# Learning path for Document Accessibility Auditors

## **BLOCK A**. Fundamental learning on Accessible **Microsoft Documents**

**Objective**: You will learn the fundamentals about how to create accessible Microsoft documents of various types (Excel, Word, PowerPoint, Excel, and Outlook).

**Note** that if there is no indication of cost it is because it is free. The approval from your team leader and/or manager is required when cost is involved.

| **No** | **Activity** | **Method(s)** | **Duration** | **Purpose/Material** |
| --- | --- | --- | --- | --- |
| 1. | Making documents accessible | Online video and step-by-step methods | 5 minutes | **Purpose:**  To learn how to work with the Accessibility Checker, add alt texts, heading styles, merged cells, PowerPoint Live and more.  **Material:**  [Accessibility video training](https://support.microsoft.com/en-us/office/accessibility-video-training-71572a1d-5656-4e01-8fce-53e35c3caaf4)  (Making your content accessible) |
| 2. | Make your Microsoft Outlook emails accessible | Online video and step-by-step methods | 15 minutes | **Purpose**:  To learn how to work with the Accessibility Checker, add alt texts to images, how to use fonts, colors, and styles to maximize the inclusiveness of your email messages before sending them.  **Material:**  [Make your Outlook email accessible to people with disabilities](https://support.microsoft.com/en-us/office/make-your-outlook-email-accessible-to-people-with-disabilities-71ce71f4-7b15-4b7a-a2e3-cf91721bbacb?ui=en-us&rs=en-us&ad=us) |
| 3. | Improve email accessibility | Online video | 15 minutes | **Purpose**:  Make sure it’s accessible to people with limited or no vision, use alt text to describe images, accessible tables and lists, and add structure.  **Material**:  [Improve your emails accessibility](https://support.microsoft.com/en-us/office/video-improve-email-accessibility-ebf3730a-18f8-4b57-81d1-730086231775?wt.mc_id=otc_accessibility_video_training%23ID0EBBD=Transcript) |
| 4. | Make your Microsoft Word documents accessible | Online video and step-by-step methods | 30 minutes | **Purpose:**  You learn to work with the Accessibility Checker, add alt texts to images, to use fonts, colors, and styles.  **Material:**  [Making your Word documents accessible to people with disabilities](https://support.microsoft.com/en-us/office/make-your-word-documents-accessible-to-people-with-disabilities-d9bf3683-87ac-47ea-b91a-78dcacb3c66d?ui=en-us&rs=en-us&ad=us)  [Create accessible Word documents](https://support.microsoft.com/en-us/office/video-check-the-accessibility-of-your-document-9d660cba-1fcd-45ad-a9d1-c4f4b5eb5b7d?wt.mc_id=otc_accessibility_video_training) |
| 5. | Make your Microsoft Excel documents accessible | Online video and step-by-step methods | 30 minutes | **Purpose:**  You learn to work with the Accessibility Checker, add alt texts to images, to use fonts, colors, and styles.  **Material:**  [Make your Excel documents accessible to people with disabilities](https://support.microsoft.com/en-us/office/make-your-excel-documents-accessible-to-people-with-disabilities-6cc05fc5-1314-48b5-8eb3-683e49b3e593?ui=en-us&rs=en-us&ad=us)  [Create accessible Excel workbooks](https://support.microsoft.com/en-us/office/918db751-1585-41c5-9ddf-5d7a0915afaf?wt.mc_id=otc_accessibility_video_training)  (Start with an accessible Excel template) |
| 6. | Make your PowerPoint presentations accessible | Online video and step-by-step methods | 30 minutes | **Purpose:**  You learn to work with the Accessibility Checker, reading order, add alt texts to images, to use slide design, fonts, colors, and styles.  **Material:**  [Make your PowerPoint presentations accessible to people with disabilities](https://support.microsoft.com/en-us/office/make-your-powerpoint-presentations-accessible-to-people-with-disabilities-6f7772b2-2f33-4bd2-8ca7-dae3b2b3ef25?ui=en-us&rs=en-us&ad=us)  [Create accessible PowerPoint presentations](https://support.microsoft.com/en-us/office/794fc5da-f686-464d-8c29-1c6ab8515465)  (Create slides with an accessible reading order) |
| 7. | Creating accessible content using Microsoft Office 2016 | Online training with **hands-on** exercises given by ITAO subject-matter expert | 3 hours | **Purpose:**  Learn best practices to use MS Office 2016 to create accessible content with Outlook, Word, and PowerPoint.  **Material**:  SABA-Course ID 0000102948 |

## **BLOCK B**. Intermediate learning on Accessible **Microsoft Documents**

**Objective**: To acquire more in-depth knowledge on all features related to the accessibility of Microsoft documents of various types (Excel, Word, PowerPoint, Excel and Outlook).

**Prerequisite**: You must have a combination of knowledge and experience about the [Web Content Accessibility Guidelines](https://www.w3.org/TR/WCAG21/) (WCAG) version 2.1. The approval from your team leader and/or manager is required when cost is involved.

**Note** that if there is no indication of cost it is because it is free.

| **No** | **Activity** | **Method(s)** | **Duration** | **Purpose/Material** |
| --- | --- | --- | --- | --- |
| 1. | Create accessible documents in Microsoft Word | Online training | 1 day | **Purpose**:  You will learn how to add accessibility features to comply with standards such as WCAG 2.1; Test your document for accessibility compliance; and repair issues.  **Material**:  [Creating Accessible Documents in Microsoft Word](https://eliquotraining.com/training/course.php?cid=MSMW301) by Eliquo  **Cost**:  $495 |
| 2. | Creating accessible documents in Microsoft Excel and PowerPoint | Online training | 1 day | **Purpose:**  You will learn how to recognize accessibility issues with your content; add accessibility features in Microsoft Excel and Microsoft PowerPoint; Test for accessibility issues  **Material:**  [Creating Accessible Documents in Microsoft Excel and PowerPoint](https://eliquotraining.com/training/course.php?cid=MSEP301&c=Accessible-Microsoft-Excel-and-PowerPoint-Documents) by Eliquo  **Cost**:  $495 |
| 3. | Creating accessible 508 compliant templates using Microsoft Word | Online training | 1 day | **Purpose:**  You will learn how to create properly structured Microsoft Word document templates and add accessibility features to comply with Section 508 standards and WCAG 2.2. Testing your document for accessibility, compliance and repair issues will also be covered.  **Material:**  Creating Accessible 508 Compliant Templates Using Microsoft Word by Eliquo  **Cost:**  $495 |
| 4. | Documents audits | Self-study | Not applicable | **Purpose:**  Perform audits using ‘MSDocument\_Audit\_ Report\_EN.docx’(link). Produce one report per document.  **Material**:   1. [FRP](https://github.com/andrewnordlund/bati-itao.github.io/blob/df4ed22333531c2db5fa84710096769bcd8562ae/learning_path/RFP%20-%20Word%20a11y%20-%20EN.docx) – Word a11y – EN.docx (link) 2. RFP – PPT a11y – EN.pptx (link) 3. Accessibilit\_Issues\_Outlook\_Practice.msg (link)   Review your results with the Technical Advisor overseeing your training.  **Validation documents:**   * Word and PowerPoint document: RFP – Correction guide.xlsx * Corrected Outlook is fixed\_email.msg |

## BLOCK C. Fundamentals of Accessible **PDF Documents**

**Objective**: To learn how to create accessible PDFs using Foxit PDF Editor.

**Prerequisite**: You must have manager’s approval to get Foxit PDF Editor install on your computer.

| **No** | **Activity** | **Method(s)** | **Duration** | **Purpose/Material** |
| --- | --- | --- | --- | --- |
| 1. | Understand what accessibility brings to your documents | Reading | Not applicable | **Purpose:**  Learn how to make your documents consumable by all by following the accessibility best practices.  **Material:**  [Foxit PDF Solutions | Accessibility](https://www.foxit.com/solution/accessibility/) |
| 2. | Foxit Instructional Videos | Online | Not applicable | **Purpose:**  Learn how to Edit PDF, Advanced PDF Editing, Add and edit images and more (about 27 videos on Youtube, works ONLY if off VPN)  **Material**:  [Instructional Videos](https://www.foxit.com/support/tutorial.html)  (Foxit PDF Editor) |
| 3. | Free webinars Foxit PDF Editor such as  ‘Overview Demo’,  ‘Integrated electronic signature solution’ | Online | Not applicable | **Purpose:**  You must register first to get access to webinar. Multitude of choices to pick from  **Material**:  [Webinars | Foxit Software](https://www.foxit.com/resources/webinar.html?open=section-508-compliant-pdfs-1#section-508-compliant-pdfs) |
| 4. | Foxit User Manual | In Foxit | Not applicable | **Purpose:**  Learn from A to Z about Foxit  **Material**:  Under Foxit - Help Menu: Select User Manual (453 pages of resources) |
| 5. | Make Accessible Wizard | In Foxit | Not applicable | **Purpose:**  Guide you step-by-step during the accessibility process.  **Material**:  Under Foxit - File menu: Select Action Wizard, Select Run Action, Select Make Accessible, follow the prompts. |
| 6. | Foxit and PDF accessibility | Online | Not applicable | **Purpose:**  Articles that contain a definition of accessibility, PDF tags, converting documents to PDFs, Accessible forms  **Material**:  [WebAIM: Foxit and PDF Accessibility - Defining PDF Accessibility](https://webaim.org/techniques/foxit/) |
| 7. | Accessible Documents Word, PowerPoint for conversion to PDF | 2 days | 5 modules between 2 to 4 hours each per week | **Purpose:**  This independent-study online training covers principles and processes for:  Creating accessible document content and structure in Word & PowerPoint.  Evaluating the accessibility of well-structured Word & PowerPoint documents.  Optimizing the accessibility of PDFs exported from well-structured Word & PowerPoint documents with PhantomPDF Business for Windows.  **Material:**  [WebAIM: Accessible Documents Word, PowerPoint, & PhantomPDF](https://webaim.learn.usu.edu/?query=accessible%20documents)  **Cost:**  $125 USD |

## **BLOCK** D. Learn intermediate knowledge about Accessible **PDF documents**

**Objective**: To learn how to create accessible PDFs using Foxit PDF Editor.

**Prerequisite**: You should have completed the previous introduction block. You must have manager’s approval to get Foxit PDF Editor install on your computer.

| **No** | **Activity** | **Method(s)** | **Duration** | **Purpose/Material** |
| --- | --- | --- | --- | --- |
| 1. | Understand PDF Techniques for WCAG 2.1 | Online Reading | 2 hours | **Purpose:**  Learn what the 23 - PDF techniques are.  **Material:**  [PDF Techniques for WCAG 2.1](http://www.w3.org/WAI/WCAG21/Techniques/#pdf) |
| 2. | Accessible PDF forms with PDF U/A and WCAG 2.1 | Online classroom | 3 days | **Purpose:**  You will learn how to: Make existing PDFs more accessible; Comply with WCAG 2.1 AA guidelines; Comply with the PDF/UA specification; Add accessibility features from the source document when possible; Evaluate accessibility and compliance and repair issues.  **Material:**  [Foxit PhantomPDF: Accessible PDF Forms with PDF U/A and WCAG 2.1](https://eliquotraining.com/training/course.php?cid=FXPP401&c=Foxit-PhantomPDF-Accessible-PDF-Forms-PDF-U-A-WCAG-2.1)  **Cost:**  $995  Manager’s approval is required first. |
| 3. | PDF Audit Procedures | Online reading | 30 minutes | **Purpose:**  Learn what are the IT Accessibility Office procedures for the audits of PDF documents.  **Material:**  [PDF Audit Procedure](https://dialogue/grp/BU6206833/Compliance/ICT%20Audit%20Reference%20Material/PDF_Audit_Procedure.docx)s |
| 4. | Accessibility—PDF Accessibility | Online training given by ITAO subject-matter expert | 90 minutes | **Purpose:**  Learn the basics on how to create accessible PDF documents using Foxit PDF Editor.  **Prerequisite**:  Foxit PDF Editor software  **Material**:  SABA - Course: 0000119088 |
| 5. | PDF Audits | Self-study with **hands-on** exercises | Not applicable | **Purpose:**  Perform audits using ‘PDF Audit Report’ (link)  **Material**:  PDF file to audit (link to)  Review your results with the Technical Advisor overseeing your training.  **Validation report:**  RFP – Correction guide.xlsx |

**BLOCK E**. Advance learning on Accessible Microsoft and PDF Documents

**Objective**: To prepare for the [Accessible Document Specialist](https://www.accessibilityassociation.org/s/accessible-document-specialist) (ADS) Exam in order to obtain the ADS Certification from the International Association of Accessibility of Professionals (IAAP).

**Prerequisite**: You must have an excellent knowledge about WCAG 2.2-Understanding the Web Content Accessibility Guidelines. You mush have hands on experience with documents audits and remediations of a minimum 1-2 years' experience who function in one of many team roles related to accessible document authoring, remediation, training, policy, and advocacy of accessible document solutions (extract from [Accessible Document Specialist-IAAP](https://www.accessibilityassociation.org/s/accessible-document-specialist#memberSec4)). The approval from your team leader and/or manager is required.

**Note** that if there is no indication of cost it is because it is free.

| **No** | **Activity** | **Method(s)** | **Duration** | **Purpose/Material** |
| --- | --- | --- | --- | --- |
| 1. | Certification Guide | Reading | Not applicable | **Purpose**:  Lists all tools and resources available to prepare for Certification.  **Material**:  [Certification Guide | International Association of Accessibility Professionals](https://www.accessibilityassociation.org/s/certification-guide) |
| 2. | Prepare for ADS | Reading | Not applicable | **Purpose**:  All resources to help you prepare for the ADS Certification Exam. This list includes free and for-purchase resources.  **Material**:  [Prepare for ADS](https://www.accessibilityassociation.org/s/prepare-for-ads)  [ADS Frequently Asked Questions](https://www.accessibilityassociation.org/s/ads-frequently-asked-questions) |
| 3. | ADS Body of Knowledge (BOK) | Reading | Not applicable | **Purpose**:  The IAAP ADS BOK is the set of concepts, terms and activities that make up the ADS professional domain, as defined by the IAAP. The ADS BOK content supports the exam preparation before participants apply to take the exam. Understand that technical certifications are not tied to a course or training program but are designed to illustrate your working and functional knowledge of the content and concepts.  **Material**:  [ADS Content Outline](https://www.accessibilityassociation.org/s/accessible-document-specialist-content) (online one pager)  [ADS Body of Knowledge](https://www.accessibilityassociation.org/resource/Ads_Book) (22 Pages PDF) |
| 4. | ADS Certification | Online | 5-10 hours per week for 6-8 weeks | **Purpose:**  The ADS credential represents an ability to express, at a minimum, an intermediate level of experience designing, evaluating, and remediating accessible documents. Awareness of how to properly guide and consult others for process, workflow, and policy development for accessible documents is also expected of the minimally qualified candidate.  **Material**:  [Accessible Document Specialist Credential](https://www.accessibilityassociation.org/s/accessible-document-specialist)  **Cost**:  Upon manager’s approval obtain:  1. Membership ($$) with IAAP  2.Exam for Member $430 USD |