



Building a Glossary and Style Guide

Synonyms are awesome fabulous great. But synonyms can also cause problems because they have the power to introduce ambiguity. When your user manual references the “handpiece” but your quick start guide mentions a “handset,” some users will question: “Are these the same thing?” And once you start translating your documentation, any tiny terminology inconsistencies get compounded on a global scale.

So how do you manage terminology? The key tools used in the translation industry are glossaries (also called “termbases”) and style guides. By building and maintaining these tools, you create terminological consistency across your documentation, making it easier for your customers to read and use the content that you distribute. This brief offers a roadmap for how to make these terminology tools work for you and your organization.

Start with the English Term List

First things first: establish your key product terms. These are terms that are specific to your product, terms that you use every day. Include the names of any component parts, frequently used acronyms, and special procedural terminology. Imagine this list as a “cheat sheet” for new team members so that they understand your internal lingo.

Once your list of key terms is established, consider adding other terms where you have noticed that different words are used across the various individuals and groups in your organization to refer to the same thing. Pick a default to make the standard, but log any alternatives in your term list so that translators of your content can clearly see that these are references to the same thing. If you can make a business case for consistency of the English terminology, establish a plan to implement your default terms globally so that all your English documentation uses one core set of consistent terminology.

Excel is a great platform for this process because most users across your organization will be familiar with it; Excel also allows you to add columns and easily alphabetize the list. At the end of this process, you will have a list that might look like this:

	A	B
1	English Preferred Term	English Alternate Terms
2	handpiece	handset
3	ZenTreat catheter	
4	ZenTreat user interface	
5	touch screen	
6	ready mode	

Open a Dialogue with In-Country Stakeholders

Your global stakeholders have their own ways of talking about your product in their local language. Their input will be invaluable as you build a global glossary. Ask an appropriate stakeholder in each language to select the preferred term used locally for each key term in your English list. They can log these terms in the next column of your Excel file for a clear correlation between the English and non-English terms. Then ask your stakeholders to add other preferred terms to the list where their language offers synonyms that might not be available in English (that is, English may only have one viable term, but German may have two similar options).

After stakeholders in different countries add their terms to the master list, you will end up with some discrepancies: the German team added a term that the Italians didn't, and the Italians added a term that the Germans didn't. Organize all the languages into a single, master glossary with one column per language. You can also consider adding informational columns, such as alternate English terms or a description of the term. Send this back to your stakeholders to "fill in the blanks" so that you have a single, comprehensive glossary for all regions.

Your final glossary might look like this:

	A	B	C	D	E
1	English Preferred Term	English Alternate Terms	Comments	French	Spanish
2	handpiece	handset	system component	pièce à main	pieza de mano
3	ZenTreat catheter			cathéter ZenTreat	catéter ZenTreat
4	ZenTreat user interface			interface utilisateur ZenTreat	interfaz (<i>fem.</i>) de usuario de ZenTreat
5	touch screen		system component	écran tactile	pantalla táctil
6	ready mode		system status	mode « ready » (prêt)	modo «ready» (preparado)

Expand the Discussion to a Global Style Guide

Glossaries are amazing for consistency, but they cannot do it all. Consistency is more than just terminology. For everything else, you will need a style guide. Where a glossary tells you (and your translators) which term to use, a style guide provides direction on how to draft your documentation. For instance:

- how should measurements be handled?
- what format should be used for phone numbers?
- should the country name in any addresses be translated or kept in the local language of that country?
- what is the protocol for common acronyms? (special, product-specific acronyms should be in your glossary)

As you build your style guide, it is important to ensure that all your instructions work not only for the English content but also for non-English markets. For instance, if your product name is part branding and part descriptor, you need to establish which part of the name is translatable. Let's imagine that you are the product manager for the "ZenTreat Catheter." Although it is tempting to establish "ZenTreat Catheter" as the full product name and ask that it be kept in English across all your documentation, this poses a dilemma for your translators. The English name includes the description of the device: this is a catheter. In Chinese, however, the description is lost even when the word is retained because the Chinese reader may not know what "catheter" means in English. Your translator must choose between losing the description by keeping the full name in English or doubling the word catheter, once in English and again in Chinese, which is terribly awkward to any reader who happens to know both languages. Discuss with your global stakeholders to establish a standard that works for all markets.

Common Acronyms

Not all English acronyms have international equivalents, although many do. For instance, the World Health Organization (WHO) is called the Organisation mondiale de la santé (OMS) in French, but there is no French acronym for the U.S. Food and Drug Administration (FDA). It is easy to prescribe that local acronyms should be used when available, but your translators will benefit from guidance on how you want them to handle common English acronyms that do not have an equivalent in their language. You can also improve the readability of your documentation by ensuring that common acronyms appear in a consistent format, whether that is "full name (acronym)" or "acronym (full name)."

Measurements

Documenting measurements seems very simple, but it is delightfully complex. There are two key questions:

1. which system (imperial or metric) will you use?
2. what punctuation will you use?

For instance, if you have a procedure that involves positioning something at a distance of 3 inches from a landmark, which do you use?

3 inches	3"	3 inches (7.62 cm)	7.62 cm (3 inches)
3in	3 in.	3 in. (7.62 cm)	7.62cm

If you plan to distribute internationally, metric units will be required. The easiest solution would be:

7.62 cm (3 inches)

with an instruction to delete the "inches" measurement when it is not appropriate for the target market of a document. However, it is best that you select a default that works specifically for your product and your global team.

Recognize that These are Living Documents

You have established a glossary and built a comprehensive style guide. You're all done, right? Not so fast. Glossaries and style guides are living documents. Changes will be needed over time as your product evolves, as you enter new markets, as you release new products, and even as global markets themselves evolve. Make sure that you create opportunities to actively review your terminology tools to confirm that they continue to serve your organization well.

Although these tools need to evolve with time, you do not want them to be in a constant state of flux. If each new reviewer or technical writer has carte blanche to re-vamp everything, you forego the benefits of having established consistent standards in the first place. Help new team members understand the amount of work that went into building these tools and the costs associated with unnecessary changes. For instance, if a new member of the Italian team wants to change a key word, what do you do about all the documentation already in circulation using the old term?

Equally important, work diligently to ensure that all English documents are created in light of these consistency tools: the use of consistent terminology and writing standards will help your English-language readers, including physicians and regulators, better understand your product and procedures while helping you avoid questions from your translators. With a bit of active maintenance, your glossary and style guide will improve your global documentation and streamline your translation activities for the long-haul.

About Idem Translations

Founded in 1983, Idem Translations, Inc. is a full-service provider of translation and localization services. Idem specializes in certified translations for medical device, biomedical, and pharmaceutical companies, as well as other organizations and entities working in the life sciences sector, such as contract research organizations, healthcare research centers, and institutional review boards. The company is a WBENC-certified woman-owned business and holds certifications to ISO 9001:2015, ISO 13485:2016, and ISO 17100:2015.

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