ESS document date: 09.12.2022

ESS Round 11
Verification Instructions
for National Coordinators[1]

Brita Dorer (GESIS, Mannheim/Germany)
Elica Krajčeva (cApStAn, Brussels/Belgium)[2]

Contents

General Notes on the ESS Round 11 Verification Instructions

In Round 11, a large number of all translated versions of the ESS Round 11 Source Questionnaire will be subject to translation verification by cApStAn.

This document is intended to guide the national teams through the verification process. It consists of two parts:
- Part A explains the organisational aspects of this exercise, and
- Part B outlines the technical environments in which the verification will take place, that is, the Excel-based "(Translation and) Verification Follow-Up Form, (T)VFF", and translation verification in TranslationCTRL (TC).

Both parts are equally important and should be followed in their entirety.

Communication via myESS

In ESS Round 11, NCs (National Coordinators) and the CST (Core Scientific Team) will use the myESS portal to collaborate and communicate with each other. This includes all communications on translation, verification and UPF Translation Assessment. Once logged in, each national team will find a predefined thread for translation and verification-related discussions with the ESS Translation Team. This is reachable via Forums – your country - Translation.

Note that national teams, the ESS Translation Team, and cApStAn will also be using myESS for any communication on the translation and verification steps.

Please also check the myESS user manual for further instructions.

Part A: Organisational aspects of the ESS Round 11 verification

1. Translation and verification steps to be followed in ESS11

National teams are asked to follow the steps below in order to translate the new items for ESS Round 11 (as described in the *ESS Round 11 Translation Guidelines*, available on myESS Master Documents Translation and on the NC Intranet):

1.1 Check the text subject to verification in ESS11: this information in listed in the Document *"ess11 new text to be verified-Alertxx"* under ESS Mater Documents – Translation on myESS.

1.2 Please inform the ESS translation team at GESIS – **at least three weeks in advance** – of the date you plan to submit your national translation(s) to cApStAn; this information should be provided to the ESS translation team via the relevant myESS Forum ("Translation" or "cApStAn Verification") (this also applies to points 1.2 and 1.4 below).

1.3 Please inform the ESS translation team at GESIS whether the translation(s) will be submitted for verification in the "Round 11 (Translation and) Verification Follow-Up Form - (T)VFF" ([Option 1]). If you are using TranslationCTRL for your translation process, the verification will take place there in the step Verification (for more information, please refer to the ESS Round 11 – Instructions for using the TranslationCTRL).

1.4 If possible, national teams translating into more than one language should schedule the translation and verification of all their languages at the same time.

1.5 In the case of '*shared languages*', please inform the ESS translation team,
(a) whether and when your reconciliation steps with the other national teams using your language (international harmonization of shared languages) take place,
(b) in which form these reconciliations will take place (virtual or in-person), and
(c) to the extent possible: when the other countries sharing this language will submit their translations for verification.

1.6 *All languages:* Carry out *Translation, Review and Adjudication* ('T', 'R' and 'A' of the 'TRAPD' method) within your national team; the adjudicated version goes into the shared languages harmonisation step.

1.7 In the case of '*shared languages*', carry out the *shared languages* harmonisation step using the adjudicated version:

- Compare country versions of the same language.

- Reconcile country versions wherever possible and appropriate.

- Carry out an *additional adjudication* step within your national team to finalise your national version(s) to be submitted to cApStAn.

1.8   **Submit your adjudicated translation(s) to cApStAn for *verification.***

1.8.1 If you are using the TranslationCTRL tool for your translation process:
Please transfer your translation from the Adjudication step to the **Verification** step using the function "Copy from other translations" under Actions on the Translation screen (for more information please consult the ESS Round 11 – Instructions for using the TranslationCTRL).
Please save your translations to be verified as "**Ongoing**" or "**Issue**".

1.8.2 If you are using (T)VFF for your translation process:
Please consider Annex 3.

1.9   **For both verification in TranslationCTRL and (T)VFF:**
Please set aside about 4-9 weeks for the entire translation verification process to be carried out. This includes: submission of your translation(s) to cApStAn, verification by cApStAn, discussions between the national team, cApStAn and the ESS translation team (and possibly ESS ERIC HQ) resulting from the verification interventions, and verification sign off.

In the case of 'shared languages', note that this process may take a little longer because the 'central verifier' will need to compare the interventions made for the different versions (see the sections on 'Verifying shared languages' included in Option 1). Therefore, please **inform us as precisely as possible about your shared language harmonisation schedules** so that this can be considered in the verifier's work.

ONCE YOU HAVE RECEIVED THE VERIFICATION FEEDBACK FROM cApStAn:

1.10   **Go through *all* the interventions you receive from cApStAn carefully!** When doing so, please keep the following in mind:

When you incorporate the comments or corrections made by the verifiers, please make sure you are **consistent for all the items translated for Round 11 throughout all the modules (sections).** For instance, if you change one word or term in one instance, please make sure to change it accordingly in other places in the new items too. As not all new items of the ESS11 questionnaire are subject to verification, it may be that a verification comment is only made in one item (subject to verification) but needs to be implemented in other new items consistently (not subject to verification) where the same word or expression is used.

→*However*, **existing translations**, that is, translations of the existing core items or repeated items from the 'Health' module, **should NOT be changed**, even if this would be consistent with verification comments from Round 11. Here it is more important to keep the time series than to be consistent within your

translated questionnaire. In case of doubt, please contact the ESS translation team at GESIS (via myESS).

1.11   The 'post-verification' version of your translation(s) will be the basis for the UPF Translation Assessment.

1.12   **Follow-up carefully on the feedback resulting from UPF Translation Assessment before finalising your national version**. Changes to the verified translation based on findings from the UPF Translation Assessment can be discussed with the ESS Translation Team at GESIS, cApStAn and, if applicable, with the countries sharing your language.

1.13   Pre-test the full questionnaire, using the version finalised after UPF Translation Assessment.

Regarding 'Adjudication': please note that additional steps taking place after initial adjudication (step 1.4) might result in new adjudication steps being necessary: comments and recommendations from the shared language harmonisation, verification, UPF Translation Assessment and Pre-testing steps might need to be followed-up in a new adjudication step.

1.14   Carefully proofread the final questionnaire for typos and logical errors.[3] Ideally, have someone who has strong proofreading skills and who preferably has not read the questions yet do a final double check of the full questionnaire. Then do a final check looking at all the notes made in documentation to see that all agreed actions have been taken into account.

2. Parts of the ESS 11 Source Questionnaire subject to translation verification

The selection of items to be verified is listed under Master Documents Translation on myESS and on the Translation and Verification page on the NC Intranet.

For any queries regarding translation verification, please contact the ESS translation team at GESIS via myESS.

---

[3] Please also refer to the ESS11 Translation Quality Check List available on myESS and on the ESS11 Intranet under Translation.

Part B: Technical aspects of the ESS Round 11 verification / Vademecum of the ESS Round 11 (T)VFF

3. General verification procedure in ESS 11

National teams using (T)VFF for their ESS11 translations will receive the Excel file back, annotated with the verifier's findings from cApStAn.

The verifiers will use the following four columns from these worksheets to provide their feedback on the questions:

- '*Verifier's version*': Verifiers will enter here a corrected version of the question when they find problems with the submitted version. These cells will be highlighted in yellow. Verifiers are instructed to refrain from preferential changes.
- '*Verifier intervention category*': By attributing each intervention to a specific category, cApStAn verifiers help national teams to define the type of intervention and better understand the nature of their comments. If verifier's interventions in the target text belong to more than one category, they will be classified accordingly in the '*Verifier's rationale'* column. The column '*Verifier intervention category*' will display the one that may affect most severely the equivalence or comprehension. The Verifier Intervention Categories are explained in more detail in Annex 1.
- '*Verifier's rationale*': Verifiers will enter here a brief explanation as to why they think an amendment is necessary
- '*Follow-up required?*': cApStAn reviewers will specify whether verifier's interventions require feedback from the NC or not:

> In ESS Round 11, **ALL verifier interventions require feedback** from the national teams – **except minor linguistic defects**, like typos or punctuation errors, where it is clear to the verifier that they do not affect the meaning of the translation (but these changes should also be implemented).

Follow-up by the National Teams:

If feedback on a verifier intervention is required, the national teams are asked to either accept the verifier intervention or, if not, to justify why the intervention cannot be implemented in the '*Country comment*' column.
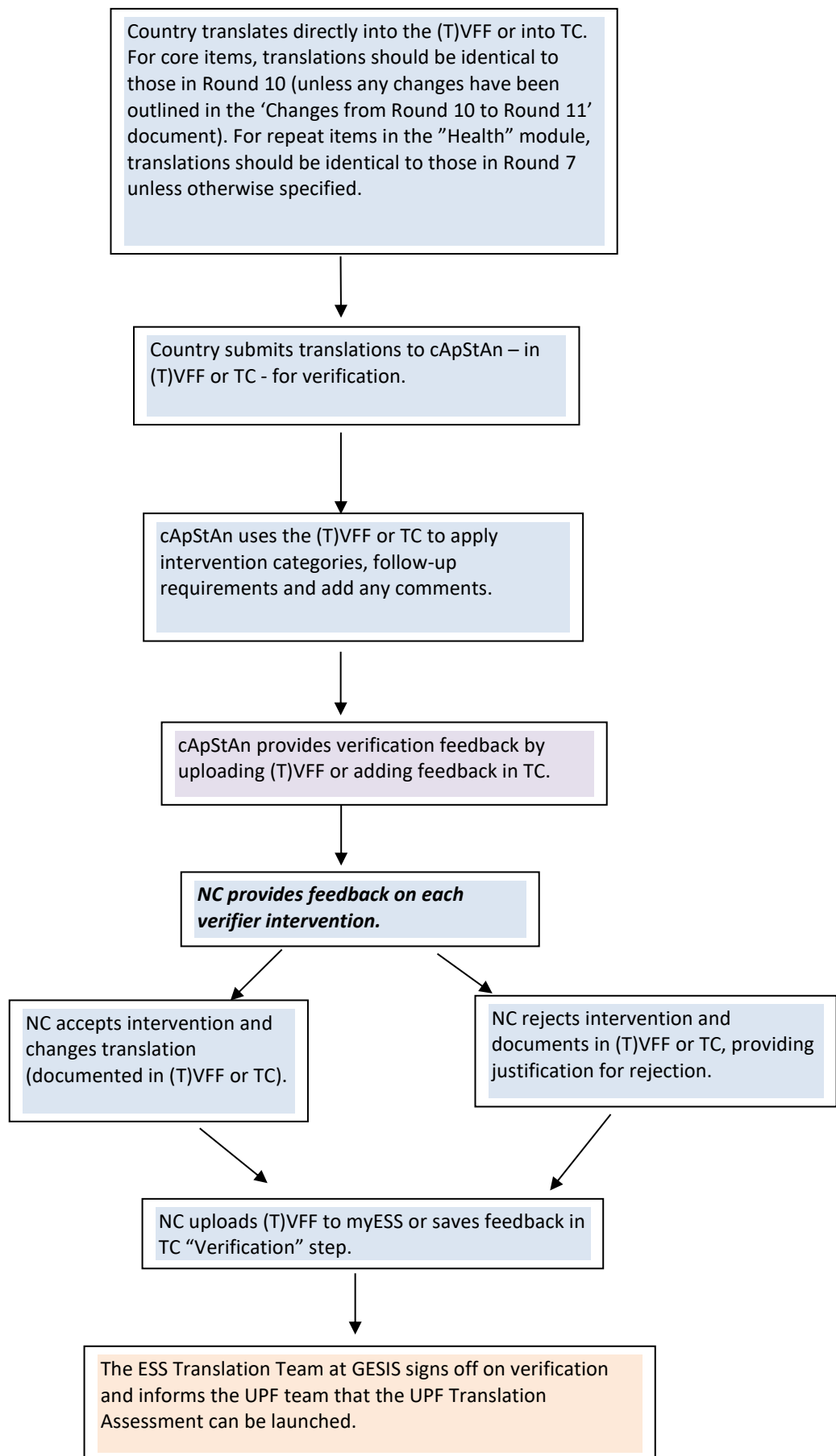
The updated (T)VFF will then need to be uploaded via myESS (see Annex 3 for detailed instructions). Once all issues have been resolved, the verification procedure is signed off by the ESS translation team.

4. Submission of translation for verification

In ESS Round 11, some national teams will submit their translations using the Round 11 (T)VFF (Option 1), others using TranslationCTRL (TC) (Option 2).

Figure 1 below shows the Round 11 verification process for both options:

Figure 1: Round 11 verification process

Country translates directly into the (T)VFF or into TC. For core items, translations should be identical to those in Round 10 (unless any changes have been outlined in the 'Changes from Round 10 to Round 11' document). For repeat items in the "Health" module, translations should be identical to those in Round 7 unless otherwise specified.

↓

Country submits translations to cApStAn – in (T)VFF or TC - for verification.

↓

cApStAn uses the (T)VFF or TC to apply intervention categories, follow-up requirements and add any comments.

↓

cApStAn provides verification feedback by uploading (T)VFF or adding feedback in TC.

↓

NC provides feedback on each verifier intervention.

↙ ↘

NC accepts intervention and changes translation (documented in (T)VFF or TC).

NC rejects intervention and documents in (T)VFF or TC, providing justification for rejection.

↘ ↙

NC uploads (T)VFF to myESS or saves feedback in TC "Verification" step.

↓

The ESS Translation Team at GESIS signs off on verification and informs the UPF team that the UPF Translation Assessment can be launched.

Option 1: Submission of national translations in the "Round 11 (Translation and) Verification Follow-Up Form – R11 (T)VFF"

The R11 (T)VFF is an Excel template, prepared jointly by cApStAn and the ESS translation team and downloadable from the NC Intranet and from the Master Documents Translation under myESS.

All sections of the ESS11 source questionnaire, the showcards and the test questions have been copied into the file, each questionnaire section corresponding to one worksheet. These worksheets are to be used for your translation. These worksheets include different columns specifically designed to allow documentation of the entire ESS11 translation history of each national version (comparable to the columns used in ESS5-10).

→ Once your translation is ready to be sent to cApStAn for verification, please submit this R11 (T)VFF file. The **translation to be verified must be included in the column called '*Version after adjudication / for verification*'.**

When receiving back the verification results from cApStAn, your R11 (T)VFF will include the verifiers' comments and suggestions.

Please use the R11 (T)VFF for **documenting** the entire history of your translation(s) of the ESS11 questionnaire.

Workflow and structure of the (T)VFF
The (T)VFF workbook is organised in different worksheets, one for each section of the ESS Round 11 Questionnaire and the Showcards.

The layout of the ESS11 (T)VFF is similar to previous rounds. Some differences are due to the fact that it is in ESS11 for the first time based on an export from TranslationCTRL, as this will facilitate later import of ESS translations into TranslationCTRL, if needed. The main differences are the worksheets "Global Fills" and "Answers". These worksheets were not included in the ESS5-ESS10 (T)VFFs, and have been added to the ESS11 (T)VFF, due to the linkage to TranslationCTRL.

The Source Version Area (filled in by ESS translation team)

The first set of 6 columns D-I - with blue column headers – have been populated with (i) the item number and type of text or entry; (ii) the English source version; (iii) the ESS annotations, such as the footnotes from the questionnaire and e.g. indications of changes between previous rounds (10 and 7) and Round 11; and (iv) routing information (see *Figure 2*). These light blue columns should not be edited at all during the different steps of the process.

Figure 2: The Source Version Area of the R11(T)VFF

ITEM NUMBER / TEXT TYPE	ENGLISH SOURCE VERSION	ANNOTATIONS	ROUTING (SOURCE)
B13	Some people don't vote nowadays for one reason or another.	OLD (B13 in ESS9)	
	Did you vote in the last [country] national[7] election in [month/year]?	[7] This refers to the last election of a country's primary legislative assembly.	
RC	Yes		ASK B14
	No		GO TO B15
	Not eligible to vote		GO TO B15
	(Refusal)		GO TO B15
	(Don't know)		GO TO B15
RI above B14	ASK IF YES AT B13 (IF B13 = 1)		
B14	Which party did you vote for in that election?	OLD (B14 in ESS9)	

The Translation Area in Purple (filled in by the national teams)

The columns of the translation area in the (T)VFF are reserved for the national translation teams: there are 6 columns in which you may enter the first two *Translations* and the comments relevant to these translations ('T' in the TRAPD model), 3 columns for the national version after the *Review* process and comments after review ('R' in the TRAPD model), and 3 columns for the translation agreed upon in the *Adjudication* step ('A' in the TRAPD model).

The version in column S, *Version After Adjudication* will be verified. Make sure that you submit the translation in this column for the items selected for verification.

In the case of '*shared language versions*', an optional column '*Shared languages – discussion*' has been prepared for those countries sharing one language: here you can document any discussions and/or changes resulting from your shared language reconciliation steps.

Because the shared language harmonisation process should be followed by another Adjudication step, there are more columns ('*Version after adjudication / for verification*' and '*Comments after adjudication / for verification*') where the national teams are asked to add the version (together with any comments they deem appropriate) that will actually be verified.

Countries not using a shared language are **also** asked to copy their translation to be verified into these two columns ('*Version after adjudication / for verification*' and '*Comments after adjudication / for verification*').

Please note that you do not need to make comments in every cell.

Figure 3: Translation Area of the R11 (T)VFF

TRANSLATION 1	ROUTING TRANSLATION 1	COMMENTS ON TRANSLATION	TRANSLATION 2	ROUTING TRANSLATION	COMMENTS ON TRANSLATION	VERSION AFTER REVIEW	ROUTING VERSION AFTER REVIEW	COMMENTS AFTER REVIEW	VERSION AFTER ADJUDICATION	ROUTING VERSION ADJUDICA	COMMENTS AFTER ADJUDICATION	VERSION AFTER ADJUDICATION / FOR VERIFICATION	ROUTING VERSION AFTER ADJUDICATI	COMMENTS AFTER ADJUDICATION / FOR VERIFICATION

The column '*Comments after adjudication / for verification*' is intended for any item-related comments that you would like to i) note down for documentation purposes, or ii) bring to the

attention of the verifier. Below a couple of examples of possible situations in which it would be helpful to add a comment in this column:

Example 1: The term 'police' has been adapted to 'police and civil guard' in the target version, to match the situation in the target country. If this has been agreed, but not documented in the (T)VFF, the verifier would point this out as an adaptation, possibly describing in detail why s/he thinks the adaptation is acceptable/not acceptable. If the verifier knows in advance that this has already been agreed between the NC and the ESS translation team, s/he would just select 'OK' (= adaptation has been correctly implemented) and leave it at that (see also *Figure* 4).

Example 2: There may be terms or expressions that are difficult to translate, and that have been subject to a lot of discussion during the review and adjudication processes. In such cases it is likely that the verifier in his/her turn will also stumble over the same issue, and it would be helpful if the reasoning behind the choice of word or expression was documented in the comment column, as it may not be obvious to the verifier at first sight.

Figure 4: Example of a documented adaptation

ENGLISH SOURCE VERSION	ANNOTATIONS	VERSION AFTER ADJUDICATION / FOR VERIFICATION	ROUTING VERSION AFTER ADJUDICATION /	COMMENTS AFTER ADJUDICATION / FOR VERIFICATION
Would you say that most of the time people try to be helpful5 or that they are mostly looking out for themselves?	[5] The intended contrast is between self-interest and altruistic helpfulness.	Da li biste rekli da ljudi najčešće pokušavaju da pomognu drugima ili da uglavnom brinu samo o sebi?		added "only" about themselves to observe annotation
Please use this card.		Molimo Vas da koristite ovu karticu.		

The **purpose of documenting adaptations and other translation decisions** in the '*Comments after adjudication / for verification*' column is not only to document such issues, but also to provide the verifier with all the relevant background information s/he will need for the verification assignment, to avoid unnecessary comments and changes.

➔ If you don't need a particular column, for example because there's no 'shared languages' process, you can always hide these columns.

➔ You can also add columns, if this helps your national translation processes.

➔ It is also possible to broaden columns and rows so that all text is visible.

➔ However, **please DO NOT ADD OR DELETE *ROWS*** in the Excel (T)VFF as in the case of copy/pasting or merging different versions this will make it impossible to clearly match cells of the source and target language, and will impede the import into TranslationCTRL if needed!

➔ Annex 2 presents a Quick Reference Guide to Excel Features that can be helpful if you are not too familiar with Microsoft Excel ®.

The column 'Comments from the Pre-test' can be used to document any findings or results from your national pre-tests ('P' in the TRAPD model) that relate to translation into the respective language version.

Before submitting the (T)VFF for verification, make sure that…

➔   …the adjudicated version of the questionnaire items (at least of those items that   are subject to verification) is in column 'Version after adjudication / for verification'.

➔   …you have documented all agreed adaptations and other relevant issues related to these items in the 'Comments after adjudication / for verification' column.

The Verification Area (filled in by cApStAn)

cApStAn verifiers will see the source version, the translated version for verification, and any item-related comments copied from the translation area. Verifiers will make a sentence-by-sentence comparison of the 'Version after Adjudication/for Verification' against the English source version, but will not take into consideration the intermediate stages of the translation process. Verifiers will document their work in the first three columns on the left side of Figure 5: the 'Verifier's version', the 'Verifier intervention category' (column with drop-down menus) and the 'Verifier's rationale' column.

The verifier will be asked to enter text in every cell of the 'Verifier's version' column: if the item does not need to be corrected or if the verifier doesn't wish to make any suggestions, s/he will merely copy/paste the Version after Adjudication / for Verification translation in that column and select the 'OK' category from the scroll-down menu in the 'Verifier intervention category' column. If a correction needs to be made, the verifier will:

a) Implement the correction in the copied text and highlight the cell in yellow;

b) select an appropriate verifier intervention category from the drop-down menu in the 'Verifier intervention category' column; and

c) as far as possible, write a brief descriptive and explanatory comment in the 'Verifier's rationale' column (see Figure 5 below).

Figure 5: Verification Area of the R11 (T)VFF (reserved for cApStAn)

VERIFIER'S VERSION	VERIFIER INTERVENTION CATEGORY	VERIFIER'S RATIONALE	CENTRAL VERIFIER'S VERSION (for Shared Languages only)	CENTRAL VERIFIER'S COMMENT (for Shared Languages only)	FOLLOW-UP REQUIRED?

Note that not all interventions call for a comment. Straightforward issues (typos, punctuation issues, maybe some grammar issues) can go without a comment.

A list of the verifier intervention categories is available in Annex 1.

Verifying Shared Languages

Like in Rounds 7-10, in Round 11 a "***central verifier***" will review the verification feedback for each of the shared language versions, and echo in other versions those corrections that apply. Such suggestions can, however, only be implemented if the survey instruments have not yet been finalized in the countries that first submitted their translations for verification.

Examples:
     If the two verifiers for the Dutch language (for Belgium and the Netherlands) come up with different verification comments or suggestions for the same issue, the central verifier would point out these differences, comment on them and suggest a more harmonised version – as long as it is possible and appropriate to use one version that fits both national contexts.
     Or, if a verifier spots a linguistic issue or deviation from the source that was not identified in the other verified versions but applies to them too, the central verifier will suggest reflecting it in all the versions.

Please note in the context of shared languages:

a) The ESS does not have a deliberate policy of harmonising shared languages; the 'as close as possible, but as distant as necessary' line should be followed in both the Translation as well as the Verification steps.

b) However, wherever a closer harmonisation is possible, this should be attempted both in the Translation and in the Verification steps.

c) With the sometimes staggered submission of national versions for verification, some of the shared languages issues will only be reflected post-hoc.
Therefore, in Round 11, it would be highly useful if **countries sharing languages tried submitting their translations for verification at rather close points in time.**
Please inform the ESS translation team at GESIS and cApStAn as soon as possible when your translations will be ready for verification, and, in the case of shared languages (if possible) also of (i) your shared languages arrangements and (ii) likely submission dates of the other countries fielding in these languages.

The 'central verifiers' will carry out their work in the two columns called *'Central verifier's version'* and *'Central verifier's comment'*:

In the *'Central verifier's version',* the 'central verifier' will write down his/her suggested version for this shared language – provided that there is one such version – and in the *'Central verifier's comment'* s/he briefly comments on the different versions of this shared language, that s/he has received up to this date.

Follow-up on verifiers' interventions

Before the verification feedback is delivered to the national teams, cApStAn in co-operation with the ESS translation team will label the verifiers' interventions that need follow-up in the '*Follow-up required?*' column, as shown in *Figure 6* below.

> In ESS Round 11 **all verifier interventions will require follow-up**, except minor corrections like typos, punctuation or spelling mistakes.

The (T)VFF with these 4 columns filled in by cApStAn will be delivered to the country.

The Post-verification Area (filled in by national teams)

Once the (T)VFF is returned to you, complete with verifier feedback in every row, please review each of the verifier interventions carefully. For those interventions that are not labelled as requiring follow-up you may decide to accept/reject the change as you see appropriate – but of course we recommend correcting any typos, punctuation and spelling mistakes detected by the verifiers.

Figure 6: Post-Verification Area of the R11 (T)VFF (reserved for National Coordinators/national teams)

VERIFIER'S VERSION	VERIFIER INTERVENTION CATEGORY	VERIFIER'S RATIONALE	FOLLOW-UP REQUIRED?	COUNTRY COMMENT	
			Requires follow-up		

For each suggestion that '*Requires follow-up*' NCs are asked to add a follow-up in the '*Country comment*' column: either write 'OK', if you agree with the change, or provide a justification if you wish to reject the change.

It is important not to edit the verifier's version in the '*Verifier's version'* columns!

Once you have processed all the comments and added either 'OK' or a comment for each *'Requires follow-up'*, please upload the annotated (T)VFF via myESS (see Annex 3 for a detailed description).

Once all discussions on 'follow-up' between national teams, cApStAn and the ESS Translation Team have been finished, the verification process is complete. Now, the full post-verification version should be copied to the '*Version after verification–for UPF'* column– and then used for the UPF Translation Assessment together with the other translations that were not subject to verification.

Option 2: Submission of national translations in TranslationCTRL (TC)

For those national teams carrying out their translations in TranslationCTRL, in ESS Round 11, translation verification, including all feedback loops between the national teams, cApStAn, and the CST, will take place in TranslationCTRL. This also includes the Central Verification stage for shared languages.

> ➔ Please inform the ESS translation team
> (using the myESS portal) at least three weeks in advance about your planned submission date for verification by cApStAn.
> ➔ Once your translation is ready to be submitted to cApStAn, please let the ESS translation team know.

To prepare your translation for the verification process, please transfer your translation from the Adjudication step to the Verification step using the function "Copy from other translations" under "Actions" on the Translation Screen.

The responsible verifier from cApStAn will check your translation on the Verification step, make the appropriate changes, add tags (e.g., tag with error category) and comments (explaining their intervention) to the changed segments if there is an issue that you will need to correct or to comment. The cApStAn reviewer, in collaboration with the ESS Translation Team will flag the issues that require follow-up.

> In ESS Round 11 **all verifier interventions will require follow-up**, except minor corrections like typos, punctuation or spelling mistakes.

The responsible verifier from cApStAn will save items under the status "Issues" for the items that require your attention. You can filter the items with the status "Issues" to see them all at once.
If the responsible verifier from cApStAn saves items with the status "Ongoing", that means they approved your translation and that items do not need to be amended.

Please also consult the ESS Round 11 TranslationCTRL Instructions available on the ESS11 NC Intranet and under Master Documents – Translation on myESS.

> ➔ **Please do not start working on verification comments in TC before you have officially received the verification comments back from cApStAn!**
> **This will confuse the verifier's work and so this step will take even longer.**

- Once you have received the verification comments and interventions (marked as tags) from cApStAn, you will be asked to either accept the interventions made by the verifiers or decline them if you do not agree with their comments and to justify why you do not want to incorporate them.
- To accept the interventions made by the verifiers, please write "OK" as a comment for that segment and save the segment with the "Ongoing" status.
- To decline the interventions made by the verifiers, please write a comment to explain why you disagree and save the segment with the "Issue" status.
- The ESS translation team at GESIS / Brita Dorer will then proceed to the verification Sign-Off step. An agreement needs to be found on each item between the ESS translation team and the national team. Once an agreement reached, the ESS translation team will add the tag "Signed-off" and save as "Ongoing".
- Then the national team should have a final look at the agreed translation. If they agree with the final translation, the national team needs to save as "Done/Ready". By doing so, the verification step is closed.

This communication will take place in TranslationCTRL in text fields below each element of an item, that is, below each sentence or answer category.
An item is signed off by the CST once the green Signed-off tag appears at the top, referring to the entire item.

It will follow the use of "notes" and "replies" explained in *Sections 6.3 Adding comments/notes to your translations* and *6.3.1 Reply to, edit, delete a note* of the ESS11 TranslationCTRL Instructions.
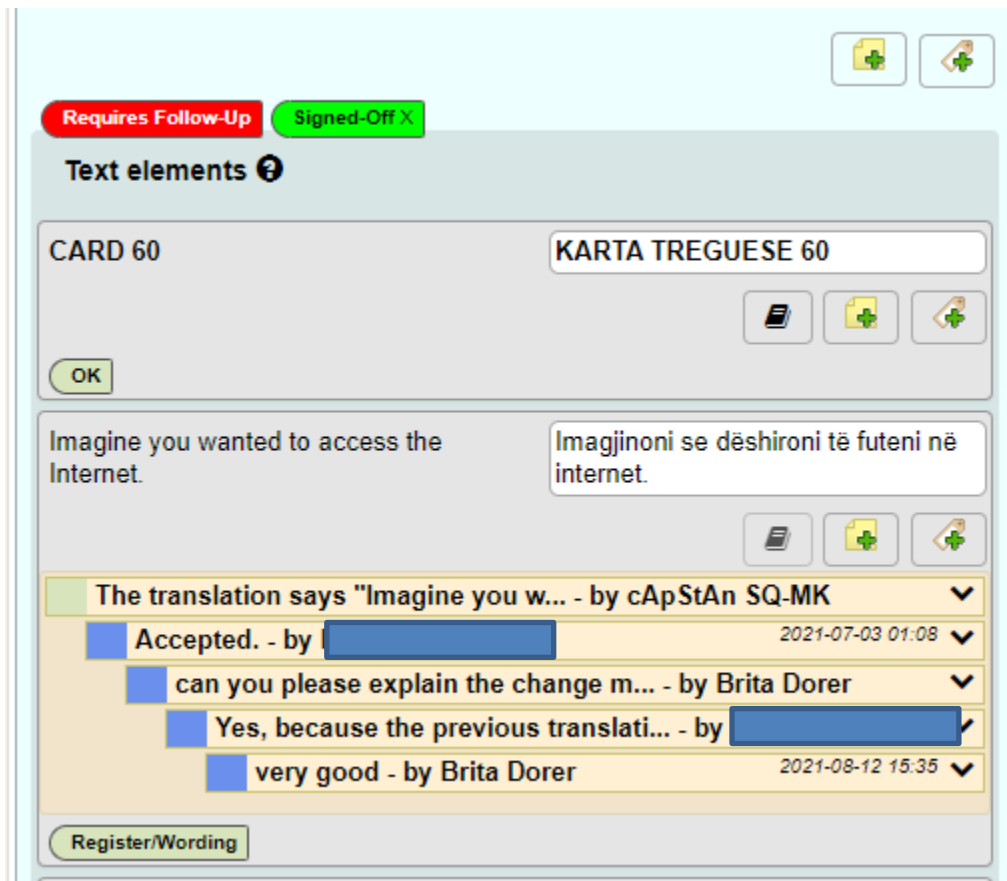
Screen of the verification feedback loop

In the above figure, you can see the setting of the screen where the verification feedback takes place. You need to react to every segment/cell where your feedback is required. Please look out for the "Requires Follow-Up" tag and/or for the "Issue" status. Also on the other items, that have an "OK" by cApStAn, you should have a look in order to confirm that you are happy with the translation.

If you want to see only the segments with the "Issue" status and skip all the others, you can filter those segments by clicking on "Statuses" on top of your Translation Screen, clear all statuses, and select only the "Issue" status. Only segments with this status will be displayed.

Filtering by status
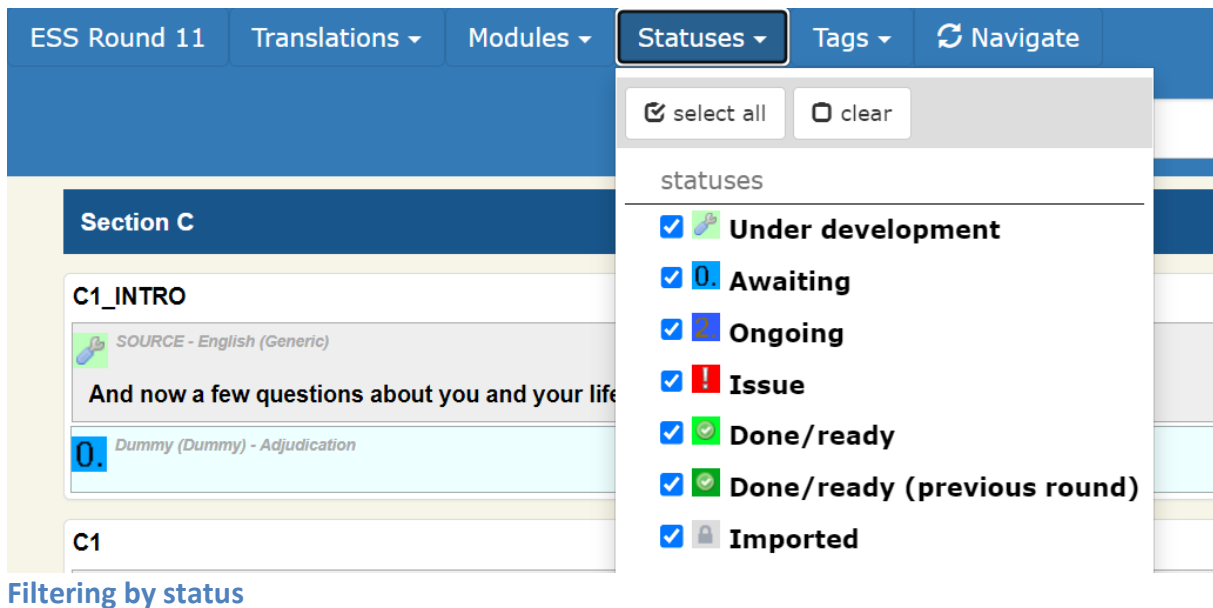
In the case of shared languages, also the Central Verification step will take place in TranslationCTRL.

Please note that you may only move ahead with the next step after verification, i.e. UPF Translation Assessment, once all verification feedback discussions are completed and signed off by the ESS translation team. The ESS translation team / Brita Dorer will put a Sign-off tag to every item subject to verification. Then the ESS translation team will formally "sign off' on the entire verification step of your language version and you can only start the subsequent step in TranslationCTRL (i.e. UPF Translation Assessment) once this is completed. **The ESS translation team will launch the UPF Translation Assessment step with the colleagues at UPF once verification has been completed.**
Please note that the UPF Translation Assessment step is only carried out for the first national language (in multilingual countries).

Please note: Unlike in ESS10, the "Source modified" status will no longer be used in TC for ESS11.
When the questionnaire is updated as a result of an Alert (which means the source has been modified), each changed item will automatically revert to the "Awaiting" status. Then the proper Alert tag will be added to this item.

List of statuses – please refer to Section 6.1.2 Different statuses in the ESS11 TranslationCTRL Instructions.

List of tags – see below:

Tag	
Verifier intervention categories	
OK	
Added info	
Missing info	
Consistency	

Adaptation or cultural issue	
Mistranslation	
Register/Wording	
Grammar/Syntax	
Minor linguistic defect	
Left in source language	
Annotation not followed	
Alert not reflected	
Layout/Visual issues	
Requires Follow-Up	
Minor issue	
UPF intervention categories	
Missing information	
Consistency problem	
Response scales	
Showcards	
Other	
Requires Follow-Up	
Central Verifier's intervention categories	
OK	
Added info	
Missing info	
Consistency	
Adaptation or cultural issue	
Mistranslation	
Register/Wording	
Grammar/Syntax	
Minor linguistic defect	
Left in source language	
Annotation not followed	
Alert not reflected	
Layout/Visual issues	
Requires Follow-Up	
CST note	
Signed-Off	
Change to existing translation	
Country specific	
Please note that more tags may be added for alerts etc.	

Annex 1: Definitions of Verifier Intervention Categories

|	
OK	**No intervention** is needed. The verifier has checked and confirms that the text element or segment is equivalent to source, linguistically correct, and – if applicable – that it conforms to an explicit translation/adaptation guideline.
ADDED INFORMATION	Information is present in the target version but not in the source version, e.g. an explanation between brackets of a preceding word.
MISSING INFORMATION	Information is present in the source version but omitted in the target version.
CONSISTENCY	1. **Within-item consistency**: repetitions or literal matches and/or synonymous matches that occur in the source version of an item should reflect the same pattern in the target version. If a word or expression is used consistently across the source questionnaire, the same level of consistency should be reflected in the translations, unless fluency is affected. 2. **Across-item consistency**: unless fluency is affected, recurring elements such as response categories or prompts that occur in a number of items should always be translated the same way, measurement units should be written the same way, etc.
ADAPTATION OR CULTURAL ISSUE	An adaptation is an intentional deviation from the source version made for cultural reasons or to conform to local usage. They should be agreed by the ESS translation team at GESIS and the ESS ERIC HQ at City, University of London. An adaptation or cultural issue occurs when an adaptation would be needed but was not made, or when an inappropriate or unnecessary adaptation was made.
MISTRANSLATION	A wrong translation, which seriously alters the meaning. A mistranslation should always be reported with an explanatory back-translation and/or accompanied by an English rendition of what the incorrect target version says. Note: a vague or inaccurate translation should rather be classified as a Register/Wording issue (or sometimes a Grammar/Syntax issue). This category may cover cases where the source has been misunderstood, but also copy/paste errors that unintentionally result in a wrong text element or segment.
REGISTER / WORDING ISSUE	1. *Register*: difference in level of terminology (scientific term >< familiar term) or level of language (formal >< casual, standard >< idiomatic) in target versus source. 2. *Wording*: inappropriate or less than optimal choice of vocabulary or wording in target to fluently convey the same information as in the source. This category is used typically for vague or inaccurate or not quite fluent translations.
GRAMMAR / SYNTAX ISSUE	1. *Grammar*: grammar mistake in the target language, e.g. wrong subject-verb agreement, wrong case (inflected languages), wrong verb form. 2. *Syntax*: syntax-related deviation from the source that affects fluency, or other syntactic problems due e.g. to overly literal translation of the source; any syntax error in the target language.
MINOR LINGUISTIC DEFECT	Typo or other linguistic defect (spelling, grammar, capitalization, punctuation, etc.) that does not significantly affect comprehension or equivalence.
LEFT IN SOURCE LANGUAGE	A text element or segment that should have been translated was left in source language.
ANNOTATION NOT FOLLOWED	An explicit translation/adaptation guideline for a given text element or segment given in an annotation was overlooked or was not addressed in a satisfactory way.
ALERT NOT REFLECTED	A late change made to the source questionnaire – released as an 'Alert' – has not been reflected in the target version.
LAYOUT / VISUAL ISSUE	A deviation or defect in layout or formatting: disposition of text and graphics, item labels, numbering/lettering of questions and, response categories, styles (**boldface**, underlining, *italics*, UPPERCASE), legibility, tables, number formatting (decimal separators, "five" versus "5"), etc. This category will only be used if submitted translations are already formatted.

Annex 2: Quick Reference Guide to Excel Features

This document provides instructions for essential Excel features. Note that the menu items in your screen may differ from the ones shown in the screenshots depending on the version of MS Excel and on the language version used. The screenshots in this document originate from the English version of Excel 2007.

Adding/Removing/Hiding Columns

- Please *do not remove columns or rows*.
- Columns or rows can be hidden, as needed.
- In the verification feedback loop, it may be required to *add columns* for documenting the different interventions from national teams, CST or cApStAn.

To hide a column, select the column you wish to hide by clicking on the column's letter in the title bar:
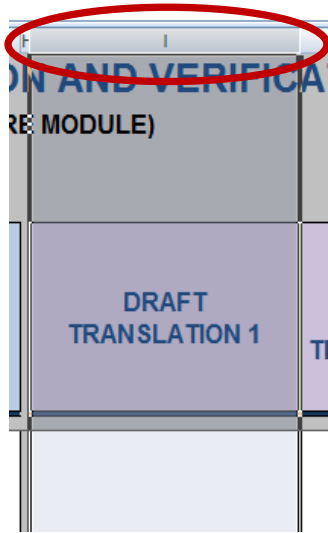
When right-clicking the selected column, the following menu appears:
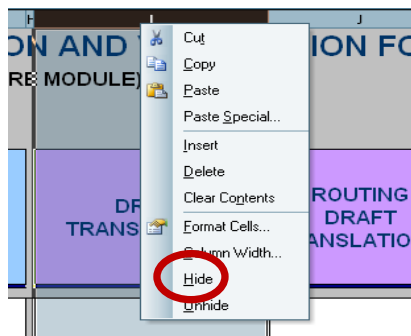
Select *Hide* to hide the selected column.

Hiding Rows

Rows can be hidden as needed. Please do not add or remove any rows, otherwise it will be extremely difficult to match source and target version cells when copy-pasting.

To hide a row, select the row you wish to hide by clicking on the row number:

When right-clicking the selected row, the following menu appears:
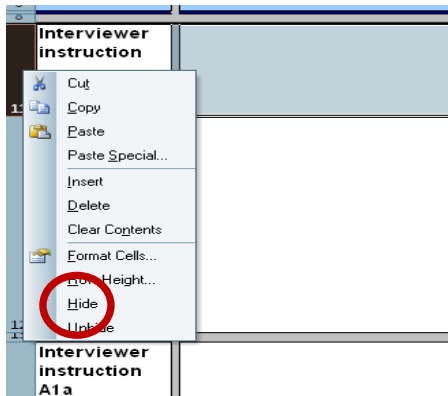
Select *Hide* to hide the selected row.

Unhiding Hidden Column/Row

To unhide a column or a row that was hidden previously, first select the columns/rows around the hidden column(s)/row(s). When right-clicking on the selected area, the following menu appears:
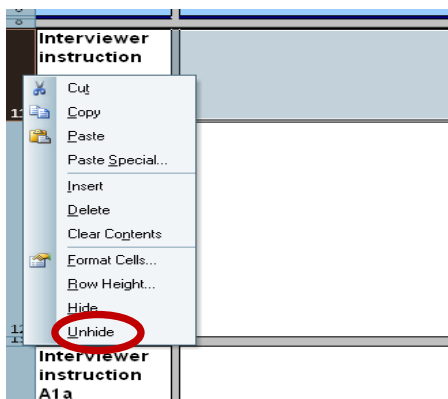
Select *Unhide* from the list, and the hidden column(s)/row(s) reappear.

Freezing/Unfreezing Panes

This functionality allows you to 'freeze' headings so that these will stay visible at all times, even when scrolling the document downwards or to the right.

To Unfreeze the pane, click on any cell in the document. Then select the *Freeze Panes* button under the *View* menu bar
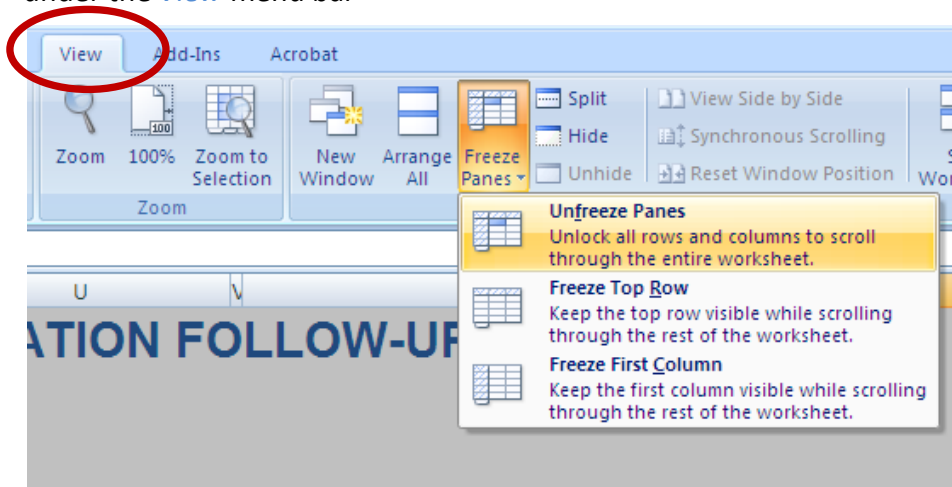
and unfreeze the pane by clicking *Unfreeze Panes*. When you now scroll the file downwards, the title area does not remain visible.

To freeze a pane, select the first cell in the upper left corner of the area that you <u>don't</u> want to include in the 'frozen' area. For example, if you want to freeze columns A-B and rows 1-3 so that these are always visible, you should click on cell C4. Then proceed as described above: select the first option under *Freeze Panes*, which now reads *Freeze Panes*.

Printing Selected Columns

To print the contents of one column only (or several adjacent columns), first select the

desired column(s), then click on the Windows icon in the upper left corner of the screen, and select *Print*, and then *Print*. The following window opens
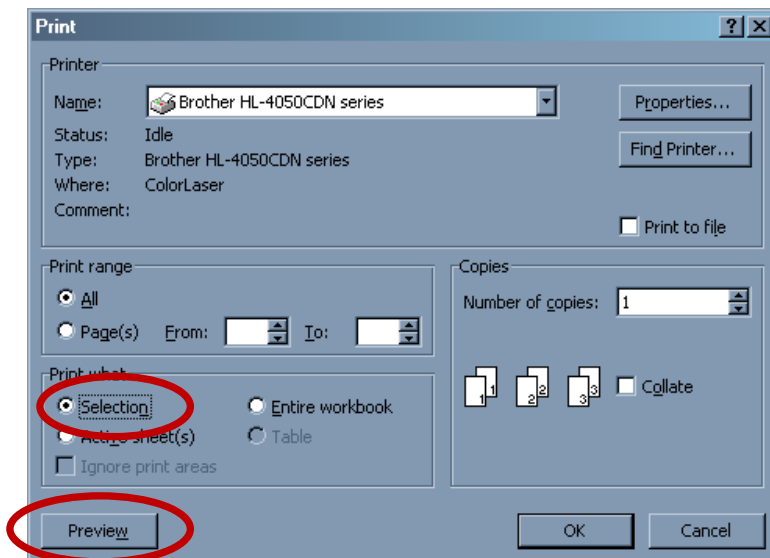
Select *Selection* under *Print what*.
To preview the area to be printed, click on *Preview*, then select *OK*.

To print the contents of several columns that are not located next to each other, first hide all columns that are between the columns you wish to print so that the columns to be printed appear next to each other. Then proceed as described above.

Other Useful Tips

Adding line break inside a cell
To add a line break (start a new line) inside a cell place the cursor where you would like to add the line break. Then press Alt+Enter. This moves the cursor to the next line within the cell.
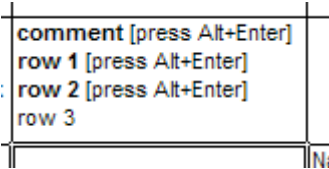
Copying text to a cell so that the formatting settings remain the same
When copying text from e.g. a Word file into the Excel, the result may look like this
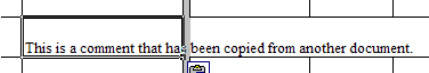
when it should rather look like this:

To avoid this problem when copying text, copy it to the text entry field at the top of the screen, not directly to the cell:
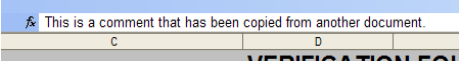
OR
double-click the cell (so that the cursor appears inside the cell), and then copy the text.
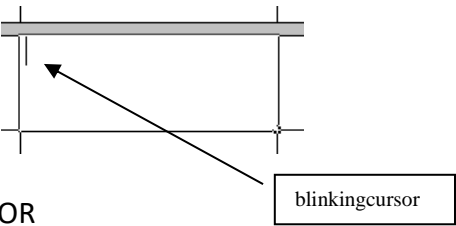
OR
If the text has already been copied, you can copy the formatting settings from some other cell that has the desired formatting, by selecting the cell from which you wish to copy the formatting settings, then pressing the format painter button in the toolbar, and then selecting the cell to which the settings should be applied.

Use of filters

You can use the filters in the table to select only one type of text or colour highlight by clicking on the arrow and selecting "Filter by Color" or "Text filters".
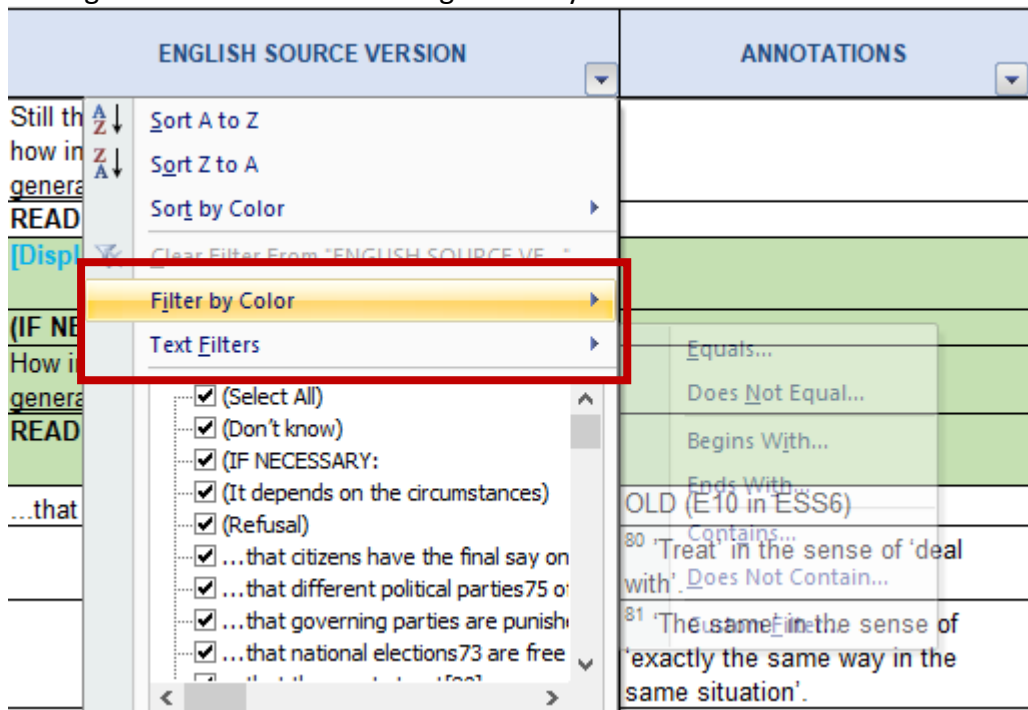
Please **NEVER use Sort** functions in the menu:
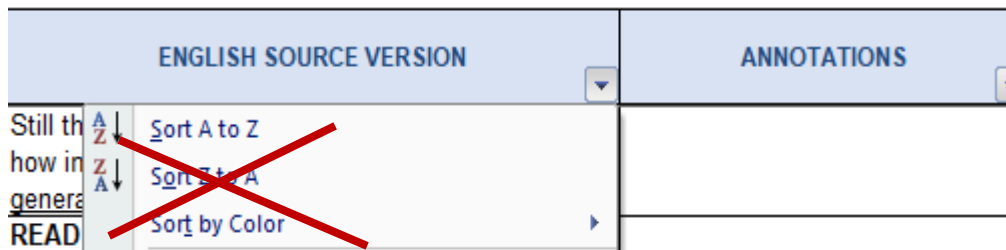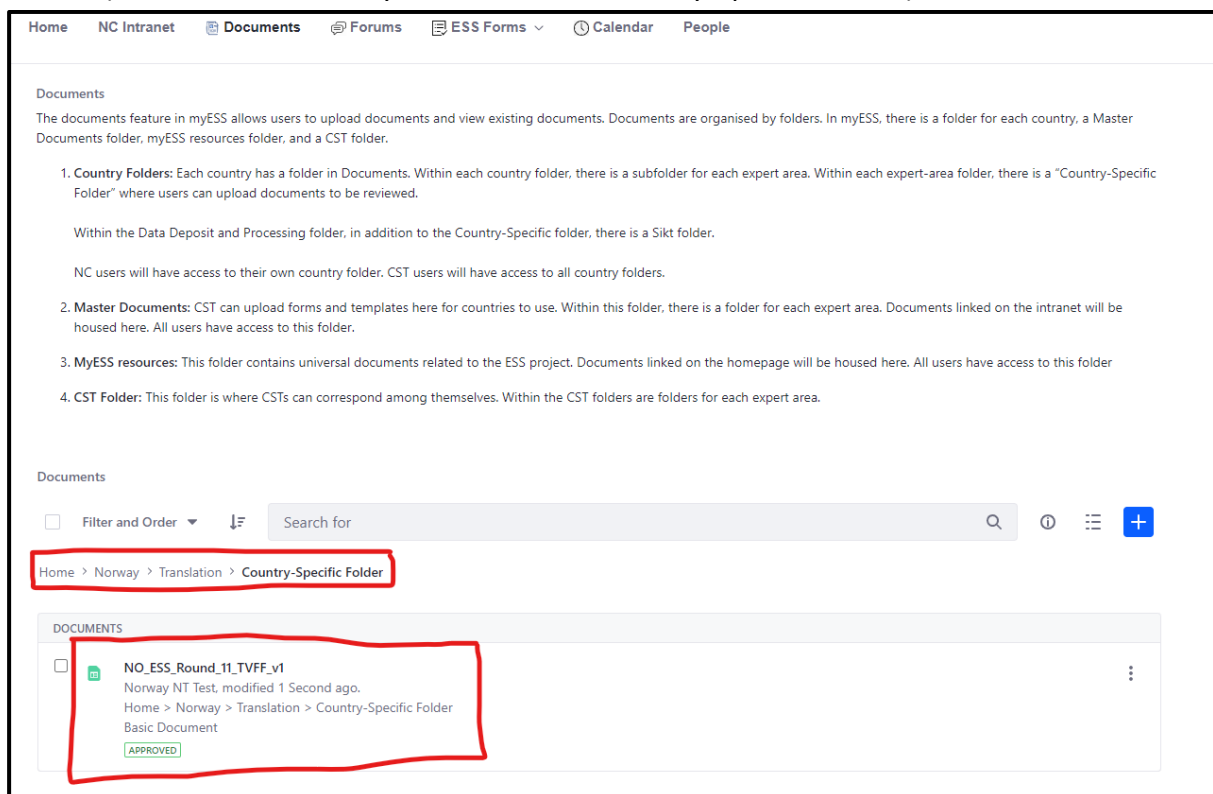
Annex 3: (T)VFF Workflow in myESS R11

Countries using the (T)VFF, GESIS, and cApStAn can use the following guidelines to carry out the workflow for the (T)VFF. This process will ensure that

- all versions of the (T)VFF are stored in the portal, should any party need to access previous versions of the file.
- all relevant parties have permissions to access the documents.
- GESIS can sign off on each iteration of the document.

Workflow

1. Country uploads the first version (v1) of (T)VFF into the Country-Specific Folder. (Documents > Country > Translation > Country-Specific Folder).

2. Country writes a message in Forums letting cApStAn and GESIS know that the document has been uploaded.
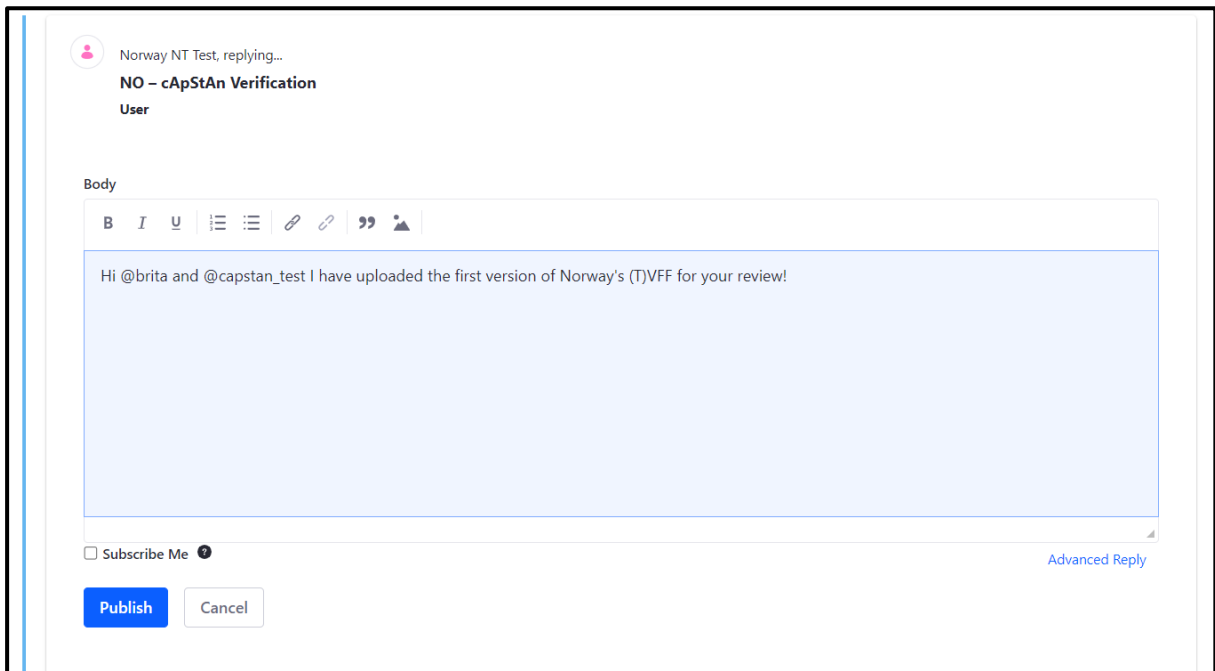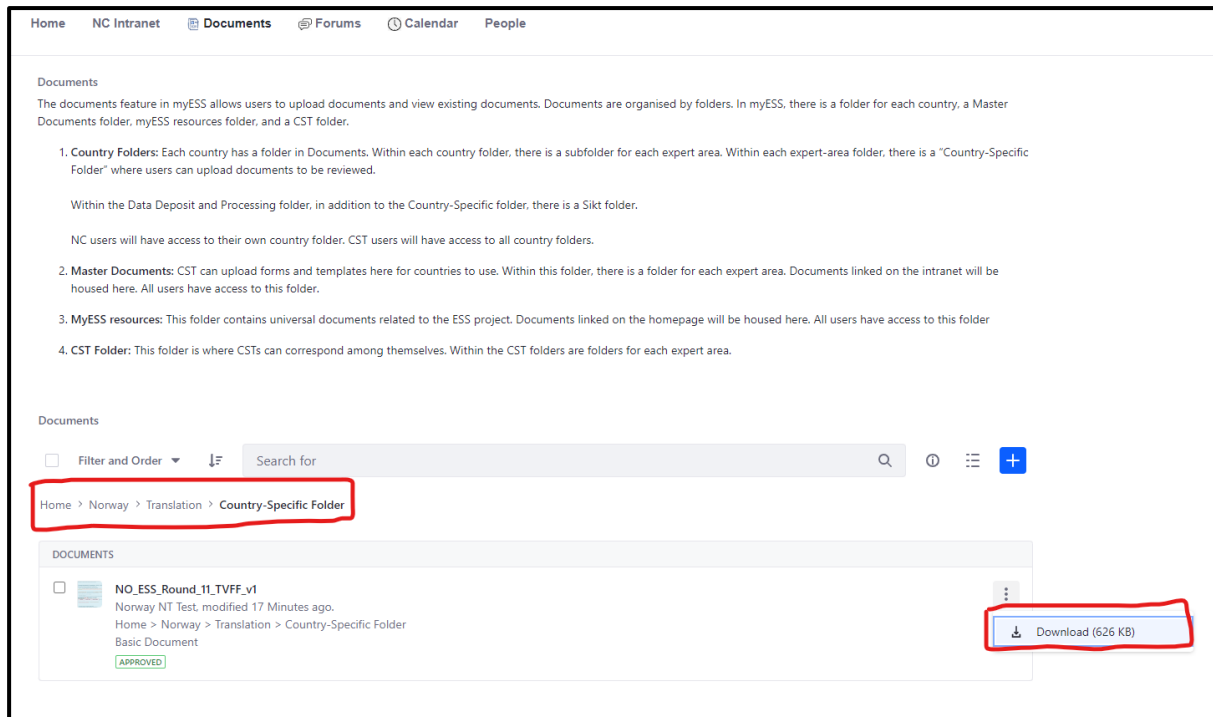
3. cApStAn logs into the platform and has received the notification that "X user mentioned you in a message boards message."
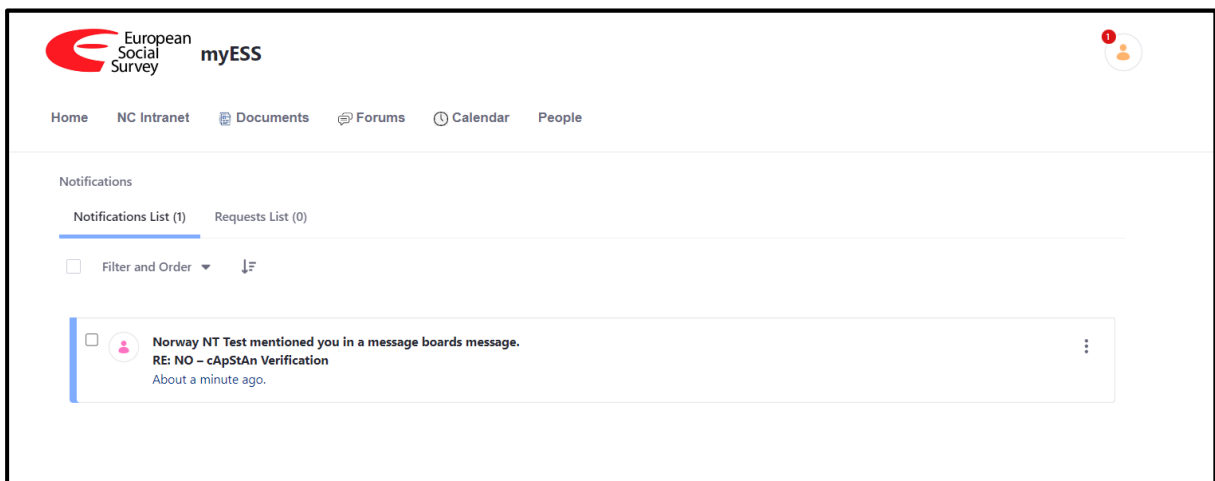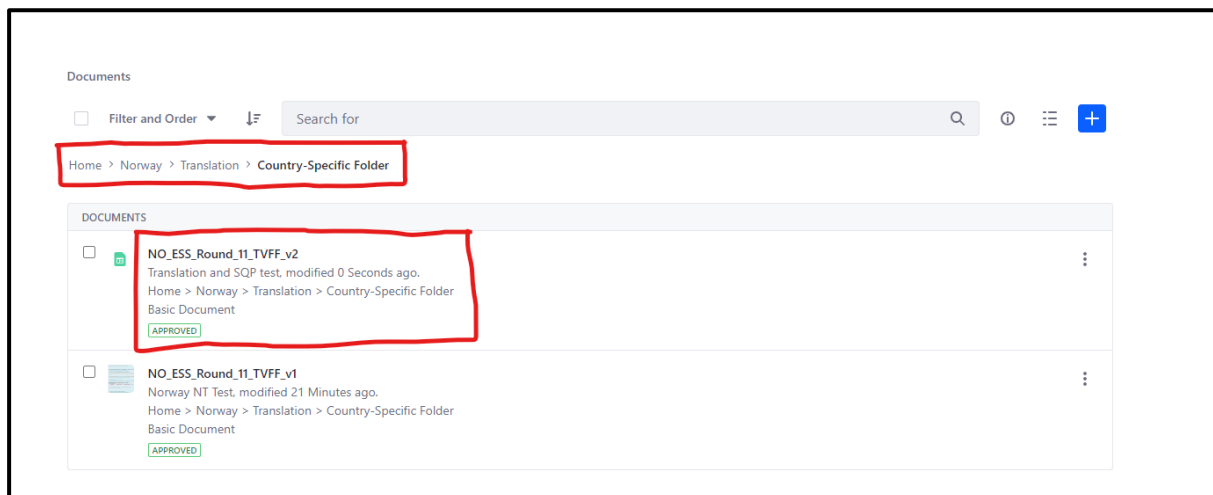

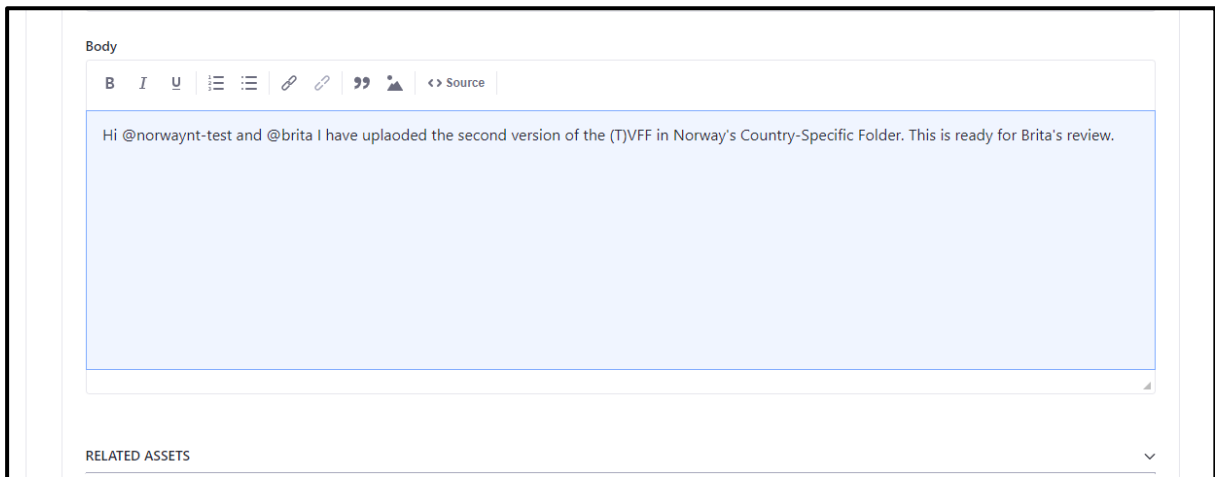
4. cApStAn reads message from the national team.
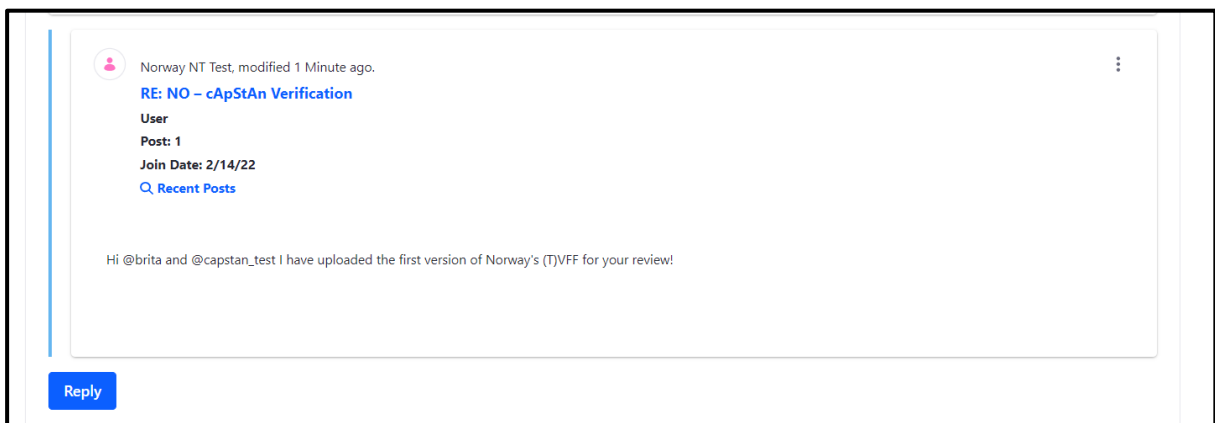
5. cApStAn navigates to the document (Documents > Country > Translation > Country-Specific Folder) and downloads it onto their device, by clicking on the three dots icon and then the "Download" button.
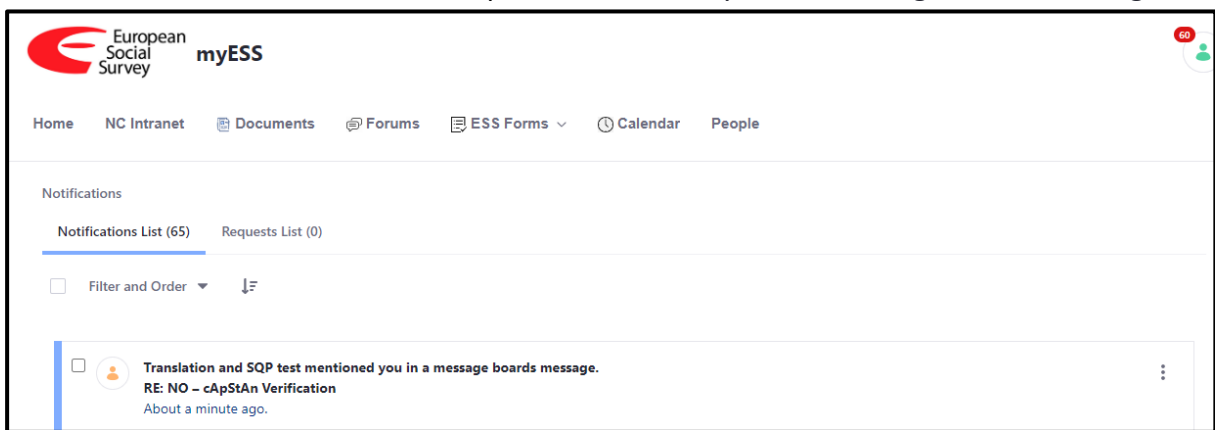

6. cApStAn edits the document and uploads their version (v2) of the document into the Country-Specific Folder the translation folder (Documents > Country > Translation > Country-Specific Folder)
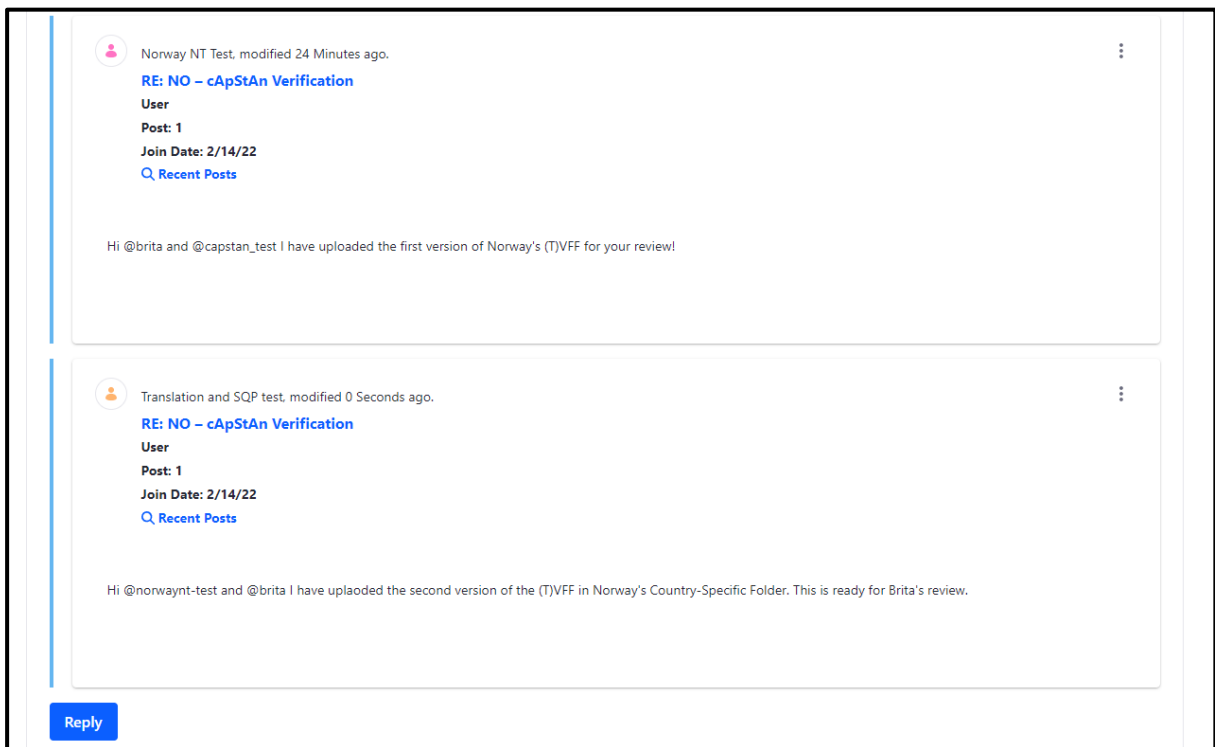

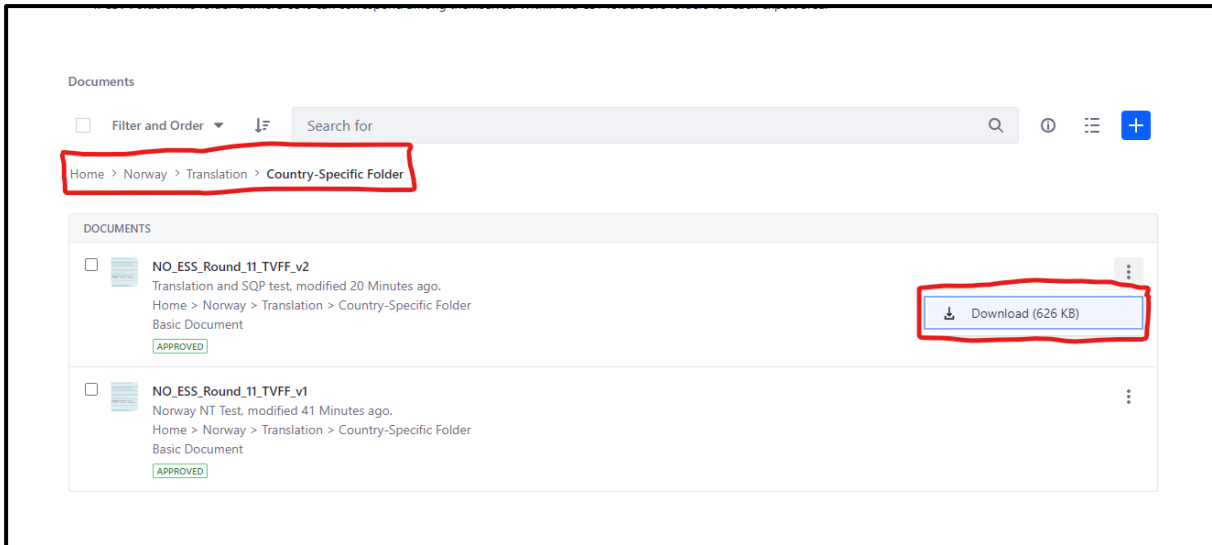7. cApStAn writes a message in Forums mentioning Country and GESIS.

Body

B *I* U̲ | ≣ ≣ | 🔗 🔗 | 99 📷 | <> Source

Hi @norwaynt-test and @brita I have uplaoded the second version of the (T)VFF in Norway's Country-Specific Folder. This is ready for Brita's review.

RELATED ASSETS   ˅

8. Brita receives notification "cApStAn mentioned you in a message boards message."

European Social Survey   **myESS**   60 👤

Home   NC Intranet   📄 Documents   🗐 Forums   📑 ESS Forms ˅   🕐 Calendar   People

Notifications

Notifications List (65)   Requests List (0)

☐   Filter and Order ▼   ↓̄

☐ 👤 **Translation and SQP test mentioned you in a message boards message.**   ⋮
         RE: NO – cApStAn Verification
         About a minute ago.

9. Brita reads the messages from cApStAn and national team.

👤 Norway NT Test, modified 24 Minutes ago.   ⋮
    RE: NO – cApStAn Verification
    User
    Post: 1
    Join Date: 2/14/22
    🔍 **Recent Posts**

    Hi @brita and @capstan_test I have uploaded the first version of Norway's (T)VFF for your review!

👤 Translation and SQP test, modified 0 Seconds ago.   ⋮
    RE: NO – cApStAn Verification
    User
    Post: 1
    Join Date: 2/14/22
    🔍 **Recent Posts**

    Hi @norwaynt-test and @brita I have uplaoded the second version of the (T)VFF in Norway's Country-Specific Folder. This is ready for Brita's review.

Reply

10. Brita navigates to the document (Documents > Country > Translation > Country-Specific Folder) and downloads it onto her device, by clicking on the three dots icon and then the "Download" button.


11. Brita edits the document and uploads her version (v3) of the document into the Country-Specific Folder the translation folder (Documents > Country > Translation > Country-Specific Folder)
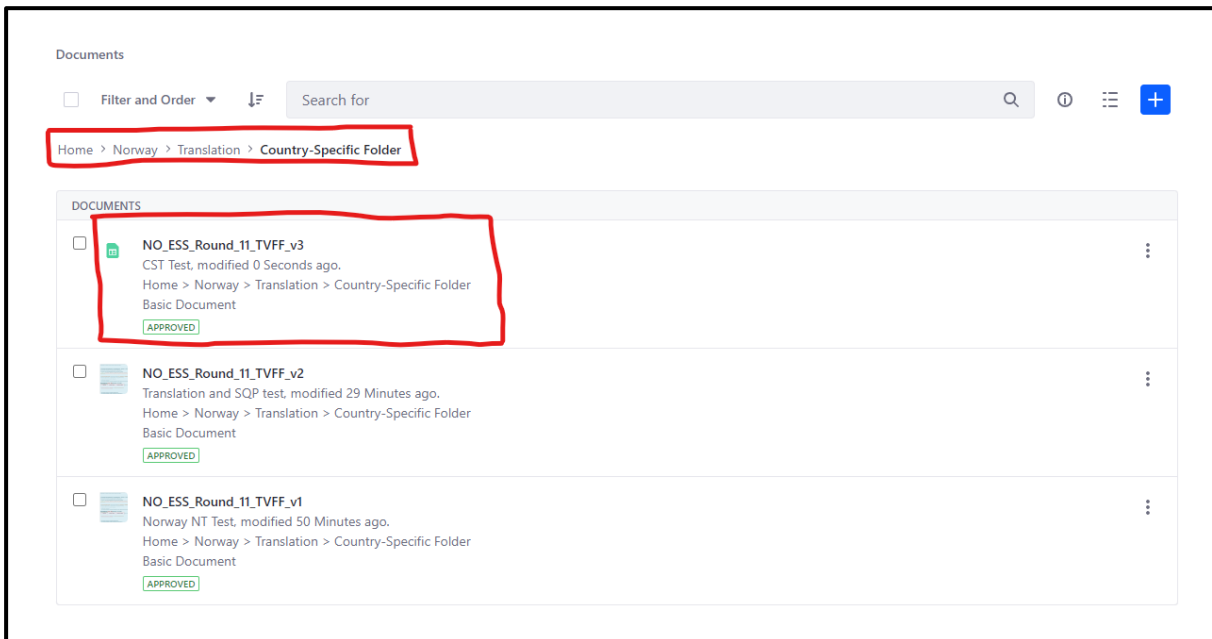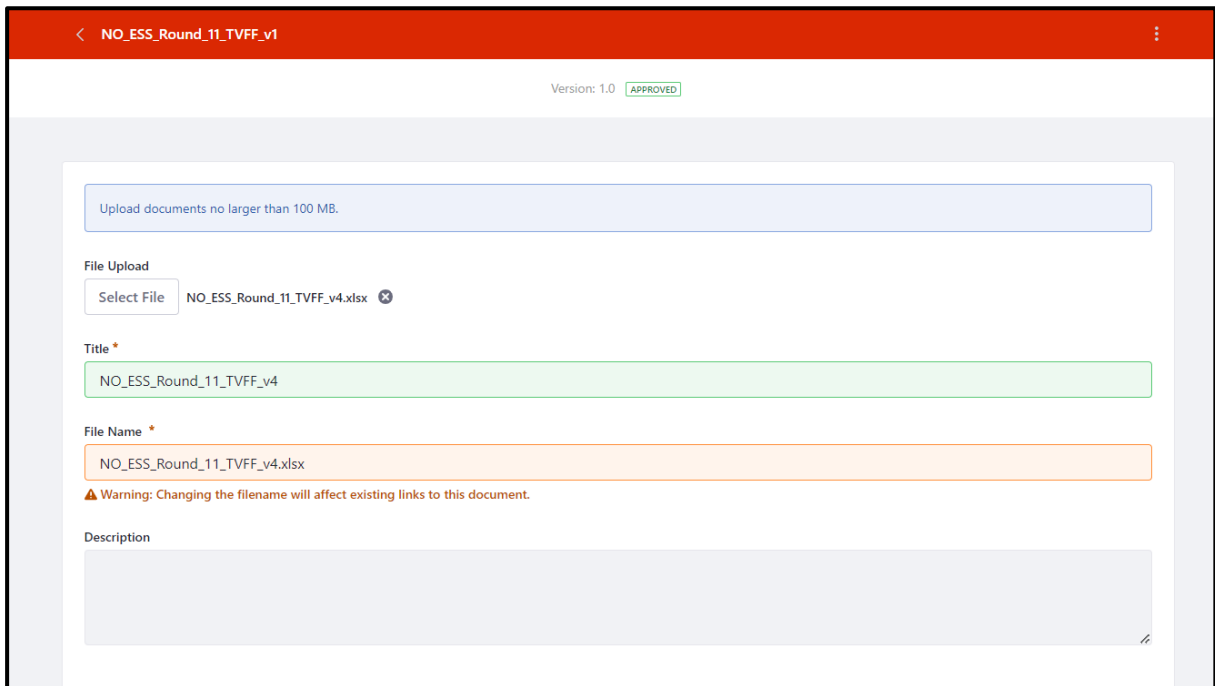

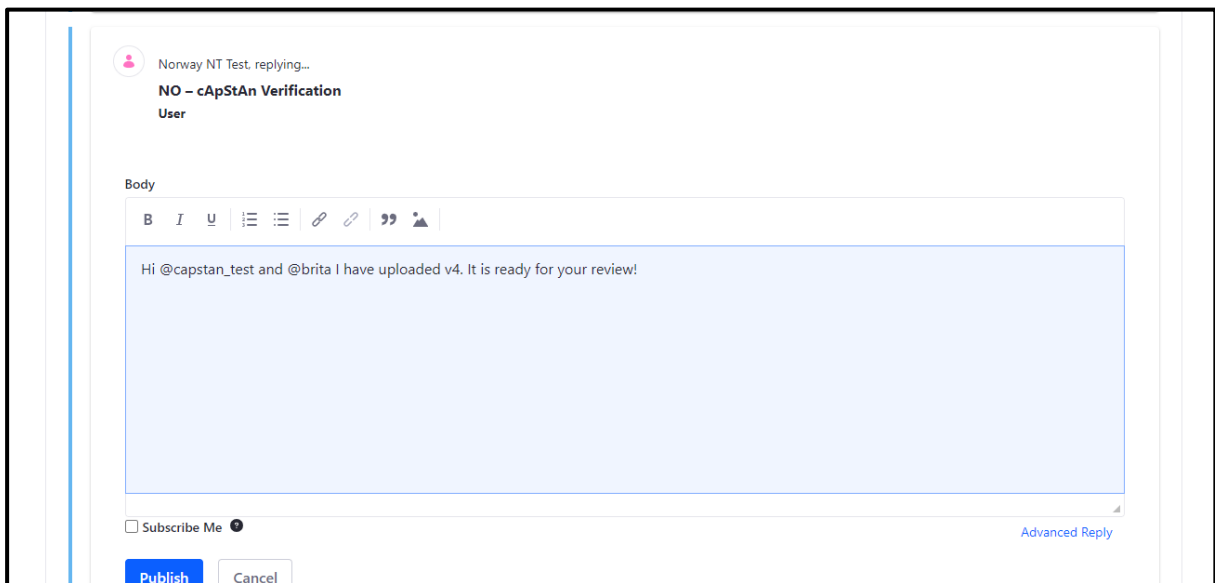12. Brita writes a message in Forums mentioning Country and cApStAn.
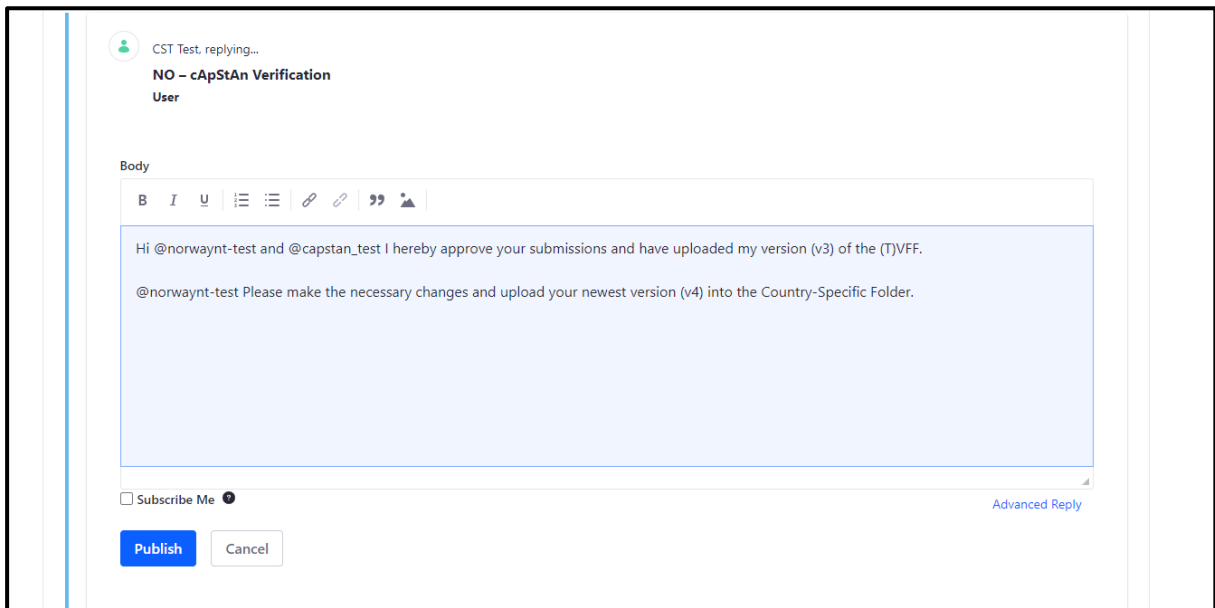
13. If further changes are needed the Country uploads their new version of the document (v4) in the Country-Specific Folder **by editing their original submission (v1)**. (Documents > Country > Translation > Country-Specific Folder).
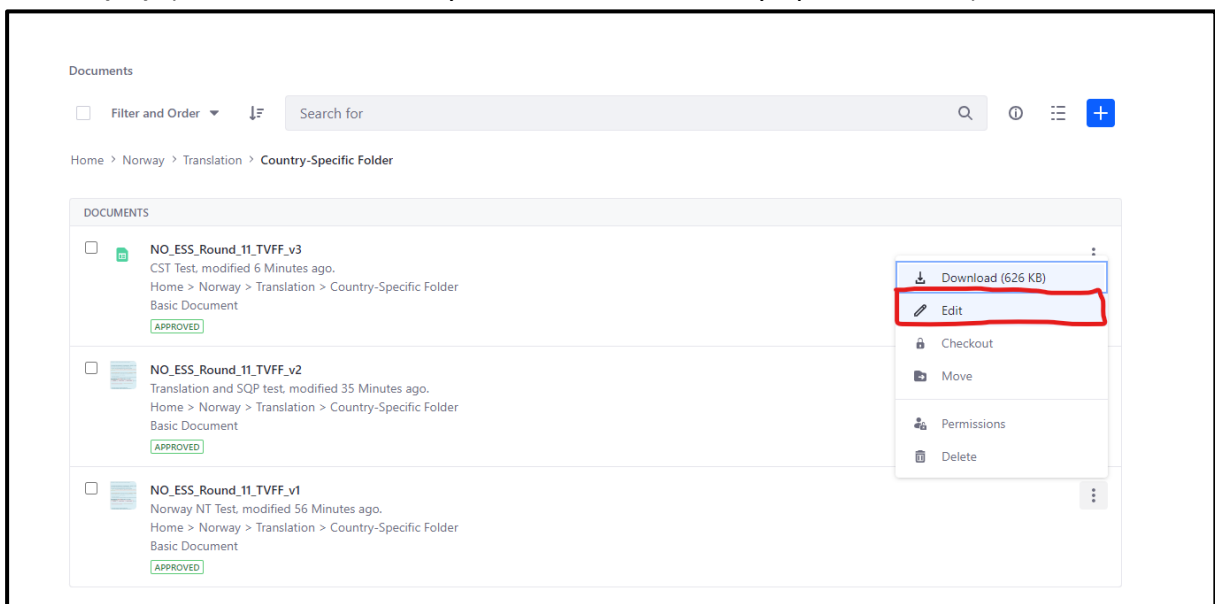
14. The country will update both the Title and the File Name to reflect the most recent version of the document.

Version: 1.0 APPROVED

Upload documents no larger than 100 MB.

File Upload

Select File   NO_ESS_Round_11_TVFF_v4.xlsx ✕

Title *

NO_ESS_Round_11_TVFF_v4

File Name *

NO_ESS_Round_11_TVFF_v4.xlsx

⚠ Warning: Changing the filename will affect existing links to this document.

Description

15. Country again writes a message in Forums mentioning cApStAn and Brita.

Norway NT Test, replying...
NO – cApStAn Verification User

Body

B   I   U | ≡≡ ≡≡ | 🔗 🔗 | 99 🖼

Hi @capstan_test and @brita I have uploaded v4. It is ready for your review!

☐ Subscribe Me ⓘ   Advanced Reply

Publish   Cancel

16. If cApStAn or Brita need to upload a new version of the file (v5 and onward), they similarly will edit **their own** original submission, just like the Country did in step 13 and 14.
    a. In this case, cApStAn would edit (v2) and Brita would edit (v3).

17. Previous versions of a document can be found by opening the document, clicking on the "Info" tab and then clicking "Versions."

18. The process repeats, with all parties **editing their previous submissions with new versions of the documents** and corresponding in Forums until the document is finalised.

19. When a country has finished cApStAn verification, Brita let's UPF know, so that we can remove cApStAn's access to that country space (for privacy reasons.)