

2.6 Reviewing and Arranging PDF Tags in Acrobat

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Getting Started with Document Tags

Properly tagging a PDF document is essential to making it accessible for all users. An assistive program such as a screen reader requires all elements of a PDF (including normal text, paragraphs, headings, lists, tables, hyperlinks, etc.) to be tagged for a user to understand the context and purpose of the document's content. Additionally, incorrectly tagged content that is redundant or confusing to a screen reader (for example, irrelevant spaces, page breaks or decorative content) must be hidden from the tag list by being changed to 'artifacts'. This module will focus on basic methods for adding and editing tags, while 'Designating PDF Artifacts' will be covered in detail in a later module.

Setting Documents as Tagged PDFs

A PDF document must first be labelled as a tagged PDF so assistive technology will be able to read the document based on the tags structure, including headings and paragraphs.

To Set the Document as a Tagged PDF:

1. Expand the **Acrobat Navigation Pane** and open the **Tags** menu.
2. Find the top-most 'Tags' item in the **Tags** menu. If 'No Tags available' is displayed in its place, find and select the 'Options' dropdown menu located directly below 'Tags'. Select 'Create Tags Root'.
3. Right-click the tags root and confirm that the 'Document is Tagged PDF' option is checked.

Tags can now be read and understood as part of the document's reading order.

Setting the Document Tab Order

The tab order (the order that content can be toggled through using the 'Tab' key) will be more closely covered in later modules that involve reading order. However, it is advisable to ensure the document tab order reflects the document structure. Carry out the following:

1. In the **Acrobat Navigation Pane**, open the **Thumbnails** menu.
2. A grid of page thumbnails will appear in this menu. Use the cursor to drag and select all pages within the document. 'Ctrl' + 'A' will also select all pages.
3. Open 'Options' in the **Thumbnails** menu and select 'Page Properties'.
4. In the 'Page Properties' dialogue window, confirm 'Use Document Structure' is selected and select 'OK'.

Understanding Tag Formats

From the **Tags** 'Options' dropdown menu, selecting 'New Tag' will display a dropdown list of all the tag types available to the user in Acrobat. It is important to ensure each item in the document is designated with the appropriate tag type, as these tags names reflect how a screen reader will identify that item.

Common Tag Types Include:

- Document (usually the topmost tag below the 'Tags' root, this is used for specifying the start of a document within the PDF).
- Figure (which identifies any figure or image).
- Form (for inputs like text fields, checkboxes or signature fields).
- Heading Levels (to preserve the text's structure when translated by a screen reader).
- Label (for any generic label, often for a figure or table).

- Link (for hyperlinks, 'Table of Contents' links or other document shortcuts).
- List (for identifying a numbered or bulleted list, inside which a 'List Item' or body of text within a list, 'List Body', can be specified).
- Paragraph (which is one of the most common tag types to specify most body text).
- Span (this is a tag type that usually covers all undesignated text that is not heading, label or paragraph text and it will often be auto-assigned for many tagged items).
- Table (for tagging tables, inside which titles and data cells are tagged with 'Table Header Cell' and 'Table Data Cell').
- Table of Contents (abbreviated as 'TOC', where each item will be tagged as a 'Table of Contents Item').

To create a generic tag, the title will be left blank. Select 'OK' in the 'New Tag' dialogue window to create a new tag.

Managing the PDF Tag Tree

If the working PDF document being remediated was converted from a fully accessible Word document that has the proper style formatting, then tags for the document, table of contents, headings and paragraphs will already be in place. In this case, most of the tagging work will focus on designating artifacts and tagging special elements like tables and form fields. This module will cover adding, editing and structuring basic text and image content in an initially untagged document. Regardless of the tag status of the working PDF document, it is advisable for a user to reference a similar, fully accessible and tagged PDF document for guidance on tag structure and content.

Starting a Tags Tree in an Untagged PDF

After the 'Tags' root is in place, right click this item in the **Tags** menu and select 'New Tag' to start a document tag 'tree'. Select the 'Document' tag type in the 'New Tag' dialogue window and press 'OK'. This will create a document tag directly under the 'Tags' root. As a note, if multiple documents or sections are compiled within the working PDF document, then multiple document tag trees can be added with unique titles for clear organization.

Arranging Tags within the Tag Tree

The first content-based tag in the **Tags** menu will most likely be 'Heading 1', which will usually represent the document or page title. This and all other tags should be superimposed by a 'Document' or similar tag. All tags can be properly organized into a tag 'tree' that reflects the document structure as to preserve the hierarchy of its presented elements.

To Add and Superimpose a Tag within the Tag Tree:

1. Right-click the 'Tags' menu or open the **Tags** menu's option list and select 'New Tag'.
2. Find and select a tag (in this example, 'Heading 1') under tag type, then select 'OK'.
3. The tag will appear in the **Tags** menu (in this instance as '<H1>'). To superimpose a tag over the new tag, select and drag the 'lower order' tag over the tag to be set as 'higher order'.

The new tag can now be found within the expandable 'higher order' tag. This same process can be repeated to properly assort all tags within the tag tree. Note that superimposing tags is primarily for placing content inside the 'Document' tag as well as organizing lists and tables. Multiple levels of headings do not have to supersede one another in the tag tree.

Adding Content to PDF Tags

The appropriate content must be selected and assigned to each tag so that screen readers can make contextual sense of the tag placement.

To Place Content within an Existing Tag:

1. Select the designated tag within the **Tags** menu.
2. Find and select the content within the PDF document to be tagged by either highlighting the text with the cursor or dragging a selection box over non-text content.
3. With both the tag and content selected, right-click the selected tag in the **Tags** menu and select 'Create Tag from Selection'.

Rather than creating a new tag, the appropriate page content will be added under the designated tag.

Conclusion

In this module, we've looked over the most common tag types and walked through a basic PDF tagging process for text and images. The next module will investigate tab order and tagging PDFs with a 'Reading Order' feature.