CHAX Training & Consulting

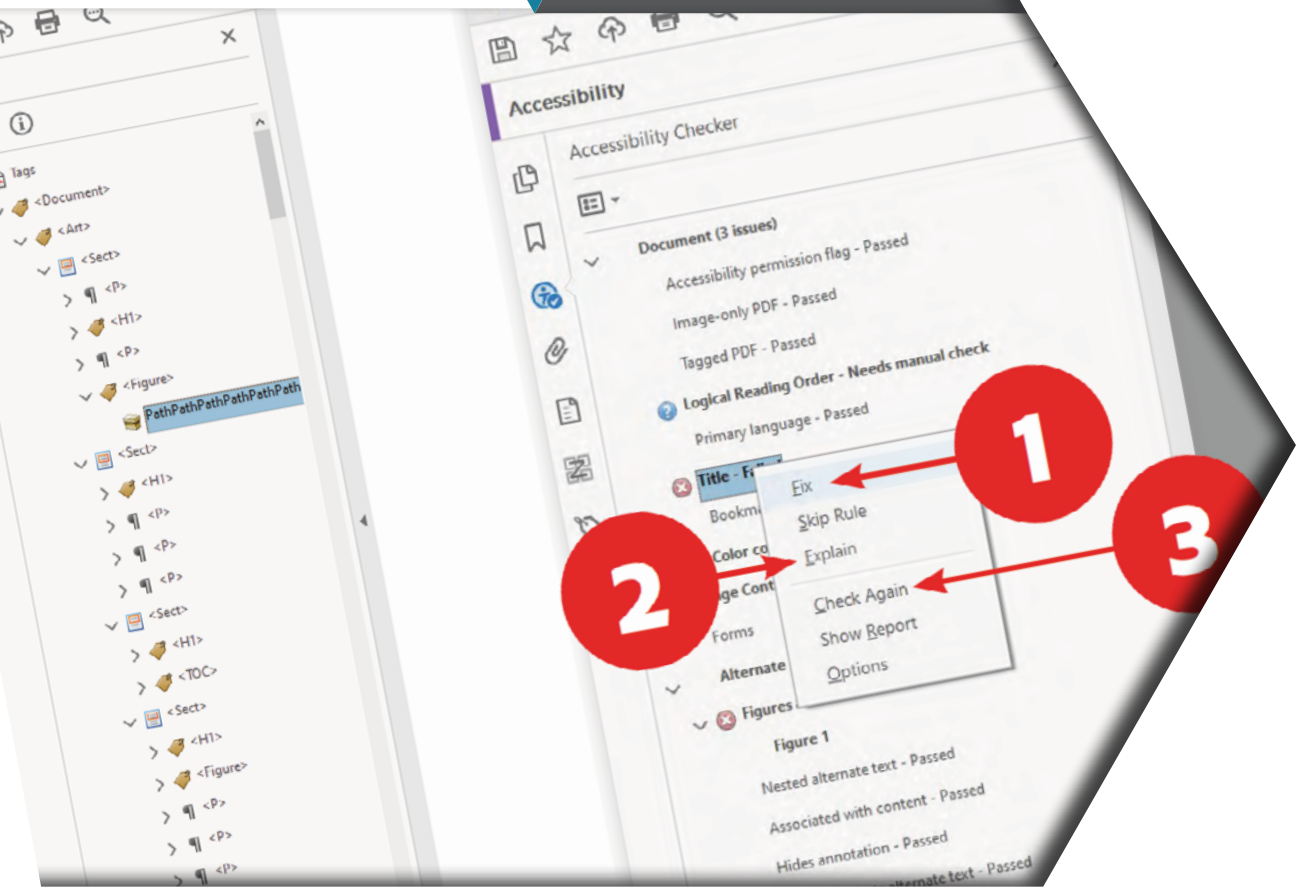
ACCESSIBILITY UNRAVELED

In-Person

1-on-1

Online

Remediation Strategies for Accessible PDFs NOTEBOOK



IAAP CERTIFIED ADS

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accessibility**unraveled.com**

From Problem to Solution:
Remediation Strategies for Accessible PDFs

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Class Outline

Day 1:

10:30 am – 10:45 am: Introduction and Workshop Overview

Teach: Introduction to accessibility principles in PDF documents.
Exercise: Icebreaker - Understanding participants' familiarity with PDF accessibility.
Review: Discussion on why accessibility in PDFs is crucial.

10:45 am to 11:45 am: 1.0 Accessibility Barriers in PDFs

Teach: Identifying common barriers in PDF documents - images, tables, graphs, etc.
Exercise: Identifying accessibility barriers in sample documents provided.
Review: Sharing findings and discussing common challenges.

11:45 am to 12:00 pm: Break

12:00 am to 1:00 pm: 2.0 WCAG in Plain English & Creating an Accessible Workflow

Teach: Learn WCAG principles for document accessibility and establish an efficient plan to tackle accessibility issues in PDFs.
Exercise: Discuss various accessibility workflows for a given scenarios.
Review: Sharing and discussing various workflow strategies.

1:00 pm – 2:30 pm: Lunch

2:30 pm to 3:30 pm: 3.0 Adobe Acrobat Interface and Basic Tools

Teach: Introduction to Adobe Acrobat tools for accessibility.
Exercise: Navigating through Acrobat, using basic tools for accessibility evaluation.
Review: Reviewing the functionalities and discussing challenges faced.

3:30 pm to 3:45 pm: Break

3:45 pm to 5:00 pm: 4.0 Understanding Tags and Table Structures

Teach: Importance of tags, structuring tables for accessibility.
Exercise: Tagging and restructuring tables in sample documents.
Review: Sharing techniques, discussing best practices for table structures.

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Day 2:

9:00 am - 10:15 am: 5.0 Common Pitfalls and Remediation Strategies

Teach: Exploring the most common pitfalls in PDFs and how to fix them.
Exercise: Hands-on practice in remediating common issues.
Review: Sharing solutions, discussing effective remediation strategies.

10:15 am - 10:30 am: Break ----------

10:30 am - 12:00 am: 6.0 Remediation Techniques for Complex Content

Teach: Advanced techniques for remediating complex content (infographics, graphs, etc.).
Exercise: Hands-on exercises focusing on infographic elements.
Review: Sharing approaches, discussing challenges faced.

12:00 am - 1:30 pm: Lunch ----------

1:30 pm - 3:00 pm: 7.0 Document Testing and Evaluation

Teach: Best practices to ensure an excellent user experience and WCAG 2.1 compliance.
Exercise: Participants work independently on sample documents applying all learned techniques.
Review: Discussing outcomes, addressing compliance issues.

3:00 pm – 3:15 pm: Break ----------

3:15 pm - 4:00 pm: 8.0 User Experience Document Testing Using NVDA

Teach: Learn the basics of NVDA and how to evaluate user experience with it.
Exercise: Participants will use NVDA to test various user experiences to understand barriers.
Review: Open Q&A, addressing individual challenges and clarifying doubts.

4:00 pm - 4:30 pm: Summary and Final Q&A

Teach: Summary of the workshop, key takeaways.
Review: Participant feedback and final Q&A session.

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1.0 Accessibility Barriers in PDFs

We start with a firm foundation of what makes a PDF inaccessible. We will review a PDF using NVDA to understand what the different types of user experience can be. We will discuss the difference between tag-based, content-based, and visual barriers. We will discuss the Top 10 barriers you are likely to encounter while reviewing PDF documents for accessibility.

QUIZ: Example Accessible vs User-focused experience

A. **True or False:** Accessibility compliance and a good user experience in documents are synonymous (the same).

B. **Fill in the Missing Word:** Accessibility compliance ensures a document can be _____ by assistive technologies.

C. **True or False:** A technically compliant document always guarantees a user-friendly experience.

D. **Fill in the Missing Word:** A good user experience involves ensuring documents are _____ and easy to navigate.

E. **True or False:** An accessible document may have properly tagged elements but still lack readability and clarity for all users.

F. **Fill in the Missing Word:** Providing a good user experience involves _____ the user experience and potential barriers.

G. **True or False:** A technically compliant document doesn't require consideration for visual hierarchy and contrast for readability.

H. **Fill in the Missing Word:** To enhance user experience, documents should be _____ to cater to diverse user abilities and limitations.

I. **True or False:** A technically compliant document always implies it's perceivable, operable, understandable, and robust for all users.

J. **Fill in the Missing Word:** A document that focuses only on compliance might lack the essential _____ elements that contribute to a superior user experience.

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The Most Common Document Accessibility Barriers

1. **Font:** Font choice can be a significant visual barrier, as well as an interpretive one. Most decorative or script fonts, can be challenging for screen readers to interpret. Unicode fonts are encoded in a way that allows for most, if not all, characters to be interpreted by a screen reader properly. It is commonly accepted that sans-serif fonts are more accessible due to their simplicity and ease of recognition. However studies have shown that proper kerning with serif and san-serif fonts help reading comprehension more. Ensuring adequate font size and avoiding overly stylized text enhances readability and accessibility for all users. Remember that there is no specified font size for accessibility. So consider your audience when choosing minimum sizes. Remember, there is no such thing as a dyslexic font. These are typically gimmics not backed by any study or proof. Also WCAG SC 1.4.12 Text Spacing does not mean font size and does not apply to PDF documents.

2. **Language:** The primary barrier related to language involves using overly complex or technical language without providing clear explanations or alternative text. Clarity and simplicity in language support a more inclusive experience, ensuring that all users, regardless of language proficiency or cognitive ability, can comprehend the document's content. WCAG SC 3.1.5 Reading Level (AAA), and SC 3.1.2 Language of Parts

3. **Colorblindness:** Designing solely based on color distinctions can pose difficulties for colorblind individuals. Relying on color alone to convey information might lead to confusion or exclusion. Adding symbols or patterns alongside colors helps convey information to all users, ensuring inclusivity. WCAG SC 1.4.1 Use of Color

4. **Color Contrast:** Inadequate contrast between text and background colors can make content illegible for many users, especially those with visual impairments. Ensuring sufficient contrast ratios between text and background colors helps in improving readability and accessibility for everyone. WCAG SC 1.4.3 Contrast (Minimum)

5. **Color as a Differentiator:** Using color alone to differentiate between elements (such as required vs. optional fields) can exclude users who cannot perceive these color differences. Providing additional indicators, like text labels or symbols, alongside color helps distinguish items for all users. WCAG SC 1.3.1 Info and Relationships and 1.4.1 Use of Color

Notes:

6. **Structural Relationships:** Headings, lists, graphics and tables provide key structural landmarks contain important information. Ignoring the logical structure robs AT users of information clearly visible to those with sight. Using properly tagged headings, lists, and nesting of content ensures a clear and logical structure, which is essential for users navigating the document using assistive technologies like screen readers. WCAG SC 1.3.1 Info and Relationships.

7. **Text as Images:** Using text embedded within images rather than as actual text can be inaccessible to screen readers, as they cannot interpret text from images. Utilizing actual text and providing alternative descriptions for images ensures that all users can access the information.
WCAG SC 1.1.1 Non-text Content

8. **Formulas:** Complex formulas and equations in a PDF are not readable in the mathematical language required to interpret the correct meaning. Alt-text is always required in all but the most simple formulas for users who rely on screen readers or speech to text devices. Providing clear, concise descriptions or alternative formats for equations aids in comprehension for a broader audience. WCAG SC 1.1.1 Non-text Content

9. **Tables:** Improperly structured or untagged tables can be challenging for screen readers to interpret. Correctly tagging tables and ensuring they have appropriate headers and cell relationships helps users to understand the tabular data effectively. WCAG SC 1.3.1 Info and Relationships and SC 1.3.2 Meaningful Sequence

10. **Images:** Images without alternative text or descriptions can be a significant barrier for users who rely on screen readers or those with visual impairments. Adding descriptive alt text to images is crucial for conveying the content or context to all users. WCAG SC 1.1.1 Non-text Content and 1.3.1 Info and Relationships

11. **Meaningful Sequence:** When the order in which content is read matters, the content must be provided correctly (i.e. Text Columns). Most often we see this with images not placed in the correct reading sequence or sidebar text being read at the end of a document rather than on the page it was intended. WCAG 1.3.2 Meaningful Sequence

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2.0 Accessible Workflow

When you start makes a difference

It is important to incorporate accessibility considerations at the earliest stage possible. The stage at which we consider accessibility directly impacts how long it will take to make the product accessible, what approach we use to do so, and ultimately how usable and informative the content is. If we start late, our goal of a single, equitable, accessible experience for everyone often fails because "there's not enough time" or "this has already been approved and we can't change it.". When teams start designing with accessibility in mind from the beginning, there are more options to present a single, meaningful user experience. Depending on what stage you begin incorporating accessibility, you can increase or limit your ability to employ accessible design by affecting your timeline or your attachment to current designs.

Starting at the Concept Stage

In addition to obvious considerations like choosing an accessible color palette and choosing colorblind-friendly design colors and layouts, designing an interactive experience for accessibility starts with the most important question of all: **"What do I want the user experience to be?"** The answer to this question affects every aspect of your design and implementation. Without answering this question, most developers find themselves at the end of the project with several accessibility barriers they had not considered. Listening to the image descriptions should also be part of your accessibility process. Mapping out the user experience will help identify how the information is presented and possible options for the user to interact with it while absorbing meaningful content.

Other considerations should include the following:

1. Is my template setup for accessible heading structure, lists, captions, graphics, etc.
2. Am I using color alone as a way to understand content or interactions?
3. Am I providing text alternatives for image-based data visualizations?
4. Is someone ready to write alt-text descriptions if needed?
5. Does my palette meet minimum contrast requirements?

Considering accessibility in the concept stage allows the most freedom for change and has the least impact on schedule and development.

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Starting at the Draft Stage

If you are starting to consider accessibility once a draft has already been developed, you still have time to make more accessible design and implementation choices. Color palettes can be reviewed. Text alternatives and presentation methods can be evaluated with assistive technology for barriers and meaningful information. But any changes may be harder to implement at this stage. Those who approve the content may have already formed attachments to the draft colors and methods. The best way to shift sentiment at this stage is to provide solutions when encountering barriers. In my career, I have experienced overwhelmingly negative push back when my evaluations only surfaced accessibility failures without also providing solutions.

Starting at the Final Stage

Even if you are starting at the end, there is still hope for creating an accessible product. With many visualizations, you can slightly darken colors to meet contrast thresholds, adjust alternate descriptions to be more meaningful, and modify tags or tag-only content to present a better user experience for those using assistive technology. But taking these steps is not always easy. Starting accessibility work after the project is fully developed is like baking an apple spice cake for someone who doesn't like apples and asking, "can't you just take them out?"

Chad and Dax's Steps for Remediation

1. Flatten the tags tree (optional)
2. Scan for color contrast issues
3. Quickly scan the tags tree for obvious red flags
4. Go back and fix what I can in the source (if available)
5. Click on the first tag and use mouse only to navigate watching to see each item highlight
6. Accessibility > Set Alt-text (to review)
7. Check Tables (if present)
8. Check non-standard bullets
9. Multi-line Hyperlinks
10. Footnotes/Endnotes
11. Run the Acrobat Checker
12. Fix anything I missed
13. Run PAC 2021

Notes:

3.0 The Acrobat Workspace

Adobe Acrobat has three basic views and four areas to access tools and commands. Understanding what is in each of these areas will help you develop the best workflow for your situation.

The Four Interface Areas

1. The Text Menu

The text menu at the top of the screen allows you to access every tool and command through a series of drop-down menus. Acrobat allows keyboard and mouse-driven access to these commands.

2. The View Tabs

These consist of the **Home**, **Tools** and **Document** tabs. They allow you to switch between interface modes and provide quick access to recent documents, tools and your document(s).

3. The Panes Panel

These are the elements to the extreme left of the screen. You may have more or less tools in this panel. You can add tools by right clicking in the open area under the last tool and selecting the desired tool to add from the pop up list that appears.

The Tools Panel

The Tools Panel (3) is located on the extreme right edge of the Acrobat window and houses all of the common tool shortcuts you will need when editing your PDF documents. You can add to these quick tools by selecting the **Tools Tab** (1) and dragging items (2) into the **Tools Panel** (3). To reorder the quick tools you will need to switch to or be in the **Tools** view by selecting **Tools Tab** (1) to the left of the **Home Tab** first. Click on a tool in the **Tools Panel** to activate it or to access the tool set for that category.

The tools you will use most in accessibility testing and remediation will be:

- Accessibility Tool
- Print Production Tool
- Prepare Forms
- Organize Pages
- Scan & OCR

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The Three Acrobat Views

There are three basic views in Adobe Acrobat. These views are the **Home**, **Tools** and **Document** view. Each of these views can be accessed by select the desired tab located just under the text menu at the top of the screen.

Home

The **Home** view shows your recent documents with various location filters, as well as, several shortcuts for **Combine Files, Request Signatures, Share, Export PDF, Send for Comments, Protect** and **Edit PDF.**

Tools

The **Tools Tab** opens a menu in the main document window allowing you to open, remove or add shortcuts to the Tools Panel by dragging them to the right and letting go in the **Tools Panel**.

Pro Tip: The **Search Bar** (1) is just under these three tabs. You can use it to search for partial matches to quickly find tools when you cannot remember what menu or area they are in.

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4.0 Understanding Tag & Table Structure

Container Elements

Document <Document>
Part <Part>
Article <Art>
Section <Sect>
Division <Div>

Heading Elements

Heading<H> (NOT USED)
Heading Level l <H1>
Heading Level 2 <H2>
Heading Level 3 <H3>
Heading Level 4 <H4>
Heading Level S <H5>
Heading Level 6 <H6>

Paragraph Elements

Paragraph <P>

Inline-Level Elements

Quote <Quote>
Span <Span>
Figure <Figure>
Form <Form>
Formula <Formula>
Link <Link>
Note <Note>
Reference <Reference>

Special Text Elements

Block Quote <BlockQuote>
Caption <Caption>
Index <Index>Table of Contents <TOC>
Table of Contents Item <TOCI>

Table Elements

Table <Table>
Table Header <Thead>
Table Body <TBody>
Table Footer <TFoot>
Table Row <TR>
Table Data Cell <TD>
Table Header Cell <TH>

Label and List Elements

List <L>
List Item <LI>
Label <Lbl>
List Item Body <Lbody>

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Tag Structure you should know:

Typical TOC

```
<TOC>
  <TOCI>
    <P>
      <Reference> *** you will hear Link ***
        <Link> *** you will hear Link ***
          LinkOBJR
```

Example of Multi-level TOC

```
<TOC>
  <TOCI>
  <TOCI>
    <TOC>
      <TOCI>
```

Typical List

```
<L>
  <LI>
    <Lbl> *** Not required***
    <LBody> *** Not required***
```

Nested List

```
  <L>
  <LI>
    <Lbl>
    <LBody>
      <L>
        <LI>
          <Lbl>
          <LBody>
```

Table Structure

```
<Table>
  <Caption> *** can be used in Lists, Tables, Figures ***
    <THead>
      <TR>
        <TD>
        <TD>
    <TBody> *** THead / TBody must be used together ***
      <TR>
        <TD>
        <TD>
```

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5.0 Common Pitfalls and Remediation Strategies

Pitfall #1: Missing or Inaccurate Headings:

Implement Consistent and Descriptive Headings. Headings are essential for document structure. Missing or improperly sequenced headings can confuse users relying on assistive technologies. It is common for people to assign headings just because the text is larger and bolder than other text on the page. Be sure the text is an actual heading for subtext below it. If it is simply a byline or other decriptive, it may not be a heading.

Solution: Validate a clear and accurate headings structure that organizes content consistently and effectively.

Quiz: Heading

True or False: There can only be one H1 in your document.

True or False: Headings must follow a structured order from H1 to H6 to ensure proper accessibility and document structure.

Fill in the Blank: Heading tags are _____-_____, meaning 'h1' is different from 'H1'.

True or False: Consistency in heading structure is not crucial for an accessible document.

Fill in the Blank: Headings serve as _____ within a document, aiding users in navigating and understanding cont

True or False: Headings should be generic and brief, avoiding descriptive titles for accessibility purposes.

True or False:: It is okay to skipping heading levels (e.g., going from H2 to H4 without an H3) if the document doesn't have that level tagged.

True or False: 'H' used as a heading structure should be used for the Title of a document.

Fill in the Blank: I can pull up a list of all headings in a document using the _____ _____.

Pro Tip: You can use Actual Text if you need to have headings beyond "Heading Level 6." It is not typical, but can be possible for technical documents that use numbered heading structures. PDF/UA allows for infinte heading levels but screen readers do not natively interpret beyond H6.

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Pitfall #2: Untagged or Improperly Tagged Content:

Lack of proper tags or incorrect tagging inhibits screen readers from interpreting content accurately.

Solution: Ensure proper tagging by "Walking the tags tree." Apply correct tags to content elements to enhance interpretation by assistive technologies.

Tagged Content Quiz:

True or False: It is okay to only have <P> tags in a document with visual headings because the text is still accessible.

Fill in the Blank: A screen reader will say this when encountering a properly tagged lists containing 6 bullets: "List _____ _____."

True or False: It is okay to split a single list into multiple <L> tags if there is a sub-paragraph for one of the list items.

Fill in the Blank: "_____ the tags tree" is a term used to describe the individual inspection of each tag.

True or False: Untagged items are artifacted automatically by Adobe Acrobat.

Fill in the Blank: Fixing content in the _____ _____ is almost always easier than fixing it in the PDF.

True or False: If a table is too complex it is okay to make it an image and apply alt-text to pass the checker.

True or False: Table Summaries are required to pass WCAG.

True or False: Visible page numbers and the PDF page numbers should always match.

Pitfall #3: Insufficient Alternative Text for Images:

Images without descriptive alternative text hinder comprehension for visually impaired users.

Solution: Provide Descriptive Alternative Text for Images. Describe images concisely and accurately to convey their content and context.

Alt-text Quiz:

True or False: Leaving alt-text blank for an image is the same as setting it as an Artifact.

Fill in the Blank: "Alt-text should be ____ to ____ meaningful sentences that describe the image to the user.

Notes:

True or False: It is okay to add additional info to alt-text to give the reader background information or extended info about the image.

Fill in the Blank: Never start your alt-text with _____ of...

True or False: Web addresses in alt-text are accessible in alt-text descriptions.

True or False: Alt-text can be paused

Fill in the Blank: The word _____ is repeated every 25 or so characters to let the user know they are still in the alt-text description.

Pitfall #4: Complex Tables and Poorly Structured Data:

Complicated tables or improperly structured data tables create challenges for screen readers and users navigating content.

Solution: Simplify Tables and Optimize Structure. Use proper table headers and data structuring for better comprehension.

Tables Quiz:

True or False: When a table is too complex to be accessible it is okay to tag it as a figure and apply alt-text..

Fill in the Blank: Table _____ are not required for accessibility but can provide useful information.

True or False: Blank cells are not allowed in a table.

True or False: Merged cells in a PDF table are not accessible by assistive technology.

True or False: Table titles should be placed in the first row of an accessible table.

Fill in the Blank: _____ can have a value of Column or Row for any TH in an accessible table.

True or False: Tables must have the same number of columns in each row to be considered "regular."

Fill in the Blank:_____ is the term that describes how many cells a particular TD or TH encompasses.

Pitfall #5: Inaccessible Forms or Interactive Elements:

Forms or interactive elements without proper labels or instructions hinder user interaction and comprehension.

Solution: Tag Forms and Interactive Elements. Fill in tool tips and label elements clearly. Ensure operability with keyboard navigation.

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Forms Quiz:

True or False: Acrobat's Auto-detect Hyperlinks feature makes URLs accessible for everyone.

True or False: Autodetect form fields makes PDF forms accessible.

Fill in the Blank: All form fields require a Tool _____ to be accessible.

Fill in the Blank: _____ is the name of the form field object.

Fill in the Blank: _____ _____ are used when the user can choose **more than** one option.

Fill in the Blank: _____ _____ are used when the user can choose **only one** option.

True or False: InDesign is the most efficient tool for creating forms that allow for multiple edits.

Notes:

6.0 Remediation Techniques for Complex Content

7 Questions you should ask before creating an accessible infographic

Use these questions to help guide you in developing an accessible user expeirence. This handout follows along our recent podcast found here:
#accessibilityMatters www.accessibilityUnraveled.com

1. What do we want the user experience to be?

Understanding the intended user experience is crucial before creating an accessible infographic. Designers need to consider the goals of the infographic, how users will interact with it, and what actions or reactions they want to evoke. This helps in determining the appropriate layout, navigation, and overall accessibility features needed to enhance the user experience.

2. What is the most important information?

Identifying the key information that needs to be conveyed in the infographic is essential for accessibility. This involves determining the main message or takeaway and prioritizing the content accordingly. By focusing on the most important information, designers can ensure that users with various disabilities can easily grasp the core content.

3. Does content order matter?

Content order is crucial in an accessible infographic, especially for users who rely on screen readers or other assistive technologies. The information should be presented in a logical and sequential manner, allowing users to understand the content flow and context effectively.

4. Do color or line weights indicate added info?

Designers should be cautious in using color or line weights alone to convey information in an infographic. Some users, such as those with color blindness, may not perceive these visual cues. It is important to use other means, like labels or patterns, to convey essential information, ensuring that all users can comprehend the content.

5. What is the volume of data? Is an alternate presentation necessary?

For large volumes of data, designers should consider whether an alternate presentation format, such as tables or charts with accessible data points, would be more suitable. This can make complex information easier to navigate and understand, particularly for users with cognitive disabilities.

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6. Can I support the infographic with body text?

Supplementing the infographic with descriptive and concise body text is beneficial for accessibility. This helps provide context, explanations, and descriptions of visual elements that might not be apparent to all users. It is also helpful for screen reader users who rely on textual content.

7. Can I test the user experience?

Testing the user experience of the infographic with individuals with diverse abilities is a vital step in ensuring its accessibility. Conducting usability tests with users who have disabilities can reveal any potential barriers or challenges they may encounter. This feedback allows designers to make necessary improvements and create a more inclusive and accessible infographic.

By asking these questions and taking the answers into account during the design process, designers can create infographics that are not only visually appealing but also accessible and inclusive to all users.

12 Ways to make graphics more accessible

1. **Break large graphics into smaller pieces**
2. **Consider the logical reading order**
3. **Use colors with at least a 3 to 1 contrast for meaningful graphic items. I recommend 4.5 to 1 when possible**
4. **Your text should follow WCAG guidelines of 3 to 1 for large text and 4.5 to 1 for regular text**
5. **Consider adding labels when possible**
6. **Add patterns sparingly**
7. **Use shapes as alternative differentiators**
8. **Vary your line styles to add clarity**
9. **Keep text as live text and set a logical reading order if appropriate**
10. **Consider long descriptions in an appendix**
11. **Legends are okay, but integrated labels reduce cognitive loads for neurodiverse audiences.**
12. **Test your infographs with NVDA or JAWS**

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Notes:

Stop struggling to understand how to make your documents accessible...

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Accessibility Classes

- Microsoft Word & PPT
- Adobe Acrobat
- Adobe InDesign
- Captions for Video
- Accessible Social Media
- Designing with Accessibility in Mind
- Document Testing with NVDA/JAWS

Available Manuals & Handouts:

- MS Word Accessibility Checklist
- MS PowerPoint Accessibility Checklist
- Using the MS Accessibility Checker
- Adobe InDesign Accessibility Checklist
- Adobe InDesign Accessibility Basics Manual
- Adobe Acrobat Accessibility Checklist
- Adobe Acrobat Accessibility Basics Manual
- Accessible Forms Manual

We also provide expert accessibility strategy sessions and workflow analysis for starting an accessibility program within your organization.

"I took your 3-hour training 'Designing with Accessibility in Mind' in January. I really loved it! I was also able to put a few things right into practice with a project. I've also been listening to your podcast, which is great." - Shelley Nichols

3-hour live online training classes available every month at www.accessibilityUnraveled.com

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We unravel Accessibility for you!

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