OECD Programme for International Student Assessment 2015

PISA 2015 TRANSLATOR'S GUIDE

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NOTE TO NPMs

Each National Centre will have slightly different processes for monitoring and managing the workflow of staff involved in the translation/adaptation process. Sometimes staff will be familiar with the National Centre, the PISA Portal and specific National Centre processes. Other staff will not have this exposure or knowledge. In order to accommodate for these differences, this Guide includes text in **<angle brackets>** that may need to be adapted.

Remove this box and update the Table of Contents (page numbers) after reviewing and adapting all texts between < >

INTRODUCTION

1.　　　　Thank you for agreeing to translate test materials for the PISA2015FT survey. To carry out this assignment, you will translate the materials using the Open Language Tool (OLT) XLIFF Translation Editor and you will download/upload XLIFF files to preview source and translated units on an online facility, the PISA2015 portal.

2.　　　　The present Translator's Guide provides detailed instructions relevant to your role as translator. It includes a section on Initial Preparations, a step-by-step detailed and illustrated Workflow (full version), a Quick-Reference Guide (short version of the Workflow, which you can use once you are familiar with the process), and an Appendix with additional hints on using the OLT software.

3.　　　　The translation of PISA test units involves double independent translation followed by 'reconciliation' of the two initial translations, verification, national review and final check – according to specifications described in the PISA2015FT Translation and Adaptation Guidelines. To successfully carry out your translation assignment, you need to be familiar with this document, **<provided by the National Centre>**.

4.　　　　In addition, the PISA2015 CBA Translation Workflow document, **<provided by the National Centre>** provides detailed description of the computer assisted workflows for translation and verification of the PISA instruments. This can be a useful additional reference for carrying out your assignment.

5.　　　　There are two source versions of the PISA2015FT test units, English and French. **<You will be advised by the National Centre whether you are assigned to translate from English or French.>**

INITIAL PREPARATIONS

6.   Before starting your work, you need to:

   o   Read the PISA2015FT Translation and Adaptation Guidelines a first time thoroughly, and keep this document at hand for consultation.

   o   Check that your PC complies with the following minimum requirements:

        - Operating system: Windows XP, Vista, 7 or 8 (the OLT software will not run on Macintosh or Linux OS)

        - Microsoft Office Suite (or just MS Excel): 2007 or later.

        - Browser: Firefox (v10.0 or later) is recommended. Other supported browsers: Chrome (v18.0 or later), Safari (v5.0 or later), Internet Explorer (v8.0 or later); however, only Firefox may be used to preview CBA units. It is best to use Firefox for all PISA work.

   o   Download and install the OLT software from the PISA Portal. It can be found in the Materials -> 2015 Field Test Resources -> Translation -> OLT folder. The installation instructions are included in the download folder.

   o   **<Receive from the National Centre>** your credentials for logging in to the PISA2015 Portal, a list of the units you are assigned to translate, and instructions for downloading the corresponding 'TAS' (Test adaptation Spreadsheet) Excel file(s) – See the PISA2015FT Translation and Adaptation Guidelines for a description of the latter.

WORKFLOW PER TRANSLATION SESSION – FULL VERSION

Login to the PISA2015 Portal, download files and launch preview

7.   Go to the PISA portal – URL: http://pisaportal.tudor.lu/portal – and login by entering your Username and Password **<provided by the National Centre>**.

8.   Navigate to the Monitoring workspace:

9.   In this workspace is the Translation Monitoring Report. It shows all active translation activities for your country and language assigned to you or somebody with your role. Use the filters on the left of the screen to further refine the list of tasks you can choose to work on. See the PISA Portal User's Guide for a detailed description of the Monitoring Report.

10.   Select a unit (or a batch of units) that you will translate by clicking the button in the "exec." (Execute) column. A small popup window will be displayed, which includes a link to the XLIFF file(s) in
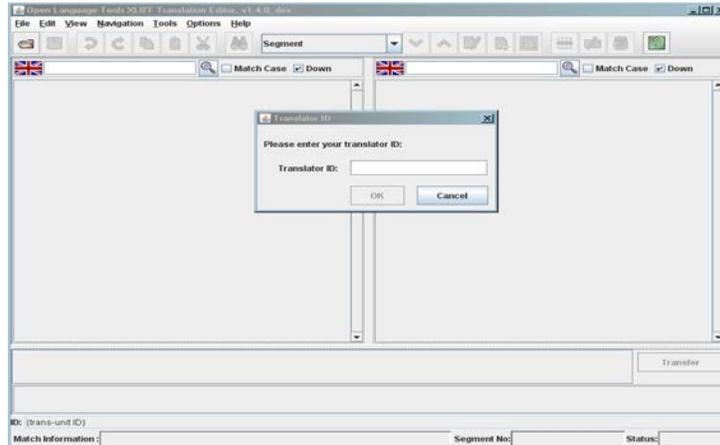
the document repository that you will need. Save the XLIFF file(s) to an appropriate location on your computer. It is recommended to save the XLIFF files in two different subfolders labelled e.g. "Originals" and "Translated", in case it is later necessary to revert to an original (OLT does not allow to save a file under a different name).

11.   In the Translation tab of the portal is a widget where you can upload and preview a unit. When the XLIFF is uploaded, a preview screen will open in a new browser tab. This preview will show the entire unit, including all questions. Preview the XLIFF you will be working on before making any changes. It is recommended that you try to solve the task as if you were a student taking the test: this will help you think about the best translation solutions.
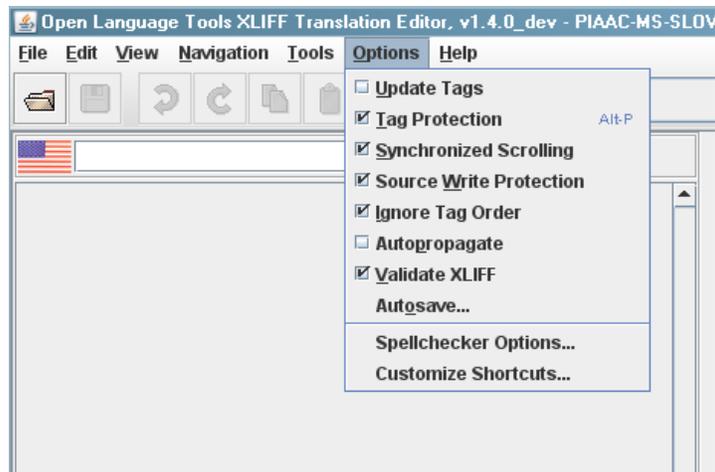
12.   Keep the preview screens open for consultation when you actually translate. (If possible, use a work station with two monitors, so that you can reserve one of them for previews.) If you prefer to translate offline, you can now interrupt your Internet connection.
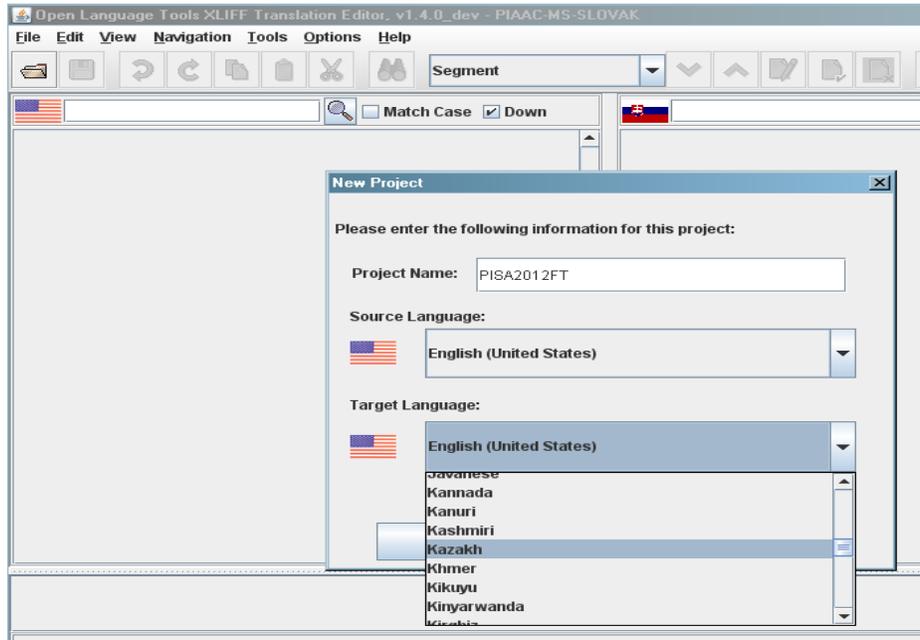
Translate using OLT

13.   Launch **OLT** (from the Windows Start/All Programs menu, or from the desktop shortcut). Enter your initials as Translator ID. You will need to enter this ID only once and you do not need to remember it.

14.   From the **Options** menu, check that **Update Tags** and **Autopropagate** are not selected (unchecked). All other options should be checked. You will only need to do this once.
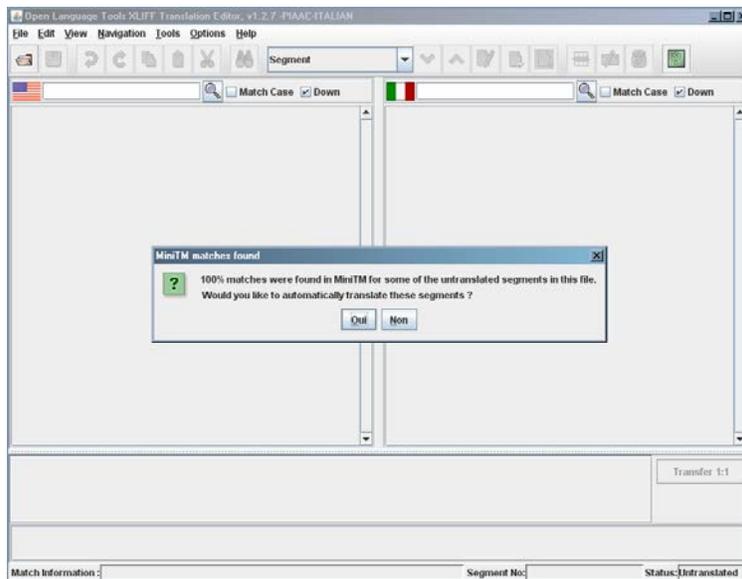
15. From the File menu, select **New Project** and create a project called e.g. PISA2015FT. Select Source Language: English (United States) OR French (France); Target Language: your language. Note: OLT will automatically open the previously used project when you launch the program, and the same project should be used for all the PISA2015FT files, so you need to create a project only once for this translation assignment.
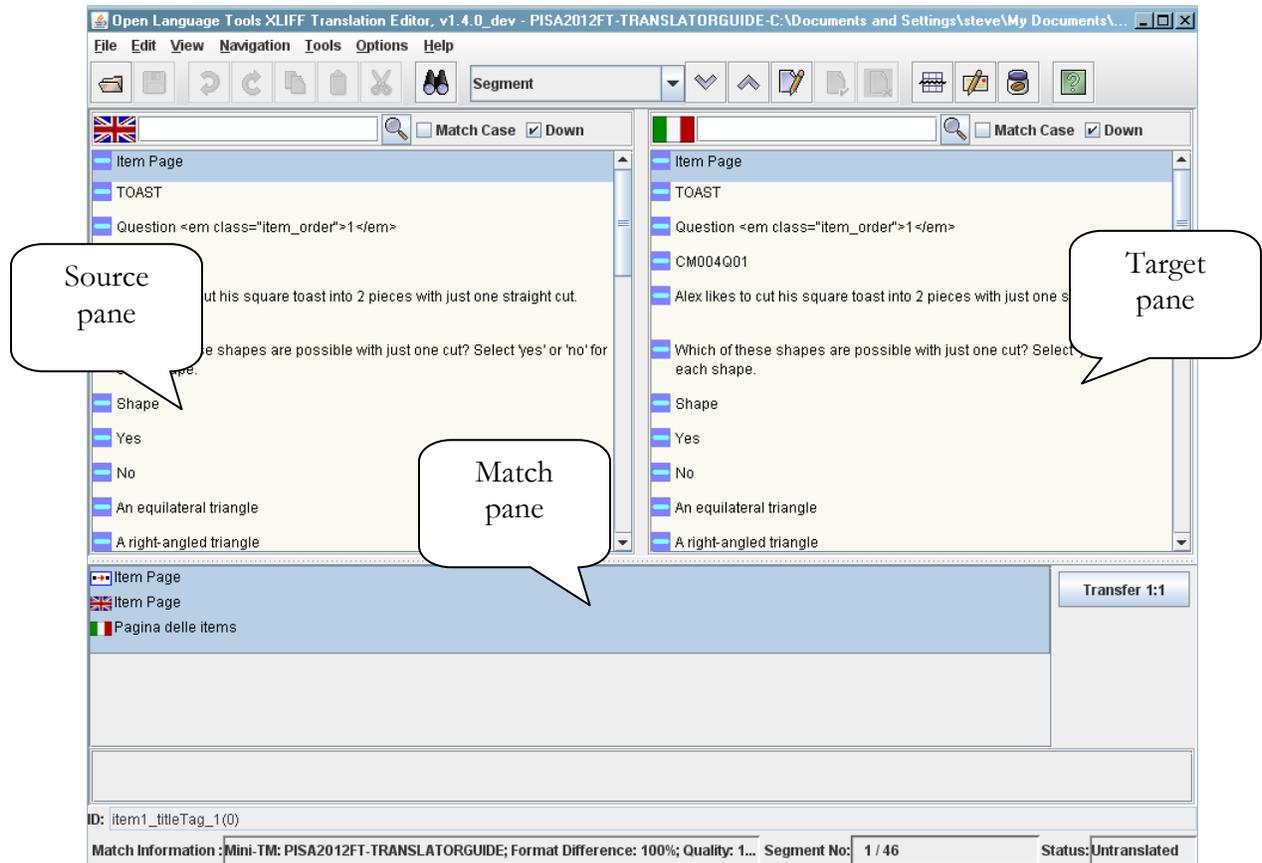

16. Open the XLIFF file: click on the **Open File** button and navigate to the file you saved on your computer in step 10. Select it and then click on Open (or double-click on it).

17. If a window opens like the one below, asking you if you want to automatically translate segments in the file, **select NO** (this is a dangerous operation).

18.   When the file is opened, the screen is divided in three sections: **source** pane, **target** pane and **match** pane. You can adjust the horizontal line above the match window by dragging it, if you want the source and target panes to have more space than in the default view.

19.   OLT displays the translatable elements separated in **segments**. Translate the segments one by one, by overwriting the text in the target pane (right side) and then moving to the next segment by clicking on the **Confirm and Translate Next** button ⬚ in the toolbar (keyboard shortcut: ALT-Enter). This action enters your translation in the Mini-TM (see later). Save the file OFTEN as you work in case of crashes (keyboard shortcut: CTRL-S).

20.   Although the XLIFFs for PISA2015FT are typically organized with segments for the items (questions) coming first, followed by those for the 'stimulus' text (the text to which the items refer), it is strongly recommended to translate first the stimulus text and then the items – following the order presented in the TAS.

21.   During your translation task, consult the item-specific **translation and adaptation guidelines** in column D of the TAS. You can also use column E (Country Comments) of the TAS to write any comments you may have for the attention of the Reconciler who will be reviewing and using your translation, for example to explain a choice you have made, explain a difficulty or doubt, propose an alternative translation you can think of, report a layout or functionality issue, etc.
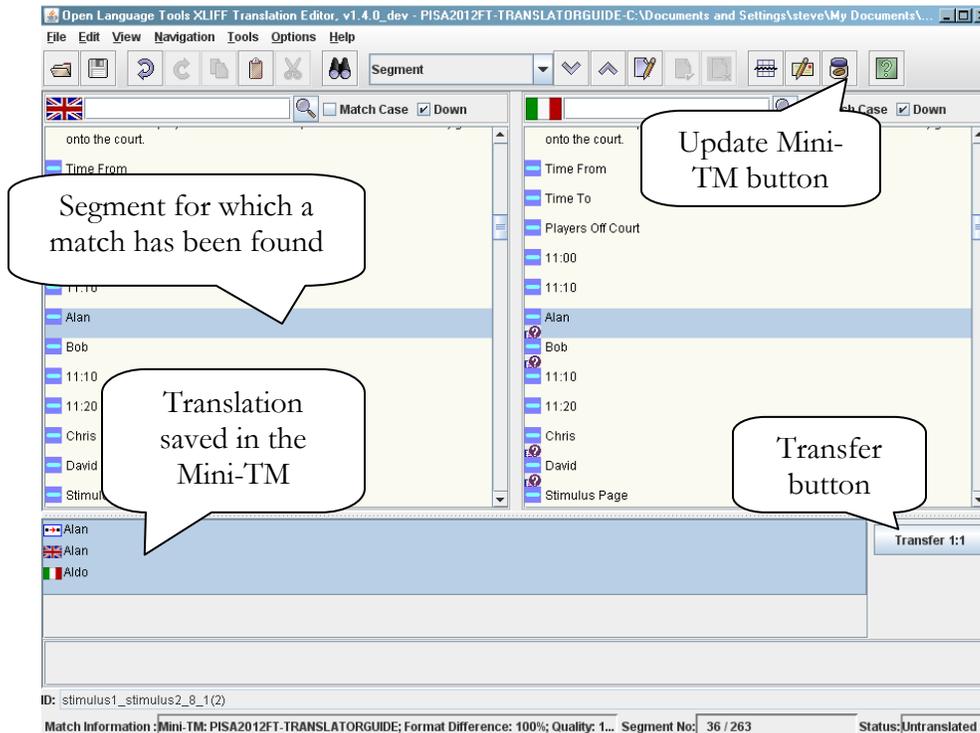
22.   As your Mini-TM builds up, you will be able to reuse translations for segments that reappear later in the file (or in other files) with identical or very similar source text. When this happens (when the software detects a match) one or more previous translation(s) will display in the match pane and the **Transfer** button [Transfer 1:1] is enabled. If appropriate, you may then select one of the matches and click on the button, to transfer the translated text to the target segment you are on without needing to type it.

- If edits are needed, make them and then click on the button **Update Mini-TM** [icon] in the toolbar (keyboard shortcut: CTRL-U). A window will display asking you if you want to **Overwrite** the entry already in the TM or **Add** another entry. Choose Overwrite if you want to keep only the latest (edited) translation, choose Add if you think the previous (unedited) translation could also come in handy.

- Move on to the next segment by clicking on the **Next Segment** button [icon] in the toolbar (keyboard shortcut CTRL-↓), if the **Confirm and Translate Next** button [icon] is grayed out and inactive (meaning that the translation is already in the Mini-TM).

23.   At times you may want to stop working sequentially and come back to previously translated segments to revise them. Use the **Next Segment** and **Previous Segment** buttons ⌄ ⌃ (keyboard shortcuts CTRL-↓ and CTRL-↑) to navigate in the file. After making a revision, click on **Update Mini-TM** 🗄 or press CTRL-U to save your latest version in the Mini-TM (normally you will want to **Overwrite** your previous version).

24.   Avoid using the button **Approve And Go To Next Translated Segment** 🗋 (This makes it difficult to re-edit a segment if needed later: you have to change the segment status in order to do so.)

25.   An XLIFF file contains **formatting tags**. These tags appear in red when the element is activated and normally must not be modified or deleted. At times you may however need to edit tags for inline formatting. More information is provided in the Appendix of this document.

26.   A last but important detail when translating XLIFF files in OLT: If for some reason (word order, length of sentence…) you do not need to use the space for a word or phrase in the source pane, then erase that word or phrase in the target pane but **leave one blank space**.

Upload, preview, correct if needed, release

27.   Once you are (provisionally) satisfied with the translation of a unit, **save** it the last time (CTRL-S) and **close** it. Answer 'Yes' if asked "Do you wish to save the Mini-TM?"

28.   Login to the PISA 2015 Portal (if you are logged out), return to the Translation tab and upload the XLIFF file for the unit on which you have been working. Remember to upload from the "Translated" subfolder.

29.   You are then able to preview the unit with your translations implemented by clicking the Preview button. A new window (or a new tab) will open in the web browser, showing the translated unit.

- Note: after uploading an edited XLIFF file to the PISA portal, the corresponding preview of the items sometimes may not reflect the latest changes you have made in the XLIFF file. If this is the case, please **clear the cache** in Firefox and try the preview again.

- How to clear the cache in Firefox:
    - ➢ From the Tools menu, select Clear Recent History. If the menu bar is hidden, press Alt to make it visible.
    - ➢ From the Time range to clear, select the desired range. To clear your entire cache, select 'Everything'.
    - ➢ Click the down arrow next to 'Details' to choose which elements of the history to clear. Click the 'Clear Now' button.

30.   In the preview window are buttons to show the English and French source versions of this unit. Clicking on these buttons will open a preview of the respective source version in a new window.

31.   If you find any errors or change your mind about any of your translation choices after previewing, re-**open** the XLIFF file in OLT, make your corrections, re-**upload** to the PISA portal (your latest upload overwrites any previous one), and re-**preview** the unit.

32.   Once you are fully satisfied with your translated unit, move on to the next unit and repeat the process with that XLIFF file. When you have completed all units within the cluster or batch, first upload your files to the portal. To do this, return to the Monitoring tab in the Portal, click the Execute button for the cluster. Then click the link labeled "Open new window with the files for this cluster". Then, upload the new versions of the XLIFF files (as well as the TAS file if it has been modified). To upload the new

versions, click the small up arrow icon (⬆) to the right of the files. Once all files have been uploaded, return to the popup window in the monitoring report, click the **I'm Done** button, and move on to the next cluster (or stop the session). Attention: **this step is irreversible**.

33.	**<Advise the National Centre of your progress according to the arrangements that have been agreed>**.

WORKFLOW PER TRANSLATION SESSION – QUICK REFERENCE GUIDE

34.	Log in to the PISA portal and go to the Monitoring tab. Select your country and language. Choose a unit to translate by clicking the Execute button. Save the XLIFF file(s) to an appropriate location on your computer. Download the relevant TAS. Launch previews as needed to assist you in the translation process.

35.	Launch OLT. Click on the **Open File** button 📂 and navigate to the file you have downloaded. Do not let OLT automatically translate segments in the file. **Save** the file OFTEN as you work.

36.	Translate the segments one by one, by overwriting the text on the right side and then moving to the next segment by clicking on the **Confirm and Translate Next** button 📝.

37.	Keep open the corresponding TAS, **consult** the **item-specific translation/ adaptation guidelines** and **write comments** for the attention of the Reconciler, if needed.

38.	Use the **Translation Memory** when appropriate/convenient: lift a previous translation by using the **Transfer** button [Transfer 1:1]. If edits are needed: make them, click on the **Update Mini-TM** button 🗄, move to the next segment by clicking on the **Next Segment** button ⌄.

39.	When all segments are translated, **save** the file (CTRL-S), **close** it, answer 'Yes' if asked to save the Mini-TM.

40.	Login to the PISA portal (if you are logged out), return to the Translation tab, upload the XLIFF by using the Browse button, and **preview** your translated unit by clicking the Preview button. If needed: re-**open** the XLIFF file in OLT, make your corrections, re-**upload** to the PISA portal, and re-**preview** the unit.

41.	Once fully satisfied with all units in the cluster or batch, return to the Monitoring tab, click the Execute button for the cluster, upload the final versions of your files to the portal, click the **I'm Done** button, and move on to the next cluster.

APPENDIX – ADDITIONAL HINTS FOR USING OLT

1.   With the **Search/Replace** button 🔍   (keyboard shortcut F3) you can search for e.g. a specific term either in the source or in target version. This may be useful if you change a recurring term and want to make sure it is changed everywhere.

2.   With the **Navigate/GoToSegment** command (keyboard shortcut CTRL-G) you can go directly to a given segment if you know the segment number (found at the bottom of the OLT view).

3.   You can change keyboard shortcuts from the menu **Options/ Customize Shortcuts**.

4.   If you have accidentally marked a segment with status Approved (and thus can no longer edit it), right-click on the segment and select **Mark Segment As Translated**.

5.   Sometimes the first character typed in a segment will not appear the first time the keyboard key is pressed. If the key is pressed a second time the character will appear.

6.   Similarly, sometimes the first character in a segment will not be deleted the first time the backspace key is pressed. If the backspace key is pressed a second time the character will be deleted.

7.   You can use the **Print** options to print a file from the editor. You can choose from a selection of print options the format you would like the print-out to take. These print options can be accessed in the File menu by clicking on Print Options. The Print Options dialog appears. You can choose Without Tags to print only the text elements for the translation.

8.   XLIFF files contain **formatting tags** i.e. sequences of characters that indicate how text will be formatted on screen. In OLT these appear in red font colour when an element is activated and are write-protected (if the **Tag Protection** option is switched on, which is strongly recommended).

9.   Most of the time, you will **not** need to 'tamper' with formatting tags. For the above example, to translate the sentence with the correct formatting (the translation of "Explain" needs to appear in bold), you would overwrite "Explain" with the corresponding word or words in your target language, and similarly overwrite "your choice." with the corresponding word or words in your target language.

10.   Occasionally (because of different word order or other circumstances), you will need to insert or delete formatting tags. To edit a tag in a target segment:

- Click on **Options** in the menu and deselect **Tag Protection**. This will switch off tag protection.
- Enter your translation with the correct formatting tags (see list below).
- Click on **Options** in the menu and select **Tag Protection.** This will switch tag protection back on.

List of commonly used formatting tags

Formatting tag(s)	Effect
 	Text between tags will display in **bold**
<i> </i>	Text between tags will display in *italics*
<u> </u>	Text between tags will display <u>underlined</u>
	Text between tags will display in superscript
	Text between tags will display in subscript
	Sequence of characters will display as a non-breaking space
–	Sequence of characters will display as a dash
—	Sequence of characters will display as an 'emdash' (long dash)
 	Sequence of characters will cause a line break

11.	For example, to translate "Why" in French with the correct typographic conventions, a French translator would enter **« Pourquoi ? »** – which will display as **« Pourquoi ? »**.

12.	It is important to check when previewing that no spaces have been deleted or added between words by accident. Remember also that if you do not need to use the space for a word or phrase that is available for English/French, then erase the English/French word or phrase in the target segment but **leave one blank space**.

13.	If you delete or edit formatting tags by **accident**, this will cause an error when importing the file into the software that generates the preview. If this occurs, you need to manually change the tag back to its original state. The original state can always be viewed in the corresponding source element.

- Click on **Options** in the menu and deselect **Tag Protection**. This will switch off tag protection.
- Manually change the tag back to its state as seen in the source segment.
- Click on **Options** in the menu and select **Tag Protection.** This will switch tag protection back on.