

2.2 Overview of PDF Remediation Processes

Contents

2.2 Overview of PDF Remediation Processes	1
Standardizing PDF Remediation	2
Outlining the PDF Remediation Process.....	2
Manually Editing an Accessible PDF.....	2
Altering PDF Metadata.....	2
Managing PDF Scanned Elements.....	2
Testing PDF Color Contrast.....	3
Reviewing and Arranging Tags in Acrobat	3
Creating and Editing PDF Tags	3
Embedding Fonts in Acrobat.....	3
Adding Alternative Text in Acrobat	3
Designating PDF Artifacts.....	3
Formatting Tables in Acrobat.....	3
Formatting Lists in Acrobat	3
Formatting Hyperlinks in Acrobat.....	3
Formatting Form Elements in Acrobat	3
Conclusion	4

Standardizing PDF Remediation

Using Acrobat to create fully accessible PDFs can be a lengthy process with many interrelated steps, all of which can vary depending on the type of content you are working with. For example, a PDF created solely from a scanned document will likely be exempt from the time-based media criteria but need focus on criteria involving text recognition and reading order. Before you begin preparing a document for accessibility, it's advisable to make general notes on which criteria will apply to your document and which will be irrelevant. Although automated tools (used later in this guide) will automatically check your PDF for accessibility issues, referencing the previous "Review of Web Content Accessibility Guidelines" module will help expose undetected failures of criteria and streamline your PDF remediation process. Once the applicable guidelines have been briefly evaluated for your document, you can begin the PDF remediation process.

Outlining the PDF Remediation Process

Remediating a document into an accessible PDF will usually consist of the following general procedures:

1. Manual edits in Acrobat (such as altering the PDF metadata, embedding fonts within the document, setting the proper format for tables and hyperlinks, etc.).
2. Automated checks and edits with Acrobat Accessibility Checker (which tests the document across a list of pass/fail accessibility checks and offers quick editing solutions).
3. Manual tests for PDF accessibility (such as using the Adobe screen reader, testing form inputs or navigating through the document with a keyboard).
4. Troubleshooting any remaining accessibility issues.

The upcoming modules cover different aspects of the first procedure, manually editing accessible PDFs, all of which will be summarized in this module.

Manually Editing an Accessible PDF

While some manual remediation methods performed in Acrobat (such as marking hidden content or formatting hyperlinks) have no need for a contextual order of execution, other methods do. For example, recognizable 'tags' must be added to a document before a reading order can be set. For this reason, the first 5 of the 12 upcoming modules covering manual accessibility edits in Acrobat, 'Altering PDF Metadata' through 'Creating and Editing PDF Tags', are recommended to be performed in their original order. Modules beyond this point have been placed in an efficient and logical order of execution that can be changed based on the needs of the content creator. Details of each module for manual edits in Acrobat, presented in their logical order, are as follows.

Altering PDF Metadata

PDF metadata communicates information about the title, author, language and other aspects of the document. Much of the data is mandatory to meeting accessibility guidelines and certain elements (such as the title) are also automatically flagged if left blank by the Adobe **Accessibility** tool. We will learn the details of setting metadata.

Managing PDF Scanned Elements

Scanned documents must be run through an **Optical Character Recognition** tool in Acrobat to allow its contents to be recognized, edited and arranged. Managing scanned elements also involves correcting mistakes in the automatically recognized text, adjusting the read order and improving the readability of the document.

Testing PDF Color Contrast

All information in a PDF document must be checked to meet a minimum contrast standard for regular and large text, as described in the 'Distinguishable Content' guidelines. It is important to carry this process out after managing scanned elements and before arranging so-called document tags. Editing contrast or other formatting will misarrange the document's important and precisely structured 'tag tree'. So, making edits to scanned or digital content before tagging will prevent content from being displaced from their tags or bookmarks, which tell a screen reader what to read and in what order.

Reviewing and Arranging Tags in Acrobat

With all the text arrangements and edits completed, the document must be designated as a 'Tagged PDF'. PDF tags will be arranged to help assistive technology understand the structure and type of the content being presented.

Creating and Editing PDF Tags

If tags are missing or improperly placed for any new or existing content, we will have to create, edit and structure a so-called 'tag tree' to properly reflect the content of the document.

Embedding Fonts in Acrobat

Not all fonts presented in a PDF will be universally recognizable from any browser or document viewer. Embedding fonts involves saving the font style to the document so that anyone can view it.

Adding Alternative Text in Acrobat

Alt text is used to provide a text equivalent to any non-text information such as images, graphs, form fields and so on. The alternative text is usually added into the tag tree for each of these elements.

Designating PDF Artifacts

Certain elements such as headers, footers, hidden spaces and layout elements are redundant to conveying the information in a PDF. These elements will need to be hidden, or in other words, set as an artifact so that a screen reader does not identify them. This will also be done in the tag tree.

Formatting Tables in Acrobat

Tables must be identifiable in a way that makes sense to any user, including those relying on the tag tree which must reflect the structure and order of the content presented in the table. Formatting tables will mostly involve making edits in the tag tree.

Formatting Lists in Acrobat

What is done for accessibility with lists is much the same as tables. Formatting lists will mainly involve properly assembling their structure in the tag tree.

Formatting Hyperlinks in Acrobat

Hyperlinks must be tested with a keyboard and mouse. They must also be identifiable as links to assistive technology.

Formatting Form Elements in Acrobat

One of the more complex modules of the series, formatting form elements requires a thorough understanding of form properties as covered in previous modules. We will mainly adjust form properties and properly tag the form elements.

Conclusion

In this module, we've outlined the recommended PDF remediation process and looked at a synopsis of each manual method for meeting PDF accessibility standards. The next module will cover the first suggested Acrobat manual fix, 'Altering PDF Metadata', in greater detail.