

Guidelines for the Production of Automated Braille Transaction Documents



Developed by the Transaction Guidelines Committee of Braille Literacy Canada

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Mission Statement

Braille Literacy Canada / Littératie braille Canada was originally founded in 1990 as the Canadian Braille Authority / l'Autorité canadienne du braille. Braille Literacy Canada (BLC) promotes braille as the primary medium of literacy for those who are blind or visually impaired. All Canadians who require braille in order to access information effectively have the right to braille literacy.



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Guidelines for the Production of Automated Braille Transaction Documents

INTRODUCTION

There are many resources available to provide guidance on braille transcription for all kinds of material. Some pertain to the braille code while others focus on formatting. All, however, presuppose a certain amount of manual intervention by a transcriber. Transactional material is relatively new in the field of braille transcription. Strict Service Level Agreements for turnaround times and adhering to delivery and security regulations (PCIDSS/HIPAA), require producers to process braille automatically with little or no manual intervention.

These guidelines have been developed by Braille Literacy Canada in consultation with braille producers and end users. Throughout this document there are references to existing codes and guidelines (such as Braille Formats: Principles of Print-to-Braille Transcription). The reason for this is that in developing guidelines for transactional material the goal was not to reinvent braille formatting, but to provide guidance on issues that are unique to this type of transcription and which are not addressed in other publications.

SECTION 1 – APPLICATION

1. These guidelines apply to the automated transcription of braille transaction documents for high-volume recurring customer communications. Strict Service Level Agreements for turnaround time adhering to delivery and security (PCIDSS/HIPAA) regulations forces producers to process braille automatically with little manual intervention.

SECTION 2 – PURPOSE

2. The purpose of this document is to ensure consistency in the formatting of transactional material and to provide producers with guidance specific to automated braille transcription.

Braille statements enable the end user to receive their documents in a timely manner so that they can make informed decisions and judgments about their personal information. This also facilitates fraud prevention and discrepancy review, as well as addressing privacy concerns.

SECTION 3 – DEFINITIONS

3. Application: Automated application for the production of braille transaction documents for high-volume recurring customer communications.

SECTION 4 – FORMATTING PRINCIPLES

4. Analyze the document. When making formatting decisions, ensure that information is conveyed logically. When first receiving a document for automated transcription it is important to review the entire statement before coding begins. You need to analyse the statement for the natural flow but also for those components deemed most important by the statement owner. A copy of the conventional/original statement in print format (electronically) will provide guidance to header formatting, tabled sections, marketing sections and how the content is conveyed. For example, a credit card statement may have columned formatting with account details (account number, amount owing, credit limit, amount over limit, due date etc.) on one side and transaction details on the other. Thinking of the document in a linear fashion, the transcriber must determine what components should come first.

Sample of the logical flow for a credit card statement would be the following:

Branding;
Statement period/Statement Date;
Customer Name;
Customer Address;

Account Details;
Account Number;
Amount Owing;
Due Date;
Amount Over Limit;
Interest Rate;

Transaction Details;
Marketing Information/Messages;
Corporate Contact Information;
Terms and Conditions

- 4.1 **Front matter:** Cover pages are not required for Transaction documents.
- 4.2 **Transcriber's notes:** Follow *Braille Formats: Principles of Print-to-Braille Transcription* for the structure of transcriber's notes.
 - 4.2.1 **Error note:** Include a transcriber's note at the beginning of the statement indicating that errors in the original have not been corrected.
 - 4.2.2 **Global transcriber's note:** When a statement contains multiple tables with the same headers, the transcriber's note that precedes the first table can be applied to all tables. A sentence to this effect should be included in the global transcriber's

note. Only tables with different headers would require an additional transcriber's note.

- 4.3 **Errors in the original:** Errors in the original are not corrected unless the producer is explicitly requested to do so by the client.
- 4.4 **Page numbers:** Braille pages are numbered in the bottom right-hand corner of the page. Print pages are not identified.
- 4.5 **Page breaks:** Forced page breaks are not required unless only the cell 5 or centered heading will fit at the bottom of a page.
- 4.6 **Headings:** Major headings (such as branding at the beginning of a statement) should be centered. All headings within sections should be cell 5 headers, sub-sections will use the cell 7 header.
- 4.7 **Tables:**
 - 4.7.1 Table Format, List Format and Linear Format (*See Braille Formats: Principles of Print-to-Braille Transcription*)
 - 4.7.1.1 Consideration of content should be made when deciding how best to apply the table format. i.e. If a tabled section only contains numbers, repeating the headings for each cell item would be preferable. Whereas a tabled section with clear contents can be left in a linear format.
 - 4.7.2 **Bullets within tables:** Bullets within tables can be omitted if they are for visual purposes only. Analyze the original content to determine if the information should be presented as a bulleted list.
 - 4.7.3 **Divided columns:** Analyze the data to determine if the information should be presented as two separate tables. Empty columns can be omitted where necessary for clarity. This only applies in narrative tables where headings are repeated in each row.

4.7.4 **Tables within tables:** (See section 4.8.3)

- 4.8 **Charts and graphs:** Charts and graphs can be reproduced in braille if the content of the chart or graph is contained in the input file. The data from the chart/graph should be conveyed linearly.

Example: A narrative asset allocation pie chart

Asset Allocation: Percentage

Absolute Return: 23%

Domestic Equity: 11%

Fixed Income: 4%

Foreign Equity: 15%

Private Equity: 19%

Real Assets: 26%

Cash: 2%

When the content of a graph or chart is unavailable, use a transcriber's note to reference the omitted content of the original statement.

- 4.9 **Branding:** In lieu of the logo, reference the company as a centered heading on the first line of the document. Identify the product (e.g. card type as the first cell 5 heading)
- 4.10 **Images:** With the exception of branding (See section 4.9) images should be omitted if they are only used for visual effect.
- 4.11 **Cheque images:** Unique cheque image content provided in the print description language must be presented in a list format. Reference to the image is eliminated.
- 4.12 **Remittances:** References to remittance vouchers should be omitted, with the exception of text that is not found elsewhere within the document. For example: Please make cheques payable to, payment due date etc.

- 4.13 **Truncated data:** Truncated information, typically found in transaction details, should not be modified. This information is generated from a print stream where fields are pre-defined by a record length (number of characters). This results in truncated information for both print and braille. Due to the automated transcription process and the unstable variability of the truncation, rules governing contractions may not be properly applied.
- 4.14 **Capitalization:** Follow print for capitalization.
- 4.15 **Ordered or un-ordered lists:** Begin in cell 1 with runovers in cell 3
- 4.16 **Lengthy items in ordered or un-ordered lists:** Lists that contain lengthy items can be formatted as paragraphs, begin in cell 3 with runovers in cell 1.
- 4.17 **Sidebars:** Sidebars/callouts/messaging are typically used for marketing messages associated with specific content on that page. These messages should follow the content to which they apply and are formatted as paragraphs.
- 4.18 **Word division:** Division of words at the end of a line is an agency decision (*See Braille Formats: Principles of Print-To-Braille Transcription*)
- 4.19 **Footnotes:** Use the indicator or follow the print. Formatted in cell 7 runovers in cell 5.
- 4.20 **Foreign language text:** If text in a secondary language cannot be identified, it should follow the rules of the text of the primary language.
- 4.21 **Content omissions:** Content can be omitted if information is presented in an image and the text cannot be extracted (such as marketing messages).
- 4.22 **Terms and conditions:** Reposition all legal, terms and conditions, corporate contact information, additional mailing details, etc. to the end of the statement. If a statement contains legal, terms and conditions etc., they are typically found on the back of the first print page. The natural flow in print should not be followed in braille. As the first page in print will likely not be transcribed to only the first

page in braille, if the legal information started on page two of the braille statement, it would start in an illogical place. Therefore moving the legal information to the end of the statement is more usable.

- 4.23 **Corporate contact information** (see section 4.22)
- 4.24 **Payment details** (see section 4.22)
- 4.25 **Legal references** (See section 4.22)
- 4.26 **Marketing and promotional messages:** Any marketing or promotional information which interrupts the natural flow of the content in braille should be positioned at the end of that section.

SECTION 5 – BRAILLE CODE

- 5. **Contracted vs. uncontracted:** Organizations should offer both contracted and uncontracted braille as this is a user preference.
 - 5.1 **Contraction issues:** (See section 4.14: Truncated data)
 - 5.2 **Acronyms:** Follow print with regard to capitalization and punctuation. Due to variable content, contraction rules may not always be applied.
 - 5.3 **Variable data:** (e.g. personal information and titles) Follow print for capitalization, punctuation, and truncation of this content.

SECTION 6 – FOREIGN LANGUAGES

- 6. **Foreign languages:** When transcribing material in a foreign language, refer to the following:
 - 6.1 *World Braille Usage Third Edition* - This book contains a listing by country of braille codes used in 133 languages.
 - 6.2 *Interim Manual For Foreign Language Braille Transcribing, 2002* – this manual provides detailed guidance on how to transcribe braille in several different languages.
 - 6.3 **Accented characters in English documents**

6.3.1 When transcribing accented characters or foreign-language material in an English context, refer to *The rules of Unified English Braille Second Edition 2013* and;

6.3.2 *Provisional Guidance for Transcribing Foreign Language Material in UEB.*

SECTION 7 – PRODUCTION

7. **Production:** For the physical production of braille transaction documents, the following is required:

7.1 **Binding:** Staple documents up to 20 pages or 10 sheets. Bind documents with comb binding or spiral binding over 21 pages.

7.2 **Interpoint:** Documents are produced in interpoint (duplex)

7.3 **Print cover page and labels:** Identify the purpose of any print pages and labels if they are included in the braille statement.

7.4 **Volumes:** See *Braille Formats: Principles of Print-To-Braille Transcription*

SECTION 8 – QUALITY ASSURANCE

8. **Quality assurance:** Proofreading of braille files should be conducted by a certified braille proofreader.

8.1 Stages of proofreading:

Stage 1: Proof text extracted from original for accuracy.

Stage 2: Proof .BRF prior to production

Stage 3: Proof hard copy, particularly in the development stage.

Conduct spot checks.

8.2 **Physical integrity:** Verify dot firmness, tearing of pages, order and position of pages, merging lines

Appendix A: Definitions

ASCII:	ASCII stands for American Standard Code for Information Interchange. Computers can only understand numbers, so an ASCII code is the numerical representation of a character such as 'a' or '@' or an action of some sort.
Braille Composition Signs:	Symbols used only in braille which do not have a print equivalent. Composition signs are used to identify a change in the appearance of the print, such as capitalization. For example: Capitalization, Italics, Bolding, etc.
BRF:	Braille Ready File: ASCII print stream for braille documents.
HIPAA:	Health Insurance Portability and Accountability Act.
HRI:	Human Readable Information: Used typically to identify numerical sequence for barcodes.
Input:	Input data from clients in a PDL which is ingested into the automated application.
Output:	The braille output files generated from the application (contracted or uncontracted).
PCIDSS:	Payment Card Industry Data Security Standard.
PDLs:	Print Description Language(s).
Print Stream(s):	A print stream is the code that's generated by software that composes documents when you instruct that software to print or to prepare a file that you intend to send to your printer: IE AFP, Metacode, PCL, PDF, PS

AFP: Advanced Function Presentation – IBM print stream format

Metacode: Xerox print stream format

PCL: Printer Command Language - Hewlett Packard print stream format

PDF: Portable Document File – Adobe proprietary print stream until 2008 when it was officially released as an open standard by ISO (International Organization for Standardization)

PS: Post Script – Is a computer language for creating vector graphics.

Product: The end produced document for shipping

Transaction: A document containing one or more financial transactions

Appendix B: UEB Implementation

Symbols Page

Upon implementation of UEB within an organization, a symbols page must be included that contains any symbols specific to UEB. The symbols page should be limited to the UEB symbols that appear in the statement. A transcriber's note is sufficient if only one or two symbols need to be defined.

Follow *Braille Formats: Principles of Print-to-Braille Transcription* with regard to the layout of the page.

This information must be included in each statement for the period of 6 months.