

## How to create accessible documents with Word and PDF

Katey Hügi May 2023





## Welcome

- This session has captions and is recorded
- Please use the Q&A to ask questions and chat for general correspondance
- Slides, a recording, and a transcript will be made available via email in the coming days
- I welcome any feedback, follow-up questions, or suggested topics for future training



## **About AbilityNet**



Strategies, standards, resources to make the Web accessible to people with disabilities





The Future of Accessibility and Inclusive Design

TECHSHAREPRO



## Agenda

- Applying accessibility principles to documents
- Creating accessible templates in Word
- Creating accessible content with Word
- PDF accessibility
- Accessible forms options



## **Example documents**

- Inaccessible Word document
- More accessible Word document
- PDF version



## Poll 1

## How much experience do you have with document

## accessibility?

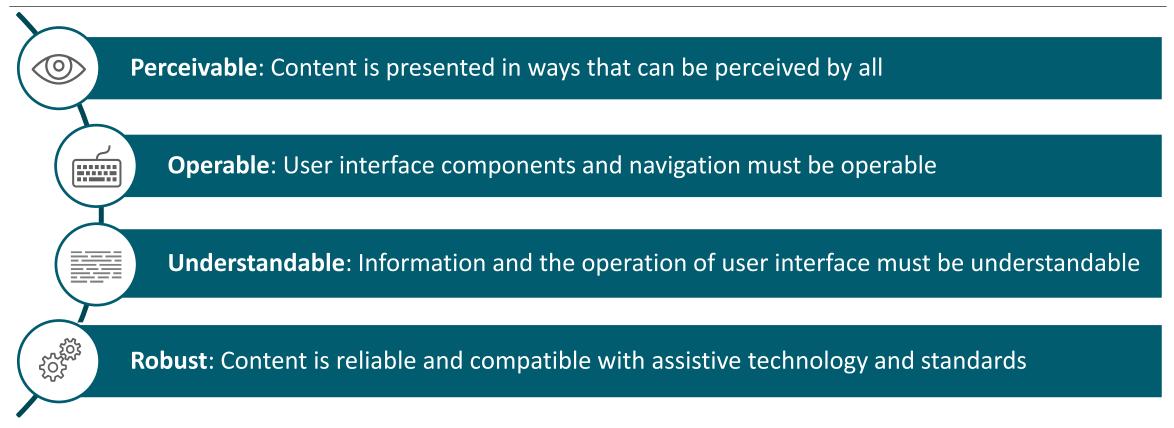
- None or little experience
- Moderately experienced
- Very experienced



# Applying accessibility principles to documents



## **Accessibility principles: POUR**





## **Remember, some documents:**

- Convey information visually so they need to be perceivable if accessed through assistive technology
- Are interactive so they need to be operable
- Request user inputs so they need to minimise user errors
- Will have different levels of support for assistive technology

Choosing the correct document format will influence the effort involved to make it accessible



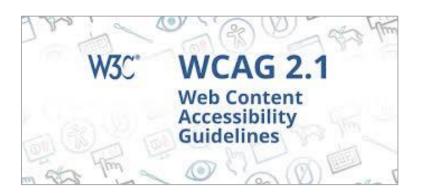
## International accessibility standards

#### Web Content Accessibility Guidelines (WCAG) 2.1 Level AA

#### ETSI EN 301 549

- Aligned to WCAG 2.1 AA
- Section 10 covers non-web documents

Note – not all WCAG requirements transfer to documents







## **Characteristics of accessible documents**

- Searchable text
- Navigational aids (bookmarks, headings, table of contents)
- Metadata e.g. title and document language
- Programmatic document structure e.g. tags
- Logical reading order
- Interactive form fields that can be tabbed to with keyboard
- Alternative text for non-text elements
- Appropriately formatted tables



## What types of document format are available?

#### Making Microsoft Word Documents Accessible

Good use of Microsoft Word <u>Styles</u>, headings and specific formatting rather than TAB, Spacebar and Enter keys to present a document make it much easier for a screen reader user or someone requiring Braille or using other <u>assistive technologies</u> to work with your learning materials. Text to speech (where content is read aloud) and careful use of colour can also help those with specific learning difficulties and colour deficiencies. All this can also make it easier for you to convert documents into accessible PDFs or Web Pages. If you are using Office 2013/2016 and need to make a file backward compatible, use save as a .doc or .rtf as these formats can also be read in many other applications such as Open Office.

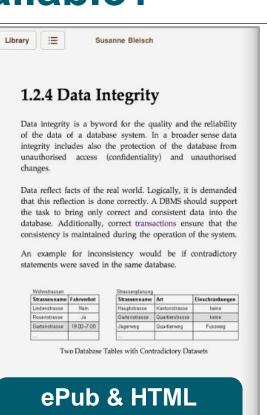
#### Considerations

~

- Use Styles. Create headings and subheadings (Heading 1, 2, 3 etc.) using styles, not just bolded, enlarged or centred text. Using headings in a document allows you to create a DAISY digital talking book that is divided into sections; these sections can be navigated by the reader. If you would like to change the appearance of a heading, select Format > Styles and Formatting (Format > Style in Mac). This will change the appearance of all instances of a certain element (e.g. every Heading 1). Make sure Fonts used are readable, preferably size 12/14
- Use picture descriptions. These are sometimes referred to as 'alt tags' (alternative text) for all graphics including graphs and clip art. Insert the image Select the image, then Format Picture (or select Format > Picture from the menu bar), use the size menu > alt text tab. Make sure the text is short but conveys meaning. <u>Microsoft Office support has screen grabs and more information</u>.
- Make sure all tables have headers across the top. If you have one row across the top, you can set this row as a header by selecting the table and choosing Table >Table Properties > Row tab > Repeat as Header Row at the top of each page. Tables should have a uniform structure with no merged cells as these can upset the reading order for someone using a screen reader. Table row and column titles should be concise and if possible provide a summary of important elements. Avoid using tables for layout.
- If equations are being included the MS Word equation editor will not produce screen reader accessible data. Read the flexible format guidance provided by the University of Bath and

Office & editable formats





based formats



## Accessibility pros and cons for document formats

Format	Pros	Cons
Word Office format - *docx	<ul> <li>Easiest to make accessible</li> <li>Compatible with wide range of assistive tech &amp; devices</li> <li>Can be personalised by the user</li> </ul>	<ul> <li>Interactive features &amp; complex tables are not accessible</li> <li>Accessibility compromised by security settings</li> </ul>
PDF	<ul> <li>All users get the same view &amp; difficult to edit</li> <li>Interactive activities &amp; complex tables can be made accessible</li> </ul>	<ul> <li>Creating / fixing accessible PDFs requires specialist skills and tools</li> <li>Cannot be personalised by the user</li> </ul>
HTML based format e.g. web page, ePub	<ul> <li>All users get the same view but can be personalised.</li> <li>Compatible with wide range of assistive tech &amp; devices</li> <li>Interactive activities &amp; complex tables can be made accessible</li> </ul>	<ul> <li>Accessibility may need specialist skills or tools that are not accessible out of the box.</li> <li>No default viewer at the moment for ePub</li> </ul>



## Poll 2

### What document formats does your

## organisation post online or share?

- Editable documents (e.g. Word)
- Presentations (e.g. PowerPoint)
- Spreadsheets (e.g. Excel)
- Locked documents (e.g. PDFs)
- Other please state in chat pane



## **Questions?**



# Creating accessible templates to avoid potential issues



## Word template: Styles and structure

Set up styles for:

- Headings 1 6: use outline level to set heading level
- Normal text: think about paragraph and line spacing, font style and colour
- Bulleted and numbered lists: ensure there are styles for common types of text



Collapsed by default

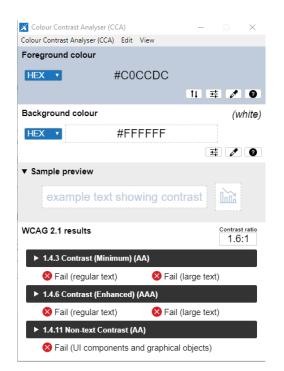
## **Example: Setting heading level in Word**

- On the Home tab, in the Styles group, select a heading style, for example, Heading 1 or Heading 2.
- Do not use headings only for styling.

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## Font size, style and colour

- Text size of 12 point or higher will benefit most users, but Word documents allow easy textresizing
- Avoid overly-decorative fonts and continuous capitalisation as they can be difficult to read
- Provide at least a 4.5:1 colour contrast between text and background (3:1 for large text) – <u>TPGi</u> <u>colour contrast analyser</u>







## **Decorative content**

#### **Headers and footers**

• Use built in tools to add headers, page numbers etc. so they are ignored by assistive technology

#### **Background images**

• Ensure background graphics are marked as decorative



## **Accessible template requirements**

- Style and structure
- Accessible text defaults
- Logical reading order
- Sufficient colour contrast
- Decorative content is marked as such



## **Questions?**



Adding content to documents



## Poll 3

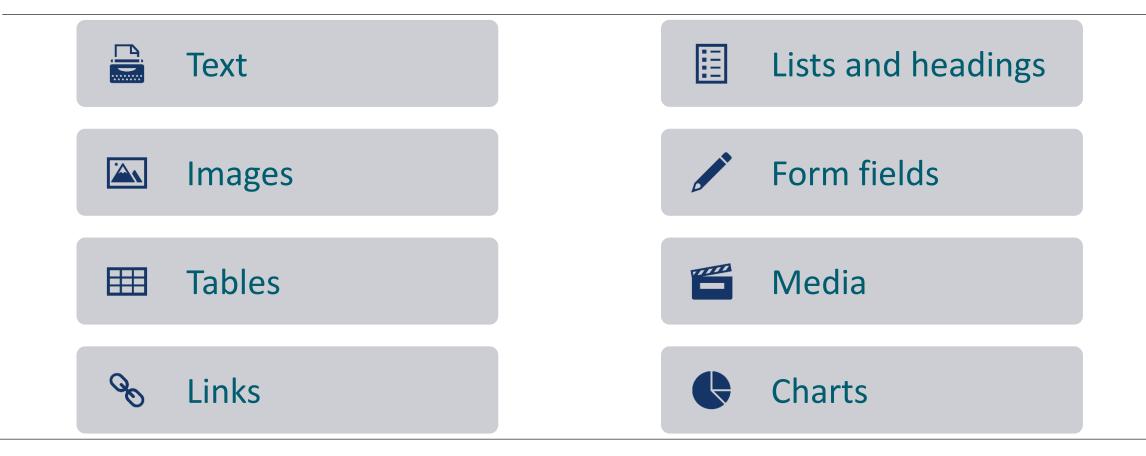
## **Does your organisation check**

## accessibility when documents are created?

- Yes
- No
- Sometimes
- Don't know
- We have a policy but it's not policed



## Types of content we need to make accessible





## What do we mean by accessible text?

- It is not an image.
- You can select and copy it.
- When you select all text / convert to a text document, it has the correct reading order.

-

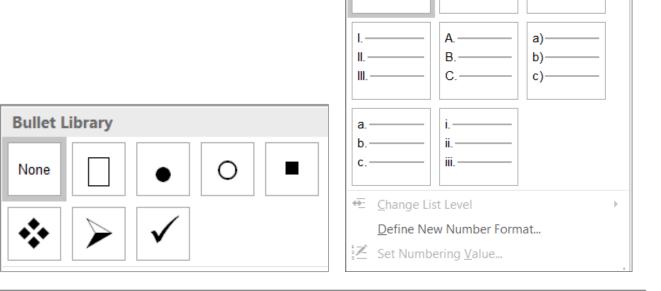


## **Example: What can we do wrong with lists?**

- **Use Styles.** Create headings and subheadings (Heading 1, 2, 3 etc.) using styles, not just bolded, enlarged or centred text. This will change the appearance of all instances of a certain element (e.g. every Heading 1). Make sure Fonts used are readable, preferably size 12/14
- Use picture descriptions. These are sometimes referred to as 'alt tags' (alternative text) for all graphics including graphs and clip art. Insert the image – Select the image, then Format Picture (or select Format > Picture from the menu bar), use the size menu > alt text tab. Make sure the text is short but conveys meaning. <u>Microsoft Office support has</u> <u>screen grabs and more information</u>.
- Make sure all tables have headers across the top. Table row and column titles should be concise and if possible, provide a summary of important elements. Avoid using tables for layout.



- Use bullets and ordered lists as opposed to images, clip-art, etc to create lists.
- List paragraph styles can be used to adapt spacing and fonts





2)

3)

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Numbering Library

None



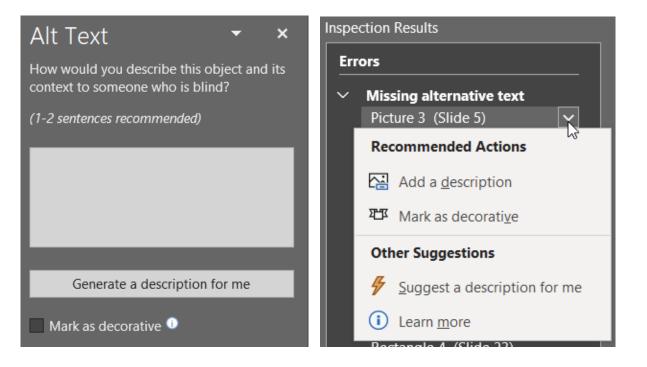
## Adding ALT text to graphics in Word

#### From the images

- Right click an image
- Edit Alt Text
- Type a description or mark as decorative

#### From accessibility checker

• Select dropdown on graphic and choose appropriate option

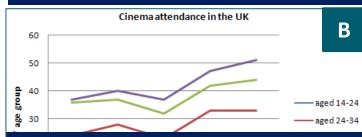




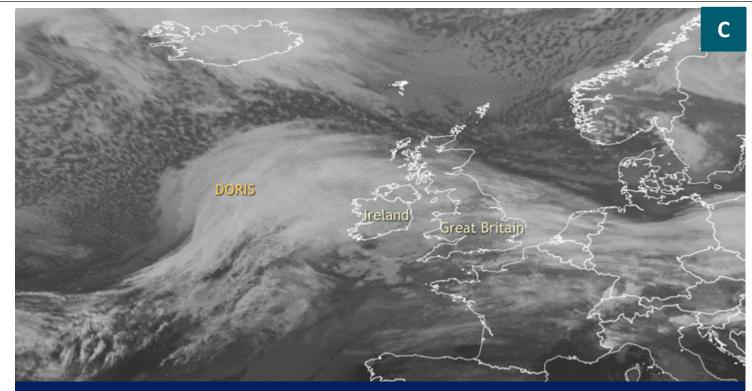
### **Example: Images and alternative descriptions**



#### An empty beach



Colour line graph for cinema attendance in UK between 1990 and 2010 by age group.

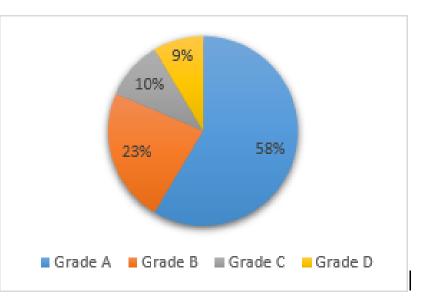


Animation of satellite images of storm Doris crossing UK and Ireland.



## **Charts and SmartArt**

- For charts and SmartArt, alt text can be added for the entire image
- Save imported charts as images and add alt text before conversion to PDF
- Provide longer descriptions if necessary for complex charts and diagrams

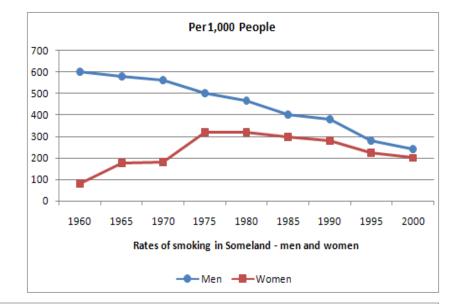




## **Use of colour**

Ensure that colour is not the only way that information is communicated.

 links should have some decoration (e.g. underlined) and charts shouldn't rely on colour vision.



The role of this link is communicated by colour

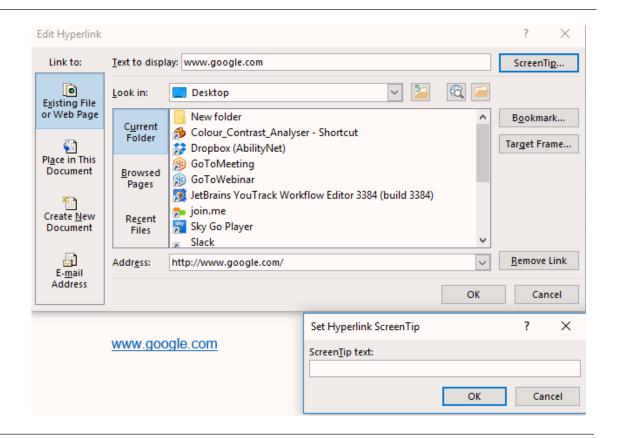
The role of this link is communicated by colour and decoration



## Links

#### Ensure that the purpose of links is obvious and self-evident from tabbing onto them.

- Where possible, enter a meaningful name into the text to display field.
- Use the screentip pop-up to provide a tooltip for users.



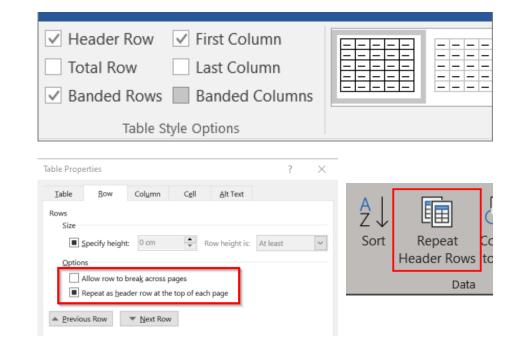


## **Formatting – Tables**

#### Use table headers:

- Table Design > Table Style Options
- Select Header Row and First Column (if first column is acting as a header)
- In Word Select Table properties: "Repeat as header row at the top of each page"
- Deselect "Allow row to break across pages"

#### Do not use tables for formatting!





## **Formatting - Columns**

- Use columns rather than just using SPACE or TAB to align text
- Laying out text using the built-in column functionality is an accessible layout method and the correct column reading order will be inherited by tagged PDFs created from the Word document



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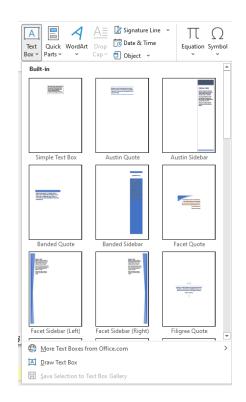
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## **Formatting - Text boxes**

- Avoid adding text boxes via the inbuilt Word functionality – these are not easily accessible to screen reader users and are not placed in the correct reading order for assistive technology
- Instead create text boxes by adding a border and positioned text to paragraphs





### **Table of contents**

- A table of contents can be added for longer documents via References
   >Table of Contents using the heading structure you have defined
- Including a table of contents helps users to navigate themselves with an outline of the content

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# File name and title

- Provide a descriptive file name for your file.
- Providing a descriptive title will ensure this is inherited by a PDF created from your Word file

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### Microsoft Word accessibility

#### **Golden Rules:**

- use the formatting tools to provide meaningful structure with built-in headings and styles
- ensure that meaningful non-text content (e.g. images) has alternative text
- use colour and meaningful hyperlink text to ensure perceivability

Microsoft: Make your Word documents accessible



Accessibility

- X

### **Microsoft Office Accessibility Checker**

The Accessibility Checker finds accessibility issues, explains why you should fix these issues and how to fix them: **Review > Check Accessibility** 

Inspection Results Errors > Missing alternative text (4) Warnings Design References Mailings Home Insert Layout Review Check reading order (5) Tips 辯 ab ۲ 123 > Duplicate slide title (1) Thesaurus Word Check Translate Language New Delete Previous Count Accessibility Comment Proofing Accessibility Language Comments Keep accessibility checker running while I work

Additional Information

Read more about making documents accessible

Google docs – see Grackle suite

How to create accessible documents with Word and PDF | Katey Hügi | May 2023



# **Questions?**



## **Optional break**



How to create accessible documents with Word and PDF | Katey Hügi | May 2023



# **PDF Accessibility**



### PDF accessibility – why is this so challenging?

Why are PDFs so challenging to make accessible?



## The challenge of making PDFs accessible

- Often scanned documents
- Require additional accessibility tags to add structure
- Don't have great usability on mobile
- Often heavily designed and complex layouts
- Some types of content (such as mathematical and scientific notation) have limited accessibly support
- Additional software and skills required to make PDFs accessible





### Additional requirements for accessible PDFs

- Text is not an image
- Permissions are set correctly
- File has appropriate metadata e.g. title and language
- Content is tagged
  - Applies alternative text, semantics and reading order



### **PDF accessibility checkers**

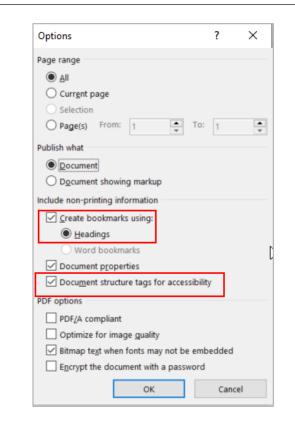
- Adobe Acrobat Pro check and fix
- <u>PAC 2021</u> checker, freeware for Windows
- <u>CommonLook PDF Validator (require Acrobat Standard or Pro)</u>
- <u>PAVE</u> online tools, some fixing possible

Manual checks will still be required



### **Exporting Word to accessible PDF**

- Add Title and other metadata
- Convert embedded Office objects to images and add alt text
- Select the following options in Save As > PDF > Options:
  - Create bookmarks using headings
  - Document structure tags for accessibility





### Lightweight PDF check

- 1. Run the PDF file through a checker. Look for:
  - Image only file this will need OCRing
  - No tags this will need lots of remediation if complex structure
  - Permissions affecting accessibility
- 2. Tab through the file to check if links and fields are interactive
- Use View > Zoom > Reflow and Save > Other > Text (accessibility) and check
  - Check for reflow issues and reading order issues



# Reading order issues in PDF

- Any content that is not laid out linearly could be read in the wrong order.
- Without tags, content likely to read in the order it was added to files and text will be concatenated where there were line breaks.

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who was due to come to Parliament		
for State Opening. The gunpowder was discovered and the plot failed,		
but every year on 5 November the		
anniversary is marked with bonfires		
and fireworks.		
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	_	arguments over who should be allowed the right to vote, women were still
40-SHILLING FRANCHISE 1430		to vote in them. excluded from the voting process.
As the practice of holding parliamentary		
elections became established, so did the arguments over who should be allowed		In 1430, following complaints about VOTES FOR WOMEN
to vote in them.		"persons of low estate" taking part, Groups demanding votes for women
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In 1430, following complaints about		law stated that only men whose land the 19th century, and in 1897 Millicent
"persons of low estate" taking part,		produced an income of at least 40 Fawcett founded the National Union
the first electoral law was passed. This		shillings a year – a very large sum at of Women's Suffrage Societies, or
law stated that only men whose land produced an income of at least 40		the time – had the right to vote. the Suffragists, to co-ordinate a
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the time - had the right to vote.		GREAT REFORM ACT 1832
GREAT REFORM ACT 1832		By the 1800s, with radical ideas and In 1903, Emmeline, Christabel
By the 1800s, with radical ideas and		revolution taking hold in Europe, many and Sylvia Pankhurst founded the
revolution taking hold in Europe, many		people felt change at home was long Women's Social and Political Union, overdue. The Great Reform Act 1832 whose members became known as
people felt change at home was long overdue. The Great Reform Act 1832		extended the vote to around one in Suffragettes and supported
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rotten boroughs - areas where only a		handful of voters, often controlled by
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industrial cities like Manchester and		industrial cities like Manchester and hid in a cupboard in Parliament so
Birmingham could elect their own MPs		Birmingham could elect their own MPs that she could give her address as
for the first time.		for the first time. The House of Commons, emphasising
		her claim to political equality with
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introduction of secret ballots at		
elections. Although the reforms		5.83 x 8.27 in <



### **Using Acrobat Pro to check & fix issues**

- 1. Run Full Check and view report
- 2. Fix metadata and permissions issues
- 3. Add tags or correct tagging where necessary

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How to create accessible documents with Word and PDF | Katey Hügi | May 2023



# **Accessible Forms**



### **Accessible Forms – Word vs PDF**

### Word Forms

- More accessible if plain text e.g. leave empty space to fill out the form.
- Built-in form controls have limited
   accessibility
- Protecting content so only form fields can be edited makes the file inaccessible

### **PDF forms**

- Can be made accessible if form fields are tagged along with the rest of the file
- Complex forms will be costly to make accessible
- Many users will struggle to complete the form digitally



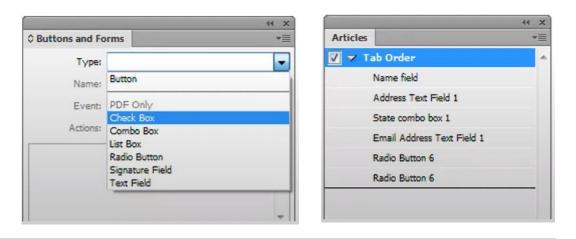
### **Accessible PDF forms requirements**

In Adobe Acrobat every field needs to be added, given a tooltip & tagged

Tab order must also be checked

Forms can also be created in Adobe InDesign







### **Easy accessible online form solutions**

- Microsoft Forms
- Google Forms
- Online survey tools e.g. Survey Monkey

# Remember data protection

		Ъ	Î	$\uparrow$
1.	Where should we go?			
	O Museum			
	O Art exhibit		8	
	<ul> <li>Aquarium</li> </ul>			
	+ Add option Add "Other" option			
	Multiple answers		Required	



## Summary

- Accessibility requirements apply to all digital documents
- Always consider if information needs to be in another format, or could be presented as HTML.
- Accessibility is best implemented at the source when creating PDF documents and a good initial publication process is essential
- Ensure you have a clear accessibility documents policy, good templates and procedures for checking content.

How to create accessible documents with Word and PDF | Katey Hügi | May 2023



# **Questions?**



### Resources

- Microsoft: Create accessible Office documents
- Adobe: PDF accessibility overview
- Daisy Consortium: WordToEPUB Conversion tool for ePUB from Word
- Web Accessibility Initiative: alt decision tree
- Benetech: Poet alternative text training tool
- WebAIM: Accessibility techniques for older versions of Word



# Thank you

Katey Hügi May 2023