Creating Accessible PDF Files – Further Features in Adobe® Acrobat® 8.0 Professional

This document describes how to add tags, links and bookmarks to an untagged PDF document.

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BEFORE YOU BEGIN

This document has been written as a follow up to the guide "*Creating Accessible PDF Files Using Adobe Acrobat 8.0 Professional*" with which you should be familiar before attempting to follow the instructions herein. You will also need to have the Professional version of Adobe Acrobat 8.0 installed on your PC.

Where possible, a PDF file should always be created from within the authoring application, eg Microsoft® Word, PowerPoint® or Excel®, as in most cases this produces a tagged file which requires minimal adjustments to make it accessible. Some applications however, are unable to create the tags automatically. This document explains how to add tags to an untagged PDF file and manipulate them in order to make it readable by assistive technology.

It is important to note that even when extreme care is taken to produce accessible content, the document may still be inaccessible to some users. Complicated layouts produce unsatisfactory results and it may be necessary to reconstruct the document in a simpler manner within the authoring application.

Working for long periods while making an Acrobat file accessible is labour and memory intensive for both the author and PC. Saving the file regularly, and occasionally closing down the application, rebooting the PC and taking a break is highly recommended.

HOW TO CHECK IF A PDF FILE IS TAGGED

If you already have a .PDF file and are unsure as to whether it is tagged, open it in Adobe Acrobat, and click on **File, Properties**. Tagging information appears in the lower left-hand corner of the **Description** tab.

CONVERTING URLS TO LIVE LINKS

Before adding the tags, it is important to have Acrobat convert any links within the document and make them "live". When the tagging process is implemented, Acrobat will then recognise them and tag them accordingly.

1. Click on **Advanced, Document Processing, Create Links from URLs**.

2. In the Create Web Links box, select **All** (or specific pages if you only want "live" links on a certain page), then click **OK**.

Note: After adding the tags, be sure to read the section on Accessible Links.

ADDING THE TAGS

1. Click on **Advanced, Accessibility, Add Tags to Document**.

    Acrobat will now analyse the pages, create a tag's tree and display an Add Tags Report alongside the document. This lists any errors and offers tips for rectifying them.

2. Assess the information in the report carefully; some elements may not warrant repair, eg where a page border or logo is missing alternate text. Since these

contain no useful content, they could be marked as Background instead of Figure tags and would then be ignored by a screen reader.

Note: During the tagging process, some applications lose the existing ALT text which was added in the source document. This can be added now using the TouchUp Reading Order tool.

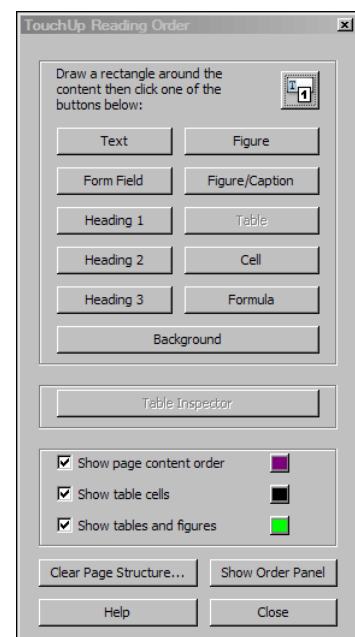## USING THE TOUCHUP READING ORDER TOOL

The TouchUp Reading Order tool is the easiest way of fixing improperly marked or grouped items, adding alternate text or amending the reading order on the page. If the page is complex however, you may need to edit the tags in the Tags tree. It is important to note that changes made using the TouchUp tool automatically reflect in the tags tree, but conversely, when the tags tree is edited, the reading order in the TouchUp tool and the layout in the Order tab may not change.

Note: It is advisable to save the file after each alteration, however as there is no "undo" feature available with this tool, you will need to close the file without saving if you make a mistake.

1. Ensure the Advanced Editing toolbar is displayed. (If not, click on **View, Toolbars, Advanced Editing**.

2. Click on the **TouchUp Reading Order Tool**. (You may need to right-click the toolbar and add it from the list.)

3. Remove non-essential content by clicking the region number in the document, and then clicking on the **Background** button in the TouchUp Reading Order window.

4. To select unrecognised content on the page, click the **Draw a Rectangle** button, and drag over the graphic(s) or text – it doesn't matter if you slightly overlap any other regions, and then click the relevant tagging button.

5. To add missing alternate text, right-click the figure, choose **Edit Alternate Text**, and then add the text.

6. Check the order of the numbered regions as this is how a screen reader will read the content. If they are out of sequence, follow the instructions below for changing the order of the regions.

CHANGING THE ORDER OF THE REGIONS

1. In the TouchUp Reading Order dialog box, click on **Show Order Panel**.

2. Select the **Order** tab, scroll to the relevant page, and then click the number of the region to be moved.

   This will select the region and also highlight it in the Order tab.
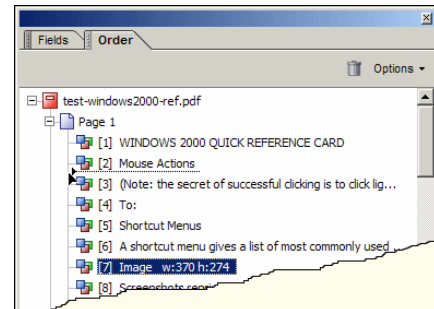
3. In the Order tab, hold down the mouse on the icon (not the text) and drag it to the new location. Markers will guide you to the correct position. When released, the region is renumbered in both places.

ACCESSIBLE LINKS

Links can be created in a number of ways, some of which <u>may</u> require further editing in the Tags tree.

- Documents automatically tagged in the authoring application generally have links correctly included in the Tags tree, and require no further attention.

- If your document was untagged, and you followed the instructions on page 1, (ie you converted the URLs to live links before adding the tags) then these <u>may</u> require activating manually.

- If you modified or added new links in the Acrobat document, or some links were not properly recognised, these will need to be activated manually.

IMPORTANT
To be fully accessible, links should have three tags present in the tag tree.

i. A parent <Link> tag
ii. A child Link - OBJR tag
iii. A child document content tag.
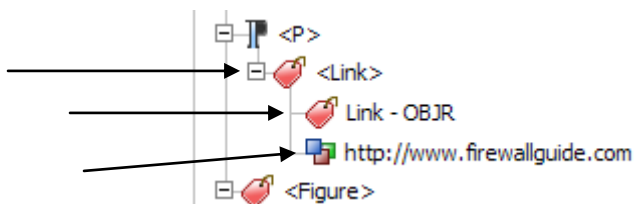
However, there may be occasions when links appear in the Tags tree with each component shown as a separate link, as shown opposite.
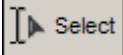
This sometimes occurs when a URL appeared in the source document text which was not a hyperlink.

When this happens it is advisable to delete the link in the document pane and then re-create it using the Create Link Command.
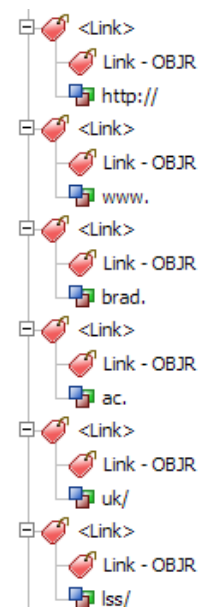
Create Link Command

This method activates a link and usually places all the relevant tags in the correct order in the Tags tree.

1. Using the **Select** tool ⟦ Select ⟧ , select the content you want for the link.

2. Right click the selection and choose **Create Link**.

3. In the Create Link window, choose one of the options under **Link Action** and if necessary, change the **Link Appearance**.

4. Click on **Next** and enter the URL (if the link is going to a web page.)

5. Click on **OK**.
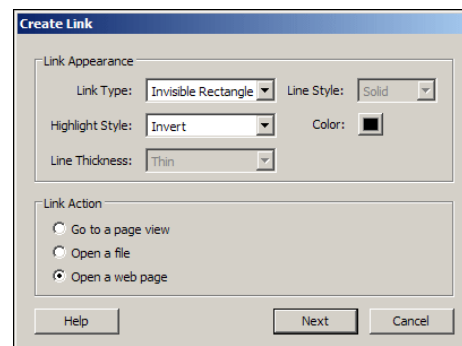
MANUALLY CREATING THE LINKS TAGS

Where the Link tags have not been properly constructed, ie where there are no parent <Link> and Link - OBJR tags, these must be created manually to make them accessible. This means using the Tags tree to locate unmarked links and then adding the missing tags.
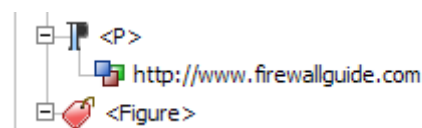
1. Click on the Tags tab and expand the tags tree. (Hold down CTRL while clicking the + sign of the upper most tag.)

2. Click the Options button at the top of the Navigation tabs pane, ensure **Highlight Content** is selected, and then click on **Find** on the same menu.
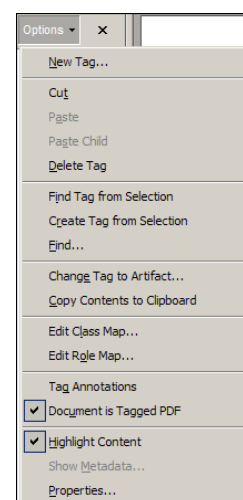
   This will open the Find Element box.

3. Click on the Find: down arrow and select **Unmarked Links**.

4. Click the **Find** button. This will find the first unmarked link on the page.

5. Close the Find Element window.
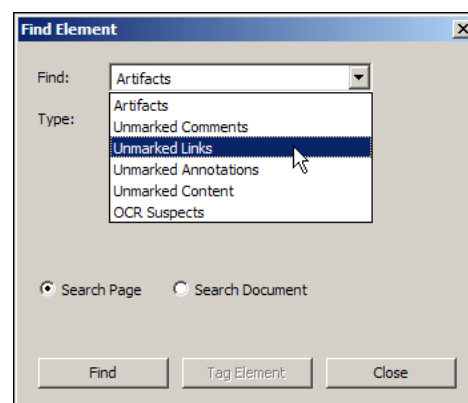
6. Use the Select tool to select some text near the link in the page, then click the Options button again and select **Find Tag from Selection**.

   You should then be able to locate the document content tag in the Tags tree.

7. Select the document content tag, click on the Options button and select **New Tag**.

8. In the New Tag box, choose **Link** as the Tag type, and then click **OK**.

   This will display a <Link> tag below the document content tag.
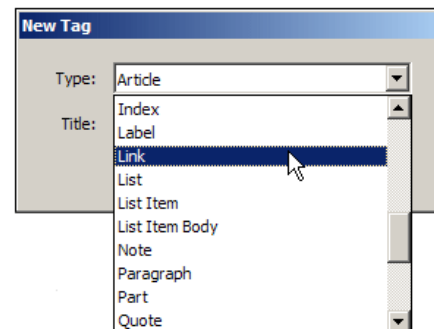
9. Hold down the mouse on the document content tag and drag it below the <Link> tag so it becomes a child tag.
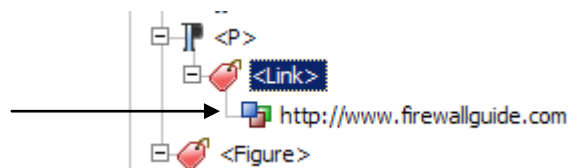
10. Now select the <Link> tag, click on **Options, Find** and then select **Unmarked Links**.

11. In the Find Element box, click on the **Find** button and then the **Tag Element** button.

   This will now produce a Link – OBJR child tag below the <Link> tag, but above the document content tag.

DELETING A LINK

1. To delete an existing link, click on the Link tool.

2. Click the edge of the link box to select it, and then press the DELETE key.

## CHECKING THE DOCUMENT FOR ACCESSIBILITY

Once the tags have been added, you should run a full accessibility check. Details on how to do this are included in the document: "*Creating Accessible PDF files Using Adobe® Acrobat® 8.0 Professional*" at:

http://www.bradford.ac.uk/lss/documentation/creating-accessible-acrobat-8-pdf-files/creating-accessible-acrobat-8-files.pdf

BOOKMARKS

Bookmarks greatly assist users to navigate through a document by generating a Table of Contents in the navigation pane. They are usually created automatically from the headings in the source document, but any text or graphic can be assigned as a bookmark if desired.

Depending on the method used to create the PDF file, or if you subsequently add security settings to the document, you <u>may</u> find that bookmarks which were created automatically from within the authoring application no longer work.
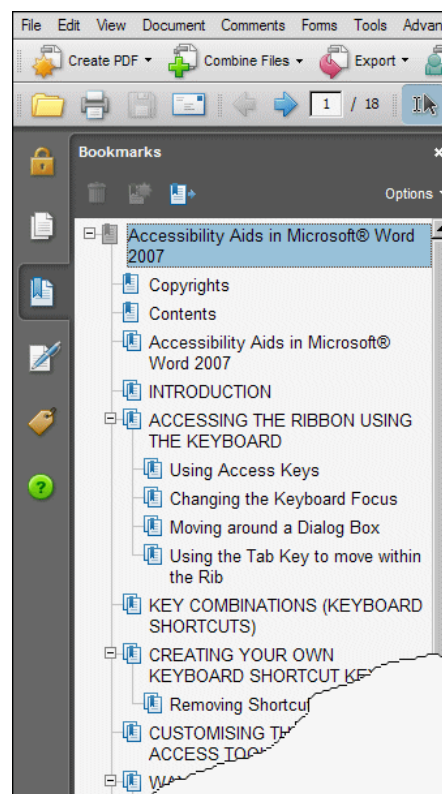
Testing Existing Bookmarks

1. Click on the bookmarks tab [icon] in the Navigation Pane.

   This will show any existing bookmarks which were created during the tagging process.

2. Click a bookmark to check if it displays the corresponding text in the document pane. If not, you will need to delete the bookmark(s) and recreate them.

Deleting Bookmarks

Select the bookmark(s) to be deleted, and then click the Options button and choose **Delete Bookmark(s)**.

Creating New Bookmarks

If your source document contained heading styles, you can create bookmarks automatically from these.

1. Display the page at the correct magnification.

2. In the navigation pane, click the **Options** button and select **New Bookmark from Structure**.

Note: if this menu is not available, then there are no styles available and you will need to create the bookmarks manually.
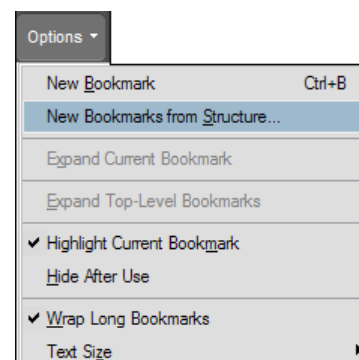
3. Select the structure elements you require as bookmarks, eg H1 for to mark all heading 1 styles. (To select more than one hold down the SHIFT key).
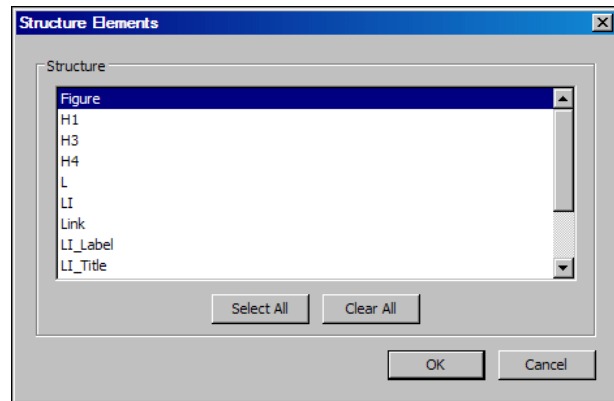
4. Click **OK**. All the bookmarks are then nested under a bookmark named "Untitled".

5. To change the name of the "untitled" bookmark, first select it, then right-click and choose **Rename**.

6. Type in an appropriate name for the top-level bookmark, eg the name of the document.

7. Expand the bookmark list by clicking on the + sign.

Manually Creating Bookmarks

1. Display the page at the correct magnification.

2. In the document pane, select the first entry you want to mark as a bookmark.

3. Click the New Bookmark button at the top of the Bookmark pane. The new bookmark will be placed at the bottom of the existing bookmark list.

4. Repeat the process to create other bookmarks.

Moving Bookmarks

1. Select the bookmark(s) to be moved, then hold down the left-mouse button on the bookmark icon and drag to the new position.
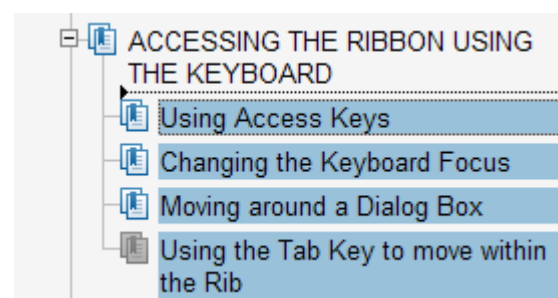
   A Line Marker guide will appear to show the current position.

2. Release the mouse at the correct place.

Nesting Bookmarks

1. To display the bookmarks in a hierarchical order, select a bookmark (or range of bookmarks).

2. Click and drag the bookmark(s) beneath and slightly to the right of the parent icon.

Un-Nesting Bookmarks

1. To move a nested bookmark back to its original position, select it and then choose **Cut** from the Options menu.

2. Select the parent bookmark, open the Options menu and then choose **Paste After Selected Bookmark**.

Setting the Page Destination

If a bookmark fails to display the proper information in the document pane, you can correct this by setting the page destination.

1. Select the bookmark.

2. Using the arrow buttons on the Page Navigation toolbar, display the correct page for the bookmark.

3. Click the Options button in the bookmark pane and select **Set Bookmark Destination**.

4. Ensure you have displayed the correct page, and click **Yes**.

Wrapping Text in Long Bookmarks

Select the bookmark and then choose **Wrap Long Bookmarks** from the Options menu.

FURTHER INFORMATION

In addition to the extensive Help system, Adobe has an Accessibility Resource Centre featuring documents and tutorials to assist authors in publishing PDF files for use by people with disabilities.

This can be accessed from: *http://www.adobe.com/accessibility*.