



# Guide to Source Document Creation

So you are planning for your product to take over the world? Excellent! Now is the time to start optimizing your source documentation, to help you avoid pitfalls down the road when your team begins to translate into a myriad of other languages. Even tiny technical hiccups can have serious ramifications for the translation process, so save your future self time and money by building the best possible documentation that you can today! Read on for concrete advice on how to optimize your English documentation and plan for smooth translations.

## Which File Type Is Best?

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Documents that go through the translation process pass through a lot of different workstations and applications. They get shipped from one person to the next (for example, from you to your project manager to your translator, and so on) and they get transformed at each stage of the process for special handling in different software applications. For this reason, you want to build a very sturdy source that can withstand the strain of all this file handling. You also want to select the file format that offers the stability that you need for the specific future your document will have:

- will it be professionally printed? if so, on what size paper?
- will it be multilingual? if so, how many languages will it include?

### Word v. InDesign v. FrameMaker

Any file that has a heavy design component should be created in Adobe InDesign or FrameMaker, with accompanying, high resolution images and all relevant fonts used. We advise the use of Adobe FrameMaker for large, single-language manuals. InDesign is perfect for smaller IFUs and shorter documents, including patient or physician brochures. MS Word can be a good option for a single-language manual if it has been properly built, but be forewarned that MS Word files can become unstable if they become too heavy. What is “too heavy?” Imagine a 20-page manual in English. Now translate it into 10 languages. You are suddenly dealing with a document over 200 pages that will behave totally normally...until one day it simply doesn't anymore! If you want to avoid catastrophe at some unknown future date, limit your MS Word documents to, say, 30 pages total. There are exceptions to every rule, but this is a safe benchmark.

### Managing Images

Adobe Illustrator is preferred for vector images that do not contain content for translation. These vector images can be dropped into any translated document and retain high resolution. On the other hand, if an image contains translatable text, we recommend migrating text into the main InDesign file prior to translation. This optimizes the workflow and keeps all translatable text together, avoiding any copy-and-paste between file formats.

#### **Pitfall: Never save PDF as Word**

When you “save” a PDF to a .docx format, the resulting file may appear clean, but it harbors many bugs “under the hood,” which create an unstable file for translation and printing.

If you do not have access to a tried-and-true source file that was built from scratch, your translation partner can help you recreate a reliable, editable source before translation begins.

## Stacking Languages into a Multilingual File

The decision to create multilingual files depends upon your business needs, but it is important to keep in mind the length of the text and how many languages it will be translated into. These considerations are doubly important when you plan to print and ship the multilingual document in packaging of a specific size. Depending on those size requirements, fonts may need to be decreased and paper size will need to be evaluated. Whenever you can (for example, if documentation is distributed via a weblink only) stick to single-language files to simplify your file management.

# How to Build a Translatable Source?

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Simple, common-sense tricks can help you safeguard the technical quality of your translated documentation. Even better, these tricks reduce headaches and hazards in translation, which means your translation partner can turn around your requests faster and for a lower cost.

## Tables of Contents and References

Document processing and graphic design applications offer many features to automate content, such as tables of contents, field codes, and cross-references. Optimizing your use of such features can shorten translation turnarounds and reduce costs.

- Only use automated tables of contents, and never include any manual overrides. Automated TOCs can be updated in translation with the click of a button, but manual modifications are prone to error.
- If you plan to use field codes, use only the number (of the section, chapter, etc.) rather than phrases or full section names. This saves you money on translation as numerals work globally and your file will not require special handling to prepare field codes for translatability.
- For cross-references, use automated hyperlinks rather than hard-coding page numbers. Different languages take up more or less space than English, so page numbering shifts in translation.
- In general, ensure that any references you use (automated or not!) are exact and not merely paraphrased. For example, if a UI label reads “Email Address,” reference it as “Email Address” and not just “Email.”

## Images

In order to ensure that your images always look professional, curate a set of high resolution vector images in Adobe Illustrator. This allow you to place image content directly into source files built in InDesign or FrameMaker. If you are using MS Word, then a curated set of image files in Adobe Illustrator or PhotoShop is best.

- Never take a screenshot of an existing image to insert it into a file for translation; this can cause a reduction of image quality. Instead, link to a single, high-resolution image so that each document relies upon the exact same foundational image file.
- Avoid using text boxes in MS Word to try to add text to images. Text expands in translation, but text boxes don't...
- If you can't avoid textboxes, avoid grouping them with their images because individual boxes will need to be resized following text expansion or contraction.
- Make all symbols in your symbols table images (unless you have the rare symbol that needs to be translated). For example, if you include “REF” as text in the symbols table, translation software automatically treats it as part of your content for translation, which can lead to confusion.

## Don't "Break" It

Although it is tempting to use various types of breaks (page, section, column, soft and hard returns) to beautify your English content, they wreak havoc on the translation process, literally "breaking" apart translated content in a decidedly ugly way.

- Only insert page or section breaks between true document sections that should always reside on different pages. Breaks that are inserted in the English source for aesthetic purposes will have to be manually removed in translations due to expansion/contraction of the content in the new language.
- Avoid hard or soft line breaks in the middle of sentences or phrases. For example, don't insert a little break to make a title or column header look nice in English. Industry-standard translation software relies upon carriage returns to segment text for translation and build the structure of your translation memory database. Beautification breaks create incorrect alignments in the translation memory and create risks down the road.

## Software and Mobile Apps

When your user documentation references software or a mobile app, take special care to maintain a clear and consistent connection between the user interface and the documentation that supports it.

- When referencing UI content, use a consistent format to cue your readers (including your translators) about what appears on-screen. For example, always use bold or italics to denote on-screen text. Definitely don't mix normal text, "normal text in quotation marks," **bold text**, "**bold text in quotation marks**," etc. for on-screen text. Consistent formatting will not only help users of the English source and the translated documents, but will enable your translators to easily identify what is and what isn't a software reference that should be pulled directly from the translated interface (or left in English to help non-English speakers easily navigate the software).
- When software gets updated—changing, adding, or removing either functionality or UI terms—update the documentation immediately so that the software and its documentation remain in sync, in both English and in translation.

# Controlling Your Docs

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## Part Numbers and File Names

Once you begin translating your documentation, it is easy to find yourself suddenly dealing with exponential growth in the number of files you manage. By establishing clear, standard conventions, you can keep all your documentation ducks in a row.

- When you send your file for quotation, provide your translation partner with the file names, part numbers, and rev letters that should be used for the translated documents. This ensures that document control requirements are explicit from project start and can be easily and immediately communicated to all relevant members of the project team.
- The source file that you send for quotation should use the final file name that will go into your document control system. Avoid appending dates, notes, author initials, etc. that are part of your pre-release version control as these only decrease clarity once the document goes into the translation process.
- Simplify communications by using the same file naming/numbering conventions from one project to the next.

- If you are not releasing a separate part number for each translated document, you may want to include language codes in the file name of translated materials. Two digit ISO 639-1 codes are standard, but don't fully cover all sub-markets. (For example, Chinese has a single code, but materials may need to be customized for mainland China, Taiwan, Hong Kong, and Singapore depending upon their intended use.) Discuss your list of languages and markets with your translation partner, who can offer advice on the simplest solution for differentiating dialects in the file naming conventions.

### Which files should you send for translation?

1. Final, clean, source files without any tracked changes, comments, or notes. This document is directly converted into a translator-friendly format.
2. Corresponding PDF printed directly from the final source file sent for translation. This document is used as the baseline for quality control processes, since it will display identically for both your team and your translators, regardless of the application (and version) used to create the source.
3. Redlines of changes between revisions are appreciated, but are only necessary when your translation provider is assisting with the update of your English source document in a professional publishing application. If you are sending the final, clean, new source in its native file format, industry-standard translation software enables the tracking of file version differences on a word-by-word basis.

## Source Updates

Mid-project updates are tricky for translations; it is a bit like changing the pharmaceutical recipe in the middle of a manufacturing run. When the source content changes, all translators must be paused so that the modified content can be integrated into the project process as early as possible to escape painful delays. Do what you can to avoid mid-project changes, but when they are unavoidable, keep the following in mind.

- Assuming that your translation partner has rigorous process controls in place, every source change that involves any text for translation, no matter if it's four words or 400, must pass all process and quality checks. This typically means independent translation and review, as well as layered quality control to ensure all project requirements have been met. As a result, even tiny source changes constitute a change in project scope, and require additional cost and time to incorporate into the final product across all languages.
- Depending upon the native file format, you may want your translation partner to incorporate source changes for you directly. This is common when the deliverable is intended as a multilingual file. In such cases, send a PDF file with clear markups of the changes required, then prepare to review and approve the updated file before translation begins.
- If you will update the source on your side, provide your translation provider with the clean, revised source (with or without redlines) and a clean PDF (no redlines, exactly as you would want to print or publish it). Confirm whether the source update means that the revision letter of the source and/or translations will change.
- Some clients prefer to maintain two different English versions: one in a print-ready format (such as InDesign) and another in an easily editable format (such as MS Word) in order to easily circulate proposed changes in-house without having to touch the design files. Having two source English files can cause confusion if both are not updated identically at every revision. We recommend only having one version to ensure all changes are implemented and approved for every revision sent to translation. If that is not possible for your team, your translation provider may prefer to receive new translation requests with the editable format, then offer a turnkey service to input the changes to both the English design file and the translations.

## 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.

## Get Help

For more information about how we can take the risk out of translations for you and your team, please visit us online:



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