
Localization and FrameMaker

by Diane Gaskill

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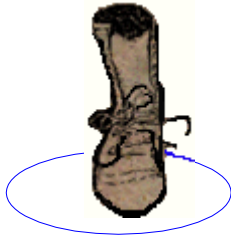
Credits

I could not make this presentation without first giving credit to a few localization experts who helped me put it all together. The following people either made written contributions to this presentation or provided me with information that I have included. My appreciation and heartfelt thanks to all of them.

In alphabetical order:

- Andrew Becraft, TRADOS, Seattle
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She and her husband wrote it.
- Steve Schwedland steve@noonetime.com
- And many other Framers who asked questions on the list causing me to start writing this, one answer at a time.

Introduction



Greetings Fellow Framers,

I'd like to begin my presentation with a little humor. Picture this:

A man is sitting at a table in a restaurant. On the table is a large plate with a very large boot sitting on it. A waiter nearby is walking away from the table. The man is mumbling to himself, "That's the last time I try to order in French."

You've all probably seen a few examples of badly translated signs from other languages into English. In fact there is a book full of them, and they are indeed funny. Here's one example from a sign in a hotel in China: "Please to take advantage of the maid in the morning." But how funny would it be if someone translated your manual into another language, did it incorrectly, and someone got hurt or lost all the data on his computer because the directions were translated wrong?

I've had my manuals and products translated to French, German, Spanish, Dutch, Swedish, Japanese, Korean, and both Traditional and Simplified Chinese for about eight years. The following presentation is based on my experience and that of others. It includes information about localization from other Framers who either are or were employed by localization vendors, and who also have a good deal of localization experience.

What I'm going to present here are the basics of localization, and describe to you, many of the things you can do to ensure that your FrameMaker documents are set up so that they can be easily localized, at the least expense, in the shortest time, and that they are translated correctly as well.

I will also explain a lot about localization vendors, including what to look for in a vendor, how to screen and hire a vendor, and how to work with one. This presentation also includes table that you can use to estimate how much your job will cost, and in addition, a list of localization vendors, with pointers to many more.

Localization

The words localization and translation are used interchangeably. But they are not the same, and it is important to understand the difference.

- **Translation** is the simple changing of words and phrases from one language to another. It does not take into account, the cultural differences between the people and the countries of the source and target languages.
- **Localization** (abbreviated L10N - L <10 letters> N) is more than translation. It not only takes cultural differences into account, but numerous other things as well. These are described below.
- **Internationalization** (I18N) is the process of creating or modifying products and documentation so that it can be localized in a cost-effective and timely manner. Another word for I18N is globalization. I18N applies to the entire product: software, online help, documentation, marketing information, graphical information, and packaging. May also include localized support.

Goals for I18N include:

- Preparation of the product to save time and money during the localization process.
- Product to operate in any locale: file names with double-byte characters, dates and times according to the locale etc.
- Prepare the interface to be language independent: label size, characters set, pictures, sound etc.
- Managing data in others language: template, database, document, etc.

Things to Consider

Dates, for example, are one consideration. In the USA, we write dates as November 2, 2000, or numerically, 11-2-00, with the abbreviation being mm-dd-yy (for month-day-year). But European date format is dd-mm-yy, and in Asia, it's yy-mm-dd. Instead of just translating the date into another language, the vendor also must reformat it to match the local custom. This is why we use the term localization rather than translation. A good localization vendor can advise you on exactly what to check for when preparing your manual for localization. Many vendors have handouts with lists of things to check. Some even have lists on their web sites. Here is a list of things to consider (not necessarily all-inclusive).

- **Country-specific institutions** such as date/time format, social security numbers, references to holidays, telephone and address format, differences in units of measure, and paper sizes.
- **Graphics and graphical symbols** such as money (dollar, pound, lira, yen, deutschmark, etc.), restroom symbols, and hand signals. Some hand symbols which are accepted in one country may be offensive in other countries or have different meanings. Electric power standards and symbols such as wallplugs are different, as are automobile traffic symbols and signs.
- **Legal information** (what legal information is removed from a document, what stays, what gets translated, what stays in English).
- **Text expansion:** number and length of words to say the same thing, sentence structure and punctuation. Include callouts in illustrations in this category.

- **Character sets, fonts, and font metrics**, especially (if double byte AND cross platform, even in PDF files).
- **Terminology**, abbreviations, acronyms, and jargon.
- **Lists and Indexes** (sorting/alphabetizing)
- **Software**, including the GUI and all text that the user sees on the screen.
- Use of **color**.
- Verbal **expressions** and phrases
- **Humor**
- **Message** files (in the product)

Preparing Your Products And Docs for L10N

One of the things that localizers in general strive for is “locale-free” source material. That is, source material which is well written and which uses straightforward phraseology and geographically independent graphics and examples. Do not include little jokes or anecdotes. Don’t use colors or hand signals which might be interpreted as offensive in other cultures, no using a zip code or a social security number as an essential element in an example of a database system.

When translators receive local free material, their work is pretty straightforward, goes quickly, and costs you less money. They use their linguistic skills and communication ability to translate the content. They generally try and follow the same style that the source writer used, and write with the same sort of tone where appropriate. In this case, however, their job is different than that of writers. The material is already there, and they function more as editors than writers.

In addition, there are two circumstances which may affect how they work with the document.

- **Page-for-page translations.** OEMs sometimes request that your documents be localized so that the same material is on the same page in the localized document as it is in the original. The reason for this is because if the translation is not clear, they can then easily find the material in the original document.
- **Maintaining document size.** There are some circumstances where it's important that the overall size of the resulting translated document set (for example) isn't physically larger than the original -- where the manuals need to fit in the same size box for example.

Most of the required copy fitting is done at DTP stage. However, the translator will usually be made aware that copy fitting is important and will take a bit of extra time to accommodate that.

Creating a Locale Free Document

Here some things you can do to create a locale free document:

- Leave about a 3/4 inch margin around the page in the English version so that the vendor can expand the text frame in the translated version(s) if needed. This is equivalent of 15-20% white space. This allows for languages such as French, German, and the Asian languages, which use longer words or more words to say the same thing. In addition, you can also indent the body text as

is done in this document. The vendor only has to move the indent to the left to increase the area for the text. That way, you can (usually) create a page-for-page version of the English manual, which is often desirable.

- Use simple English, short, clear sentences, as little jargon, and as few abbreviations as possible.
- Be consistent in your style: for instance use italics each time you refer to a command in the software. Use your company templates and style guide. Talk to your editors if you have any questions.
- As much as possible, make your sentences concise and explicit. Avoid phrases which can be misinterpreted, for example, Database administration server. Does it mean Database of the administration server or Database administration of the server?
- Be consistent with the software strings when using references.
- Use industry-standard terminology and be consistent with the terminology chosen. for example, “exit” versus “quit”, and “select” versus “click.”
- Find out what legal information should remain in the manual and what should be removed, especially if it does not apply in other countries. Also find out what legal information is to be translated and what should stay in English, even the translated manuals. Some things like the FCC Declaration of Conformity have to remain in English or you have to leave the English in as well as the translated version.
- Check all symbols for meanings in other languages that they don't have in English. For example a green phone = public phone in Japan. Your localization vendor can help you with this.
- Use international symbols when possible so they are understood in any locale. Symbols for Note, Caution, and Warning are examples of places to check.
- Avoid using tabs or spaces to create tables or columnar data.
- Do not embed callouts in any graphic. Put them in the text frame over the graphic. Otherwise, the translation vendor will have to open every graphic and work in it. This will cost you a lot more and take more time as well.
- Do not copy graphics into Frame, especially screen captures of GUI windows, dialog boxes, etc. Import them as referenced graphics. That way, all the vendor has to do is replace the graphic in the directory with a translated one of the same name and it comes out the right size, placement, DPI, etc. automatically. This saves you both time and money, as the vendor will charge you around \$25 for each graphic they have to open in the native format.

To get the translated screens, the vendor provides the translated.RC files to your company's engineers, and they build a localized version of the product. Depending on the agreement with the vendor, you either send the localized product back to the vendor and they capture the localized screens, or you run the localized product and capture them yourself. However, if you choose the latter method, you may need to bring one of the vendor's linguists/translators in house to help you.

Sometimes the vendor can actually build the localized version of the product, but they would have to have the exact build environment and all the source code for the product, and that's not likely to happen. Many engineering departments do not like to send source code outside their company.

- Use 8.3 filenames (8-character names with a 3-letter extension), and keep file naming conventions simple and easy. This is especially important if you are doing cross-platform work. See below for more information regarding this.
- Remember that if you have a glossary, it will need to be sorted for each target language and the index recreated.
- Set up a simple, easy-to-follow directory tree for English, and use that same tree structure for each language. This makes files much easier to keep track of. Remember, both you and the vendor will have to keep track of multiple sets of files. If possible, use a file management system such as Clear Case, Source Safe, or CMS.
- As much as possible, make sure your manuals are completely finished before submitting to the vendor for translation. That means trying to get your engineers to stop making product/code changes at the last minute. You may have to get management to help with this. Fixes in multiple languages are expensive and time-consuming and most engineers don't realize it. And it a lot less work for you at the last minute.

Localizing the Product

If the product includes software, meet with your company's engineers and/or engineering management and explain to them that they should put all text strings into a message catalog or a resource file, which are both text files. Otherwise you have to either extract the text strings from the code or send the code to the localization vendor, something many development engineers won't do. Most vendors can handle finding text strings within code and give it back to you in good shape, but it costs more and takes a lot longer. And the engineers or QA must test the code in each language when they get it back. This is time-consuming and expensive.

Working with GUIs

GUIs (Graphical User Interfaces) present their own sets of problems. These will usually be handled by the development staff. Just as you need to leave extra space for the text in a manual, you also need to leave room for expanded text in the fields in the dialog boxes and message boxes. How much space depends on the language. The engineers can usually design the GUI to accommodate most languages, even though there may seem to be a lot of extra space in the text boxes in the source GUI. They also need to make sure that the field size in the code is large enough to accommodate the extra characters in the localized version.

Cross-platform Issues

Localizing documents and products that are ported to multiple platforms and/or operating systems brings a whole new meaning to the word "issues." This is often not a simple task for either you or the vendor, especially when localizing to Asian languages. Because of the complexity of Asian languages, each character requires

two bytes of information, as opposed to English and most other languages. Hence the name “double-byte” language. Some of the problems I have encountered include:

File Naming. Even though operating systems such as Windows NT, MacOS, and Unix can use long filenames, file names can accidentally be truncated during transit from one platform to another, particularly when being incorrectly packaged in a ZIP file or being FTPed. This is especially true if the names include spaces or special characters which are not correctly interpreted. This is also true if the file names contain characters from languages which are not set on your computer. To help prevent this type of error, keep your filenames short and simple. Use 8.3 filenames if possible (8 characters, a period, and a three-character file extension). While neither MacOS nor Unix need the file extension, it is required for Windows systems, and many localization vendors use these systems for most of their work.

Font Metrics. Font metrics are the numerical values used to define fonts for a specific operating system. When you create a file on a particular platform and then move it to a different platform, the fonts may not look the same on the screen, nor will they print the same. This problem is particularly bothersome when you are using Asian fonts. For example, let’s say you create a Japanese PDF file from FrameMaker on Windows NT and include bookmarks in the file, then move the PDF file to a Unix machine. On the Unix system, the text in the file will display just fine because you embedded the fonts in the PDF. The bookmarks, however, because they access the system fonts, may not display correctly and will probably not link correctly to the destinations inside the file. This is because the font metrics in the bookmarks do not match the font metrics in the system fonts they are trying to use. There are two solutions to this problem: either create the PDF without bookmarks, or distill the .PS file on the Unix machine as well as on the Windows NT machine. The latter method, however, will mean that you have to create and ship two files for every manual. If you distribute all versions of your product and documentation on a single CDROM and are short on space, this can be a real problem.

Single Sourcing

Single sourcing is a whole topic in itself, and could easily be the subject of an entire presentation such as this one. I will just touch on it here, as it can help save time and money in the localization process.

If you have multiple manuals that contain, for example, 90% of the same information in the Preface, you can save some localization fees by using a text inset in Frame. You create a single Frame file that contains the information and import it by reference into the front of each manual, as appropriate. The vendor translates the file once and forgets about it. Frame takes care of the rest.

This is even simpler and less expensive than using translation memories, which I will talk about later in this presentation.

LOCALIZATION VENDORS

I have noticed that every time the subject of translation comes up on the Framers list, several people on the list volunteer the names of the localization vendors they are using and they usually say that their vendor has done a great job for them. While I have no doubt that their vendor(s) did do a good job for them, and I certainly applaud their helpfulness, I would strongly encourage you to screen and hire your own vendor. This does not mean that you need to start from scratch, definitely investigate the vendors that have been recommended as long as they fit your needs. But screen a vendor just the way you would screen a technical writer you might be hiring. Find out if they can do the job YOU need them to do.

Types of Localization Vendors

There are four types of localization vendors. The first two types deal with the location of the vendor.

- **Internal Vendors.** These are not really vendors, but in-house employees who are hired to localize your company's products. While there are advantages to doing this, there are also some significant disadvantages.
- **External Vendors.** These are what we commonly refer to as localization vendors. They are companies whose job it is to manage and produce the localized products and documents for you. While there are some disadvantages to this, there are also some significant advantages. The following table describes some of the pros and cons of internal and external vendors.

Comparison Of Internal Vs. External Vendors

<i>Internal Vendor</i>	<i>External Vendor</i>
Better control	Less control
Faster turnaround	May take longer to complete the job, slower fixes
Easier communication	May have delays in communications, and/or a language barrier
Hard to staff up; teams may be unwieldy	No staffing requirements, smaller in-house teams
Linguists will become product experts	Less product knowledge
Not flexible or scalable	Flexible and scalable
May not keep up with the target languages	In-country linguists always current in target language
Can be very expensive	Reasonable cost; many vendors, much competition for business, buyer's market
	Localization industry is undergoing changes. Many recent mergers.

The other two types of vendors deal with the number of languages they work with.

- **Single Language Vendors (SLV).** These vendors specialize in a specific target language and usually do an excellent job localizing products and documentation from several languages to that language. Included in this category are vendors who specialize in a limited number of related languages. For example, a vendor who specializes in four major Asian languages: Japanese, Traditional Chinese, Simplified Chinese, and Korean.
- **Multi-Language Vendors (MLV).** These vendors localize from many source languages to many target languages. To accomplish this, they employ many linguists in many countries, and usually have large production facilities in strategic cities around the world.

The following table lists some of the pros and cons of Slavs and Mavis.

Comparison Of Single-Language and Multi-Language Vendors

<i>Single Language Vendor</i>	<i>Multi-Language Vendor</i>
Excellent quality for single language	Average to Good quality for many languages
Output can vary by vendor	Consistent output across languages
High management overhead (cost)	Low management overhead (cost)
Difficult and costly selection process	Easier selection process

Choosing a Vendor

Given the information above, how do you decide which type to use? Look at the pros and cons. The answer depends primarily on the type of job you are doing and what your long range plans for localization are. Most companies start out by localizing their products to a small number of languages and increase the number as their sales expand around the world. I think it best to pick a vendor that can satisfy not only your current L10N needs, but will be able to accommodate them as those needs expand.

How Many Vendors to Use?

In addition to the considerations of Internal/External and SLV/MLV, there is also another factor to consider, and that is whether to use one vendor to do the whole project or divide the project among two or more vendors. I have recently had some long discussions with other localization managers regarding whether to use a single vendor or multiple vendors to handle your L10N projects. In my experience, a single, multi-language vendor has worked well; however the products, including software, on line help, and on line docs, were smaller than some of the other managers' products were.

With large projects or products, a single vendor may not be able to handle the whole job, especially if deadlines are tight. One of the possible divisions of the work would be to have one vendor for European languages and another for Asian languages. However, as you might guess, managing localization with multiple vendors is lot more work for you than working with just one vendor.

This is actually a decision that the vendors themselves can help you with. They will be able to tell you whether they can complete a large project within the time constraints you set. if not, you may wish to spread the project among two or more vendors.

How to Screen and Hire a Localization Vendor

As mentioned in other places in this presentation, hiring an L10N vendor is similar to hiring a staff member or contractor. The most important thing to look for is whether they can do the job you have. But there are other considerations as well, some that would not apply to a staff writer. Here is a list of the most typical qualities to examine when screening localization vendors, in alphabetical order:

- Affordability
- Agility
- Chemistry
- Financial Stability
- Flexibility
- Geography
- Quality
- Scalability
- Security
- Technical Competency

Now that you know what to look for, how do you go about getting this information? One of the first places to look is on the vendor's website. Most vendors will publish the languages they work with, a bit about the history of their company, and even a list of the people on the executive staff. But you may have to ask them for other information. With that in mind, here are 20 questions that you can use when screening a localization vendor. These are not necessarily in the order of importance. Use the answers to compare one vendor with another, just as you would when hiring a writer.

- 1 Get company data, officers, etc. When was the company founded?
- 2 What are current revenues?
- 3 How many on staff? project managers, translators ("linguists"), DTP specialists, engineers, programmers, etc.
- 4 What is the location if their main offices?
- 5 What are the locations of their partner offices?
- 6 Do they have an office in your time zone or in an adjacent time zone?
What you are actually looking for here, is the time lag for communications.
NOTE: This one is very important. See below to find out why.
- 7 Do they have offices in the countries where the languages you are interested in are spoken?
- 8 Where are the individual translators located?
- 9 Will they work directly with your in-country offices for proofreading and editing?
- 10 What methods do they use for file transfer? FTP, email, etc.

- 11 What services do they provide? Some services provided by vendors are: Translate, localize consult, edit, format, publish. One of the newer services many vendors provide is evaluating your products (including docs) and advising you on the best ways to improve them to reduce the time and costs of localization.
- 12 What output media can they provide? PDF, hard copy, film, etc.
- 13 Which languages are available from the vendor? How many years experience do they have in the languages you are interested in?
- 14 Which authoring tools do they know? Frame, Word, RoboHelp, Forehelp, Webworks, Illustrator, other DTP tools, etc. Also, which versions/releases of the tools do they use.
- 15 What translation-assist tools do they use? Are they standard or proprietary? Do they use TMs (translation memories / databases). If not, do the tools they use support XTM?
- 16 What file formats can they accept and deliver?
- 17 What are their update procedures?Glossaries, databases, TMs etc.?
- 18 Are they ISO 9000/9002 certified?
- 19 Do they provide localization training to you and your company if needed? At whose cost?
- 20 Do the translators they use have technical experience in products similar to yours? Are they able to quickly learn enough about the technology of your products so that they can localize the docs in a way that our customers can understand and use them. Are they willing to take training classes on your products to bring them up to speed if needed? (This should be provided at no cost.)

Important Considerations

Technology. Make sure that the translators who are doing the work are technically competent in the subject of your documents, as well as Frame, Acrobat, RoboHelp, and whatever other tools you use. You may have to train them in your products or send them to one of your company's training classes. If they don't understand the terms (even though you'll probably be asked to provide a glossary), the translations may be incorrect. I've seen some bad translations because the vendor did not understand anything about the product. This is just the same as if you hired a technical writing contractor who knows nothing about the industry you are in. Remember, they are writing to your customers, just as you are.

If you have time during your product development cycle, send the translated docs to your company's sales offices in the countries where they speak the languages you translated the docs to. Have them check for technical correctness. Do this at least the first time you use any translation vendor. If the terms are not correct, have the sales offices provide the correct translation and send it back to the vendor. You can often have the sales office contact the vendor or translator directly, which will save you time and effort as well.

Geography. It is important to choose a vendor that has an office, preferably an office with a project manager (not just a sales office), located within, say, three time zones of your location. The closer, the better. This is so that at least some of your normal work hours overlap with theirs. This is very important for communication and to help prevent last-minute delays in fixing small errors. If the vendor's office is in Europe and you are in California, for example, there is an eight hour time difference, and it can take a whole workday to get a message there and an answer back. If you are on a very short deadline, you might also want to make sure that the vendor's production facilities are also within three time-zones.

Native Speakers. One thing to note is that all reputable companies use translators who are native speakers, that is, someone who grew up in the country and learned the language to which you are translating your English files, rather than someone who learned English and then the other language. You get much better translations that way, as they not only know the language, but they think in that language, and they are also familiar with local customs and any nuances the language may have. The problem is that the translators are usually located in the countries where the language is spoken, so even though your direct contact is in the US, they still have to contact the translator in the offshore country, and it may take a day or two to implement any changes you might make after the original translation is done.

Comment by Grant Carpenter: No reputable firm uses translators who aren't native speakers. A lot of stateside translation companies use native speakers located in the US. Generally, these folks return home pretty frequently and are generally well-connected and current with what's going on in their native land and, more importantly, they're professional translators. Being in fluent in Spanish doesn't make someone a great translator, just as being fluent in English doesn't make anyone a great technical writer! Moreover, make sure your translation is being performed by a translator who has expert knowledge of the subject matter--especially for technical material. If you're having a maintenance manual for a ball return translated, it might be difficult to find a translator with an expert knowledge of bowling center equipment, but--at a minimum--make sure someone with an engineering background is handling your translation. Dick's account of his experiences with offshore translators and the delay involved with changes is true for a number of firms in the industry--if you look for firms with in-house linguists, however, this isn't as likely to be the case.

Working With The Vendor

Localization is a team effort between your company and the vendor. Contrary to popular belief, you cannot just give the vendor all your files and say, "Here, translate this into xyz languages." The following list describes some of the things you can do to help ensure that the job goes smoothly and efficiently, and help keep costs down.

1. Get detailed quotes before giving them the go-ahead. However, in order to get a meaningful quote, you must first provide the vendor with what is commonly called a localization kit. The kit includes every file that you want localized and a detailed explanation what each file is and how it fits into the documents or products. Be sure it includes information about the file types you will send and expect back, the method of file transmittal (email, FTP, disk), file naming conventions, directory structure, and exactly what deliverables are required (Frame source, PDF, PS, hard copy, and/or film output). A more detailed description of what goes into a localization kit is included a little further on in this presentation.

2. Provide a glossary of any special terms used in your industry to the vendor. The translators are usually technical (many have engineering degrees as well as degrees in linguistics) but they may not know the specific terminology that your company and its customers use. To see how well the vendor can do the job, have them translate the glossary to each language you are interested in and then send the translations to your in-country offices for a quick check. This is also a good way to help get the vendor technically up to speed on your products.

3. Make a localization plan with the vendor. Make sure they know exactly what you need and when. Include costs, schedules, work to be done, deliverables, source files, contact personnel, etc. While some of this information will also be in the vendor's quote, the quote may likely be based somewhat on your plan.

The quotes should include a schedule or timeline. The schedule should include at least the following milestones. Note: I usually allow at least 4 weeks for medium sized jobs, but large jobs can take three to five months.

- Submission date (when you give them the files)
- Translation complete. Not formatted. Just plain text. This is also the "begin first review" date. Either the vendor or you could send the files to your company's in-country offices for review, but it is better to have them work directly with your in-country offices.
- Review back to localization vendor.
- Edits complete, begin DTP.
- End DTP, begin final review by you and/or your offshore sales offices.
- Final review back to vendor.
- Final copy back to you in whatever file format(s) you agreed on.
- Translation source files delivered to you (TMs, etc.)

Localization Kits

One of the best things you can do to ensure that the vendor has everything they need to get the job done efficiently is to assemble an effective localization kit. Most people would agree that the successful communication of project expectations and deliverables significantly impacts the final quality of a localized product. Software engineers, web designers, technical writers, and product managers all have vast amounts of knowledge about their products that can easily get lost in the transfer to the localization vendor. This loss of product knowledge reduces the efficiency of the localization effort by: a) decreasing the accuracy of the vendor's quoting and scheduling process; b) increasing the time spent by project managers and engineers; and c) producing inaccurate deliverables.

A localization kit offers a relatively easy solution to these challenges. Created by the client, the kit documents the project-specific requirements that otherwise may be lost during the transfer of information to the vendor.

You do not need to flatten your document tree in order to send your localization vendor your files. However, in order for all of your cross-references, imported graphics, book files, etc. to work properly once you drop the files to the vendor, you need to send them a well-organized document tree with fully functional files. Naturally, they will have their own network on which they perform their tasks. As you can imagine, they won't be able to mirror the structure of your whole network. If your documents are scattered throughout your network, the vendor can't be expected to do the same.

It's generally a good practice to organize your documents centrally, but it becomes imperative when you have to get the documents localized. Remember, everything they have to do, they have to do X number of times, where X is the number of languages into which your documentation is to be localized. Unless you send them an organized document tree yourself, or pay them up-front to reorganize your documents and get them working on their end, they will have to fix all of the broken cross-references, missing files, and broken graphics for EACH language!

To answer your question from a directly Frame-related perspective, you can partially expedite the process of reorganizing your files in preparation for localization by using Frame's ability to create generated files. In other words, you can add an LOR (List of References) file to each of your BOOK files, and specify Imported Graphics in the Set Up List of References dialog box. This generated file will specify the location of each and every one of your external graphics. You can also add other things to this LOR file, such as External Cross-Refs, enabling you to see where on the network your external cross-references are going.

Tips for Creating Effective Localization Kits

- 1 Standardized Content -- Each person completing a localization kit will have different ideas as to what should be included, what is important, and how to communicate information to the vendor. Set standards for the types of information to include, what level of detail is appropriate, and general presentation guidelines.
- 2 Organization -- Every product component should have its own localization kit or, at least, its own sections of the main localization kit. This may seem like overkill but its obvious that software deliverables, web sites, and marketing collateral have expectations that are quite different from one another.
- 3 Reference External Documents -- Your organization's linguistic and formatting style guidelines do not need to be repeated in the localization kit. Reference the correct version of these documents in the localization kit, along with information on how to access them.
- 4 Client Approval -- All kits should be approved internally prior to handoff to the localization vendor. For example, if a technical writer is compiling the localization kit for printed documentation, the print manager (or print vendor) approves all deliverables listed in the kit.
- 5 INVOLVE VENDOR -- It is beneficial to have the localization vendor review draft versions of the kit so that they have a chance to ask questions and provide feedback before the final project handoff.
- 5 Build A Strong Foundation -- Localization kits are not silver bullets. Assembling a localization kit can be an involved process, and they cannot substitute for regular communication between clients and vendors. However, the benefits far outweigh any negatives. Once designed, a localization kit may be reused for future projects, often with only minor changes. And a localization kit can help avoid the cost, frustration, and delays that result from not clearly stating expectations. A project handoff that is accompanied by a thorough localization kit and the initial source files provides a strong foundation for any localization project.

Suggested Contents Of A Localization Kit

- Every client has unique requirements, timetables, deliverables, and constituencies. As a result, localization kits will vary from company to company, if not from project to project. Nonetheless, a number of components should be included in most kits:
- Product, project, and component names.
- Contact information for the localization project managers, engineers, etc.
- Overview of the product and the target audience.
- Leveraging information (What is the history of the product? Where can the vendor leverage past translations or glossaries?)
- Source and target languages or locales.
- Expectations for review and delivery dates (by component, if necessary).
- Formatting or stylistic guidelines not included in a separate style guide or print specification.
- A handoff checklist. (The localization kit may often be accompanied by all or some of the files to be localized, test plans or specifications, in-country review guidelines or contacts, a product specification, etc.)
- File listings, including an indication of whether or not the files should be translated (this should include support files such as graphics)
- Deliverables, including versions of applications to be used, part numbers, naming conventions, directory structures, and delivery method.
- Quality expectations. (What is acceptable quality for this product? Is this a marketing brochure in which the localized content can be customized in order to sound better in the target market? Or is this a technical manual that must accurately reflect the English text?)
- Specific localization instructions that, depending on the component type, may include information such as:
 - Which terms to translate or leave in the source language. this is often referred to as a DNT (Do Not Translate) list of terms, and will generally include company and product names, copyrighted terms, etc.
 - Which strings are concatenated and how to handle them
 - Which operating systems to test the product on;
 - Which browsers to use
 - Build and resizing instructions and guidelines
 - Test plans or testing guidelines
 - Formatting guidelines
 - Print specifications

The Localization Process

Understanding the translation process is not required to have your project localized, but it can help you set reasonable expectations from the vendor and help determine exactly what you need to provide to them. Here is basically what the vendor does with your files.

- 1 The vendor converts the Frame files to MIF. Then they hide the MIF commands with Trados TagEditor (part of the Trados Translators Workbench set of tools) so that all that is visible on the screen is the source (English) text. Translators Workbench is a tool that works with MS Word and also creates and maintains the Translation Memory databases.

A Translation Memory is a database of sentence-or-smaller pieces of language that help ensure consistency and reduce the likelihood that repetitive pieces of language will be translated twice). TMs are covered in more detail on the next page.

- 2 The translators now use Word or other word processor of their choice to add the translation (text) to the English file. At this point, both English and the target language are visible on the screen.

Note that the Translators Workbench only works with MS Word and TagEditor. Other tools have their own editor that the translators work in. S-Tag files do not have to be translated using Translators Workbench, they are simply marked up RTF files where the text to be translated appears in black and all other markup is displayed in some other color.

- 3 When the internal review and editing are finished, the vendor gives the MIF files to their in-house DTP people, who bring up the MIF file in Frame and do whatever formatting is needed to match the original English formatting. A page-for-page translation is generally possible, but you have to ask for it ahead of time.

Depending on the source and target languages, and the type of content, a page-for-page translation can sometimes be difficult to obtain. If you require this, note that the text from an average English document can expand upwards of 30% in the translation process (table headings, captions and callouts may expand considerably more). You will need to publish your English documentation with this in mind, leaving about 30% white space on each page to allow for the expansion. In many cases the use of acronyms in table headings, captions and callouts will cause severe complications, these acronyms may need to be written out in the translated document.

- 4 The vendor now sends the Frame files back to you for review. If there are problems, notify the vendor and they fix the files and send a new version. In some cases, changed phone numbers, for example, you may be able to fix the files yourself. Be sure to let the vendor know what you found and fixed, to prevent the error from happening on the next go-round. Also send the vendor the fixed files so that they will use the latest ones as a source for the next time you use them.

Translation Memories

Vendors who use the Trados toolset can save the translations in a database called a TM, or Translation Memory. They save both the source and target languages, usually sentence-by-sentence, but other units of text can be used. Each sentence in the target language is linked to its source sentence in English. The translator then queries the database for a particular sentence or text string in English, and if it's there, the database will also return the translation as well. That is how the database is used to assist translating documents similar to ones that have already been translated. For example, they translate a manual and then a help file. When translating the help file, they run the English against the TM, and anything it finds will be translated automatically, saving you a lot of time and money. This method is also used for updates.

Note that some vendors use their own proprietary tools to do the same thing. Be sure to check with the vendor to find out which toolset they use. If they use a proprietary toolset, ask if they have a way to convert their files to Trados. The reason for doing this is that Trados is currently the defacto standard for CAT (Computer Assisted Translation) tools and many vendors use them. There is a conversion standard called XTM but this has not (yet) been adopted by the localization industry as a whole.

Comment by Steve Schwedland: Note that there is extra cost involved in the use of TMs. Also the TMs need to be maintained. The process is not always simple. The translation process consists of three basic steps, translation, edit and proof. TMs are easy to create through the edit stage, where the files are still in the S-Tag format. Once the files are brought back into Frame all changes to the document, from the proof and the In-Country-Review, are done in the Frame document. Those changes must then also be done to the TM. This usually happens at the very end of the project, generally just a few days (or even hours) before the delivery deadline. TM maintenance will generally happen after the localized docs have gone to press. Because of the cost involved with creating and maintaining TMs, you should have an understanding of their purpose before you agree to pay for them.

Comment by Sarah Carroll: Although the first-time costs may be slightly higher than not using a TM, you will find that the savings you gain from recycling repetitive material within and between versions will outweigh the costs in the long run. While some benefit is gained in consistency and re-use within a document, most of the benefit is gained when the document is updated or changed and then retranslated. In other words, you will not get the main advantages of TM use until your next project. If you are translating a document that is fairly static or one that will not need to be updated, then you will probably not want to pay for the TM. However, if you are documenting a product that will be ported to UNIX and MAC and the updated every year, you will certainly want to use a TM and have it cleaned up and ready for the next update. Your situation likely falls somewhere in between, so you will have to look at your needs and make decisions accordingly.

Localization Costs

The cost of localization consists of three major items:

- **Translation** of the words in the file. Costs are defined by cents per word, and the harder the language, the more it costs per word. Costs range from 22 to 35 cents per word. Remember, that is just for the raw translation. The vendor will do a complete wordcount on your documents for you.
- **DTP per page**, usually around \$10 or \$12, to put the file back in Frame format and clean up all the formatting so it looks as much as possible like the original document.
- **Project management**, usually 10% to 15% of the total cost of the job. This can be \$200 or more per day (the number of days depends on the size of the project).

Comment by Sarah Carroll: Regarding the cost of translating the words, there is a consideration whether to use the source words or the translated words as the basis of the per word cost. There is very sound logic behind the practice of paying per source word for translation. First, before you begin a translation project, you need to know how much it's going to cost you. If you are paying per translated word, as opposed to per source word, you must either tell the translator that you will pay x amount per word, and that they may only use a maximum of 2 (for example) translated words per source word. Alternately, if you are translating from a rather verbose language into a more succinct one, you have to tell the translator that you will pay x amount per word, but that they must use only one translated word for each three source words. In both cases, you have to count the words both before and after. I'm sure there are some people who work on that basis, but the majority of us don't. Most of us want the best quality translation possible. We want the translator to use their linguistic skills to adapt the language and content of our source material to their locale. We don't want the translator to have to compromise the translation for the sake of the number of words they are allowed to use.

Examples of Costs

Below is a table of actual localization costs imported from an old quote on a project. The localization is from English to the listed target languages.

IMPORTANT: The information is three years old and prices have gone up, but it will give you a general idea of what the price ranges are. **Check with your vendor for current prices.** Note the differences in translation costs for the different types of sources - doc, help, and sw. Translation costs are in US cents per word. The glossary and engineering per day costs are in US dollars.

<i>Title Key</i>	<i>Meaning</i>
PAGE COMPosition	DTP after the translation is done (US dollars per page).
PS PAGE	Making a postscript file, (US dollars per page)
GRPH EDIT	Editing of callouts, screens, etc. that are embedded in the graphics (US dollars per graphic).
SCREEN CAP	Capturing screens from the localized GUI (US dollars per graphic)
SCREEN PLC	Screen placement, inserting captures in the FM files (US dollars per screen).
ENG PER	Engineering cost per day. This includes compiling and testing translated software. help files, etc.

Cost of Localization

LANGUAGE	GLOS TRANS	DOC TRANS	HELP TRANS	S/W TRANS	PAGE COMP	PS PAGE	GRPH EDIT	SCN CAP	SCN PLC	ENG.PER DAY
FRENCH	388	0.25	0.28	0.31	12	1.7	21	8	8	388
GERMAN	388	0.25	0.28	0.31	12	1.7	21	8	8	388
SPANISH	388	0.21	0.25	0.28	12	1.7	21	8	8	388
ITALIAN	388	0.21	0.25	0.28	12	1.7	21	8	8	388
DUTCH	388	0.27	0.3	0.32	12	1.7	21	8	8	388
DANISH	388	0.27	0.3	0.32	12	1.7	21	8	8	388
NORWEGIAN	388	0.27	0.3	0.32	12	1.7	21	8	8	388
SWEDISH	388	0.27	0.3	0.32	12	1.7	21	8	8	388
FINNISH	388	0.27	0.3	0.32	12	1.7	21	8	8	388
PORT_BR	388	0.21	0.23	0.26	12	1.7	21	8	8	388
PORT_IB	388	0.23	0.26	0.3	12	1.7	21	8	8	388
CZECH	388	0.26	0.28	0.29	12	1.7	21	8	8	388
ESTONIAN	388	0.26	0.28	0.29	12	1.7	21	8	8	388
HUNGARIAN	388	0.26	0.28	0.29	12	1.7	21	8	8	388
LATVIAN	388	0.26	0.28	0.29	12	1.7	21	8	8	388
LITHUANIAN	388	0.26	0.28	0.29	12	1.7	21	8	8	388
POLISH	388	0.26	0.28	0.29	12	1.7	21	8	8	388
RUSSIAN	388	0.26	0.28	0.29	12	1.7	21	8	8	388
SLOVIANIAN	398	0.27	0.29	0.3	12.3	175	21.5	5.2	8.2	398
ARABIC	388	0.28	0.31	0.35	12	2.5	23	9	9	388
GREEK	400	0.27	0.3	0.37	12	2.5	23	9	9	400
HEBREW	550	0.28	0.31	0.35	17	2.5	23	12	12	550
TURKISH	388	0.25	0.28	0.31	12	2.5	23	9	9	569
CHINESE S	388	0.17	0.19	0.21	12	3.3	25	7	7	420
CHINESE T	388	0.19	0.2	0.22	14	3.3	25	10	10	420
INDONESIAN	388	0.3	0.31	0.35	14	3.3	25	10	10	479
JAPANESE	388	0.33	0.37	0.38	20	4	35	12	12	479
KOREAN	388	0.2	0.23	0.25	14	3.3	25	10	10	454
THAI	388	0.3	0.31	0.35	14	3.3	25	10	10	479
VIETNAMESE	388	0.3	0.31	0.35	14	3.3	25	10	10	479

List of Vendors

Here is a short list of localization vendors and contacts that you may find helpful. For a long list of vendors, including the ones below, with links to their web sites, see the Trados web site and look at their customer list.

http://www.trados.com/about/tsp_references.asp

All of the vendors on that list can accept and return FrameMaker files.



Although I have personally used some of the vendors listed below, and they did a good job for me, it is important that you screen the vendors for compatibility with *your* company, *your* products, and *your* project.

Some of the contacts may have changed since I compiled this information (people move around within the localization vendors, just as they do within other companies). Check their websites for current contact information.

In addition, some of the companies have merged with each other. See the notes with each vendor listing. One thing to note for sure. The vendor field is changing rapidly. Vendors are highly competitive and they are beginning to offer extra services, as well as improving their processes, delivery times, and accuracy, just as you are in your company. The web has hundreds of vendors listed, and most of the vendors listed here have web sites.

SDL International, Headquarters in the United Kingdom, many offices worldwide. Recent merger with ITP (International Translation and Publishing)
Telephone +44 (0) 1628 410100 Email: sdlinfo@sdlintl.com
USA contact is Glen Robbins, +1 650 246 2493. Email grobbsins@sdlintl.com.

Alpnet - HQ is in Dallas, TX, USA, many local offices. Contact Heidi Bergvall, hbergvall@alpnet.com

Real Idea - Asian languages only. HQ is in Palo Alto, CA, but they have offices in Japan, China, Taiwan, and Korea. Contact Victor Tan at victor_tan@realidea.com.

Jubilee Tech International, Norfolk, VA 23502, USA. Offices worldwide.
Telephone +1 757 459 4601 E-mail: info@jubilee-tech.com

Simultrans, HQ in Mountain View, California 94043 U.S.A.
Telephone: +1-650-969-3500 Email: info@simultrans.com

ForeignExchange Translations, Inc. One Richmond Square Providence, RI 02906-5139 USA. Phone: +1 401 454 0787

Bowne Global Solutions - headquarters in Los Angeles, CA, USA.
Telephone +1 323-866-1000. Email: info@bowneglobal.com.
Bowne was formed by the merger of five localization vendors.

ISL Group, Inc. formerly called ISL - International Software Localization
 Headquarters in Portland, Oregon, USA. Many offices, Contact Dan Zidan,
 danz@islg.com. Phone +1 503 624 1880

AT&T - Headquarters in Monterey, CA, USA. Many offices.
 Contact Joanne Coleman Email: jcoleman@att.com,
 Telephone 1-408-243-5410 or 1-800-752-6096

Transperfect International, HQ in New York City, NY, USA
 Telephone +1 212 689 5555 Email: newyork@transperfect.com

INT'L.COM Headquarters in San Francisco
 Contact Mark Jen, mjen@dlc.com, phone 1-415-546-6885

Japanese Language Services, Boston, MA.
 Contact Karl Kay, 1-617-338-2211

Berlitz, San Francisco, CA.
 Contact Matt Park, 1-800-628-4808 or 1-415-986-6474

American Translators International, Stanford, CA.
 Contact Alice Peck, 1-800-443-2444 or 1-415-323-2444.
 NOTE: They advertise 110 languages

Princeton Technical Translation Center, East Windsor, NJ.
 Telephone 1-609-443-6770

Softans International Ltd. Dublin, Ireland.
 Contact Michael Gavin, +011-353-1-283-1389. California office, Greco and
 Associates, telephone 415-389-1307

Multilang International, Inc. Provo, UT
 Telephone 1-801-377-7707

Auerbach International, San Francisco, CA.
 Contact Hernan Jaramillo 1-415-284-9946

