Creating Accessible PDF Documents

An instructional resource companion to the webinar “Creating Accessible PDF Documents with MS Word and Acrobat Pro” on 4/21/2015.

Basic Overview

This guide provides the essential step by step instructions for creating an accessible PDF document from MS Word and Acrobat Pro.

Mac OS

The Mac version of MS Office does not allow for saving an accessible PDF document, additional work must be done within Acrobat Pro to create an accessible PDF on a Mac OS computer.

People who are using MS Word for Mac OS must have Office 2011 with Service Pack 1 installed in order to provide alternative text descriptions for images.

Creating Accessible MS Word Documents

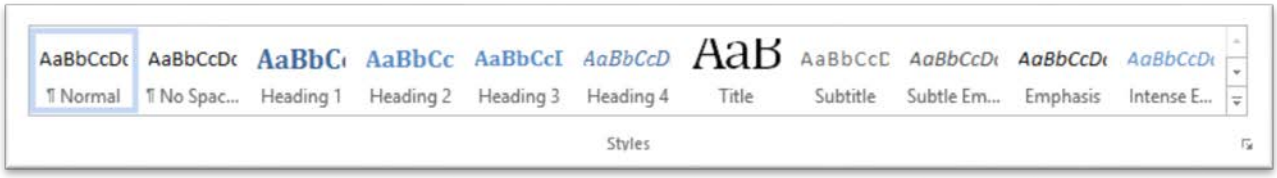
The easiest way to create an accessible PDF document is to start with an accessible MS Word document. While there are many ways to enhance the accessibility of a MS Word document, there are three essential aspects that should always be in place:

1. Semantic Structure (use of Styles)
2. Image Descriptions
3. Table Headers.

By ensuring these three things are in place, you can greatly increase the accessibility of your MS Word documents.

Step 1: Apply Heading Styles

You create structure within your documents by using the Heading styles in MS Word. You can find the Heading Styles in the Style Bar within MS Word.



Above: the MS Word Style Bar.

To apply a heading style in your MS Word document, select the text that you want to style as a Heading, and then click on the appropriate Heading Style from the Style Bar.

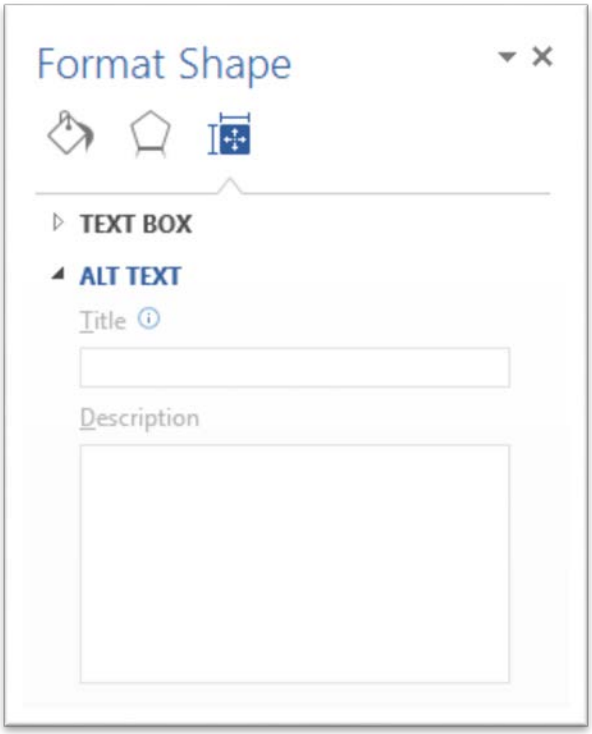
Step 2: Provide Image Descriptions

When you use images to help you communicate, it is important to include an alternate text description.

To insert an alternate text description into an image inside MS Word:

1. Select the image.
2. Right-click the image.

3. Select “Format Picture”. The “Format Shape” panel appears at the right side of the screen.
4. Click the “Layout & Properties” icon.
5. Expand the “Alt Text” option.
6. Enter the description into the “Description” field. Leave the “Title” field blank.



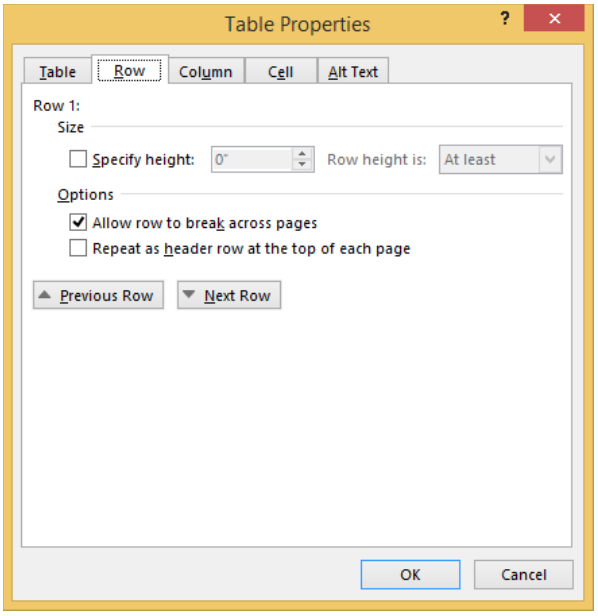
Above: the “Format Shape” panel from MS Word.

Step 3: Use Table Headers

When you use tables to present information, always include table headers.

To use headers in your table(s):

1. Select the cells in your table that you want to be header cells.
2. Right click the selected cells, and select “Table Properties”.
3. Select the “Row” tab from the Table Properties dialog.
4. Select the option labeled “Repeat as header row at the top of each page”.
5. Click “OK”.



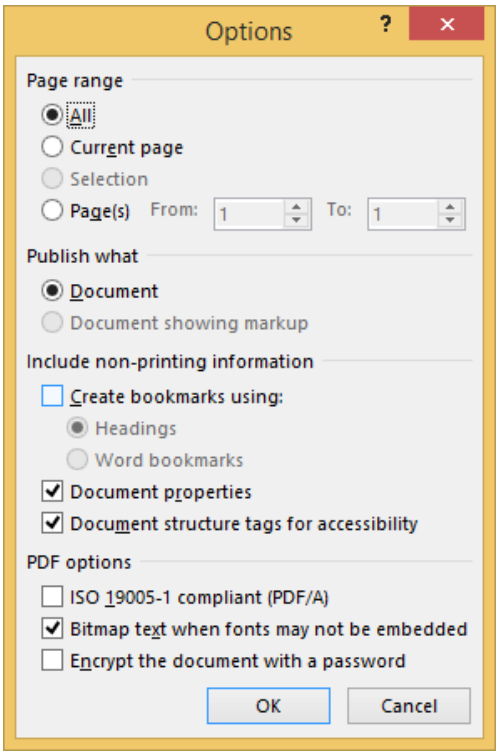
Above: The Table Properties dialog.

Exporting Accessibility to Acrobat Pro

There are a few important settings to configure before you save the document as a PDF.

Using the Native Save as PDF Option from Word 2013

If you are using the native "Save as PDF" option from within word, be sure to open the options dialog and under the "Include non-printing information" section, select the option for "Document structure tags for accessibility".



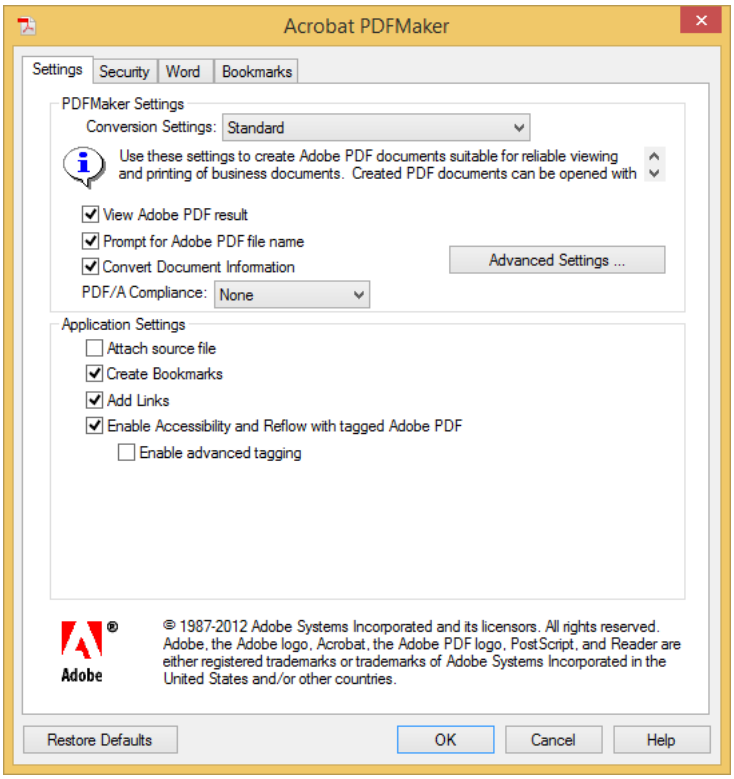
Above: the "Save as PDF" Options dialog.

Using the Acrobat PDF Maker Option

If you have Acrobat Pro XI installed, then you should notice an "ACROBAT" menu option.

To configure the export settings for Acrobat PDF Maker:

1. Click on the “Preferences” option.
2. Click the “Settings” tab.
3. Select the option for “Enable Accessibility and Reflow with tagged Adobe PDF”.
4. Select the option for “Enable advanced tagging”.



Above: Acrobat PDF Maker Preferences Dialog.

In most cases, saving as a PDF document from MS Word with the above export settings in place will result in an accessible PDF document (except for Mac OS users), but it is critical to always verify the accessibility of the PDF document with Acrobat Pro.

Creating Accessible PDF Documents with Acrobat Pro XI

Acrobat Pro XI features the capabilities for addressing accessibility concerns with most PDF documents. Often it is easier to address accessibility concerns in the original source document that the PDF was created from, and it is always recommended to employ this approach whenever possible.

Tags

Just like HTML, PDF documents employ a tagging structure to help better define the structure of documents. Not all PDF documents have tags, however, so it is important to know how to verify that tags are present within your PDF document.

To determine if there are tags in your PDF document:

1. Go to the View menu.
2. Click “Show/Hide”.
3. Select “Navigation Panes”.
4. Click on “Tags”.

With the Tags pane open, you can see if there are tags in your document. If there aren’t tags, it will say “No Tags available” within the Tags pane.

If you need to add Tags to your PDF, it can be done with the Accessibility Tools (see below).

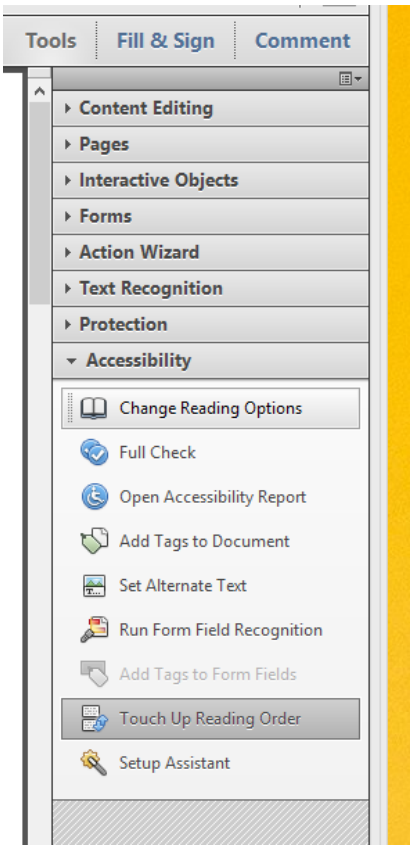
Accessibility Tools

Acrobat Pro XI features a range of accessibility tools to help you make your documents accessible.

To expose the Accessibility Tools in Acrobat Pro XI:

1. Click on the “View” menu.
2. Select the “Tools” option.
3. Click on “Accessibility”.

The Tools pane opens with the Accessibility tools displayed.



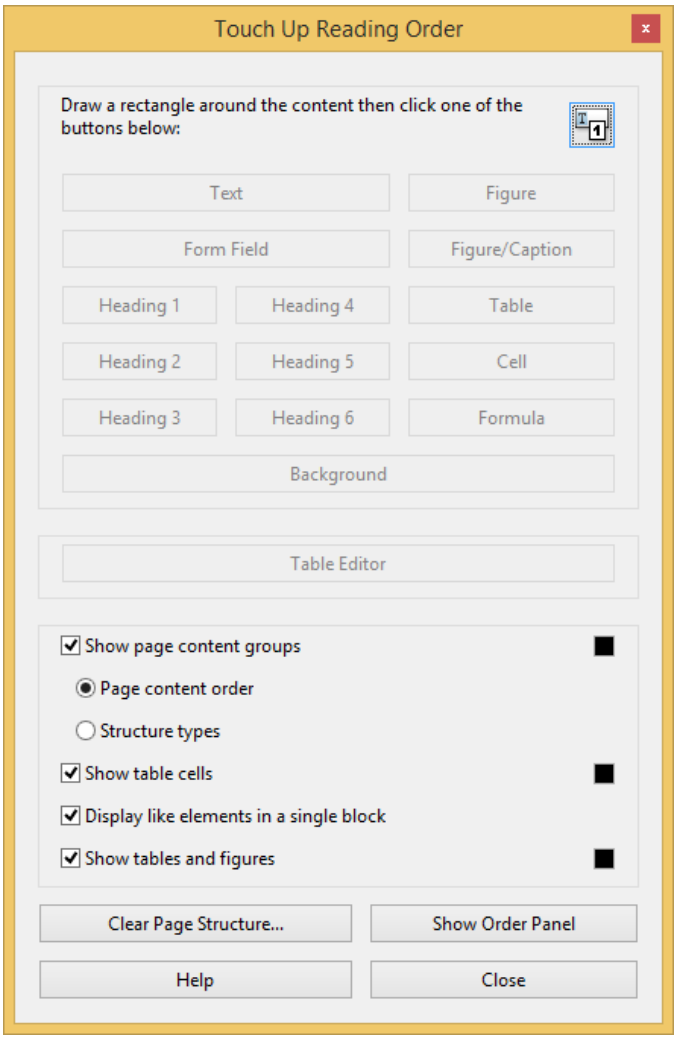
Above: The Accessibility Tools.

Touch Up Reading Order Tool

The Touch Up Reading Order Tool allows you to redefine the content structure within your PDF document. It will not change the visual presentation of information, but it will affect the Tag structure.

The Touch Up Reading Order Tool provides one of the most direct means for addressing accessibility issues with your PDF document. The Touch Up Reading Order Tool will allow you to re-classify headings, insert alternate text descriptions for images/figures, and edit your tables so you can ensure that you have table headers for your columns and rows.

You can activate the Touch Up Reading Order Tool from the Accessibility Tools.



Above: The Touch Up Reading Order Tool.

Reading Order Panel

The Reading Order Panel allows you to rearrange the sequencing of your PDF document for non-visual presentation.

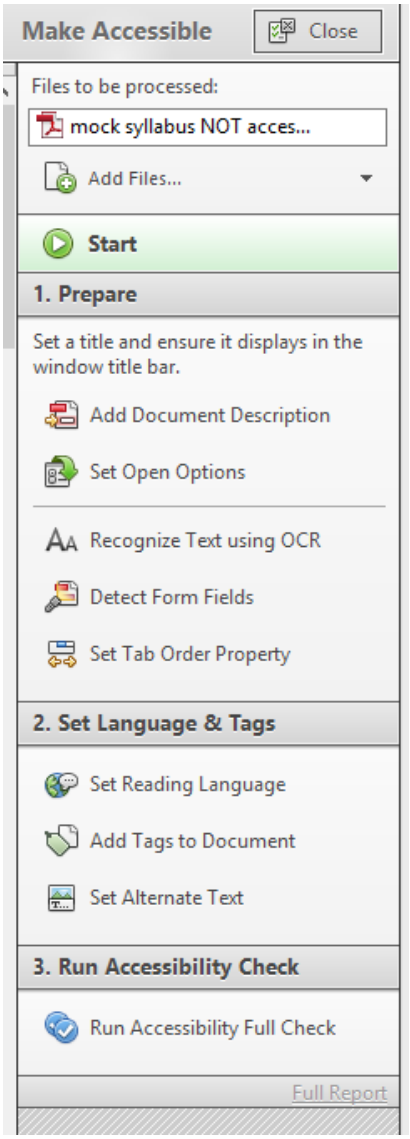
You can activate the Reading Order Panel from the Touch Up Reading Order Tool, or from the Navigation Panes menu within the Tools Menu.

Accessibility Checker

Acrobat Pro XI features an Action Wizard that will check your document for the most common accessibility issues and help you fix any problems. It is recommended that you always perform an accessibility check on your PDF documents.

To perform an accessibility check with Acrobat Pro XI:

1. Open the Action Wizard pane from the Tools menu.
2. Find the “Make Accessible” Action and click on it. The Make Accessible Action wizard will open.
3. Make sure your document is loaded by checking the top of the Make Accessible Action Wizard pane.
4. Click “Start” and follow the prompts.
5. At the end of the process, use the accessibility report to evaluate and repair any remaining issues with your PDF document.



Above: The Make Accessible Action Wizard.

By running the Make Accessible Action Wizard and responding to any issues identified in the Accessibility Report, you can address common issues and maximize the accessibility of your PDF documents.

Additional Resources

OEI Accessibility Resources: http://tinyurl.com/OEIaccessibility

NCDAE Cheatsheets: http://ncdae.org/resources/cheatsheets/

WebAIM Tutorial on Accessible PDF Documents: http://webaim.org/techniques/acrobat/

Adobe.com Accessibility Information: http://www.adobe.com/accessibility.html