Terminology Management for Translation: a Starter Guide COTSOES

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1   Why terminology management?

The main arguments to justify systematic terminology management in a translation/language service are:

- Terminology management reduces time spent on translation and revision and therefore costs.

- It helps translators produce more consistent and higher quality translations.

- It improves communication between your organisation, its staff, partners and other stakeholders.

Failure to manage terminology professionally can prevent your organisation from communicating effectively and damage its image.

Terminology management will help your organisation avoid the duplication of tasks. Translators spend a significant amount of time doing terminological research. Studies suggest that experienced translators invest 20-25% of their time in terminology research, compared with 40-60% for inexperienced translators.[1] Because researching specific terminology for a translation is a time-consuming and labour-intensive task, it makes no sense to repeat this research for new translations. To save time and personnel resources, translators should therefore record the results of their research and other relevant information in a central terminology database (termbase) accessible to them and their colleagues. A well-managed termbase can reduce the time spent on terminology research considerably.

Your clients may have terminological preferences that are not covered in termbanks/ terminology repositories created by other organisations or institutions. Your organisation may therefore want to consider creating a customised collection of terminology entries, such as a terminology database (termbase).

The termbase can be made available not only to translators but also to other members of your organisation who are responsible for writing and editing texts for publication. This gives everyone involved in the production of texts an overview of approved terminology, facilitating a consistent and cost-saving revision process.

Your termbase should only contain terminology that is relevant to your organisation.

Questions to consider:

- What are the potential benefits and aims of terminology management for my organisation?
- Who are the potential users of the terminology?
- What level of support for terminology management can be expected from the management of your organisation?
- Should the termbase allow the management and retrieval of client-specific terminology?

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[1] Guy Champagne, cited in Lynne Bowker, "Terminology and Translation", in Hendrik J. Kockaert, Frieda Steurs, eds., *Handbook of Terminology: Volume 1*, John Benjamins Publishing Company, 2015, p. 311.

2   Required resources

The first step to establish a terminology management system is an evaluation of the resources required. An analysis of the relation between the financial, time and personnel resources to be invested and the expected benefits will be crucial for convincing your decision makers. The resources depend on the organisation of the system (stakeholders involved), the terminology management tool chosen and the user groups.

Some or all of the following stakeholders can play a role in terminology management: managers (to ensure provision of resources), terminologist(s), translators and subject experts (for the validation of entries). All stakeholders need to dedicate time to their terminology tasks.

Who is involved?

Terminologist(s)

Terminology management should be carried out by a single dedicated terminology team. Consider setting up a terminology team/service within your organisation. Ideally there should be at least one full-time terminologist to ensure the quality of the work. This will save time for translators and writers in your organisation. If this is not possible, you may want to consider training translators and assigning them regular hours for terminology work.

> *Questions to consider:*
>
> - Who will be involved in your terminology project?
> - Should a full-time terminologist be hired to develop and run the system, and to set up and feed the termbase?

Translators

Terminology entries can be made by terminologists and/or by translators. Translators seldom have the time to make complete terminology entries with full sources and other terminological information unless terminology work is part of their job description. You should, however, encourage translators with an interest and expertise in terminology work to get involved in terminology work.

> *Questions to consider:*
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> - Will translators be involved in setting up and maintaining the termbase?
> - How can translators free up time to contribute to the termbase?
> - What kind of training will translators (and terminologists) need to contribute effectively to terminology work?

Experts

Subject experts or specialists within and outside your organisation who have an interest in terminological issues can help provide and check new and up-to-date terminology that is often not mentioned in reference works. Experts can also draft definitions and check definitions of concepts to be included in the termbase.

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Note that collaboration with experts outside your language service requires time and personnel resources. This is all more the case if terminology work is outsourced. Contractors need very detailed technical specifications and proper assistance in order to provide high quality terminology entries that can be directly imported into your termbase. Furthermore, outsourcing terminology work entails administrative work to prepare and process contracts as well as costs.

Questions to consider:

- Should subject experts or specialists be involved in terminology work?
- Are subject experts willing to be involved? Do they have time for terminology work? What do they get in return for their contribution?
- If so, what process will be used to consult them?

Which terminology management tool?

A terminological collection can be maintained with existing software (e.g. an Excel spreadsheet). The advantage of this solution is that the software is usually already available. The main disadvantage is that non-dedicated software tools often do not allow proper, concept-based terminology management and cannot be integrated into CAT tools.[2]

Consider the pros and cons of purchasing a dedicated full-feature terminology software tool to store your termbase. Dedicated terminology software tools can be expensive but they are the best tools for proper, concept-based terminology management. Consider the possibility of adding a terminology module to your translation software.

If you purchase an off-the-shelf tool, make sure you can adapt certain functions and fields to your organisation's needs.

The following terminology management tools are current market leaders:

Anylexic – Terminology Management Software

Fusion Terminology

Logiterm

MultiTrans Prism Terminology Management System

SDL Multiterm 2015

TermStar

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[2] CAT = computer-assisted translation: a technology used to support translators by means of a software application.

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Questions to consider:

- What languages should the terminology tool support?
- Do you want to create your own tool or purchase an off-the-shelf tool?
- Do you need a server-based or a web-based tool?
- How compatible is the terminology tool with your IT infrastructure and in particular with your CAT tool if you use one (hardware and software requirements, security)?
- What financial and personnel resources are available to install and maintain the tool?
- How many people should have access to the terminology tool (access rights)?
- Can existing terminology glossaries/entries be imported into the tool?
- Can term entries/terminology glossaries be exported from the tool?

Who are the users?

The scope and the coverage (languages, information included in terminology entries etc.) of the terminology activities and of the termbase depend on the user group they are intended to serve. Translators may need domain-related information in the terminology entries and internal expert writers and editors may need additional linguistic information. Making the termbase accessible to external users requires compliance with specific data and copyright protection regulations.

Questions to consider:

- Which is the target audience of your termbase?
- Will your termbase be for internal use?
- Is a web-based interface needed? Will the termbase be accessible through your organisation's intranet?
- Will it be made available to your clients outside your organisation's language services?

3   Planning and reporting

The project to create a terminology management structure requires approval and a mandate from your organisation's management, which will have to ensure that appropriate resources are made available. You should therefore outline a project plan defining the different stages and setting out (1) the goals of the terminology management project in your organisation; (2) the project target groups; (3) the tools, resources and timetable to accomplish the goals; (4) how the project will be evaluated.

Project phases: a typical project can have five phases: (1) drafting guidlines to define rules for terminology work in the language service and the processes for feeding and maintaining the termbase; (2) setting up the database and defining the roles and rights of individual users; (3) a test phase to identify technical problems and adapt processes if necessary; (4) training translators and other users in handling the terminology tool (e.g. Multiterm); (5) making the database available to users (initially usually the terminologist(s) and translators).

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Once the structure is in place, the terminology work needs to be planned and monitored on a regular basis (e.g. twice a year). The planning can be based on thematic needs, specific translation-related needs or specific user needs. Reporting usually consists of a general (e.g. on training, cooperation with experts) and a termbase-related part.

The termbase should be evaluated in accordance with quantitative indicators (e.g. number of entries created and updated) and qualitative indicators (pertinence of entries, quality of sources and definitions).

Questions to consider:

- What are the project goals? What are the priorities?
- Who is the project manager?
- What are the deadlines for each stage of the project?
- How will the project progress be monitored?
- What process will be established to plan and report on regular terminology work?
- What is the budget for the project?
- How much time will each stakeholder spend on terminology work?

4 Quality assurance

A large number of entries is not in itself an indication of the quality or usefulness of a terminology database. A proper validation process can help ensure the quality of the terminology entries. At the same time validation can be an opportunity to merge possible duplicate entries and to delete poor quality entries.

If possible each terminology entry should comply with previously defined quality standards and be validated by a terminologist in cooperation with a subject expert.

Questions to consider:

- With whom will the terminologist(s) validate the terms?
  - With the translators who initiated the entries?
  - With other stakeholders within your organisation?
  - With internal or external subject area specialists?
- Will the terms be validated by native speakers of the language concerned?
- On which basis should the terms be validated? Tailor-made criteria or external criteria?

5 Technical matters and training

Once the decisions on the structure and the most appropriate tool for your terminology management system have been taken, two additional aspects need to be addressed.

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The first concerns the hosting of your termbase and the provision of technical support, which may have to be provided by a team other than the terminology management team.

The second relates to training and largely depends on the experience of the staff members involved in terminology work. If an experienced full-time terminologist is already working in your organisation, training can be given in-house. Otherwise you may want to consider external options. Many software firms offer courses to train users of their products (mostly online or via webinars). Courses on basic methodological and theoretical aspects of terminology management are organised by terminology organisations such as TermNet (see Further Reading), which provides basic and advanced e-learning terminology management courses as well as a one-week summer course (International Terminology Summer School). Another option is to hire an external terminology expert to provide in-house training.

Questions to consider:

- Where (i.e. on which servers) will the database be stored?
- Who will provide technical support?
- How will you back up your data?
- Who will provide and who will receive technical training and terminology training?
- Will the training be carried out by external trainers?

6   Guidelines for terminology work

Terminology guidelines are important to guarantee a harmonised approach by all stakeholders involved in terminology work. They lay down the methodology for carrying out terminology work in your language service and the processes for feeding and maintaining the termbase. This will ensure that agreed quality standards are met and that terminology entries follow the same data entry and presentation rules.

The guidelines explain the structure of a terminology entry and the content of its various fields, including their status as compulsory (e.g. domain, source) or optional (e.g. context, grammar information).

The guidelines also explain in detail how to create an entry: who is authorised to create entries, who is involved in validating the entry, etc.

Terminology guidelines should be drafted during the first phase of the establishment of a terminology management system. They can be updated whenever processes or terminology rules need to be adapted. They should be used as a basis for assessing the quality of the entries and to validate entries.

Questions to consider:

- What should the guidelines contain?
- Who will write the guidelines?
- Who is the target audience of the guidelines?

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7   Further reading

Many small and large organisations with successful terminology management systems have published guidelines based on their experience. Numerous terminology management guidelines are also available. Applying internationally recognised terminology standards and best practices facilitates terminology work and helps avoid mistakes.

The following publications are useful:

In English:

Bauer, Silvia Cerrella. "Managing terminology projects: Concepts, tools and methods" in Hendrik J. Kockaert, Frieda Steurs, eds. *Handbook of Terminology: Volume 1*, John Benjamins Publishing Company, 2015, pp. 324-340.

Childress, Mark D. "Terminology work saves more time than it costs." *Multilingual*, April/May 2007, pp. 43-46.

Conference of Translation Services of European States (COTSOES). *Recommendations for Terminology Work*, 2nd revised and enlarged Edition. Federal Chancellery, 2002.

IATE Handbook, version 20.02.2015.

Hendrik J. Kockaert, Frieda Steurs, eds. *Handbook of Terminology: Volume 1*, John Benjamins Publishing Company, 2015.

International Standards Organisation. ISO 704: 2009. *Terminology work – Principles and Methods*. Geneva, 2009.

International Standards Organisation. ISO 1087-1:2000. *Terminology work -- Vocabulary -- Part 1: Theory and application*. Geneva, 2000.

International Standards Organisation. ISO 15188: 2001. *Project management guidelines for terminology standardization*. Geneva, 2009.

Public Works and Government Services Canada. Translation Bureau, *Handbook of terminology*, 2001.

Wright, Sue Ellen. *Handbook of Terminology Management*. John Benjamin Publishing Company, 2001.

In German:

Deutscher Terminologie-Tag e.V. (Hrsg.). *Terminologiearbeit: Best Practices 2.0.* Köln, 2014.

Konferenz der Übersetzungsdienste europäischer Staaten (KÜDES). *Empfehlungen für die Terminologiearbeit*. Schweizerische Bundeskanzlei, 2002.

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In French:

Conférence des Services de Traduction des États européens. *Recommendations relatives à la terminologie*. Chancellerie fédérale, 2014.

Travaux publics et Services gouvernementaux Canada, Bureau de la traduction. *Précis de terminologie*, 2001.

Useful links:

International Centre for Terminology (Infoterm):
http://www.infoterm.info/

International Network for Terminology (Termnet):
http://www.termnet.org/