need to be logged and accounted for in the final costing and scheduling.

Each worktype has its supplier, who will have all the details we talked about earlier, and all of which, ideally, will be accessible. The prime information needed, however, is that relating to the size and costing of the worktype, and the worktype itself

Batch/date level

Below this, for each worktype, comes the schedule, the record of when the worktype is sent, when it is due, the degree of criticality of the delivery date, the method of return, and, finally, confirmation of the date on which the completed worktype is received.

At this stage, I pause to say that I am sure there will be some among you who are thinking that all this is unnecessary for you, because you only work for departments within your own company and you only ever need to allocate work internally. In response, I would say that it is too detailed for your everyday needs, but this outline still contains all the elements that are essential record-keeping for you, too. As a simple illustration, consider the case of a staff translator who is suddenly away from work. This person is not the tidiest of workers, and so his desk is a mess, files and papers all over the place. It may be that he has some urgent work somewhere in the jumble, but how to find it and how to tell? A set of records kept as I have described would save you even looking

at the desk until you have consulted the schedule - is there anything desperate for today delivery, if so, what is the job number and who is the client? You can then go to the desk and look for a specific file ... or not bother at all if the log shows that there is nothing urgent there. So much surer and so much simpler.

Now look at the job we have just described: one job, into four languages, each of which contains a number of stages - and until you sit down and analyse just how many steps there are in a job, you do not realise the complexity of the operation. If only we could all get our clients to understand that you don't just pass something through your translator - if you do think that, then surely you deserve what comes out the other end, for that is what you are likely to get!

Some of those stages can be ignored, as they are loops, an interworking between two suppliers until, in flowchart terms, the work passes on to the next stage. Nonetheless, there will still be somewhere in the region of 20 - 30 different suppliers and worktypes active in the course of the one job. Then add, just for the sake of realism, the fact that no progress operation is likely to have only one job in hand at any given time. Highly reminiscent of the circus act in which the artiste keeps 24 plates spinning on the top of bamboo poles; it is no good being the juggler who boasts of being able to launch 24 balls into the air at one time - he needs to be able to keep them there, or at least catch them safely on their way down.

One thing becomes of paramount importance in all this, if we are to avoid chaos, and that is that every supplier, every client, every job and every component of every level of every job must without fail have a unique identity. It is simple enough to achieve, but needs a little careful forethought if problems are to be avoided.

Let us now move on to using all these data.

Reports, statistics, paperwork

First, a definition: a report is a collection of data for a specific purpose. In this context, therefore, an address label is a 'report': it brings together and prints the title, initials and surname, together with the company name and address. A purchase order is another form of report, and so too is the job history, a record of all the activity within one job. Other reports may be more general, such as those which log the work in progress, which can be done in several ways:

job number order

due date order

(these two are the most obviously useful ways)

client order (either account number or company name)

or any other order you wish.

If you - or your boss - need to know how many words have been translated this month from, let us say, German into English, it is a matter of seconds to produce a report which is valid and up to date at whatever instant you called for it.

Once the information is in the system, it can be produced and presented in any way you like, as often as you like, and on screen, on paper, or as a file on disk, ready for export to another program.

From practical experience, I can say that the 'reports' function of the computerised management of your Progress function will enable you to make a significant saving in time and increase in your efficiency. First entry of the data is generally more time-consuming, for there is a lot of data for every part of each job, as we have seen. But it can be simplified and speeded up considerably, as you will see in a few minutes, I hope.

A simple illustration should suffice to make the point: consider your present way of doing things, the records you keep of work passing through, and the paperwork you still have to generate. How many times in the course of a job do you write out the job number and the translator - or other supplier - name and address or similar information? Depending on your system, including the statistical reports of work done, probably between 5 and 10 times: job sheet, order form, address label, internal file slip, and so on. Similarly for the client. And each of the many worktypes needs to have the job number and description, plus the specific-to-supplier instructions.

Solving the problems - options

Computers and databases have been around for quite a few years now,

and I am sure that many of you will have spent either your own time or your company's internal resources in devising some form of database application that will do many, if not all, of the things I have been talking about in this presentation. Certainly, it is possible to arrive at some very elegant solutions via this route, subject to limitations on skill, time or money.

There are also a number of project management packages available on the market, such as SuperProject and Project Manager WorkBench. Of those I have seen or about which I have read, they all are intended for project planning at a different level from our needs. They either do not provide certain functions that would be considered essential for our application, or provide them in amongst 50 other functions that would be of no relevance to us at all. I do not mean this in any way disparagingly, for they are excellent programs, but not for our purpose.

For those who are fortunate enough to have in-company computer and programming experts, the problem is apparently easily solved. You give them a specification of what you want, and they produce it. If only! I know of three large organisations that have tried to go this route and their systems are still, let us be kind and say, not fully functional. Others have played about with databases and arrived at a simplified system that covers some aspects ... adequately ... but leaves whole areas of work un(a)dressed, a bare system, you might say.

Truly, it depends on the level of sophistication that will satisfy you. The problem is that ultimate satisfaction is always just around the next corner, after just this one more modification has been added, you know: "wouldn't it be nice if..."

There is no doubt in my mind, after nearly two years of using one, that a computerised progress management system is indispensable, given the volume and complexity of work that we are now having to handle. It is not the size of the job in terms of the number of words, but the number of volumes, documents, languages, suppliers of all sorts, batches - in short, handling the multiplicity of components, all to the same level of detail and competence. This can only be achieved, in my opinion, by electronic means, for only in this way can one provide the detail - without the arduous and extremely time-consuming repetition of essential information. Surely, if you can save effort, it must make you more efficient. To give one last set of statistics, recorded when we were working on the theory of the program, we calculated that for a normal job to go through from receipt to despatch, there were 123 separate operations had to be carried out within the Progress area; of these, for example, 7 involved writing the translator's name, 5 were duplications of the language pair, a similar number of repetitions were needed for the client name, due date and so on, not to mention the paragraphs needed to produce the special instructions for the job. With an electronic

system, all this is done automatically, at the press of a key once the job has been compiled. Need I say more?

It is perhaps interesting to note that the program I use - ETM - embodies all the concepts I have been talking about and, for those of you who are seeking or have already obtained accreditation to ISO 9000 or its national equivalents, the design and operation of the program has been described by a BS5750 lead assessor - a former BSI inspector - as being "materially significant in addressing the requirements of the standard with regard to the establishing and maintaining of essential formal records and procedures". It is central to my own operation and, frankly, it would be impossible for me to cope with my throughput without it.

ETM - history and approach to the problem

The Electronic Translations Manager - ETM - first started as an idea of mine, the first notes on paper dating right back to 1983. The amount of duplicated effort in my office was horrifying, and life was consequently full of panic through workload, potential crises only being averted by the competence of the people doing the job. Computers were back at the level of the dedicated mini-computer word processor, and we were happily using Wordplex equipment. A heady moment when we thrilled to the power and speed of our first XT, compared with some of the things we had seen. And think of the speed of an XT compared with the 486/66 machines we have now, over 100 times as fast.

The idea grew, on paper, with helpful and many critical comments from my staff until 1988, when we decided to write the program and install it. Bruce Carroll and I spent many late and happy hours putting thoughts on paper and testing out ideas and structures. We were still finding that our wishes were ahead of the computing power of the programs and equipment available at the time. Nevertheless, we persevered and had a workable program ready to put on the market at the beginning of 1992. Then out came a new version of Clipper, the program in which ETM had been written, followed shortly after by two upgrade releases of Blinker, the compiler program that enables all the components to interact.

These upgrades between them added delay to the successful introduction of the program, as we decided to rework the program at the same time as it was upgraded with the new Clipper release. I am happy to say that we now have an extremely powerful and stable program, independently tested and approved by specialists. It has been in small-scale daily operation now for nearly two years and, we feel, is capable of meeting the needs of a specialist market, regardless of the size of the

user. It is suitable for translation departments which only work for internal requesters, and which do all, or nearly all, their work in-house; it is equally suitable for the small or large translation company, with its span of clients, internal translators and external freelance resources.

At the moment, it is a DOS program, but it runs daily within Windows and is also stable in OS/2. It works over a network and multiple users can have simultaneous access. We are looking to have a true 'Windows' version operational early in the New Year - the compiler has just recently been released, but we do not know what surprises it will hold for us.

Much of the speed of performance and accuracy of entry is achieved through the extensive use of 'picklists', database lists that are consulted by the program and the operator has to pick an entry from the list before passing on to the next box within the screen. This not only forces an answer, but ensures that it is consistently presented - none of the arbitrary abbreviations for languages that we so often see, all different, and sometimes leading to confusion. Not only confusion, but how can one possibly automate any form of statistical reporting if the very language pairs are not written in such a way as to be picked up by the machine.

Conclusion

My theme here, today, has been to express my thoughts and my conviction about the benefits of electronic translations management, not to promote my program. If I have succeeded in convincing you, my time has been well spent. If, as a result of what I have said, you wish to talk to me about the program, that is a bonus which I hope will be of mutual benefit.

Worktypes

Translation

Checking (revision, editing)

Wordprocessing

Proofreading

Correction

Checkingoff corrections

Type markup ready for setting

Typesetting

Proofreading

Correction of typesetting galleys

Artwork, if appropriate

Courier

...and so on

Database areas

Client

Supplier

Job history

Task

Worktype

Batch

Typical Reports

Address labels

Job history

Purchase order

Telephone list

Work in progress

- By due date

- By client

- By language

- By supplier

Client list (name, telephone/fax numbers, with or without address)

Supplier list, similarly

Language and subject lists
(who does what)

Statistical reports
- content optional

```
┌── ETM - Main Menu ──┐
Main data bases:
[Jobs]
[Clients]
[Suppliers]
[Invoices]

Utilities:

[Lookup lists]
[Data utilities]

Reports:

[Standard reports]
[Report generator]

[Quit ETM program]
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┌── History options ──┐
[Job record]
[Worktype level]
[Date level]
[Invoices]

[Quit to main menu]
```


Job Sheet

ID Ref Client A/c and Co name Order Ref

Job contact Phone & Fax

Received Wanted Send by Urgency Sent Method

Job description

Job special conditions

Client standing instructions

Quotation

Client special rates

Task details

ID	Language from - into	Units	Measure	Method	Notes
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Worktype details

ID	Worktype	Supplier a/c & name	
Notes:	Phone/Fax		
Units	Measure	Rate	Currency
Costs:	Approved	Invoiced	Variation
(ex VAT)			

Batch details

ID	Date:Sent	Due	Urgency	Method	Notes	Received
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Supplier		Status & notes Updated	
A/c No	Company name		
Title	Initials	First name	Last name
Mother tongue		D O B	Qualifications
Address:			Position
Street	-		Equipment:
Town	-		PC -
County	-		WP type -
Post Code	-		Printer -
Country	-		VAT No. -
Telephone 1		Telephone 2	(Y/N) Modem (Y/N)
		Fax	
Source Languages			Target Languages
Subjects:			
Notes:			

Rates (see memo for notes)

Worktype	Language pair	Rate	Cur Unit Min?	Level Updated

Jobs in progress

Job / T / W P	Worktype	Units	Measure	Notes

VAT codes

Code	Rate	Country	Notes

Client details			
ID	Status	Company name	Updated
		VAT	
Address for work		Address for invoice	
-	Building/site	-	
-	Street	-	
-	Town/city	-	
-	County	-	
-	Postcode	-	
-	Country	-	
-	Main <- Phones	-	Special instructions
-	Fax	-	
-	Email	-	Special rates
-	Telex	-	

Client contacts

Title	In	First & Last names	Position	Phone	Fax

Client job summary

ID	Ref Contact	Order reference	Description	Date wanted