

**3.6 PDF Accessibility Troubleshooting – Headers & Footers I**

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## ***Managing Headers & Footers with Differing Origins***

Significant obstacles for PDF editability and accessibility arise when a PDF's header/footer content originates from multiple sources. Content can make its way into the header and footer sections of a PDF in several ways. The Microsoft Word 'Headers & Footers' feature is one way, where the content is added prior to the document being converted into a PDF. Header and footer elements can also be created directly in Adobe Acrobat through an 'Update Header and Footer' window. Thirdly, text boxes can be manually inserted with the Acrobat 'Edit PDF' tool to create headers and footers. The combination of these methods in a single PDF can create confusing header/footer issues over the document's life. At some point, you are likely to encounter a PDF that has passed through multiple iterations and authors, in addition to being converted back and forth between Word and PDF formats. The latter would be the most likely scenario where these header/footer discrepancies appear. The troubleshooting solutions featured in this and the following module focus on identifying and managing headers and footers added through different methods and at various times in the document's life. Let's first look at each method separately and how they can be identified.

### **The Microsoft Word Method**

Adding headers and footers to a document is most easily done in Microsoft Word before the document has been converted to PDF. In Microsoft Word, the user ultimately has more control over the uniform placement and design of these elements in the original document. When a document containing Word headers and footers is converted into a PDF, these elements are automatically tagged as artifacts. Identifying and tagging the few essential headers and footers can be done efficiently, as all header and footer elements are artifacts by default in this case. The user can determine if the PDF's headers were added via Word with the 'Edit PDF' tool.

#### *To Identify Microsoft Word Headers and Footers:*

1. In Adobe Acrobat, start the 'Edit PDF' tool and open the 'Header & Footer' dropdown menu. Select 'Update'. If an Adobe dialogue window reports that the elements cannot be updated, this indicates that Acrobat has recognized a set of headers and footers that were added in Word.
2. Reopen the 'Header & Footer' dropdown menu and select 'Add'. If another dialogue window states that the file already contains headers and footers, the user can assume these elements were constructed in Word.

Ideally, all changes to these elements should be made in Word before the document is converted to the PDF format. However, if post-conversion changes must be made to the PDF, there are two options available when selecting 'Add' in the 'Header & Footer' dropdown menu.

#### *Options for Managing Microsoft Word Headers & Footers Include:*

- **Add New.** The 'Add New' option will allow additions to be made through a new set of Acrobat headers and footers. These elements can be assorted around or in line with the original Word headers and footers.

- **Replace Existing.** If changes need to be made to the original Word headers and footers, then the user must erase and overwrite them with 'Replace Existing'. Keep in mind that all text, layout and design features that were included in the Microsoft Word header and footer sections will be replaced with this option.

In some cases, such as in short documents, it might be more efficient to revert the PDF back to Word format and simply make changes there, rather than completely removing and replacing content with 'Edit PDF'. Keep in mind that a file conversion will undo any remediation procedures already completed on the document. For this reason, in more complex or lengthy documents, replacing the Word headers and footers with the 'Replace Existing' feature may be a more efficient use of time as opposed to remediating the PDF again. If the 'Add New' or 'Replace Existing' options are used, refer to the Acrobat 'Update Headers & Footers' method for guidance on adding Acrobat headers and footers.

### **The Acrobat 'Update Headers & Footers' Method**

As mentioned, when a PDF is created, some headers and footers can be created automatically and are independent of Word-created headers and footers. All changes to a PDF's automatically placed headers and footers are made through the 'Update Headers & Footers' window, which is opened by selecting 'Update' in the **Edit PDF** tool's 'Header & Footer' dropdown menu.

*Features of the 'Update Header and Footer' Window Include:*

- **Font Settings** (for adjusting the font type, size and color for all Acrobat-placed headers/footers).
- **Margin Settings** (to set the margin dimensions around which the headers and footers are placed in the PDF).
- **Input Fields** (where header and footer texts are entered separately by their left, right and center positions).
- **Insert Features** (like the 'Insert Page Number' and 'Insert Date' buttons, which allows the page number or date to be placed as a dynamic field; the 'Page Number and Date Format' settings allow the user to set the appearance of these two elements and assign the starting page number).
- **Page Range Options** (which limit the specified headers and footers to apply to a specific page range. Multiple sets of headers and footers covering different ranges can be added to a PDF with this feature, allowing different sections of a document to have individualized headers).

The 'Preview' section of the 'Update Header and Footer' window shows how these elements will appear on the page. Using the 'Preview', the user can scan each page and determine if there are headers and footers added separately from the 'Update Header and Footer' menu. For example, the presence of an element shown in the left header of the 'Preview' section, despite a blank 'Left Header Text' field, will indicate that the element was previously added under a different page range or added manually. Check for any of these inconsistencies, which can be manually edited later. Finally, once basic presets have been chosen for the headers and footers, select the 'Save Settings'

option and name the current configuration. This will be useful if previous versions of the current document or other documents need to be accessed, as the user can apply these settings by simply opening the saved preset. Select 'OK' to apply the latest content to the PDF.

### **The Manual Acrobat 'Edit PDF' Method**

Under other circumstances, a header or footer may need to be manually added to a page. Manual headers and footers often create format and content discrepancies within the document and thus should be avoided when automatic alternatives are still available. However, if a unique header or footer element is needed only on a single page, it is simpler to create the element manually.

#### *To Manually Add a Header or Footer:*

1. First check the font of any surrounding headers and footers. After opening the **Edit PDF** tool, select 'Edit'. Place the cursor within the text box of a nearby header or footer. In the 'Format' section of the right-hand **Edit PDF** toolbar, note the font type, size, and color.
2. To place the header or footer element, select 'Add Text' in the top **Edit PDF** toolbar and drag a text window in its intended location on the page. Type the contents of the header or footer in the textbox and replicate the earlier noted font type, size, and color of the surrounding elements.
3. Align the text box with other header and footer elements. Open 'Edit' in the top **Edit PDF** toolbar. Hold the 'Ctrl' button to select the manually placed textbox and another header or footer. Use the 'Align' features in the 'Objects' section of the right-hand **Edit PDF** toolbar to properly align the new header or footer with the original content.

Remember that any content added with the **Edit PDF** tool will be automatically added to the tag tree. Therefore, after manually placing any headers or footers, ensure that they are found in the tag tree and set as artifacts.

### **Conclusion**

In this module, we've explored how to distinguish and manage headers and footers by their origin. In the following module, we'll cover a universal solution to organize, edit and remediate header and footer content with multiple origins.