PDF Accessibility Guide

This guide will focus on PDFs that began in a Microsoft tool. It would be beneficial if PDFs started in those tools then the content was exported to PDF. For all questions related to headings, alt-text, lists, descriptive hyperlinks, formatting tables, and fonts should be directed to the specific guide on the tool where the file originated (Word, PowerPoint, Excel).

PDFs that we cannot control or should not due to copyright such as those from journals or printed to PDF from websites, will not be able to be edited. Work with the library to identify strategies for locating accessible PDFs.

Please note these instructions are assuming that you have access to a licensed version of Adobe, which can be acquired through your Purdue Career Account. If you have not accessed the license through Purdue, **please contact the IT department for support**, then follow these directions.

Objectives

By following the guide, you will be able to:

       Part 1: Export a Microsoft file into PDF.

       Part 2: Run the accessibility checker.

       Part 3: Fix the issues.

       Part 4: Set reading order.

       Part 5: Verify tags.

       Part 6: Set document properties.

Part 1: Export a Microsoft file into PDF.

Check: Was the PDF exported from the original Microsoft file?

Why is this important?

Exporting a Microsoft file to PDF preserves the document's formatting, fonts, and layout across different devices and operating systems. It also ensures that the file is easier to share, print, and protect from unintended edits.

To export a Microsoft file into PDF, follow these steps:

1. In the original Microsoft tool, navigate to the **File** tab.
2. Select **Export.**
3. Select **Create XPS/PDF Document** option from menu, then again as a button in the right panel**. Note: Avoid Print to PDF** – this creates untagged PDFs. Note: if you are using a Mac, you'd need to select "Best for electronic distribution and accessibility".

4. When the Publish as PDF or XPS box appears, select the Options menu. (see screenshot)
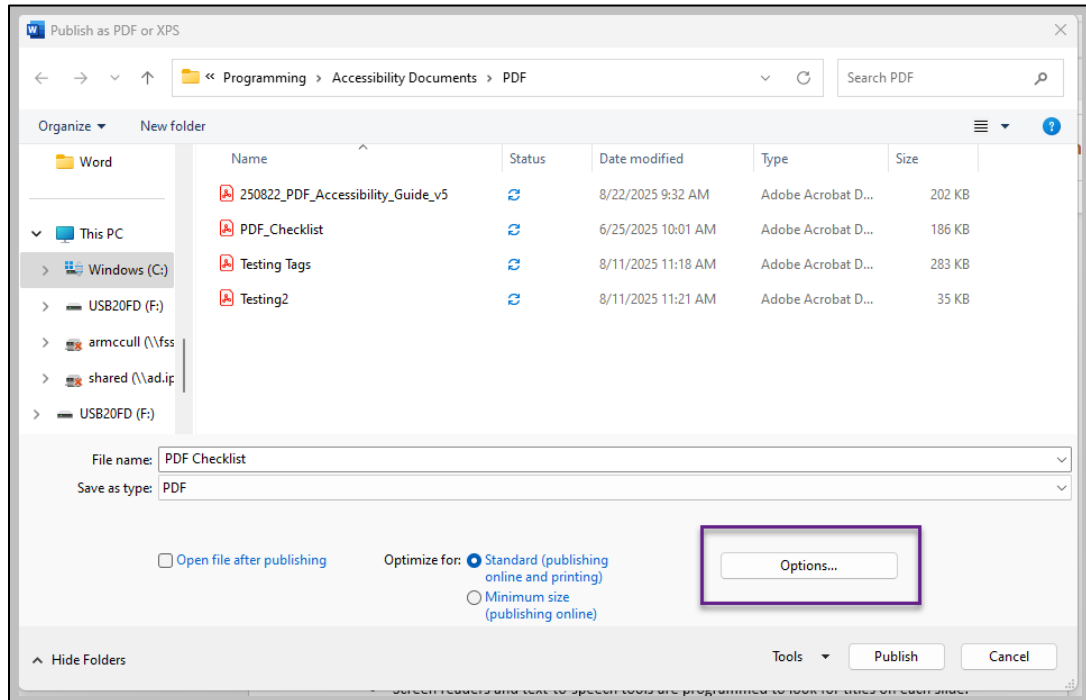
5. From the **Options** menu, select the checkbox next to **Create Bookmarks Using.**
6. Verify the radio button has Headings selected.
   a. **Note**: Once this is set up once, it should continue these settings unless otherwise changed.
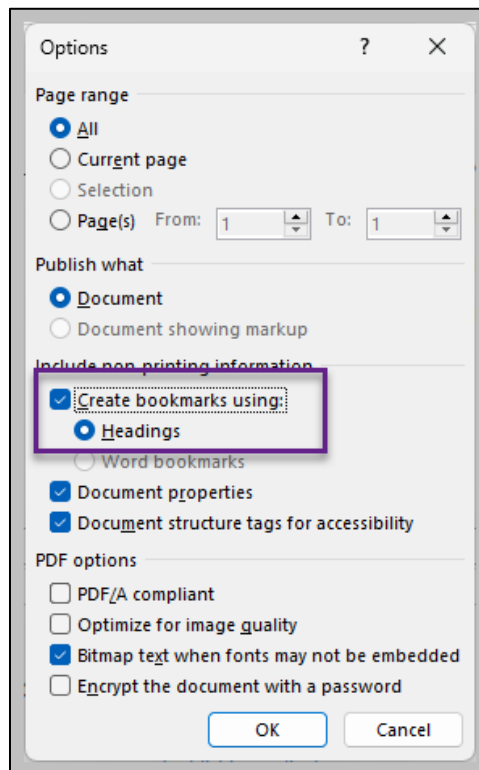
Part 2: Run the accessibility checker.

Check: Has the accessibility checker been run on the document?

Why is this important?

Running the PDF accessibility checker identifies barriers that could prevent people with disabilities from accessing the content. It ensures the document meets accessibility standards, improving usability and compliance.

Note: Accessibility checkers should not be the only verification method for accessibility. They are not always correct, but they do provide a foundation for an accessible document.

To add run the accessibility checker, follow these steps:

1. Open the PDF.
2. Select **All Tools.**
3. Select **Prepare for Accessibility** (or Check for Accessibility for Mac users).
4. Select **Check for Accessibility.**
5. Select **Start Checking.**

Part 3: Fix the issues.

Check: Did you run the accessibility checker and receive an issue-free report?

Why is this important?

Fixing issues found by the PDF accessibility checker ensures all users, including those with disabilities, can navigate and understand the document. It also helps maintain compliance with accessibility laws and institutional standards.

To fix the issues, follow these steps:

1. Select drop down menu for each section.
   a. If Adobe offers the option to fix it for you, use that strategy for quick updates.
   b. If Adobe requires Manual Check (see image below), you will need to verify whether the content is accessible, make updates as necessary, and then select **Pass** from the menu using the following steps:
      i. Right clicking on the item that says Manual Check.
      ii. Select **Pass.** Note: Do NOT pass an item without correcting. Owners of the document are responsible for accessibility – passing items without correction could result in issues for users.
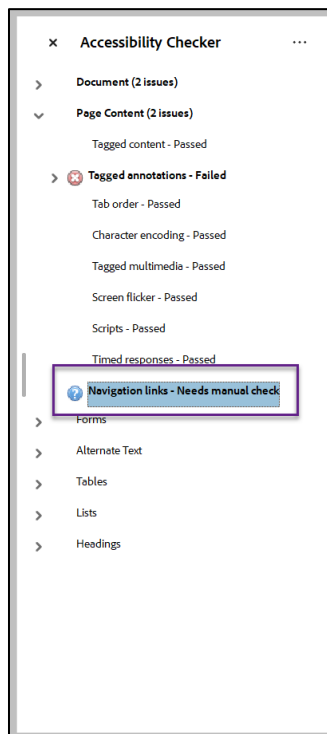
Part 4: Set the reading order.

Check: Is the reading order correct?

Why is this important?

Checking the reading order in a PDF ensures that screen readers present the content in a logical, meaningful sequence. This improves comprehension and accessibility for users who rely on assistive technology.

To set the reading order, follow these steps.

1. Select **All Tools.**
2. Select **Prepare for Accessibility.**
3. Select **Fix Reading Order.**
4. Reorder in the panel accordingly. There are corresponding numbers with each section.

Part 5: Verify tags.

Check: Is your document tagged?

Why is this important?

A tagged PDF contains structural information that allows screen readers and other assistive technologies to interpret and present the content accurately. Tags ensure proper navigation, reading order, and accessibility for all users.

To verify tags, follow these steps:

1. Open the **Tags** menu using the following steps:
    a. Select **Menu** at the top left.
    b. Select **View.**
    c. Select **Show/Hide.**
    d. Select **Side Panels**
    e. Select **Accessibility Tags.**
        i. If Accessibility Tags has a checkmark next to it, the menu has already been selected for the right side panel of your Adobe screen. A tag icon will be displayed in the right side panel (see screenshot below). Select the icon for the menu to open.
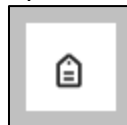
2. Review the roots in the menu, confirming logical nesting, such as H1 above H2. Learn more about Logical Nesting, if unfamiliar, from WCAG: Headings in Page Structure
3. Right click any tag and adjust type, language, or alt-text in the **Properties** menu. Note: You can drag to re-order items, instead of updating the properties.

Part 6: Set the document properties.

Check:

1. Does the document have the title, author, and keywords set?
2. Is the document language set?

Why is this important?

Setting the document properties provides essential information like title, author, and keywords, which improves searchability and organization. It also enhances accessibility by giving assistive technologies accurate metadata about the document.

To set the document properties, follow these steps:

1. Select the **Menu** (or File Menu on Macs).
2. Select **Document Properties** from the options.
3. If it does not exist, update the Title for the document in such a way that tells the user exactly what is in the document. For example, instead of Chapter 1, title the document Chapter 1: An Introduction to Engagement.
4. Update the **Author** with your name, if it is your original content. In the event of openly licensed content, where users can edit but cannot take over the copyright, the author name should remain unchanged.
5. In the **Keywords** box, input key terms associated with your document.
6. To set the language, navigate to the **Advanced Tab.**
7. In the Reading options menu, verify the language is the language you want (i.e. English).
8. When it is done, select **OK.**