Word and PDF Training

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# Outcomes of this Training

1. Build an accessible document in Word.
2. Check a document using Word’s Accessibility Checker
3. Fix basic accessibility issues in Word documents.
4. Convert a Word document to an Adobe PDF
5. Find and run the Adobe Accessibility Checker
6. Use the reading order panel to change order and structure of a PDF
7. Interpret and fix basic accessibility issues of a PDF.

# Word

The links in this section of the document lead to instructions for Windows users. However, the main [Microsoft Word accessibility page](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_wintableheaders&PickTab=Mac) has instructions for a variety of operating systems including Mac, iOS, Android, and Online.

## Building an accessible document from scratch

1. Use the built-in formatting—avoid using blank spaces to format. Modify style as necessary to achieve desired look.
   1. [Headings](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_winbuiltinheadings)
   2. [Bulleted Lists](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_winbulletlists) and [Ordered Lists](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_winorderedlists)
   3. Styles (modifying)
   4. Paragraph
   5. Increase/Decrease Indent
2. Font
   1. For documents that will be digital, use a sans serif font (Calibri or Arial)
   2. Limit the number of different fonts you use in a document to two or three at the max. Sometimes too many fonts can cause issues for learners with reading or processing disabilities, like dyslexia.
3. [Using color](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_windowstextcolor)
   1. Microsoft Products don’t always check for this—it’s a smart idea to do it on your own. Check for contrast—[Paciello Group Color Contrast Analyzer](https://developer.paciellogroup.com/resources/contrastanalyser/).
      1. What seems bright enough to you may not be to someone with color-blindness or low-vision.
      2. We are responsible for meeting contrast at the AA standard level of WCAG 2.0 and the contrast is graded differently between large and small text (see [screen shots of the analyzer here](https://ida.wichita.edu/microsoft-word/use-sufficient-contrast-text-background-colors/) by scrolling down the webpage)
   2. [Don’t use color alone to convey meaning](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_windowstextformat)—use bold or underline
4. Use simple tables
   1. Make sure to [specify header rows](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_wintableheaders) and have them break and repeat across pages
   2. Avoid splitting or merging cells—this can cause the user of assistive technology to misinterpret the order of information when they are only listening to it rather than seeing it.
   3. Don’t use blank cells for formatting
   4. Only use tables where data needs to be tabular—if it can be conveyed in a simple list, do so.
5. [Images](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_winaltvisuals) and [hyperlinks](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-US&rs=en-US&ad=US#bkmk_winlinksscreentips)
   1. Make sure ALL images that convey meaning have an alternative description
      1. Word Art, SmartShapes, Charts, Tables
      2. Mark it decorative if it does not convey meaning
      3. If you cannot explain the information in a chart or graph in 125 characters or less, you should explain the relevant information in your main text and type “explained in main text” in the alt text.
   2. Make sure your links can stand alone and clearly represent what the links direct to.

## The Accessibility Checker

Navigate to the Innovation Café and download the Incomplete Grade Contract (word doc) for the following activities:

### How to Find and Add the Checker to Quick Access Toolbar

1. Select the downward arrow in the blue space at the top left of the screen.
2. Select “More Commands” from the dropdown menu
3. In the “Choose Commands From” dropdown, select “All Commands”
4. Scroll down to Accessibility Checker and select.
5. Select the “Add” button in the middle off the two menus
6. Use Accessibility Checker anytime by clicking on it in the Toolbar!
7. On a Mac, you can find the Accessibility Checker under the Review tab in Word.

### [Three Types of Rules](https://support.office.com/en-us/article/rules-for-the-accessibility-checker-651e08f2-0fc3-4e10-aaca-74b4a67101c1)

* Has three levels of severity with different rules (things that the checker looks for) falling into each category: errors, warnings, tips. (explore link above for further explanation)
* Errors and Warnings are what must be fixed, but we encourage you to fix the Tips as well as it just creates an easier document for people with disabilities to interact with.
* Some errors or warnings may not be able to be fixed, but this is a rarity. (look at “heading is too long” warning in the accessibility checker for this very document).

### Fixing a Document

**Important: If you do not have auto-save enabled, save your document frequently.**

1. Select each item from the Inspection Results menu to locate it in the document.
2. Use the information below the Results menu if you need clarification on why and how to fix something
3. Be patient with yourself and keep trying—some errors are more challenging to fix and may distort the document, but fixing one issue at a time will get you where you need to be.
4. Check alt-text on all images for accuracy (even if they aren’t listed as missing alt text).
5. When you fix all of the tasks in the menu, review the document for font style, size, and color use.
6. Check the metadata by selecting File and looking at the information to the far right.
   * Here you should at least add a title (preferably whatever you have set as the Title on the document).
   * This title will sometimes help eliminate the common accessibility error of “failed title” when you convert to PDF.

# PDF

## About PDFs

This training looks *specifically* at the kind of work needed to be done for documents that have already been properly formatted in Word. That means that most tagged structures will be inherited.

Tagging is what gives a PDF document its structure—like headings, paragraphs, lists, and tables of content. The structure is what ensures smooth and logical interaction with assistive technology.

## Creating a PDF

When starting with a word document, use one of two methods to create your PDF.

1. From an open document, select the Acrobat tab in the tool ribbon in Word. Then Select Create PDF, or
2. Find the file in your File Explorer, right click on it, and select the “Convert to PDF” feature.

These are the best ways to bring the structure of the document you have worked so hard on over to the PDF format.

If you do not have the Create Adobe PDF options, you will want to submit a ticket to IT and look at options to have the tool added—it does the best at translating your work in Word and keeping your structures.

**Warning:** If you create the PDF using the second option above while using the remote desktop, the PDF will not translate any of your structure into tags. Make sure to create the PDF while not remoted in, then you can open it and check/edit it using Acrobat Pro X on the remote desktop.

## Adobe Accessibility Checker

Navigate to the Innovation Café and download the Incomplete Grade Contract (PDF) for the following activities:

### Finding the Checker

The accessibility tools section in Adobe is accessed by

1. Selecting the Tools tab at the top right hand of the screen.
2. From the tool list dropdown, select the Accessibility menu.
3. Then select Full Check.
4. Leave the settings as they are and select “Start Checking”

### Navigating the Checker

Once you run a Full Check, the Accessibility Report will appear on the left hand side of the screen.

1. Scroll down to the Detailed Report section and you will see a list of the document’s errors.
2. Selecting one of the errors will highlight the item that needs fixed in the document.
3. You will also see a link that you can click in the report to get instruction on how to fix that error.

Below the detailed report are two more sections: Summary and Hints for Repair. These also provide information on the various errors found in the report.

For more information, review [Adobe’s in-depth walkthrough](https://www.adobe.com/accessibility/products/acrobat/using-acrobat-pro-accessibility-checker.html) (with visuals) of all of the features of the Accessibility Checker as well as errors you may encounter.

## Touch Up Reading Order (TURO) Tool

This is the tool you will use the most for fixing basic elements of structure, tagging, and sequencing in a PDF. You should supplement this brief demonstration by exploring this very thorough [walkthrough of the TURO](https://www.adobe.com/accessibility/products/acrobat/pdf-repair-repair-tags.html) on your own.

To access the TURO tool, open the Accessibility pane (if it is not already open) and select Reading Order.

**Warning:** Changes made to Reading Order or Tag Structures cannot be undone using the Undo feature. Always save a copy of your document before beginning major tagging or reading order work.

### Functions of the TURO Tool

* Review the order in which items on the page will be read by looking at the numbers associated with each content section (gray or highlighted area).
* Review structure by selecting to show page structures rather than reading order. **Note:** Uncheck the “display like elements in a single block” checkbox to check that elements within a single block are ordered correctly.
* Delete page structures that are not necessary.
* Review table structures for header rows and reading order of cells.

## Reading Order Panel

To the left of your document is a vertical toolbar. There is an icon that looks like four squares with a Z on them. This is the Reading Order Panel.

This panel shows the reading order of your entire document by considering every tagged element per page. It displays them in a linear, nested form. You can drag elements around, just like in File Explorer on Windows, to change their position in the reading order.

This may look a bit more complex, but it is often easier to change the reading order in this panel than by dragging elements around on the page.

## Common Issues

### Failed Title

Use the Properties tab under File to add Title (if it didn’t carry over from source doc) and any other metadata like author, subject, and keywords.

### Reading Order Needs Manual Check

Use the TURO tool to scan through each page and make sure each structure is numbered in the order it should be read on the page.

If an item is out of place, fix it using the Reading Order Panel or the TURO tool. Then right-click that error message and mark it as passed.

### Contrast Needs Manual Check

If you have already done this in Word using a contrast checker, so you can simply right-click and mark it as passed.

## Other Considerations

### Review Links

Double-check that the links from your Word document came over as links in the PDF by clicking through the links and confirming they direct as they should.

### Unnecessary Page Structures

Automatic tagging cannot always distinguish between instructive figures and decorative page elements. Items that visually enhance page layout, such as decorative borders, lines, or background elements, can add clutter to the structure layout and should be removed.

When you are reviewing reading order or structure, you may also see areas highlighted that do not have any content. This can also be removed or tagged as background so assistive technology will not read them.

To tag something as a background element:

1. Select the Touch Up Reading Order tool.
2. In the Touch Up Reading Order dialog box, select Show Page Content Order and Show Tables And Figures.
3. In the document, select the page element, and then click Background in the dialog box.

# Wrapping Up

There are many topics we cannot cover in just one training. Both Word and Adobe have accessibility considerations for fillable forms that are more advanced than the basic changing tags and reordering that are covered here. For advanced training, or training on issues specific to the documents you use (fillable forms or scanned documents), you may need to set up extra training with ITAS.

This document is also a resource beyond the words on the page. The links in this document lead to resources that will help you navigate the various processes we have covered in greater depth.

# Other Resources

## University of Minnesota Accessibility Website

[*Microsoft Word*](https://accessibility.umn.edu/documents/microsoft-word)

[*Tables in Documents*](https://accessibility.umn.edu/documents/tables-documents)

[*Creating Accessible PDFs*](https://accessibility.umn.edu/documents/creating-accessible-pdfs)

## YouTube

[Short Word Accessibility Video](https://youtu.be/Pi6cA8o5Hkk)

[Word Accessibility Webinar](https://youtu.be/lWRaw7krQug)

[PDF- Touch Up Reading Order video](https://youtu.be/AfS7_bow570)

[Make PDF Fillable Forms Accessible](https://www.youtube.com/watch?v=uuWprCpv6W0)

[Making Word Documents Accessible Playlist](https://www.youtube.com/playlist?list=PLt6yjZYKfmdsT0GfehmvsXlTJNwxAaOb2) (short videos on a variety of topics)

[Making PDFs Accessible Playlist](https://www.youtube.com/playlist?list=PLt6yjZYKfmduZp2VVH7Ukb52hbC6FLAhe) (short videos on a variety of topics)