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The four year project (2015-19) is a collaboration between the three leading European Research Infrastructures in the social sciences – the European Social Survey (ESS ERIC), the Survey of Health Ageing and Retirement in Europe (SHARE ERIC) and the Consortium of European Social Science Data Archives (CESSDA AS) – and organisations representing the Generations and Gender Programme (GGP), European Values Study (EVS) and the WageIndicator Survey.

Work focuses on three key areas: Addressing key challenges for cross-national data collection, breaking down barriers between social science infrastructures and embracing the future of the social sciences.

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1. Summary

The Translation Management Tool (TMT) is an online service for supporting questionnaire translation processes for large multilingual surveys, originally developed by CentERdata (University of Tilburg, NL) for SHARE (https://demo.tmt.centerdata.nl/?goto=login). It has been adapted to be usable by projects applying a ‘team’ or ‘committee’ approach or TRAPD (Translation, Review, Adjudication, Pretesting, Documentation) for their questionnaire translations. In 2016 it was tested in ESS round 8 in three countries: this involved the TRA steps (see below) as well as external translation verification by the private service provider cApStAn.

This document presents and discusses the findings from this real-time testing in the European Social Survey (ESS) in its preparations for round 8 in 2016.

The following national teams carried out the real-time testing of the TMT in ESS round 8: Poland (into Polish), Lithuania (into Lithuanian and Russian) and Russia (into Russian). In addition to the findings from these three national teams, this report includes observations from the ESS translation expert (author of this document) as well as of cApStAn, an external service provider of linguistic verification of the questionnaire translations in the ESS.

The purpose of this report is to determine whether the testing of the TMT in ESS round 8 can be considered to have been successful and, if not, draw a list of recommendations for how to make the TMT fit to be used in the ESS in the future.

The primary audiences of this report are the ESS-ERIC team and CentERdata, who are interested in whether and how TMT might be used from ESS round 9 onwards. The findings and recommendations of this testing might then also be of interest to other stakeholders interested in adopting the TMT, in particular other cross-national surveys or institutions/agencies handling multilingual surveys.

The main finding from the report is that the TMT has the potential to be useful for cross-cultural surveys with a rigorous questionnaire translation scheme, such as the ESS; a particular advantage turns out to be the harmonization of different versions, needed for ‘shared languages’ as well as within-country harmonization between more than one language. However, the version of the TMT subject to testing requires some improvements before it can be considered for wider roll out on the ESS; all parties concluded that it was more time-consuming and complicated than the previous, excel-based translation platform and made the translation step more burdensome than before. The ESS team are working with CentERdata to make the tool more user-friendly.
2. Introduction

The Translation Management Tool (TMT) is an online service for supporting questionnaire translation processes for large multilingual surveys, originally developed by CentERdata (University of Tilburg, NL) for SHARE. It has been adapted to be usable by projects applying a ‘team’ or ‘committee’ approach or TRAPD (Translation, Review, Adjudication, Pretesting, Documentation) for their questionnaire translations. In 2016 it was tested in ESS round 8 in three countries: this involved the TRA steps (see below) as well as external translation verification by the private service provider cApStAn.

This document presents and discusses the findings from this real-time testing in the ESS in its preparations for round 8 in 2016.

The following national teams carried out the real-time testing of the TMT in ESS Round 8: Poland (into Polish), Lithuania (into Lithuanian and Russian) and Russia (into Russian).

This means that this testing included several use-cases and needs represented by the variety of ESS participating countries in terms of their linguistic landscape. One national team (Poland) provided a single-language translation (with Polish only used in Poland). The testing included a ‘shared language’, as Russian was used both in Lithuania and Russia. In addition, Lithuania is a multilingual country, using two national languages. All three languages carried out the full TRA steps, that is, two parallel Translations, then the Review and Adjudication steps (further information on the ESS translation approach can be found at: http://www.europeansocialsurvey.org/methodology/ess_methodology/translation/)

Poland had to stop using the TMT before the verification stage because of time pressure: as it was foreseeable that the verification process would last longer in the TMT than in the traditional excel files and the national team had a strict schedule for their fieldwork preparations, it was agreed with the ESS and SERISS management that keeping the ESS fieldwork schedule was more important than completing the full TMT testing.

Lithuania and Russia, however, carried out the whole translation and verification process in the TMT. In the verification stage, all cApStAn verifiers (those for the national versions in Lithuanian, Russian for Lithuania and Russian for Russia as well as the ‘Central Verifier’ for Russian, checking that the verification interventions on both Russian versions were consistent) carried out their work exclusively in the TMT. Also, the entire follow-up process for signing off on the translations and any communication between the national teams, the CST (mainly the ESS translation expert, authoring this document) and cApStAn was carried out in the TMT.

The next sections will present and discuss the findings from the three national teams, the ESS translation expert and cApStAn.\(^1\) In chapter 3, all positive aspects will be presented and discussed, while chapter 4 will list and summarize the negative observations made as well as recommendations about what should be improved in the future. Chapter 5 then includes the conclusions and indications for further steps. Appendix 1 consists of the report from cApStAn about the use of the TMT when verifying the ESS round 8 translations from Lithuania and Russia.

\(^{1}\) The author acknowledges the detailed and useful comments made by the national ESS teams from Poland, Lithuania and Russia as well as cApStAn.
3. Positive Feedback / perceived advantages

The following positive points were mentioned by the testing teams, cApStAn and the ESS translation expert:

3.1 Easy and automated documentation
It was appreciated that the TMT allows automatically all translation steps to be documented without anybody having to deal with that explicitly as a separate step, as had been the case with the excel-based “(Translation and) Verification Follow-Up Forms / (T)VFFs”.

3.2 Format for all steps of translation is fixed
A positive aspect is that the format for all steps is automatically fixed without the participants having to agree on that.

3.3 All participants are required to work systematically
It was highlighted that the use of the TMT required everybody to work in a systematic manner which was appreciated as a positive development compared to the excel-based translation templates used so far.

3.4 Good presentation and easy overview between source and translated versions
Several translators, reviewers and adjudicators explicitly appreciated the presentation of source and target versions on one screen: they liked that the source questionnaire is better related to the translator’s parts than previously in excel and that it is easily visible while translating. In the TMT, the overall structure of the source questionnaire became clearer for some of the translators.

Some of the reviewers and adjudicators appreciated the possibility to see different translations and reviewed/adjudicated versions on one screen – especially if this is a larger screen: this means that, for instance for the shared language harmonization, you can visualize all parallel translations and reviewed/adjudicated versions on one screen (if it is large enough). Having a clear view of all these versions facilitates the decisions about how to best harmonize these. In excel, one first needs to copy-paste the different versions – received from the respective national teams – into the same excel file; this results in a clear overview too, but the copy-pasting is no longer required in the TMT.

3.5 Facilitates harmonization of shared languages and multilingual countries
An important finding from this testing exercise is that one of the biggest advantages of the TMT is its use for harmonising different language versions:
a) translating into languages that are shared by more than one national team, the so-called ‘shared languages’ (international harmonization), and

b) for ‘multilingual countries’ that translate the ESS source questionnaire into more than one language (within-country harmonization).

In both cases it is necessary to harmonize between different language versions – at international level for shared languages and at national level for multilingual countries. In the TMT it was felt to be relatively easy to see these different language versions on the same screen, which facilitates this harmonization process.

There is no need to share excel files any more, as was the case previously with the (T)VFF, where for instance versioning was an issue, as it always needed to be ensured that the correct versions were used and that the different actors in the process were available and ready to share their files. Now in the TMT, all versions are automatically in the tool and its database, and accessing these versions is only a matter of distributing the appropriate access rights to all actors. As soon as one actor has been granted the right to access, e.g., the other versions of a shared language, these are all available in the tool as soon as any version is saved by the other national team(s). No additional communication between the actors involved is needed, which facilitates and speeds up this process.

This was felt to be a major advantage of the TMT compared to excel, and as shared languages as well as multilingual countries make up an important part of all ESS language versions, this advantage is of relevance for the future organisation of ESS questionnaire translation.

3.6 Positive feedback from cApStAn

cApStAn felt that the features included in the Translation Management Tool are useful and that the platform is fairly well adapted for complicated workflows.

It is appreciated that verifiers can view the translations produced by translator 1 and translator 2 in the TMT. In excel, this was only possible if the national teams had carried out their translations in this same file; while this used to be the case in most country teams, in some national teams, only the adjudicated version was forwarded to external verification.

The integration of cApStAn’s “Verification Categories” in the tool as tags is a smart and useful approach, especially since verifiers can choose more than one category for their intervention.\[3\]

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\[2\] See Appendix 1.

\[3\] “Verification Categories” are the categories that the verifiers from cApStAn use to describe the nature of their interventions; examples are “Adaptation or Cultural Issues”, “Minor Linguistic Defect” or “Mistranslation”. They can be consulted in the ESS Round 8 Verification Instructions, available on request from the author.
4. Negative feedback / perceived disadvantages

Not all of the feedback on the TMT was positive. In this chapter, the negative feedback received about the TMT is grouped into nine areas: it includes the comments from the national teams, from the ESS translation expert, and from the cApStAn testers. In addition, the comments made by cApStAn are provided in their entirety in Appendix 1.

4.1 Poor instructions

Prior to this testing exercise in ESS round 8, there had been no proper training of the national teams, neither in-person nor online, although written instructions were circulated (see SERISS deliverable D4.3 “Testing specifications for real-time testing of Translation Management Tool (TMT) in ESS Round 8”). Several comments made related to the fact that the instructions provided were not sufficient for working with the TMT.

Some specific points criticized in the Instructions document:

1. In the Introduction, the translator should be specifically informed that the text can be formatted; otherwise they will have to realise it by themselves.

2. **Code**: is this word in the interface a noun or a verb? Some clarification would be useful.

3. When editing the document, one sees **document source** (or source of document). This is unclear: shouldn’t this rather be called ‘edit target’?

4. The window on the right (Messages for) is confusing: Whom is the message sent to? Who gets it? This is unclear.

5. When clicking **Submit**, there is a ‘waiting’ signal (the website is renewing) and the translated version appears. This process should be described/clarified in the Introduction, otherwise it seems confusing and frightening to lose one’s translation.

6. The statuses **under development, awaiting, ongoing** are not clear and may not make sense for the ESS: in this survey, the questionnaire is always considered as a whole and not at item-level, therefore it does not make much sense to mark a status at item-level (this is a feature taken over from SHARE that uses a different translation approach). Having this by default on the main screen although it is not used for the ESS is very confusing and disturbing and should be removed.

7. If the different statuses are kept, the translator should be told to begin by changing the status into ongoing, otherwise the work may be confusing.

8. The **icons for translating and editing are not intuitive** and it should be better explained why they are all visible if not all of them are needed: If you choose a question for translation one needs to use the option **Edit** (pen sign). It is not obvious why the other icons are shown if they are not needed: why the eye sign? It would be good to have an easier way to go to the Editing function (just start to type). Perhaps for each role only the icons really relevant should be showing?

9. It needs to be explained where all the **intermediate translation versions** created during the process as well as all comments are stored and how they can be consulted by anybody interested. Within the Team approach, only the versions “Translator 1”, “Translator 2” and the version of the Adjudicator can be accessed by...
the national teams, but not all the intermediate versions and comments made. Currently, the adjudicator needs to delete previous versions and enter the final one on the top of it, so information about all previous versions does not seem to be stored and we cannot return to our previous decisions or versions. This is problematic – and against the ESS translation approach – because the intermediate versions are a valuable source of information and must absolutely be kept and be consultable throughout the process.

The teams did not find a way to store different versions of the translation after other steps of the translation were completed (as soon as Adjudicator version 1 is ready). They needed to change the Adjudicator version again and again after each further step of the work on the translation. The following trick was used in order to keep track of the different versions: the teams continued adding comments and reasons of changes / discussion to the Adjudicator version. But this is not an adequate solution and it must be ensured that all intermediate versions are stored separately and easily searchable by all team members.

It needs to be explained in the Instructions where all intermediate versions are stored in the TMT and how they can be easily consulted without having to contact CentERData to make extra exports. Currently this is not covered in the Instructions at all, but this is crucial for the ESS translation processes.

10. It needs to be clarified whether intermediate saving is possible, e.g., by the key combination 'Ctrl+S'.

4.2 Need for personal training
The need for extensive, in-person training, especially for the adjudicators was stressed: written instructions are important, but should be complemented by a personal training, the key person to be trained should be the adjudicator. While the use of the TMT is relatively easy for translators (because they are used to using Computer Assisted Translation (CAT) software in their professional life), the adjudicator needs to have a very good understanding of the tool, so in-person training is recommended in addition to written instructions.

In particular, training was felt to be needed on how to compare questions with similar wording in different parts of the questionnaire. This was not covered in the written instructions and turned out to be very confusing and time-consuming and could hamper within-questionnaire consistency (see below, e.g., about Consistency).

4.3 Poor user-friendliness
Many of the comments made related to the fact that the TMT was not very user-friendly, which resulted in an increase in time needed for carrying out the ESS translations and, in addition, added to the difficulties encountered (in many cases leading even to frustration and stress) of many of those participating in this testing exercise. Below the aspects of poor user-friendliness are presented and discussed in more detail.

4.3.1 TMT more time-consuming than previous (T)VFF
Overall, using the TMT was more time-consuming than the previous excel files in all cases: national teams, ESS translation expert, and cApStAn.
For example, to open the edit box (which you need to do for every item to be translated) double-clicking is needed. This wastes a lot of time since the questionnaire has about 490 such edit boxes (490 x 3 seconds = 1470 seconds → 24.5 minutes of time per person just for opening the edit boxes).

While it is acceptable that a new software requires more time when used for the first time, overly complicated and time-consuming working steps – such as the high number of clicks required for all the actions (see the example of the edit box above) – need to be reduced to a minimum or removed in the next rounds.

4.3.2 Extremely full and “crowded” screen
The general outlook of the program on the screen looks extremely crowded: there is so much information on one screen that it is difficult to be focused on one particular activity and not to get lost. It looks overly complicated with information not relevant for work.

It would be better if the user (for example, the adjudicator) could see only the central part of the screen, that is, the English question and the place for the translation, but not the left part (for navigation) or the right columns (Search, Smart list, etc.) by default. It should be enabled to switch and use these buttons and/or the whole column if necessary and switch it off if necessary.

It is suggested to remove the “visible states”, as these are not relevant while translating, and so it would be better to switch this on only if necessary.

In addition, the positioning of items is somewhat chaotic, especially when one tries to view more than two versions; for example, when viewing the versions of translator, reviewer and adjudicator of one item – or several versions in the case of shared languages or multilingual countries – a large screen is needed in order to see all versions clearly.

When two embedded windows are open, these are inconvenient to use, as each must be scrolled separately, which takes a lot of time.

4.3.3 Adjustable size of window
The content does not adapt when a window is minimized. This could be problematic for users who do not work with two screens and who might want to keep verification instructions opened, for example.
Suggestion:

- Possibility to adapt the content when window size is reduced to fit the new window.
- Make the use of two screens a prerequisite for all users working in TMT.

4.3.4 Layout in notes pane

Users reported that when a question is open for editing and they wish to add a comment, the text formatting buttons overlap with the box in which they are supposed to enter the comment.

Suggestion:
The cApStAn tester was not able to reproduce the issue, independently of the number of screens or the navigator. The issue seems to have been fixed.

It is recommended to ensure that buttons are now shown horizontally rather than vertically for all users, and not covering the comment field.

4.3.5 Place of buttons
The place of the buttons is not optimally practical: all linguists start by clicking on the Edit button of a question and then modifying its status ("Awaiting to verification", for example). Then they translate/verify/review the question and scroll down through the various fields, adding comments where necessary. In order to save their work on a question, they have to scroll back up and click on the Submit button.

Suggestion:
The cApStAn tester suggests changing the place of the Submit button so that it appears at the bottom of a question. This would avoid unnecessary scrolling and save time.

4.3.6 Layout on Google Chrome
Drop down menus are not displayed on Google Chrome.
Suggestion:

- Ensure that drop down menus are shown on all navigators.
- Instruct linguists to work either in Explorer or Firefox.

### 4.3.7 Showcards layout

The field in which linguists are supposed to type their translation is very small and cannot be enlarged.

**Suggestion:**

Display showcards in the same way as questions are displayed when pressing the Edit button.

### 4.3.8 Difficult navigation within the questionnaire; Comparing and/or making use of existing translations from the same questionnaire

Overall it was found that the navigation between the different parts of the questionnaire, in particular between the different sections, is very complicated and costs much time.

This is particularly relevant in the case of repeated text: as so far the TMT does not include a Translation Memory or Term Recognition functionality (see below), any repeated text needs to be searched and then added manually. For this purpose, the easiest way is currently to go back to the previous instance of a repeated text and copy-paste this translation into a newer occurrence.
However, when text is repeated between different sections of the questionnaire – as was largely the case in ESS round 8 – a lot of navigation between sections was required: each time the new section needed to be entered, then the particular item found, then the translation opened and text copied – and the whole process needs to be repeated for entering the copied text at the desired place. This is much more time-consuming than in excel and error-prone because there is no search functionality for finding existing text (which exists in excel).

It may be that later, with a Translation Memory function or at least Term Recognition (see below), the process of handling repeated text can be improved, but in this round 8 testing this proved to be very complicated and may have resulted in lower consistency than desired because too many steps are required for cross-checking – and modifying, if needed – even only one particular word.

It is very difficult to work with similar or even already translated text elements, e.g., Instructions (such as Interviewer Instructions), similar answer categories and other technical information, especially if they are located in different sections of the questionnaire, but also within one section.

In addition, it is also difficult to just “compare” similar text: to find similar/identical instructions, to check whether they are really identical, as each question must be opened separately (see above).

There should, for instance, be an easy way to use the same answer scales for other questions (and it should already be marked in the questionnaire where answer scales are the same as in other items) – and not to have to compare and then retype or copy one by one. The same with repeated categories such as “ Unsure”, “refused”, ASK ALL, etc.

It would be best to allow navigating through to other parts of the translation, while keeping the section you’re working on open, which is absolutely necessary for both translating and crosschecking work against other sections. As a result, in the ESS round 8 testing, some translators had to jot down their translation on paper, or in a word document, and then open sections related to the part of the questionnaire they were working on (as with all the showcards, for example). This proved very time consuming and unprofessional.

With introducing a Translation Memory and/or Term Recognition functionality, or at least cross-references pointing at similar source text, this may be facilitated in the future; or there should be a faster and more intuitive way of jumping to other items also in different sections, while the item one is working on is still kept open. But the current way of navigating costs more time than it saves.

4.3.9 Increasing font size
The font size in edit windows should be increased (it is smaller than the font in the Master Questionnaire). Alternatively, users should have the option to change the font size.

4.3.10 Confusing naming / missing or misleading TMT icons or buttons

- Submit – instead of clicking on Submit (or in addition to clicking), a keyboard shortcut would be very useful for saving. Optionally, a Submit button in a convenient place
would be useful. As a minimum, Submit should be in a different colour (rather than navy blue which is used throughout the user interface).

- After submitting a portion of text, there should be a ‘Next’ arrow. Otherwise the user needs to scroll down to choose the next question and scroll up again to begin editing. This wastes a lot of time.

4.3.11 Comments and discussions not easily visible
The comments from all participants are not easy to view: e.g. the comments made by Translator/Reviewer/Adjudicator/etc. should be better visible without entering into an edit mode.

Also, it was not clear to the teams where the team discussion, expert views, etc. should be documented. There are clear spaces for “comments” of Translator, but not others. In the end, the teams put all the discussion under “Adjudicator” comments one by one (experts said, we decided … team discussed, then decided… verifiers suggested, we decided…). But this was not very clear. These experts may have had separate logins, so they should be able to make comments by themselves. However, it would be important to easily see these discussions in their entirety.

4.4 Technical problems in the TMT
Several of the comments made related to technical problems in the TMT. These issues related to the following issues:

4.4.1 Connection timeout
The TMT often froze and logged users out without notice, even after a short time. Further, since the users did not know whether their work was automatically backed up in real time while working (at least this was neither explained in the Instructions nor was the work recovered intuitively in the tool, see above), the participants lost quite some work done on multiple occasions, when the software froze or logged them out without notice. This also happened repeatedly during the review session. This is of course very time-consuming and troublesome and needs to be fixed before larger rolling-out in the ESS. A warning about imminent logout should appear on the screen before logout happens.

A session lasts an hour and a half. Users need to log in again after that.
**Suggestion:**

Extend the time to 4 hours for example, so that lesser users are interrupted by the connection timeout while working.

4.4.2 Login issues

When a login window opened, a translator logged in, but instead of logging the person in, the system transferred him/her to the home page and he/she had to log in again. This wastes a lot of time and should therefore not happen.

4.4.3 System stability issues

Sometimes users had to wait because the system or parts of it crashed; sometimes it took very long to save the input (perhaps because of Internet connection problems).

4.4.4 Saving intermediate versions

When the user accidentally navigates while editing the questionnaire, there should be a prompt „Save changes?” or similar.

4.4.5 Global Fill Array problem

The **Global Fill Array** disappeared in several cases after having been filled; this seems to have been a technical problem.

4.4.6 Scrambled pages

In some cases, after using the small black arrow in the upper right corner (to move to the next segment), the page got scrambled. This scrambling happened repeatedly. The same effect  

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4 The “Global Fill Array” contains the routing instructions “GO TO” and “ASK” followed by the question name to which the route leads, these need to be translated only once in each language version.
(scrambling) occurred when using the left arrow. This seems to have been a technical mistake that should be fixed for future use.

4.4.7 “Back” button not working
Back button not working: If you make the mistake and entered the wrong questions for editing, the button “Back” is not working.

4.5 Crucial elements missing in the TMT
Some of the comments made pointed clearly to features that were missing in the current version of the TMT and should be included in the future so that the tool would satisfy the team members’ needs.

4.5.1 Missing pre-import of existing translations
Some participants noted that existing translations, for instance from previous ESS rounds, had not been imported into the TMT before they started working. This would of course have been optimal, but for time reasons it was not possible to populate the TMT with existing translations before the real-time testing was launched. But this is not to be seen as a disadvantage of the TMT because this is technically possible and should be done in preparation for the next ESS round in the TMT. Once a Translation Memory (TM) functionality is added to the TMT and linked with a database of existing translations that would be searchable by the TM, this issue will be fixed.

4.5.2 Missing Translation Memory (TM) and/or Term Recognition functionalities
At several instances, the participants pointed out issues that would be fixed if a Translation Memory and/or at least Term Recognition were included in the TMT: if any translation that has already been entered into the TMT could be easily retrieved and offered to the translating teams, a lot of navigation, searching and copy-pasting could be avoided (see the criticism listed above).

Examples are:

- **Term recognition**: The TMT does not appear to have been designed with the leading translation software platforms in mind, and has not learned from them: for example the software would ideally alert the translator to how key words have been translated elsewhere in the survey. Capabilities like this add value beyond what the translator can do without the software.

- It should become possible to **view questions from different sections** (when one has some questions tested in supplementary part) on the same screen.

- As long as no Term Recognition and/or Translation Memory functionality are included in the TMT, copying-pasting is required for any pre-translated element. Copy-pasting in the TMT is much more time-consuming than in word or excel, because there is no “search and replace” function in the TMT: this means that at each instance where a user decides that a pre-translated element should be added, you need to close the window in which you are, navigate to the place where the existing translation is stored, open this place, copy-paste, close this field, navigate back, re-open this target field.
and can then finally add the pre-existing place. This is much more complicated and time-consuming – and therefore error-prone, than in word or excel. More effective options than copying of the repeated content should be available (especially in the case of showcards): automatically retrieving what has already been translated would be the easiest and safest solution; as in traditional Translation Memory systems, the user would have to decide if a retrieved translation should be used verbatim or modified for a particular new context.

- There should, for instance, also be a ‘Populate’ function (as in common CAT tools) to be used with frequently repeated items (such as “Refusal” or “Don’t know”). There should always be an option to edit the previously populated (i.e. automatically repeated) text, e.g. for gender adjustments etc. An example where this would be useful are questions B6–B12 in ESS round 8: as there is a lot of repeated text between these items, there should be a way to populate the fields based on B6. Otherwise it is tedious to copy the same text 6 times. This wastes a lot of time and is error-prone. Also in this case, Term Recognition and/or Translation Memory would help.

- Showcards: the translations should be automatically copied from questions (Answer type fields) and only required changes or additions should be introduced separately and manually, otherwise, automatic copying from the items to the appropriate showcards would be safest.

Currently there is no translation memory management system integrated in the TMT. This would be a requisite in any linguist work:

**Consistency enhanced:** using translation memories would ensure consistency since translators would be able to use fuzzy matches, search directly in the translation memory how a term was previously translated.

**Time saver for all users:** currently translators need to translate the same sentence multiple times. The verifiers and the reviewers need to verify it multiple times.

In the following example, question A4 has already been translated.

![Card A4](https://www.seriss.eu/GA No 654221)

**CARD 2**

Using this card, generally speaking, would you say that most people can be trusted, or that you can’t be too careful[5] in dealing with people?

Please tell me on a score of 0 to 10, where 0 means you can’t be too careful and 10 means that most people can be trusted.

You can’t be too careful. Most people can be trusted (Refusal) (Don’t know)

**A4**

Answer types “Refusal” and “Don’t know” are repeated throughout many questions, for example Question A5. These answers are not included in a showcard.

When the cApStAn tester, e.g., opened question A5 for editing, no suggestions were offered on how to translate those response options. Linguists have to scroll up and check how these options were previously translated to ensure consistency.
With the help of Translation memory the translators and the verifiers would be able to accept the proposed existing translation or modify it according to the context of the particular question.

4.5.3 Flagging inconsistencies, problems maintaining consistency

In the translation business, one of the major advantages in using CAT tools is their support in maintaining consistency in translations: both consistency over time as well as within one text.

Also, for translating the ESS questionnaires, consistency is of great importance, both over time, that is, from round to round, as well as within one questionnaire.

The TMT, however, proved to be of little help in this regard, in any case less than the excel-based (T)VFF. This was related to (a) the missing Translation Memory and/or Term Recognition functionalities (that would automatically show where an existing translation is similar or identical to a new source text element), and (b) to the poor navigation within the survey instrument being translated into another language, both within and across questionnaire sections.

In this ESS round 8 testing, maintaining consistency in the TMT was extremely difficult without constantly exporting the work to a Word file. The users could not easily see the previous work done and translation solutions applied earlier. This made the work much harder than in a Word or excel file and wasted a lot of time (see above).

In ESS round 8, consistency within the questionnaire was of particular relevance in relation to the Multi-Trait Multi-Method (MTMM) experiments included in the questionnaire where similar, but not identical source items were included in the main and in the supplementary questionnaire. Here it was of highest importance to make sure only the parts that were modified in the source text – for experimental purposes – were modified in the target texts, and that apart from these changes, the translations were identical (as far as this was linguistically possible of course).

The national teams reported that the largest part of the discussion with their verifiers and more than half of all time of the translation work were related to changes in identical categories in different questions, MTMM versions of the questions (slight modifications), instruction of interviewers and other technical issues where it was of utmost importance to keep consistency, but modify what was modified in the English source.
In the current TMT it is very difficult to detect small modifications because you cannot view similar items on one screen (which is possible in excel for instance). Therefore, it was difficult to keep consistency between questions: in the case of verification, e.g., it was necessary to open and answer each comment of the verifier and remember whether it was the same issue which was discussed in a previous question or something new, and this was extremely inefficient.

It is not obvious for the translating teams how this issue may be resolved, but currently it makes the process unnecessarily complicated, twice as long as necessary and still unsatisfactory in results (still many mistakes cannot be noticed because one cannot view on one screen all similar items).

So the tool should ideally include a function to memorise and show similar and identical text elements both in the source and target languages.

Introducing a Translation Memory functionality will surely help in this regard, as this will compare new text to existing text in the database from previous but also ongoing translations. Then automatically not only the existing translations, but also the comments should be provided and the national teams can decide how to proceed.

But the current lack of comparison between similar items is unsatisfactory and needs to be improved for the future as it risks hampering consistency even more than the previous excel files.

Inconsistent translation for identical sentences is not flagged or spotted. Linguists are able to enter different translation for the same source and still change the status of a question from “Awaiting” to “Done” even if an inconsistency is present.

In the example below, the cApStAn tester was able to enter an inconsistent translation for “(Refusal)” and “(Don’t know)”, and then change the status of question A5 from “Awaiting” to “Done”.

These inconsistencies may be spotted at a later stage (adjudication, verification), but extra work for the adjudicator and the verifier could be avoided if the environment would automatically flag such inconsistencies.

In some cases, this difference is needed because of the target language that may need to be adapted to the different question context. The linguist should be able to do it, but it would be useful if the system could alert the linguist when this adaptation is made, to make sure that consistency is maintained as much as possible.

Suggestion:
• Implement translation memory management.
• Include all repeated items in a system similar to the one for the showcards, as showcards are translated only once and attached to questions.

Special case: numerical categories

There should be a possibility to copy numerical categories from the English original to the translation (for instance, insert the source automatically, as is common in CAT tools) – otherwise we risk errors when copying elements manually or reproducing what translators see.

4.5.4 Routing translations should be added

According to some translators and reviewers/adjudicators, the Global Fill Array did not work reliably. This is the section in which the Routing particles in the ESS questionnaire (“GO TO” and “ASK”) are stored. These need only to be translated once and are then be added to the respective questions. However, technical problems were encountered in several cases, for instance these elements disappeared unexpectedly. So a more reliable solution for translating the ESS Routing instructions – and adding these to the right questions – is needed.

4.5.5 Versioning issues

In different respects, the different versions of the translated ESS survey instruments don’t seem to be sufficiently prepared for in the TMT:

• “Review/Adjudication/Verification/etc.”: the selection options for versioning do not seem to work intuitively. The translators always produce “Translation”, reviewers the “Review” and so on. It seems that versioning of the same role would be more appropriate, for example, translator 1 should be able to save several different versions of his/her translation “preliminary/final/etc. version” (see above for the need to save and make easily available intermediate versions).
• Versions after “SQP” and “Pretest” as well as “Final translation” are not foreseen in the current version of the TMT. These are of course crucial steps within the ESS questionnaire translation process that are needed if the TMT is to be rolled out in the future.
• The pre-test was not part of the ESS Round 8 testing to use the TMT for following-up on the national pre-tests (‘P’ in the TRAPD process).

4.5.6 Copying with formatting and without formatting

With the view to producing the final survey instrument, copying with and without formatting should be offered as options before copying.

Note that with the integration of a translation memory function in the system, there would be no need for copying but rather inserting matches with quick keyboard shortcuts: (such as Ctrl+I, Ctrl+R (OmegaT), Ctrl+1, Ctrl+2 (memoQ), etc).
4.5.7 Missing “Search” function
It would be useful to have a “search” function such as in word or excel in order to find other text elements within the same questionnaire by an automated research instead of having to remember similar instances and then search manually (see above multiple examples of this need).

4.6 Poor export facilities
The TMT offers the possibility to export the survey instrument and the showcards at any moment of the process in file types such as word or excel. However, many comments criticized the poor quality of these exports.

- When exporting into a Word file, the editing features get lost (poor visual output), and this does (a) not allow a true check of the translation, (b) wastes a lot of time when this export is needed to produce the final survey instrument (as the formatting needs to be added manually), and (c) is frustrating.
- The exported document is, at times, not useful because it contains no scales and is thus incomplete.
- When trying to export the document, the showcards received were all scrambled, no matter if the participants tried it while using ‘Done.ready’ or ‘Ongoing’.
- Exports into Word should become much better with regard to formatting.
- An option for simultaneous export of two versions – one version of ‘translation’ and one version for ‘reviewer’ – should become available. This is a must option when reviewing/discussing preliminary translations.
- After exporting into Word, the text appeared in special “boxes” – a format which cannot be easily used. The general look of the Word document is messy and could not be presented to experts or any other external people working with the national teams as experts outside the TMT panel.
- When preparing the questionnaire in its final format, the teams practically needed to copy text line by line because the Word format does not help even in copying in current format.
- So the export facilities for both intermediate versions during the process – for proofreading, discussion with experts or the like – as well as the final survey instrument, including showcards, need to be improved: it is important that the required final layout is easily produced out of the TMT. Otherwise this creates a huge amount of manual formatting which makes the use of TMT less than optimal.

4.7 Problems implementing team approach / TRAPD
While overall it proved to be possible to apply the team approach in the TMT, there were some issues reported:

- If two translators leave comments, there doesn’t seem to be a way to view both comments at the same time. This goes against the TRAPD methodology where both translated versions (and comments) must be compared.
• As mentioned above: there is no possibility to store and easily access (a) intermediate versions, and (b) group discussions. Both are crucial elements of the team approach and should be fixed in the future.

4.8 Problems with the verification process
It was possible to carry out the verification step, including central verification as well as the signing-off by the ESS translation expert. However, the whole verification process, especially the feedback and signing-off loops between the ESS translation expert, the national teams and the verifiers, turned out to be extremely complicated and time-consuming for all parties involved (national team and GESIS translation expert).

• At the stage of the discussion with verifiers and the central translation office, the system becomes so complex that it is extremely difficult to be sure that nothing is missed, for the national teams and the ESS translation expert. The main problem is that every step of the discussion is in a single text field – and all items are separated from each other. So by far too many clicks are required – by all sides – in order to be able to view and work on all text elements separately (every question stem, sentence, and answer category are separate fields). Here a more straightforward way of handling the signing-off process should be involved. Otherwise it cannot be guaranteed that information won’t get lost because it is very difficult to keep the overview.

• Cannot one, e.g., click on one button and then have a screen where ALL verification discussions, at least related to one item, are automatically visible in their entirety? Or alternatively all discussions visible for all items? That will be a lot of text on one screen, but at least you don’t need to click on each item to open them but can see and scroll by yourself.

• The notification? “signed off” after verification is difficult to see because it is in white letters on green background. This should be programmed in different colours because this is really an important signal.

• The ESS translation expert needs to sign off on all verifications of all ESS language versions. If cApStAn’s verifiers flag a comment as ‘requiring follow-up’, the national teams need to react by either accepting a comment or, if rejecting it, by providing a reason for not accepting cApStAn’s recommendation. The ESS translation expert needs to sign off on all these discussions. This process was clearly possible in the TMT, so that no information was lost. However, as already mentioned above, it was very time-consuming as many clicks were required for opening the item, opening the comment and then adding a comment, writing and then adding a flag. While it does not change the general set-up of the verification signing-off exercise, it takes much more time than previously in the excel format, and there is a risk of overlooking flags, so this should be improved in the future. Also, given the impossibility of comparing with other items or languages while leaving one text field open, consistency across the project is made more difficult because a lot of navigation between different versions and languages means each time closing down and opening versions which is long and error-prone. So an automated comparison of new and existing text within the TMT would be helpful.
Comments on the verification phase with regard to particular roles:

4.8.1 Role-related observations

4.8.1.1 Verification

Instructions for Verifiers

a. Location of the instructions: currently, instructions for verifiers are inserted in the notes pane, at the bottom of the question. Verifiers have to scroll down through the question to be able to read the instructions.

Suggestion:

- cApStAn tester suggests notes for verifiers, adjudicators to be inserted at the top of the questions, where translator instructions are inserted.

Layout of the notes field: the field in which the notes for verifiers are inserted is very small and cannot be enlarged. If instructions for verifiers are long, linguists need to remember to scroll in the notes field to read all the instructions.

- All notes should be directly visible without unnecessary scrolling. This may be fixed if instructions for verifiers are inserted in the same field as instructions for translators.
**Viewing multiple versions** (translation 1, translation 2, adjudication)

A layout issue occurs when a verifier opens translations 1 and 2 in addition to the reconciled version. This has been reproduced on Chrome and Internet Explorer.

**Cancel button**

Verifiers feel that the word “Cancel” is frightening and that by clicking Cancel all their work will be lost, even though it is not the case.

**Suggestion:**
- The name of the button could be changed.
- When a user types something in the translation field, the name of the button automatically changes from Cancel to Submit. cApStAn tester suggests that the button should change from Cancel to Submit when a comment or a tag is added as well. This would reassure users.
### Size of translation fields for answer types reduced

When users add comments, the size of the fields containing the translation of the answer types is automatically reduced. This can be a problem for long answer types as the verifier can no longer see the full translation.

#### Suggestion:
- As for the showcards, cApStAn tester suggests that the answer types should be presented in the same way as the questions. Comments should be added below, and not next to the translation.

### Number of comments and tags

When comments and tags are added to fields and the users leave the editing mode, the number of comments and tags does not reflect the ones associated to the fields.

In the screenshots above, the main screen indicates there is one note for this question, whereas when the question is opened, there is an additional note associated to the first field.
Going back to the question **after opening the attached showcard**

Users were in doubt as to how to return to the question they were working on after opening the showcard attached to the question. Their assumption was that all steps were to be repeated as if they had just logged in: select the module-tick “verification”-find the question they worked on.

**Suggestion:**

- cApStAn tester could go back to the list of selected questions directly by pressing the Back button in the navigator.

The question was however closed. It would be easier and less time consuming if the question remained open.

**4.8.1.2 Verification Review**

*For clarification:* this is the internal review within cApStAn, that is, during the verification stage, and NOT the Review by the national translation team during the TRAPD process!

**Handling tags**

**Tag order:** when several tags representing verification categories were inserted and when one of them required follow-up, users were not certain for which one follow-up was required.

**Suggestion:**

- The reviewer should be able to insert the REQUIRES FOLLOW-UP tag right after the tag for which follow-up is required. If several tags require follow-up, the REQUIRES FOLLOW-UP tag can be inserted after each such tag.
Unnecessary clicks: adding a tag representing a verification category takes four clicks: click on tag button, choose type drop down menu, click on type and click on create. An additional click necessary if a tag should be shown in multiple translations. This can be time consuming, as verifiers are required to report all different verification categories.

**Suggestion:**

- Once a verifier clicks on the tag button, the list of interventions should automatically appear. Once a verifier chooses a tag from the list it should be better if no extra confirmation was needed (i.e. click on create button). This would reduce the number of clicks to two.

**Editing verifier's comments**

During the review at cApStAn, the reviewer sometimes has to go back to the verifier to clarify a number of issues. Depending on the verifier’s explanation, comments sometimes may need to be edited for clarity, or minor typos in the comments sometimes should be corrected. Verifier's credentials were used for minor edits in this round, since the cApStAn reviewer did not have editing rights.

**Suggestion:**

- Enable editing for the role of the cApStAn Reviewer.

**Submit function**

was not available when a comment or tag was changed at review. The following workaround was used: make a change of the status to enable the Submit function.

**Suggestion:**

- Enable Submit function at any change made to tags and comments, too.

**Status function for reviewer**

The cApStAn reviewer cannot change the status, the drop down menu is empty for the reviewer:

**Suggestion:**

- Enable status for reviewer's role.
Discrepancy of flagged tags view

Review (using verifier’s credentials):

Main screen shows 1 occurrence of “Requires follow-up”

When question opened in Edit mode, there is no such a flag visible

When status changed to Done/ready and submitted, the flag disappears. This is confusing and should be fixed: it should be ensured that flags only point to actual instances of “Requires Follow-Up”.

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Formatting

There was a discrepancy between the source version in Word/Excel and in the TMT:

Thus verifier commented: Underlining was not present in source, so verifier removed it. Underlining was retrieved by reviewer. This was probably an error when entering the source text into the TMT and shows the need to carefully check that the source text is entered correctly into the TMT, also in terms of formatting.

4.9 Confusing error messages

Some error messages received by the national teams were not easy to understand. Screenshots of these were already sent to CentERdata and solutions to most of them found in the meantime. Therefore these are not listed in detail here.
5. Conclusions, recommendations and next steps

The Translation Management Tool (TMT), developed by CentERdata (University of Tilburg, NL), was subject to a real-time test in preparation of ESS round 8 in 2016: three national teams used this program for preparing their national survey instruments.

This testing yielded very useful and valuable results that should help in shaping the TMT for future use in the ESS. Comments were made by all three national teams, the ESS translation expert (author of this report) and also cApStAn, the service provider that has been carrying out linguistic checking of all ESS questionnaire translations since ESS round 5, the so-called “translation verification”.

The main comments received from all actors, that is the national teams as well as of the ESS translation expert and the verifiers (cApStAn), are listed and discussed in the previous sections of this document. The document containing the observations from cApStAn is also provided in its entirety and untouched as Appendix 1 below.

In conclusion, the impression gained through this testing exercise was quite mixed. It is already a positive finding that it is possible to carry out all steps of the ESS translation scheme – that is, the ‘team’ or ‘committee approach’, including external verification – within the TMT. The main positive aspects mentioned after this testing are mainly connected with (a) the use of TMT for harmonizing different language versions, above all ‘shared languages’, used in several countries (such as Russian in this testing), or Lithuania using two national languages, and (b) the documentation facilities provided by this program.

Also, cApStAn concluded that the features included in the Translation Management Tool are useful and the platform is mostly adapted for complicated workflows. It is appreciated that verifiers can view the translations produced by translator 1 and translator 2. And the integration of verification categories in the tool as tags is a smart and useful approach, especially since verifiers can choose more than one category for their intervention.

However, the amount of negative comments made by all parties shows that the TMT was not fit to be rolled out to the entire ESS, at least in the version that was subject to testing.

All parties concluded that it was much more time-consuming than the previous excel-based translation files. One of the main aims of introducing the TMT had been to make the translation workflow easier, and this goal was not met in this testing exercise.

Overall, there are a number of ways in which the TMT could be improved which might then facilitate roll out for future rounds of ESS.

While the comments, findings and recommendations can be consulted in detail above (from the national teams) and below (from cApStAn), these are the most striking weaknesses and areas where improvement is required:

(a) poor user-friendliness, in particular connected to complicated navigation both within and across questionnaire sections, resulting in increased difficulty to keep consistency at all levels (within items, within sections, within the questionnaire, across rounds);
(b) a very crowded screen with too much information shown by default that is not needed for the translation process; in addition, many important elements such as icons or tags are placed in a non-intuitive way so that they are not easy to find;

(c) frequent logging-out without alerting the user, resulting in frequent loss of entered translations;

(d) complicated and time-consuming fulfilment of frequent tasks, such as editing, feedback loops during verification, where too many clicks on specific items are required which becomes tiring, difficult to handle and error-prone – and costs too much time;

(e) missing “search” / “search and replace” function such as in word or excel that would facilitate keeping consistency across the questionnaire;

(f) missing possibility to easily compare different sections and existing translations in general in order to ensure consistency;

(g) poor export functionality both for intermediate versions in view of proofreading and of the final version of the questionnaire and the showcards; a large amount of manual formatting is needed that was felt to be inefficient;

(h) it was not clear where all intermediate versions as well as comments received from additional persons, such as topical experts, are to be stored in order to be consultable and reusable whenever and by whomever needed – or whether these are stored automatically and already available to the users;

(i) missing place where to store and easily access intermediate versions and group discussions between all actors during the TRAPD process;

(j) difficulty to maintain consistency in ESS round 8 experienced by most users. This difficulty is understandable given the lack of an active Translation Memory (TM) and/or Term Recognition functionalities;

(k) difficulty to maintain consistency across ESS rounds since the pre-import of existing translations was not possible due to time constraints.

These are just the most striking comments made during the testing exercise. For a complete list of all details to be fixed in the TMT, please consult Chapter 4 in its entirety.

The conclusion is that there is a lot of potential in the TMT in order to make the whole questionnaire translation workflow for cross-cultural surveys more efficient and professional; however, many improvements are required in the version subject to the testing.

Next steps

This testing in ESS round 8 was finished by spring 2017. After the ESS, in summer 2017, the European Values Study (EVS) used an updated version of the TMT that built on the ESS comments. Feedback from the EVS team suggests that many of the issues encountered by the ESS testers, especially with the usability of the tool, have already been resolved.
Further improvements to the tool, based on feedback from both the ESS and EVS, are currently being made. In particular this concerns the following points: poor user-friendliness, crowded screen, adding a Translation Memory (TM) function.

In ESS round 9, that is, starting from April 2018, 5-12 language versions in the ESS will use the latest version of the TMT for their questionnaire translations. At the time of finalising this document, that is, March 2018, the languages for testing are being selected and instructions as well as training sessions for the adjudicators and/or National Coordinators for ESS round 9 are being prepared.
Appendix 1: Feedback from cApStAn: “European Social Survey (ESS) Translation Management Tool (TMT) – Observations by Users”
European Social Survey Translation Management Tool

Observations by users

Danina Lupsa, Elica Krajčeva
3/20/2017
Translation Management Tool
Observations

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Translation Management Tool Summary of Observations

This summary includes the feedback collected from various users of the Translation Management Tool (referred to as TMT in this report) for ESS Round 8.

A cApStAn tester, familiar with translation tools, reproduced all the issues pointed out by the users and offers suggestions on how to improve the tool. It is divided in two main categories: general observations applying to all users and observations related more specifically to the Verifier role.

General observations

General layout for all users

All reported layout issues were tested on Google Chrome, Firefox and Internet Explorer.

1. **Adjustable size of window**

   The content does not adapt when a window is minimized. This could be problematic for users who do not work with two screens and who might want to keep verification instructions opened, for example.
Suggestion:
- Possibility to adapt the content when window size is reduced to fit the new window.
- Make the use of two screens a prerequisite for all users working in TMT. Linguists understand the advantages of working on two screens and most of them do use them. We are not aware whether National Coordinators already benefit from this advantage.

2. Layout in notes pane
Users reported that when a question is open for editing and they wish to add a comment, the text formatting buttons overlap with the box in which they are supposed to enter the comment.

Suggestion:
cApStAn tester was not able to reproduce the issue, independently of the number of screens or the navigator. The issue seems to have been fixed.

It is recommended to ensure that buttons are now shown horizontally rather than vertically for all users, and not covering the comment field.
3. **Place of buttons**

The place of the buttons is not optimally practical: all linguists start by clicking on the Edit button of a question and then modifying its status ("Awaiting to verification", for example). Then they translate/verify/review the question and scroll down through the various fields, adding comments where necessary. In order to save their work on a question, they have to scroll back up and click on the Submit button.

**Suggestion:**
cApStAn tester suggests to change the place of the Submit button so that it appears at the bottom of a question. This would avoid unnecessary scrolling and save time.

4. **Layout on Google Chrome**

Drop down menus are not displayed on Google Chrome.

**Suggestion:**
- Ensure that drop down menus are shown on all navigators.
- Instruct linguists to work either in Explorer or Firefox.

5. **Showcards layout**
The field in which linguists are supposed to type their translation is very small and cannot be enlarged.

Suggestion:

- Display showcards in the same way as questions are displayed when pressing the Edit button.
Desirable features

1. **Translation Memory Management**

   - Currently there is no translation memory management system integrated in the TMT. This would be a requisite in any linguist work:
     a. Consistency enhanced: using translation memories would ensure consistency since translators would be able to use fuzzy matches, search directly in the translation memory how a term was previously translated.
     b. Time saver for all users: currently translators need to translate the same sentence multiple times. The verifiers and the reviewers need to verify it multiple times.

   In the following example, question A4 has already been translated.

Answer types (Refusal) and (Don’t know) are repeated throughout many questions, for example Question A5. These answers are not included in a showcard.

When cApStAn tester opened question A5 for editing, no suggestions were offered on how to translate those response options. Linguists have to scroll up and check how these options were previously translated to ensure consistency.

With the help of Translation memory the translators and the verifiers would be able to accept the proposed existing translation or modify it according to the context of the particular question.
2. **Flagging inconsistencies**

Inconsistent translation for identical sentences is not flagged or spotted. Linguists are able to enter different translation for the same source and still change the status of a question from “Awaiting” to “Done” even if an inconsistency is present. In the example below, cApStAn tester was able to enter an inconsistent translation for “(Refusal)” and “(Don’t know)”, and then change the status of question A5 from “Awaiting” to “Done”.

These inconsistencies may be spotted at a later stage (adjudication, verification), but extra work for the adjudicator and the verifier could be avoided if the environment would automatically flag such inconsistencies.

In some cases, this difference is needed because of the target language that may need to be adapted to the different question context. The linguist should be able to do it, but it would be useful the system to alert the linguist when this adaptation is made, to make sure that consistency is maintained as much as possible.

**Suggestion:**
- Implement translation memory management.
- Include all repeated items in a system similar to the one for the showcards, as showcards are translated only once and attached to questions.
Other general observations

1. **Connection timeout**
   A session lasts an hour and a half. Users need to log in again after that.

   ![Connection Timeout Screen](image)

   **Suggestion:**

   - Extend the time to 4 hours for example, so that lesser linguists are interrupted by the connection timeout while working.
Role-related observations

Verification

2. Instructions for Verifiers

a. Location of the instructions: currently, instructions for verifiers are inserted in the notes pane, at the bottom of the question. Verifiers have to scroll down through the question to be able to read the instructions.

Suggestion:

- cApStAn tester suggests notes for verifiers, adjudicators to be inserted at the top of the questions, where translator instructions are inserted.

b. Layout of the notes field: the field in which the notes for verifiers are inserted is very small and cannot be enlarged. If instructions for verifiers are long, linguists need to remember to scroll in the notes field to read all the instructions.

Suggestion:

- All notes should be directly visible without unnecessary scrolling. This may be fixed if instructions for verifiers are inserted in the same field as instructions for translators.
**Viewing multiple versions** (translation 1, translation2, adjudication)

Layout issue occurs when Verifier opens translations 1 and 2 in addition to the reconciled version. This has been reproduced on Chrome and Internet Explorer.

3. **Cancel button**
Verifiers feel that the word “Cancel” is frightening and that by clicking Cancel all their work will be lost, even though it is not the case.

**Suggestion:**
- The name of the button could be changed.
- When a user types something in the translation field, the name of the button automatically changes from Cancel to Submit. cApStAn tester suggests that the button should change from Cancel to Submit when a comment or a tag is added as well. This would reassure users.
4. **Size of translation fields for answer types reduced**

When users add comments, the size of the fields containing the translation of the answer types is automatically reduced. This can be a problem for long answer types as the verifier can no longer see the full translation.

**Suggestion:**

- As for the showcards, cApStAn tester suggests that the answer types should be presented in the same way as the questions. Comments should be added below, and not next to the translation.

5. **Number of comments and tags**

When comments and tags are added to fields and the users leave the editing mode, the number of comments and tags does not reflect the ones associated to the fields.

In the screenshots below, the main screen indicates there is one note for this question, whereas when the question is opened, there is an additional note associated to the first field.
6. **Going back to the question after opening the attached showcard**

Users were in doubt as to how to return to the question they were working on after opening the showcard attached to the question. Their assumption was that all steps were to be repeated as if they had just logged in: select the module-tick “verification”-find the question they worked on.

**Suggestion:**

- cApStAn tester could go back to the list of selected questions directly by pressing the Back button in the navigator.

The question was however closed. It would be easier and less time consuming if the question remained open.

**Verification Review**

7. **Handling tags**

a. **Tag order:** when several tags representing verification categories were inserted and when one of them required follow-up, users were not certain for which follow-up was required.

**Suggestion:**

- The reviewer should be able to insert the REQUIRES FOLLOW-UP tag right after the tag for which follow-up is required. If several tags require follow-up, the REQUIRES FOLLOW-UP tag can be inserted after each such tag.
b. **Unnecessary clicks:** adding a tag representing a verification category takes four clicks: click on tag button, choose type drop down menu, click on type and click on create. An additional click necessary if tag should be shown in multiple translations. This can be time consuming, as verifiers are required to report all different verification categories.

**Suggestion:**

- Once a verifier clicks on the tag button, the list of interventions should automatically appear. Once a verifier chooses a tag from the list it should be better if no extra confirmation was needed (i.e. click on create button). This would reduce the number of clicks to two.

8. **Editing verifier’s comments**

During the review at cApStAn, the reviewer sometimes has to go back to the verifier to clarify a number of issues. Depending on the verifier’s explanation, comments sometimes may need to be edited for clarity. Or minor typos in the comments should be corrected sometimes. Verifier’s credentials were used for minor edits in this round, since the reviewer did not have editing rights.

**Suggestion:**

- Enable editing for the role of the Reviewer.

9. **Submit function**

was not available when a comment or tag was changed at review.

Workaround was used: make a change of the status to enable the Submit function.

**Suggestion:**

- Enable Submit function at any change made to tags and comments, too.

10. **Status function for reviewer**

Reviewer cannot change the status, drop down menu is empty for reviewer

**Suggestion:**

- Enable status for reviewer’s role.

11. **Discrepancy of flagged tags view**

Review (using verifier’s credentials):
Main screen shows 1 occurrence of “Requires follow-up”

When question opened in Edit mode, there is no such a flag visible

When status changed to Done/ready and submitted, flag disappears
12. **Formatting**

There was a discrepancy between the source version in Word/Excel and

Thus verifier commented: Underlining was not present in source, so verifier removed it.
Underlining was retrieved by reviewer.

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**Conclusion**

The feedback was collected from various users of the TMT for several verified versions. Some of the issues described above may have been addressed already for the last version.

Features included in the Translation Management Tool are useful and the platform is mostly adapted for complicated workflows.

It is appreciated that verifiers can view the translations produced by translator 1 and translator 2.

The integration of verification categories in the tool as tags is a smart and useful approach, especially since verifiers can choose more than one category for their intervention.

To further improve the tool and facilitate the work of all linguists involved layout issues should be solved.

The integration of a translation memory management system should be envisaged.

cApStAn tester has no knowledge of the feasibility of the latter, but it should at least be explored.