Overview

The purpose of this document is to provide a workflow and style guide for the purposes of video captioning within the Garland Independent School District (GISD). The aim is to provide a framework for an efficient workflow, a consistent end-user experience and quality control.
GISD Video Caption Workflow

Captioning videos

The majority of videos posted online by GISD are hosted by YouTube. Therefore, the following workflow and best practices will reflect the workflow for captioning videos via YouTube.

Uploading

1. Sign into YouTube and upload your video. Set privacy setting to either “Unlisted” or “Private.”
2. Generate an appropriate title and description and modify other necessary settings.

3. Upon completion select “Done” and allow the video to process.
Captioning

1. Select “Video Manager”

![Video Manager selection]

2. Navigate to your video. Click on the drop-down arrow next to “Edit.” Select “Subtitles/CC.”

![Dropdown menu with Subtitles/CC selected]
3. If YouTube has generated “Automatic” captions, then select the “Automatic” option under “PUBLISHED” and proceed to caption editing to edit and quality check the captions.
4. If YouTube does not generate “Automatic” captions, then select “Add new subtitles or CC.”
5. Choose the appropriate language for the captions, and then select the method for creating captions. If you have a script, then you may choose “Upload a file” or “Transcribe and auto-sync” (refer to YouTube help options for greater clarification). If you do not have a script then you will select “Create new subtitles or CC” and begin editing your subtitles.
Caption editing

Automatic captions overview

Automatic captions generated by YouTube will require editing. Do not rely on these captions to be accurate or even acceptable. This process is critical to ensure a quality end-user experience. The caption editor must be mindful of spelling issues, capitalization issues, and punctuation because the YouTube process does not often address these issues.

Workflow:

1. Make an initial pass editing the text only by correcting apparent capitalization errors, spelling errors and by adding appropriate punctuation.
2. Make a second pass editing the text while watching the video to adjust for timing and synchronization.
3. Make a final quality-check pass in which the editor proofreads the text and makes any fine-tuning adjustments to fix any timing issues.
**Editing Automatic captions in YouTube**

1. Edit the text in the caption editor located to the left of the video viewer.
2. Play back the video while adjusting for timing. Timing for onscreen appearance can be adjusted by typing in a numeric value in the caption editor or by adjusting the text boxes located beneath the video viewer.

*It is helpful to be familiar with keyboard shortcuts to assist the editor in navigating the caption editor and timeline.*

3. Make a final pass to ensure a high-quality experience for the end-user. This final process of proof-reading should include attention to spelling, capitalization, punctuation, and proper timing.

4. Once it has been determined that captions have been edited accurately and appropriately, select “Save changes” located above the video viewer. The “Automatic” captions will now be published.

5. Navigate to “Info & Settings” and change privacy settings to “Public” if necessary.
**Editing manual captions**

The YouTube caption editing interface includes four main components:

1. New subtitle field
2. Caption editor
3. Video viewer
4. Timeline

The best practice workflow for manual captions is as follows:

1. Play the video and insert captions in the “New subtitle field” as the video plays. Do not worry about being perfect the first time through. The goal is just to get in as much as possible.

   *Helpful Hint: Keep the “Pause video while typing” function enabled during the process to stop the video from playing while inserting new text.*

2. Make a second pass through the text in the caption editor in order to clean up spelling, capitalization and punctuation issues.

3. Make a third pass focused on adjusting for timing and synchronization.

4. Make a final pass to ensure a high-quality experience for the end-user. This final process of proof-reading should include attention to spelling, capitalization, punctuation, and proper timing.

Please refer to *Editing Automatic captions in YouTube* for interface screenshots and further context as well as to the YouTube help options for further assistance.
Offline editing

In the event of a long transcript, it may be desirable to edit the text portion of the captions offline.

1. Click on the “Actions” dropdown menu located directly above the “New subtitle field.”

2. Select .srt. An .srt file will download to your system.

3. Open the .srt file in a text editing application such as “Notepad” (PC) or TextEdit (Mac).

4. Make necessary changes to the text.

5. Upload the file to YouTube.
6. Continue the workflow best practices by adjusting for timing and synchronization and proceeding with a final quality check.

7. Select “Save changes” to publish the transcript.
GISD Video Caption Style Guide

Purpose

The aims of this style guide are to provide uniformity and quality controls with the end goal being a consistent, high-quality experience for the end-user. The guide should also provide to the caption editor a model to increase efficiency.

General Guidelines

This style guide follows guidelines set forth by The CBC Captioning Style Guide (2003). There are two forms of captioning: off-line roll-up captions and pop-on captions. YouTube provides “pop-on” captions. This style guide will provide guidelines that generally comport with “pop-on” captions. Further, not all guidelines are pertinent to the workflow for GISD caption editing. In sum, this style guide seeks to provide only relevant information to the GISD video caption editor.

Style Guide

Editing and timing

Editing text

A caption line should end at a period or comma. New captions should be created at the beginning of a new sentence where possible. Use discretion where sentences are unusually long and/or timing may be compromised.

Timing

Captions should be in sync with the audio track whenever possible. Caption changes should also be in sync with scene/shot changes whenever possible to eliminate confusion and to provide the most accurate experience as possible.

The standard onscreen duration for single words and short sentences is one second ten frames (1:10) and the minimum duration is 1:00.

The standard duration for one full line of text is 2:00 and the minimum duration is 1:20.

The editor may use discretion in timing when/if the speaker speaks quickly to allow for an acceptable reading time.
Captioning verbatim is the standard, but fast speakers may not proceed at a comfortable reading rate. It is incumbent upon the caption editor to use language skills to ensure readability, consistency and the best possible experience for the end-user.

**Positioning and appearance**

The YouTube caption position default is to the bottom of the video viewer. However, the user has the ability to change the caption position if so desired.

If the default position of the caption obscures an onscreen super-imposed image (super), then it might be necessary to include the obscured information in the caption. An example would be that of a name super used to identify a speaker. The caption editor should provide the same information provided by the super including name, title, etc. using the following format:

>>> John Smith (Teacher):…

Other caption notes might include location or URL notes provided by obscured graphics. Examples:

(Location note: Garland, TX)
(URL note: www.garlandisd.net)

Captions should generally be only one or two lines in length.

Spacing should be limited to one space. It is unnecessary to use two spaces after a period.

**Speaker Identification**

Identify speakers using the following convention: two chevrons followed by a space, speaker identification and a colon.

Example:

>>> John Smith: That’s why I choose GISD!

Off-screen speakers must be identified by their whole name when off-screen, and then by either their first or last name upon their appearance on screen.

Captions for on-screen conversations and interviews between two or more people need to indicate who is speaking.

Multiple speakers or groups speaking at the same time should be indicated by three chevrons, a space, description of speakers and a colon.

Example:

>>> All: That’s why we choose GISD!
Abbreviations

Spell out all words fully unless the abbreviation is actually spoken.

Quotation marks

Use quotes around titles and to indicate deliberate puns.

Place commas and periods inside of quotes.

If a quote spans multiple captions, place quotation marks at the beginning of each caption except for the final caption containing the quote, which should contain a closing quotation mark.

Numbers

Numbers under ten are spelled out. The number ten may be spelled or displayed numerically depending on spacing and aesthetics.

Common fractions are preferred to be spelled (e.g. 1/2 should be one half) out whereas uncommon fractions may be represented numerically (e.g. 1 1/32).

Dollar signs ($) are acceptable.

Years when expressed as decades may be spelled or represented numerically (e.g. the ‘80s or the Eighties). Actual years should be expressed numerically (e.g. 1980).

Times of day should be represented numerically (10:00 a.m. or 10:00).

Temperatures should be captioned as spoken.
Line and caption breaks

When determining where to break a line and start a new line, the editor must keep in mind readability and understandability. Do not break modifiers from the words they modify, conjunctions nor a person’s name.

Interruptions are illustrated by a double dash.
Example:

>> Jane Smith: Good morning! It’s nice –
   >> Jill Jones: Good morning!

Hyphenated words should remain on one line.

Unfinished sentences and long pauses should be indicated by an ellipsis (…).

Descriptive captions

Descriptive captions are used to describe non-spoken portions of the audio track. This includes non-verbal utterances, sound effects and music. All relevant sounds should be described in a caption to provide a high quality experience.

Descriptive captions are all lower-case and set apart by brackets.
Examples:

[whispering]
[applause]
[silence]

If speech is indiscernible, a descriptive caption is helpful.
Examples:

[muttering]
[speaking Esperanto]
Music and song lyrics

Instrumental music is captioned by displaying two music notes separated by a space (e.g. ♪ ♪).

On a Mac, the music note is located in “Emoji and Symbols” which is accessed under “Edit” in the menu bar or by using the keyboard shortcut “Control – Command – Space Bar.”

On a PC, the music note may be typed by using the keyboard shortcut “Alt - 1 – 3.”

The caption editor should provide descriptions of the music where possible, including style, title and artist. Examples:

♫ [emotional electronic dance music]

♫ [“Greatest Love of All” by Whitney Houston]

All lyrics must be captioned fully. If lyrics are indiscernible, use an appropriate description in accordance with previous guidelines for indiscernible speech. Caption lines are generally derived from the lyric lines, and a musical note should be placed at the beginning and end of each caption. Avoid using punctuation unless necessary for clarity. Example:

♫ I believe the children are our future ♫

♫ Teach them well and let them lead the way ♫

♫ Show them all the beauty they possess inside ♫