3.7 PDF Accessibility Troubleshooting – Headers & Footers II

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Relevant Headers & Footers

The header and footer text located at the top and bottom of a page will be present in a PDF for various purposes. They may contain a document version, a response date, the individual or organizational author, the section title, the page number and so on. For multipage PDFs, particularly those spanning tens and hundreds of pages, repetitive and redundant headers and footers will undermine a document's accessibility if they are included in the reading order. Consequently, headers and footers should be approached with a strategy of minimalism.

Applying a Minimalist Strategy

Look at, for example, a book in PDF format that contains dozens of pages with an identical section name in the header. Screen readers should not announce this same section or chapter listed in the header of every new page; instead, the header should only be introduced on the first page. However, if the header's content, i.e. the section or chapter, is introduced in the body text as a *heading*, then the *header* displaying that same information becomes entirely irrelevant. All instances of the header including the first would be set as artifacts in this case. The same logic applies to other headers and footers that present the subject, author and so on. User discretion is needed to determine which of these elements should be visible to a screen reader while considering a specific goal: minimize their presence in the reading order without excluding essential information. The vast majority of header and footer elements will be artifacted as most are redundant. Thus, the removal of extraneous headers and footers from the reading order improves accessibility by greatly reducing how often a screen reader is interrupted from page to page.

Header & Footer Artifacts

Generally, unless a relevant header or footer's content is also present in the body text of the same page, the element should be introduced once in the reading order with all further instances set as artifacts. Certain header/footer content, however, detracts from the simplicity or clarity of the relevant content. These headers and footers should always be artifacted, even in their first instance.

Set the Following Header & Footer Content as Artifacts:

- **Page Numbers.** As pagination is most often in the footer section, it will be confusingly read after the content that relates to that page number. Pagination content should therefore be removed from the reading order and set as artifacts.

- **Hyperlinks.** Live links left in the header and footer sections will generate 'Tagged Annotation' failures in the **Accessibility Checker** as these elements are not assigned object reference tags. Even with an object reference tag or as an artifact, header/footer hyperlinks are problematic as they are still picked up by assistive technology Hyperlinks should therefore be removed while the remaining text content is artifacted.

- **Design Elements.** A basic understanding of artifacts will make it clear that design elements like decorative content, layout lines, etcetera, should be artifacted. This is important to check, however, because this header and footer content can sometimes be missed in the artifacting process. For example, a tagged logo on the header of each page will appear to the screen

reader as a unique image on each new page. Check repeating logos and other design elements to ensure they are artifacts.

- **Recurrent Information.** While it's already apparent that repeating headers and footers should be set as artifacts, more subtle cases of repetition can also occur. For example, if contact information is presented in the body text of an earlier page in the PDF, yet the contact info is again provided in the header or footer sections of later pages, all instances of this content in the headers or footers (including its initial occurrence) should be artifacted.

Keep in mind that, if the removal detracts from the document structure or consistency, rare exceptions should be made to include these header and footer elements in the reading order and tag tree at the discretion of the user.

A Universal Solution to Managing Headers & Footers

PDF headers and footers should be remediated through a specific order and process, while taking into account their origin and relevance in the tag tree. Reference the previous module, *PDF Accessibility Troubleshooting – Headers & Footers I* to learn how to identify and manage headers/footers added through differing methods. After examining the methods separately, we can synthesize our knowledge of these elements into one catch-all procedure.

The Universal Solution

To Manage Any Set of Headers & Footers:

1. Save the original document and then create a 2nd working version of the PDF to be periodically saved while managing the header and footer elements.

2. Test the header/footer contents in the working PDF document with the **Edit PDF** tool by deleting and manipulating them to determine their origin. For instance, the elements that disappear from the document after their fields are cleared in the 'Update Header & Footer' window have clearly been added through the automatic Adobe method, and not through manual **Edit PDF** text fields or Microsoft Word. Reference the previous module for more information. After concluding the test, do not save these changes and close the document.

3. Reload the working PDF document. Manage any manually added header or footer elements that need to be adjusted or removed before adding Acrobat-generated headers and footers. This will prevent a confusing overlap between the erroneous manual header/footer elements and what is added later.

4. If no Microsoft Word header and footer is present, select 'Update' or 'Add' from the **Edit PDF** 'Header & Footer' dropdown menu. If a Word header or footer is present, selecting 'Add' will prompt the user with two options: 'Add New' or 'Replace Existing'. Where it is appropriate to remove the existing set completely, use 'Replace Existing'. Alternatively, keep the Microsoft Word headers and footers and add additional necessary content with 'Add New'.

5. To configure a new set of headers and footers, use the 'Add (or) Update Header and Footer' option window. If a specific page range is set for the header and footer content, review the

changes page-by-page in the 'Page Preview' section. Save the current preset in case the document must be reloaded.

6. Examine all headers and footers for each page in the document viewing window. Make any final manual additions with the **Edit PDF** tool. If an automatically generated header or footer element needs to be changed on a certain page, select the element's textbox and edit the content. Keep in mind that reopening and reapplying the 'Update Header and Footer' settings will erase these changes.

7. Remediate headers and footers for accessibility. If these elements were added automatically through Word or Acrobat, they should be already artifacted. Ensure that this has occurred and then tag any relevant headers and footers.

If any confusing mistakes were made during this process, the original document can be used to start a fresh working document. The working document can be saved over the original to finalize all changes.

Conclusion

In this module, we've outlined a strategy for identifying the relevant headers and footers and how to manage these elements in any scenario. In the next module, we'll move on to troubleshooting issues for tables of contents.