

# Is Your PDF Accessible? Module #1

MARCH 28, 2022

## Introduction

### Intro

Is Your PDF Accessible? This is the first in a series of two training modules for MN WIC state staff on creating accessible documents.

### In This Module 1

In this first module, we will review our responsibilities when creating documents, provide an overview of Word templates, walk through converting a Word document to PDF, setting up Adobe Acrobat to check accessibility,

### In this Module 2

... performing an accessibility check, resolving the first most common issue by setting properties, how to walk the tags, and resolving the second most common issue, which is documents missing headers.

## Responsibility

In WIC, we must ensure the documents we are responsible for, or create, are accessible. Accessibility, at its most basic, means the document makes sense if a screen-reader is used.

Although we are especially attentive when creating documents that will be posted to our website, this is actually a requirement for all of our documents.

<no audio> Screen transitions to SiteImprove screen.

## SiteImprove

### SiteImprove

The MDH website uses SiteImprove, a tool to help us monitor and improve our website, and which allows us to identify documents not meeting accessibility requirements.

Our most common accessibility issues on our PDFs tend to be: The Document has no title, the document contains no headings, and the Image has no alternative presentation.

<no audio> Screen transitions from SiteImprove to Word document.

## Templates

### Templates

The first step towards creating an accessible document is to start with the MDH and WIC templates.

In our templates, the styles found on the Home ribbon have been pre-set to make formatting our documents easy.

When we first open a new Word document, if we click Styles...

<no audio> Click the Styles button.

### Styles

...we can see that these are not the MDH styles, which would have 4 headers, 3 of which are the MDH blue.

Let's go find our MDH WIC templates.

Click on **File**.

### Open Template

The templates are currently stored in Share >> Accessibility >> Document Templates and, as of now, there are two of them: MDH WIC and ADA Memo.

We'll open the ADA Memo.

### ADA Memo

Now if we click on **Styles**...go ahead...click anywhere for a hint...

<audio-hint> The Styles button is in the middle of the Home ribbon directly under Help.

### ADA Memo Styles

...we can see our 4 headers and our other formatting options, including bullets and List Numbers both of which we always want to use from our Styles since using those available on the Home ribbon can result in accessibility errors once converted to PDF.

We can remember to always Save As when using a template or we can make it one of our own templates. Let's do that, click on File...

### Save As Template

...and Save As.

<no audio> Select **Save As**.

And click the arrow for the type of document drop-down.

## Change Doc Type

We are going to save the document as a Word Template, which means we have to change the type of document from .docx to .dotx.

We'll keep the file name the same, but we could change it if we wanted to.

Select **Word Template (.dotx)** from the list.

## Custom Folder

When we select Word Template, Word automatically saves it to our own Documents >> Custom Office Templates folder.

All we need to do is click Save.

<no audio> Click the **Save** button.

## Find Saved Template

So now that it's saved, how do we find it?

Well, click **File**.

And since we use templates when creating new documents, we select **New**.

## Display Templates

If we often use our custom templates, they will automatically display when creating new documents.

But notice our new ADA Memo Template isn't listed here.

If it doesn't display...

...we'll need to click below the scroll bar...

## Custom Templates Folder

...we will find it in our Custom Templates Folder.

If we don't see that, make sure that Custom is selected.

Notice also that there is an MDH Templates folder that contains many different types of templates, which we can explore on our own time.

For now, click on the **Custom Office Templates** folder.

## Open New Template

And there it is. Go ahead and select it.

<no audio> Click the saved ADA Memo Template.

## Transition to Memo

And it opens a new document using the template.

<no audio> Transition to Memo

## Original Document Accessible?

### Start

Before converting our document to PDF, we should ensure its original format meets the accessibility requirements that can be identified by Word, Excel or Powerpoint using their Accessibility Checkers.

If we aren't sure how to turn on the accessibility checker, we can simply type...

### Search

...“accessibility” into the Search field.

### Actions Menu

And select it from the Actions menu.

### No Issues

The Accessibility panel will open to the right of the document.

Notice that “No accessibility issues are found.”

Go ahead and close this document.

<no audio> Click the **X** to close this document.

## Convert to PDF

### Convert

We should always use Adobe Acrobat to convert our documents to PDF instead of any of the conversion features in Microsoft Office.

To do that, click on **Tools**.

## Create PDF

Select **Create PDF**.

## Select File

Click the **paper icon** or **Select a File** link.

## Example 2 Doc

We are going to start with the **Example 2**. Double-click that one.

## Create Button

Now click the **Create** button.

## Application Start

<no audio> Blue status line on application start bar.

## Wait

<no audio> Blue status line on application start bar.

## Setup Adobe for Checking Accessibility

### Setup

OK. Now let's make sure our Adobe Acrobat is ideally setup for checking accessibility.

We should have two tool panes.

### Tools Pane

If not, we click on **View** in our menu bar, select **Show/Hide** and then **Tools Pane**.

### Tags Icon

On the left toolbar, when we hover our mouse over an icon, a Tooltip displays telling us what it is and its function.

And we'll use the Tags icon to eventually "walk the tags".

## Accessibility Icon

On the right toolbar, we can again use our mouse to ascertain that the purple person icon is our Accessibility tool.

## Expand Toolbar

We can expand our toolbar by clicking the arrow directly to the left of it. Go ahead and do that.

<no audio> Click the arrow to expand the toolbar.

## No Icon

If for some reason Accessibility is not already on our toolbar...

## Tools

...we can select Tools next to the Home button.

## Scroll Tools

And scroll until we find our accessibility tool.

## Add Tool

Click the Add drop-down.

And select Add Short cut.

If we want to move it higher on our toolbar, we can right-click it and...

## Move Up

...select Move Up from the menu.

## Move Up 1

<no audio – on screen> Moved up one position on toolbar.

Or, while in the Tools screen, we can...

## Drag Tool

Click and drag the tool into its desired position.

## PDF Tab

And click our document tab to return to our original view.

<no audio> Click the Example 2.pdf tab.

## Transition

<no audio – screen description> Red box around Accessibility at top of tool bar.

Transitions back to original screen.

## Accessibility

So, now let's get down to the nitty-gritty. click on Accessibility.

## Accessibility Checker

### Accessibility Panels

This opens our accessibility panel.

To assess our document, we select Accessibility Check.

### Save Document First

I always forget this.

We always need to save our document before we can run the Accessibility Check.

Click OK.

<no audio> Click OK or press the Enter key on the keyboard.

### File

Select File.

### Save

Select Save.

### Save Again

And click Save again.

<no audio> Click Save or press the Enter key on the keyboard.

### Accessibility Check

OK. Click Accessibility Check again.

## Checker Options

The Accessibility Checker Options window opens and all the default settings are correct, so we just have to start the checker.

<no audio> Click the Start Checking button.

## Checker Panel

Once the check has completed, the Accessibility checker panel opens on the left.

The toolbar on the left impacts the panel directly to its right.

In this instance, we have 3 issues under Document.

To view the issues we have to click the arrow to the left of Document.

Go ahead and do that.

<no audio> Click the arrow to the left of Document.

## Document Issues

### Document Issues

The Logical Reading Order and Color Contrast issues always display because they require a manual check.

We will ensure the reading order is appropriate when walking the tags and for the most part, it usually is.

If we've used the MDH or WIC templates, we know the Color Contrast is appropriate and no further check is required.

<no audio> Screen transitions to webaim.org page.

### WebAim

However, if we use a color outside of the MDH template, we should always verify contrast using the webaim.org site.

<no audio> Screen transitions to PDF.

## Title Failed & Properties

### Title Failed

As we indicated earlier, the Title-Failed error is one of our most common accessibility issues and we'll address that first.



To do that, click on File...

## Properties

...and select Properties.

## Document Properties

The tabs that we will always review under Properties are Initial View and Description.

In the Initial View tab, there are two changes we are going to make.

The most important change to remember is to correct the Show drop-down.

Go ahead and open it.

<no audio> Click the Show drop-down.

## Show

The current File Name is Example 2.

File names for the website have requirements: less than 13 characters, lowercase, and no spaces.

## File Name

If we were to leave Show drop-down as File Name, the tab in the browser would display example2 instead of the actual title of the document.

## Transition

<no audio> Slide transitions back to PDF screen from browser.

## Document Title

Which is why we must always select Document Title from the Show drop-down in the Initial View tab. Go ahead and select it.

<no audio> Select Document Title from the Show drop-down.

## Magnification

Remember, we said there are two things to change in the Initial View tab.

The second, and admittedly less important, is the Magnification.

Click the Magnification drop-down.

## 100%

In general, we want our documents to open at 100%.

This isn't an accessibility requirement but it does create a consistent feel on our website if all documents open to 100%.

So let's select 100%.

## Description Tab

The other important tab is Description.

Go ahead and click on it.

<no audio> Click the Description tab.

## Description

Obviously, if there isn't a title, it can't be displayed.

The other half of correcting the Title-Failed error is to ensure the Description fields are completed.

First, with the exact title of the document.

The Author, which is always Minnesota Department of Health – WIC Program.

And the Subject, which can just be a copy of the title or if appropriate, more descriptive.

## Transition to Word

Let's take a moment to go back to our original Word document.

## Word – No Errors

Our document in Word indicated there were no accessibility issues.

However, if we were to post this Word document on our website, its title would be missing resulting in a SiteImprove accessibility error.

We know this information wasn't completed in the Word doc because the title, author and subject did **not** default into our PDF when we converted it.

Remember, we want our original document to meet the accessibility requirements as well.

So, let's fix it here too. Go ahead.

Click anywhere if you need a hint.

<audio-hint> Click on File on the menu bar.

## Info

<audio-hint> Click on Info on the left pane.

## Word Properties

<audio-hint> Click Properties at the top of the right-most column.

## Advanced Properties

<audio-hint> Select Advanced Properties.

## Complete Properties

Nicely done.

For most of our templates, the Author and Company should default. But if not...

## Multiple Choice Quiz Slide

What is the Author and Company for all our WIC documents?

- A) Author = MN WIC Program and Company = Minnesota Department of Health
- B) Author = WIC Program (Unit) and Company = Community and Family Health
- C) Author = Minnesota Department of Health – WIC Program and Company = State of Minnesota
- D) Author = Your Name and Company = MN WIC Program

## Complete Properties

Did you get it right?

Author is Minnesota Department of Health – WIC Program and Company is the State of Minnesota.

And we'll quickly add our title and subject.

Click OK and we'll return to our PDF.

<no audio> Click OK or press the Enter key on the keyboard.

## Transition to PDF

<no audio> Screen transitions from Word to PDF.

## PDF Properties Completed

One other note. Always check the Description tab in Properties. Templates, or existing documents, used as the foundation for a new document often reflect the original document's Title and Subject.

If you do a search for "MDH template" on the MDH website you might be surprised how many documents exist with the title: MDH basic template.

We're done with the PDF properties so go ahead and click OK to save our changes.

## Re-check Title

Notice our Title now displays both on the title bar and on the document tab.

So, we should be good but it's always best practice to run another Accessibility Check. Go ahead. Click anywhere if you need a hint.

<audio-hint> Click Accessibility Check on the right panel.

## Re-check Title 1

<audio-hint> Click the Start Checking button at the bottom of the Accessibility Checker Options modal.

## Walk the Tags

### Recheck Tags

It's always reassuring to see a "Pass".

Last step is to walk the tags.

The tags icon looks like a tag.

If for some reason, the Tags icon is not displaying on the left toolbar, we can right-click it...go ahead...

And select **Tags** from our menu options.

### P Tags

The tags panel opens to the right of the toolbar and the Tags icon will now be pinned to our toolbar.

A tag has an open carrot and a close carrot with something in between.

Each line is considered a tag and if we click the first tag...

<no audio> Click the first <P> tag.

## First P Tag

...it should highlight, or tag, a corresponding line of text, image, etc. on our document.

If highlighting doesn't display, right-click the tag and ensure Highlight Content is selected.

In general, this should be turned on by default.

Notice, to the right of our logo there is an empty tag. This often occurs with images and tables.

In our tags panel, if we expand the tag by clicking the arrow to the left of it...

## Empty Container

We can see that it contains the logo represented by the <Figure> tag and an empty container.

Clicking the empty container...

## Empty Container 1

...isolates the empty tag.

We should correct these whenever we see them and we may be tempted to simply delete them but don't(!) that would result in a tag error that would also need to be corrected.

Instead, we right-click on the empty container...

## Content Panel

...and select Show in Content Panel.

## Content Panel 1

In the Content Panel, the empty container will be highlighted.

We'll use the menu this time to delete it. Right-click on Container <P> tag.

## Delete Container

...and select Delete.

## Return to Tags

Once it's deleted from the Content Panel, we can return to Tags. Go ahead. Click anywhere if you need a hint.

<audio-hint> The Tags icon looks like a tag. It's the last icon on the left toolbar.

## Walk the Tags

Let's continue walking the tags. We can either click on each P tag, or press the Down Arrow on the keyboard, to move down the tag tree and see what it highlights. Go ahead and do that. Click for a hint.

< audio-hint> Click the 1st <P> tag after the <Figure> tag or click the Down Arrow key.

< audio-hint> Click the 2nd <P> tag after the <Figure> tag or click the Down Arrow key.

< audio-hint> Click the 3rd <P> tag after the <Figure> tag or click the Down Arrow key.

< audio-hint> Click the 4th <P> tag after the <Figure> tag or click the Down Arrow key.

< audio-hint> Click the 5th <P> tag after the <Figure> tag or click the Down Arrow key.

< audio-hint> Click the 6th <P> tag after the <Figure> tag or click the Down Arrow key.

< audio-hint> Click the 7th <P> tag after the <Figure> tag or click the Down Arrow key.

## Empty Tag

This is another empty tag.

<no audio> Screen transitions from PDF to Word with Paragraph turned on.

## Enter Key

This type of empty tag occurs when the document writer hits the Enter key to make an extra space between lines of text instead of using the Layout ribbon and adjusting the spacing.

<no audio> Screen transitions from Word back to PDF.

## Expand Empty P Tag

Anytime we see these they also have to be deleted.

Click the arrow to the left of the empty <P> tag.

## Delete P Tag

This time, all there is inside the tag is the empty container, unlike before where we also had a <figure> tag and wanted to delete just the container inside the <P> tag.

So, we are going to delete the whole P tag, not just the container inside it.

We've already selected it, now just hit the Delete key on the keyboard.

## Finish Walk

Let's finish walking the tags.

Click the last <P> tag.

Click below the scroll bar.

Click or arrow down to this last <P> tag.

And that's all there is to walking the tags. Just ensuring that each tag corresponds with an image or text in the document.

<no audio> Screen transitions to SiteImprove.

## Headers

### SiteImprove Error 2

Another of our most common errors that SiteImprove assesses PDFs for is: The document contains no headings.

<no audio> Screen transitions back to PDF.

### No Header Error

Thinking back to our Accessibility Checker results, we didn't have any Heading errors, right?

However, it is an MDH requirement that ALL documents must have headers.

And our PDF accessibility checker does **not** verify that so we have to remember to check it ourselves.

### Word Template

<no audio> Screen transitions to Word document.

We should note that the most recent version of our templates should have a header as the title.

### Transition

<no audio> Screen transitions from Word styles to bulleted information screen.

So let's talk headers.

### Let's Talk Headers

The PDF Accessibility Checker does not identify if the document is missing headers.

All MDH documents must have headers.

A document can only have one H1 header, usually the title.

Headers must be "nested" correctly, which means they descend in order.

For example, H1 must come before H2, which must come before H3, followed by H4.

Once a header is used, we can return to it, except for H1.

For example, H1 followed by h2, h3, and h4 can go back up to h2.

## Quiz-Headers

Which header order is nested appropriately?

- A) H4, H3, H2, H1, H3, H2, H4
- B) H1, H2, H3, H2, H3, H4, H2
- C) H1, H2, H3, H4, H1, H2, H3
- D) H2, H1, H3, H4, H2, H3, H4

## Answer

B is correct. It only has one H1 header. Headers descend in order and we can return to a header once already used, except for H1.

<no audio> Answer screen transitions back to PDF.

## Correct Header

So, how do we correct the header?

We change the P tag that corresponds with the Title to an H1.

To do that, we first click on the tag to select it.

<no audio> Single click the <P> tag.

## Correct Header 1

Then single click it again to highlight it. (No. Double-clicking does not work.)

## Correct Header 2

And type an open carrot, H1, close carrot then hit the Enter key.

<no audio> Type an open carrot, H1, close carrot then press the Enter key on the keyboard.

## Header Done

Once we've ensured there is a header, we are done making this document accessible.

<no audio> Transition to End Slide.



## End Slide

Thank you for reviewing this module. For more information about accessibility, please review the second training module in this series.

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