# Creating Accessible PDF's Training Part 1-Meeting Recording

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3h 57m 49s

 **Kim Casey** 0:04
Some ground rules we are going to be holding questions. I'll share the agenda with you in just a minute, but we since we have such a large crowd, if you could, if you're not speaking, please. And really, unless it's a question session, please stay on mute.
We will be monitoring the chat, but since there are so many of you, we may not get to all the questions. But we will try our best. Of course, there'll be some follow up and try to figure everything out.

So today we are going to be talking about creating accessible documents.
Let me just go ahead and I'll do intros and then I'll go ahead just for those who are straggling coming in a little bit late, I'll go ahead and repeat the ground rules.

Welcome! I am Kim Casey, I'm the Director of Accessibility here at Ablr. I'm also joined by Arielle Gines and we are going to talk about how to we know you all probably have a workload of PDFs or documents that you've been tasked with making accessible so you know we are going to share our experience and our best practices and hopefully by the end of this two day webinar, you will feel more comfortable with documents.

I started this industry over 20 years ago. I didn't know what I was getting into but absolutely love accessibility because it gives me something new to learn every day and I think you'll find that a lot with documents. Is that there? There's never one doc. There's never. I mean, unless of course it's the same template. You're going to have a different experience on every document, so it's kind of a mind twisting kind of fun exercise every day. And Arielle is, I can't even say she's one of our newest additions, but I really admire the way that she went from. She joined our team not really knowing a whole lot about accessibility, and I kind of threw her in with the documents and now it's like there isn't a document that can best her so. She's kind of our resident specialist and if you know. Of you know, if anything goes wrong, I just call Arielle. She is kind of the backup, and she can figure out a way around. All right.

Again, so we are recording this session. We will be if you want. There are transcripts available. I have enabled them, and you can just enable those so you can read along as we go. We will also be holding questions and if you if it's not a question session, please stay on mute. It's going to be a very large group today, so just make sure we all can hear each other, and everything goes as smoothly as possible.
All right. So, jumping into our agenda, I'm going to do my best. I do like to talk and get really excited about these topics. I'm very passionate and so hopefully I'll stay within these time parameters. So far, I'm doing so OK, I gave myself 5 minutes for intros.

But today, we're going to talk for the first hour about getting to know your audience so that you can create accessible content. And so, a lot of times, you know, we just have to get into, you know, why are we doing this for the document? I'll spend the first hour on that.

Second hour, we'll get a 10-minute break and then the second hour will be source files. So how do we set ourselves up for success so that we have the least amount of work when we get to the last step? And then I'll talk about Microsoft Word and PowerPoint, and then I'll put in sometimes for questions I get about 10 minutes, and then we'll have another 10-minute break. I want to make sure that everybody is fresh.
This is a lot of content, so I don't want to overwhelm you. And then from 10:50, we're going to be talking about generating PDFs kind. I'll walk you through my process and how you know, I set myself up in Adobe. And then for the last hour, we'll talk about checking for and remediating issues. And so, we'll kind of walk through an example PDF and then I have 10 minutes at the end for questions.

I may go over, so I did put in 20 minutes for questions, of course. We may not have time for all of them, but we'll do our best today. Alright, so it is 5 minutes after the hour, so I'm just going to go ahead and jump right in.

So really, like I said at the beginning, no document is going to give you the same experience. So, it's important when you are starting off with accessibility that you understand your audience.

So, I'm going to be kind of peppering these tips throughout this training and the first tip that I have for you all is think about accessibility, and that may seem like really simple and yes, of course. That's why we're here. But when we think about accessibility. Sometimes it's at the end instead of at the beginning when we should be thinking about accessibility and understanding our audience.

What are the needs of our audience? You know who are the types of people?
So maybe I have somebody you know, and I'll go through the different types of disabilities, but we want to talk about who's going to be reading your content and really understand their needs.

And then I always say think about accessibility often, so you can't just think about it once you know, of course, thinking about it at the beginning is great. But then if you kind of just forget about it throughout and you just rush and start putting things in and you don't really kind of revisit that question as is this accessible?

You're going to find that at the end you're going to find issues that you may or may not have time to deal with. And so, I always say think about accessibility early, often and make sure it's top of mind and then again just to be safe. And I know that may seem a little bit paranoid. But you know, in this industry I've been doing documents all sorts of documents, electronic documents, even web pages, everything, even if you think about accessibility throughout the whole process, there's going to be a spot where you may slip up and things sneak in. Or I always have things that I always forget to do. So, it's one of those things where I'm always reminding myself, I'm doing double chips and triple checks, and I may have Arielle check it out. I may have another team member check it out. So, it's really important to be thinking, keep it top of mind all.

And so when I talk about audiences, it's really important to understand who is your audience. And so, to do that, it's kind of we'll break this down and we'll make it people. And so instead of, you know, we're talking about disability types, but then what do those disability types, what types of assistive technology do those people use?

And so the first disability type is visual and these are people ranging in disability for they can't see at all. or they can't see color, or they can see perfectly, but they can't process the visual input. So, there's a wide range of people and needs. When you talk about people with visual disabilities.

And so they may use something called a screen reader that reads everything on the screen. They may choose to invert colors. So instead of like on the slide I have dark text on a light background, they may prefer light text on a dark background and then of course magnification. So, a lot of you are probably familiar with magnifying or increasing the text size of the font that you're reading. Just because it makes it easier.
So that is another visual enhancement.

The next disability type is auditory. So, if you're creating documents this may not have a huge impact on your work. It's good to know about what those types of adaptations can be. And so, there's of course captions, transcripts, and tactile output.
So if somebody is deaf and blind, they will be using a Braille display so that it outputs what the words are in Braille. As you know, as they read through.

Mobility disabilities. So, we need to make sure that the forms, things that the interactive documents that we're creating are also accessible with a keyboard, and so that you don't have to use a mouse to click through certain items. And also, if you are using a keyboard that tends to be very difficult to use with a keyboard, so let's make sure we streamline, If it's a form. For example, let's make sure that's really easy to do.
Of course, we have the cognitive disabilities as well. And when we're developing any sort of informational or obviously forms any sort of document we want to make sure that that document is presented in a simple intuitive way and so that it's not overwhelming to, you know, there's not a big block of text for example.
There's also text reading software for people with cognitive disabilities where it'll highlight certain sections of the page so that they only kind of get bite sized pieces of the page rather than the whole thing all at once.

And then, of course, there's other and hidden disabilities. This is kind of my catch all and really my plea to everyone out there is that if you are creating some content, let's go ahead and build accessibility in so that accessibility is opt out rather than opt in. And so, we want to make sure that we're anticipating people's needs and that if somebody needs a certain, setting or something designed into the form that we've already thought about that. And so that we can make the experience seamless and as enjoyable for all users.

Alright, I'm going to go into, you know, just some general here.
Personas here and so when we talk about mobility disabilities, we are talking about people who can't use the mouse. Maybe they can't use their limbs at all.
And so there's, you know, a lot of ways that we can interact with a computer that doesn't have to do with a mouse. And so many of you may be familiar with dictate, where people speak to control their computer. But there's also other types of keyboards out there, it's I found it really interesting when I was kind of doing the research on this. There is, you know, obviously the QWERTY keyboard that we're all familiar with. It's the kind of the standard keyboard, but then there was a whole movement where they created a keyboard with an alternative layout, and they did studies on which keys are the most frequently pressed and that the result of that was the Dvorak keyboard.

There's also alphabetical touchscreen layouts for people who can't use, mice and a mouth stick so you can see in the picture here in the lower right where a gentleman is holding a stick in his mouth and he is pressing on a keyboard.

And so if you think about, sometimes, even when you're filling out a form, it's your 18 clicks. We'll think about the experience of somebody who is using, you know, their head neck and trying to press a specific key. So we want to make sure that what we're designing is as simple and intuitive as possible, and then of course in the upper corner here I have the sip and puff device and that is basically a series of you know, you either suck air in or suck air out and then it brings up a keyboard, a control pad on the keyboard screen and you can control your screen completely with this device.
And so, if you start thinking about, you know, just user experience here on the content that we're creating, let's make sure that it's as friendly as possible.

Another user persona would be somebody who may be losing their vision. They're not quite, you know, technologically advanced. This may be the first time that they've used assistive technology and so they're using magnification on whatever device they're using, and we want to make sure that when we're creating forms, when we're creating informational brochures that anyone who is accessing our documents has the same experience or equivalent experience obviously we can't always be one for one, but make sure that we create something that is just the same and gives the same amount of information as any other experience. Make sure that that works on a computer or mobile or tablet. And then we want to make sure that our designs allow people to adjust text size and as you can see in the screenshot here, sometimes we don't have that luxury because if we did, you know, make text larger, this form would go on for pages and pages. And I'd like to thank whoever sent in those samples of PDFs, I have sprinkled those throughout this training and so we'll be able to kind of really dig into examples that I'm sure you're all familiar with seeing. So, a form like this is probably something you see on a regular basis, and of course we have very small text. We have form fields everywhere, but we want to make sure that it's an accessible experience for somebody who might be using magnification.

So I'm going to break from this, PowerPoint really quickly and I just want to give you an example of what that might look like if I'm using a magnification product.
So I'm going bring up that form exactly, and then I'm going to enable magnification. So, this is just the standard windows magnification tool, but I'm going to maybe magnify up to three or 400 percent.

And you can see when you do enable magnification, what it's doing is it's creating an experience. So, if you walk into a darkroom and you're tasked with, can you find an object in that room, and all you have is a flashlight when you enable Magnification and you're looking at something on your computer. You only get to look at where the focused area is, so as you can see I am, walking around like the page here and I'm using the mouse to just kind of drag the page along, so it's kind of one of those things where if you've ever used a magnifying glass, you'll go back and forth and up and down. And so that's what I'm doing here with this form and the one thing that I really wanted to call out as when we're making forms for, you know, for thinking about people with, you know, low vision here the way that they would fill this out is they'd start here and as you can see I it's not just my computer. But yeah, because the text was so small, it's starting to get a little bit blurry. So, it may be a little bit difficult for some people to read. I have to go left to right, and I see, OK. There's radio buttons there and then I have to go back to here to read scheduled for insurance purposes and then please describe items and estimated volumes if applicable.

I'm trying to be as smooth as possible with this, but I really know people that use.
Magnification and they really fly, on all of these documents.

So, as you can see now I'm on the yes, no and then the blank input. And so it would be difficult for me. So, there for me there would be a lot of back and forth.
I'd have to go back and forth and OK. That's what they want in that.
So when we think about magnification and we're designing forms, the best advice that I can give is make sure that your questions are grouped and they're in the same kind of, I don't want to call it geographic area, but that's the only word that's coming to me. But make sure that you know you’re yes and no. So, to this question Mark, I have a question right here. And of course, I understand there's space limitations and so really we'll try to do our best for these. But we can't always come up with the optimal solution on all of these. I just wanted to show you this experience.

I'm going to go ahead and zoom back out. But really, when we look at something you know in in the way we're used to seeing it. You know, it really provides a different view here when we think about. You know what would be the experience of somebody with a disability?

And how can I make this accessible and so I wouldn't have thought twice about these, Yes, no questions because I can see the whole picture all at once.
But when that is not available to you, then it becomes a little bit more difficult.

And then of course, we have, If you've ever had the experience of hearing a screen reader, this is a technology that reads everything on the page that's there.
And so if it's not hidden, this hidden content has a lot more to do with web pages, but it also could apply with documents. I've seen cases where people put extra descriptions behind pictures that are visually essential to the message, and they'll put a hidden message behind it. And we'll talk about that in just a little bit.
So it can be a blessing and a challenge, depending on what information is available behind the scenes for a screen reader user.

So all of those visual details that again just like that form when it wasn't zoomed in, it really all made sense to us. But then once it zoomed in, it doesn't. So, for screen readers, sometimes people put hidden messages in there that have nothing to do with the content that they are reading. And so, things to keep in mind when you are creating content or creating forms to make it more digestible.
Screen readers will pause for things like periods, semicolons, and commas.
And so if you really want to drive an idea home, you can use punctuation to kind of get the screen reader to pause. Otherwise, it'll just kind of read on in one long sentence.

It will also try to pronounce acronyms, but otherwise it'll spell out the letter. So in that case it's best to just spell out the letters or the acronym first. So give you know obviously this is the standard English proper way of writing. You define your acronym first and then from then on and then from then on it will say you know if we say NCDIT. We will spell out North Carolina Department of Information Technology and then from then on, the screen reader may say nicked it or something like that because it doesn't know or, you know, it may say NCDIT you just never know what the screen reader is going to give you. Because those two are related with what we spelled out in the first place, then the screen reader user will know it moving forward. It will also announce the page title and I'm going to give you a demo of a screen reader here in just a second.

But there's a lot of background information that screen readers fill in because it gives context to all of the content that is needed, and so it may seem like way too much talking for you. But for somebody who can't see the screen, they're really thankful for all of the background information that's given. Then of course it announces headings, It announces links, it announces images, and it tries to make the content as readable as digestible as possible.

And so you know, of course we can really use headings, links and you can also read by line by word or by character. And so let's say somebody's reading your brochure and they don't know how to spell a certain word. They can go by character and figure out how to spell that word? Maybe it's a street name? Maybe it's a proper name and they just are curious what? How do you spell that? And so screen readers really are an amazing tool. But we have to know how they work so that we can use that in our benefit so that the documents that we're creating are really top notch because we thought about what the screen reader might say.

So I'm going to go ahead and play a quick video here. And make sure I'm sharing my sound. Please interrupt if you are not hearing this video, but I'm going to go ahead and play.

We are here in Ablr resources summary PDF document. I have a screen reader loaded. It's called NVDA and that stands for non-visual desktop access. I'm going to press the tab key to get into this document.

 Ablr resources summary. Adobe Acrobat Pro 32 bit, Ablr website link.
And the screen reader said Ablr website link, which is great because you can see that there's no text there, just a line drawing of a globe. Remember I said that screen readers can read invisible content? Well, here's an example. It also told me that this is a link, so if I want to go to the website, I'll just press enter here.
Now I'm going to navigate by heading by pressing the letter H Ablr graphic heading level one. Now the screen reader said Ablr graphic heading level one.
That tells me two things. The first, most important heading on the page is a graphic of Ablr. This document's about Ablr, so that makes sense.

Next, I'm going to press H two more times so that you can see how I can jump from section to section. Methodology heading level two, our services heading level 2. The screen reader said, “Methodology heading Level 2 and our services heading level 2”.
Notice how you can start to see the structure of this page. First, we had the Ablr graphic. Now we have methodology in our services as subsections.
Also notice here that there's a good amount of text between methodology and our services headings, but I was able to skip that text because I wanted to get to our services section. This saves valuable time because I don't have to read line by line and can jump to the content that interests me.

Next I will navigate by link by pressing the letter K. Testing link heading Level 3 Training link heading Level 3. The screen reader said testing link heading Level 3 and training link heading Level 3. When I pressed K twice. This gives me a quick overview of the services, and it provides links if I wanted to find out more information about these services. It also announces the links as headings, so that would be a clue to me that under each link there's more information about these services. Now I'm going to navigate by image or graphic by pressing the letter G.
RTI international, Carolina Hurricanes, ECPI university graphic so the screen Reader said RTI International, Carolina Hurricanes, ECPI University graphic, which means that these images have been labeled so that someone who cannot see will still have access to these images. Be our client’s section would be really sad if the only thing here that was announced was logo graphic or something else not descriptive.
Also notice that I have some images in the R services section. But because they don't contribute to the content, I mark these as decorative so that the screen reader skips over them. And finally, I will show you how the screen reader reads by line, word and character by pressing the arrow keys to navigate the content.

Graphic manscaped heading level 2 about USA Ablr is a mission driven disability. After pressing the down arrow, the screen reader said, Graphic manscaped.
Then I press down arrow again and it read heading level 2 about US.
Then I pressed it again and it read Ablr is a mission driven until I press the command to silence the speech.

Let's pretend here that I heard the word Ablr and I was curious how it is spelled.
I will press the right arrow here to read by character. BABLR space I S. Now, I would know that if I'm spelling abler, it's spelled a b l r.
After that quick demo you can see that with an accessible document, a screen reader user can quickly get to the different information quickly without having to spend time reading the entire document or needing to ask someone to describe what the images are because they aren't labeled.

Assistive technology are exceptional tools to help people access content.
Remember before when I was talking about innovation. There's so much that we can do to level the playing field if we just learn the rules.
All right, And that is an example of PDF that has been remediated. That is accessible that has great structure and so I'm sure you're all saying yes, that's exactly what I want to do.

So how do we make accessible content? And I have a few first steps. And again, I'm going to have tips and tricks, and all sorts of helpful tips baked in, but the first steps to making more accessible content is make sure you give yourself enough time.
So this is, and I know, nobody has time these days. But really, you're going to be thankful if you can carve out some time. So don't assume that you can do what you used to do in the same amount of time. If you are considering accessibility, at least until you get up to speed and you start building it in from the beginning.
It also starts with your content, so I'm going to talk a lot about what's called the source document. So, a lot of times I'm sure that you get PDFs, finished PDFs and nobody has any idea who created it. Where it came from, anything about it?
And so your kind of stuck with that document. But if you do have the luxury of going back to that source document, you will be able to save yourself a lot of time.
So when you are creating the source document, you want to make sure that you're intentional with your message, and So what am I trying to convey?

Try to boil it down as much as possible and to make it as straightforward as possible.
And that also helps when you create really good structure for your content.
So if you think about, how would I outline this if I had just five points to tell somebody they didn't have the whole time to listen to this entire document, what would I tell them? Those are going to be what makes the structure of your document and then. Also try to see your content from another perspective, so I showed you one example of somebody using magnification or somebody using a screen reader.
How would that look? How would your document come across a lot of times I mentioned the images in that PDF. A lot of times those images come across as file names and a lot of times those file names are a series of numbers and letters and so it's just extra chatter that we have to listen to. You know, if you were using a screen reader. Also ask questions, you know, try to involve people with disabilities. so if you know somebody who uses magnification, say, hey, what's your preference in this type of, you know, like, if I do this or this, which would be better?

You are at the starting ground, so at this point changes are really easy and they’re really fast. Nobody's fallen in love with the design of the document, and it's really easy to start. You know, building it in and making it much, much easier to do.
And then of course, you're going to start with the most common accessibility issues.

And so I kind of have an overview here. Of the most common accessibility issues that I see and kind of ways around them. some of you may already know all of this, but I do want to bring this up just because it all has to do with making sure that you are getting to the last step with the most accessible document possible.
And so the most common accessibility issues we see is number one with images. People either over under don't know how to describe them or don't understand, you know, what's important about images.

Links a lot of times we'll see a lot of ambiguous links like click here.
And so really links are you know if we are creating an electronic document, we want people to interact with the document and find the resource that we're trying to, Not advertise, But put forth. Also structuring content, we see pages with no heading structure or heading structure that goes from. If I was to read a list and it went from 6 to 2 then 3, It would be very confusing and I would wonder what was missing.
So we want to make sure our content is structured and our list or our outline goes in kind of that same 1-2 and it's a very organized structure.

Also using font choice, this is one that gets people. A lot of people tripped up because they get kind of fancy at the beginning and they want to use a really pretty font. And sometimes the assistive technologies have trouble reading the more cursive fonts. Of course people who have visual vision loss are going to have difficulty making sense of the words if they're in cursive. Same thing if somebody has a cognitive disability. There are certain fonts that really make it more difficult or much easier to read, and so we want to think about font. We want to think about the design of our document before we get too far.

Color is another one. If you come to any of my trainings are going to hear about color at least once, and probably at least 20 times so.

Color is so important we use color to make things more interesting and a lot of times we get carried away with that and we don't really think about the colors that we're using and making sure that if we're using color to create information or if we're using color on different colors on fonts it becomes really difficult to read.
So we want to make sure that we set our project up. I'm calling your documents a project. We set it up with a good color scheme.

Then of course tables. We have lots and lots of data in all of our documents.
Tables are one of the things that get the most muddled up, and so I'm going to spend some time on that as well.
So we'll start with images and with images I always. Thankfully you don't have a website, you just have documents. And unless it's a document that is mostly images, you generally have, you know, a handful, maybe a dozen images in a document.
But I always like to advocate for, you know, think of those, you know, the hoarding shows that you see on TV, where they go into the person's garage and they say, let's make piles of all of this stuff. This is the stuff you want to keep. This is the stuff that you can donate, and this is the stuff that you need to get rid of that just needs to be thrown out. And so I like to do the same thing with images, because we need to make sure that we're establishing clear lines.

What kind of image is this? Is this a keep essential image or is this you know this is just a visual image or you know and so we need to make sure. Or is this an active image? Is this a linked image? And so there's different types of images.
And So what we want to do is for every video we decide, you know why?
Why are we using this image? Is it creating essential information or is it just looking pretty? Is it a link? And so we need to create a process and so that we have something repeatable, you're going to be working with teams.

You may have two or three people working on the same document, and so if you're not all following the same process, this is going to get pretty messy pretty quickly because we find you know, 1 colleague will do one thing. They'll put in the wrong alt text and then another colleague has to go in and change it. And then they're annoyed. And then there's this friction. It just becomes a mess. So make sure that you establish like, what are we going to do with images moving forward?
Because you need to have a streamlined process. Really, we don't want accessibility getting in the way of what your work is and process really goes a long way with establishing what you can and can't do. What makes the most sense?

And so I'm going to give kind of an example here.
So what do we what do we ask when we determine what kind of image is this?
So you know what some of the questions are that we may ask?

So I have some examples here, on the screen. There's a screenshot from the NC.Gov website and they have these various tiles. You'll see this kind of layout a lot on blog posts. Where a website has a listing of all the most recent articles where there's a picture. And sometimes that picture has essential information. Sometimes it doesn't.
And then there's the article title, and then a short blurb about that article.
And so in this example here there's a hand holding a North Carolina real ID. And then, of course, the article has got your real ID yet. And so when we think about that image, it's just kind of a visual, you know, we don't just want an all text website.
And so whoever designed this? Put in this picture and it's just kind of like, uh, adding more to. I'm sorry it's duplicating, not adding more content to this and so we want to make sure that we know what types of images they are.
I also have from an example of a PDF that you all sent me. There's a page that I'm not sure if it was even intended for distribution, but I think the whole thing's an image.

So of course we also have images of text and when I talk about images of text, these are things that we want to avoid.
And so if you are creating this really complicated diagram or something like that in another program, when you copy paste that into whatever document you're creating, it creates this whole situation where it's very possible a screen reader won't pick up any of the text. It's also possible somebody who has low vision is going to have significant difficulty reading that text. Because what if their visual impairment means that they need to spread letters out so that they can read them better or what if I have an example here of black text on a blue background.

What if they can only really see, you know, yellow text on a black background?
And that's the only thing that sticks out to them there. When it's an image of text, there's no way for them to be able to modify that text at all.
And so we want to avoid those images of text altogether. And here we have in the second example I have. Do not handwrite any information. And then there's kind of an icon of a tax form, A person writing on it, and a big red X in the middle.
Like, don't do it, Don't use your hand to write. So that's just duplicating the text there.

So if this were actually not an image of text, they do not hand write, any information would be enough for a screen reader user. They wouldn't need this additional image to describe it for them, because they're not going to be handwriting any information.
Great, Check! The next one says do not use commas when entering amounts and then it shows an example of a number with a comma and then a number without a comma. And of course, we've got again got our red X and our green check mark.
And so these images are just kind of supporting what the text is already saying. And so we need to make sure that you know what we may think they're really important because you know, you may be a very visual person. I learned by seeing by doing and so, these pictures help me. They make you know, I may skip over the text that's on the page, and I may gravitate towards the images. So I'm not saying don't use images. To support what you're saying in text, but make sure the text is.
Actually conveying the majority of the message there because the text is what the assistive technologies can manipulate and make easier for different personas.
Again, I'm going to talk about patterns again and again. So make sure everything's labeled consistency consistently, so we don't want, you know, two out of three of these labeled. And then, you know, one not because when we have unlabeled images, then somebody using a screen reader is like, well, those other two were labeled. Why isn't this one? What am I missing? What important information could I possibly be missing? So make sure whatever you do is consistent.

And then make sure everybody knows you know how you agreed upon this and the and the logic behind it because you'll get better buy in if you have a team making the same document. If everybody understands the why behind what we're doing and why we're spending extra time on this.

When we do have essentials, so these are all examples of images that we don't need to create alternative text and so for all of these. You may or may not know what alternative text is. It is a description that you can put behind an image. It doesn't show up on the image, but it will show up for assistive technologies and so this is a really important piece of information. So if you have something that is visually important a lot of times when I was talking about those logos on that PDF.
If we had a section of these are our clients and then the screen reader read nothing. It would be like, well then, who are your clients? So, when we have essential information, it's really important to use that alt text strategically so that we're describing the purpose of that image so.

The purpose of those images is to tell people who our clients are. And then you'll find again with other Images that you put in If there is a purpose behind that image and if you were to take that image out, there would be a loss of information.
I have some tips here for writing good alternative text.
It is a skill. It does take developing. There may be people on your team that are better at better at it than you are. You may just have to find that dynamic.
You may just have to develop that skill in yourself, but start with short and clear and so as you heard the screen reader reading. If it said image of blah blah blah blah blah, that “image of”, are extra words that the screen reader user doesn't need. Because of course, like I said, that screen reader is going to identify it as a graphic.
You heard it saying graphic Manscaped, graphic RTI.

So we don't need to put anything in the alt text. That explains the fact that what type of element it is because the screen reader is going to do that.
So what you'd want to do is put the most important stuff up front, and then don't be too wordy because when you do get too wordy and I know documents have a lot more leeway. So there are times where when you have a PDF and all you have is what you have and you can't go back to the drawing board, you have to put in a longer than optimal alt text.

What this screen reader will do is it'll break it up into multiple announcements, so it may sound like it's multiple graphics, which can be very confusing, but it's better that than not describing the image. So a lot of times when you are creating documents, you're going to create the less you know the least, worst option? That you have, you're going to pick the best one that you could do.

Also make sure it's a quick overview of the image. Essential content we don't want to add anything extra. You know, be concise, but also make sure that it makes sense and one way to do that. My recommendation is when you are creating alternative text for images, read it alongside with the text that you're putting it next to and if it feels like it's not helping or adding to the content. Maybe you need to go back to the drawing board on that alt text. We will also be providing these slides after the fact, so I have links built into this document and you'll be able to go.

I have provided some tools. There's an alt text decision tree. You know I have image X and it is like this. So the decision tree of course works like a decision tree.
And you can kind of walk through picking, Yes, No. And it'll give you kind of the answers that you need to properly label that image and then of course the American Foundation for the Blind Alt text tips. This is also a great website, you know, like I said in the beginning, when you incorporate people with disabilities. In your design process, when you understand and you see it from their eyes, it really helps.
And so I feel like this American foundation for the blind, as alt text, very, very essential for people using screen readers and who can't see the content.
I think they have some of the best observations and helpful tips on how to create alt text. So you can check those out.

Then next we have links. So I mentioned that links are also a problem and all of the documents that you send me I did not get an example. So I use an example from an old project that we were working on and you'll see this a lot when people are writing about something. They'll talk about a program and they'll say learn more about it and click here and click here is the only thing that ends up being that link.
And So, we don't want that to be, you know, right here I have in North Carolina. It's talking about the, Homeless community of contacts, they have more information and they want you to go to that page. Well, if you're using a screen reader and if you remember back when I was navigating by link, I pressed the letter K and it was telling me, you know, the Services. It was actually naming the service, but if instead I had, you know, learn more about the training, click here and I had three click here links, then the Screen meter user would have to read through all of the content to figure out what which click here goes with which service. And so instead of saying more information can be found here, we could make a link something like, find our we could make the actual link more information about blah blah blah and then that would be very obvious. And I don't know why, Here is always you know the kind of go to for links but we want to avoid that. It becomes very difficult to figure out what it is. Then of course we have, If you know your documents is going to be only distributed electronically and not printed out because of course when we make something a link were hiding the URL and it makes it a lot more visually pleasing. It also makes the screen reader read a lot better.

Screen reader will try to read out a URL, but of course if we have print documents we want to make sure that when it's printed, you can't just hover over the text and see what the link is. So we have to have it spelled out. So I have an example here of where they actually spelled out the URL and that's perfectly fine in print materials, but if you know you have a 100% digital document, make sure that you're hiding these kind of undesirable looking URL’s because the screen reader will try to read this. It would probably say something like hmisnecceh dot com. And so it's like what?
What is that link? I just have no idea, so I wanted to kind of, give link practice.

So we have #1 we have click here For more information on related events and so if you read that whole sentence it all makes sense. There's context there, but if I'm navigating by link it will just say here link and then of course as you can see in #2 we have another here link and so both of those sound exactly the same. And we want to give our users the same experience and so. You know, we don't want to make some users have to read line by line and some users get to jump by link.
And so in this case, what we can do instead of saying click here For more information on related events, we can rewor. Now the sentence says more information on related events and the words related events has turned into the link and so that makes as, you can see, it makes the sentence shorter. It makes it really direct.
There's no, you know, ambiguity about where this link is going to take me.
It just it's related events. So if I want to know about related events. I’m going to click on that. Same thing goes for the next sentence.

So we have applications are due by August 12th and the link to oblige can be found here. And of course here, the word here is the link. We can reword that to say applications are due by August 12th. Apply now! Way more simple, you know, and from a cognitive level, just because we're thinking about accessibility and we're fixing links, we're also making the text easier to read. And so it's shorter. It's more digestible and I'm not going to struggle. I'm not going to have to read that sentence twice to figure out what I need to do to apply.
Again, we have in the third example we have visit Artsy's website and then I provide the URL. If this is going to be a 100% digital document we can just make it visit artsy's website the link and so then we eliminate the URL all together. And we make it one Nice pretty plain, concise link.
And then finally, we have you can learn more about Sally's work on her website site and that's, you know, it's a decent sentence.
It's not difficult to read, but if we want to make a link that's more obvious, maybe we'll have on this page more than one link that says website.
We can change that to say more about Sally's work. And Sally's work is a link, and by definition links take you to the web. So it's not like we need to be filling in these details and over describing try to, you know, pull your content back and make it as concise as possible.
And so and again, that's really one of the best benefits of accessibility is it makes you think about these things that end up benefiting everybody.
So it's not just we're designing for people with disabilities. It turns out that your documents going to be a lot more readable and enjoyable by all audiences.

The third most common issue is structuring content. So I have PDF here.
One of the ones that was shared actually, this was shared with me, so I have IRS disaster assistance. I've pulled it up in Adobe Acrobat Pro and I'm looking at the tag structure and when I pull out accessibility tags it says no tags are available.
So that means when a screen reader gets to it, it's going to say, well, I have to translate this page before I can even read it. I don't even know what I'm looking at.
So then the screen reader tries to do its best job of making it an accessible document. And we've seen very varied results. So sometimes it's it does an OK job if it's just a plain text and sometimes it does a terrible job.
We've seen things where entire blocks of text aren't even registered, or it'll read the bottom of the page and then jump to the second paragraph and then go to the fifth paragraph and we really want to make sure that we are structuring our content.
When we have bolded areas that those get turned into headings and really understanding, you know limitations when you're converting from one program to another.

So I know that you're all using different programs. You may be using Microsoft Word for some of your documents. You may be using in design. You may be using just straight in Adobe or Canva. A lot of people are using Canva to create visual documents. Some of these programs have better and worse conversions when we save as PDF.

So I'll talk about that when I get to the process part of this presentation.
But when we do have correct tags, so notice we've gone from, no guidance, no definition of any of the content on the page to now I have things defined as figures.
I have them defined as headings as paragraphs.
I have one list in here and so all of this coding you know it's kind of it's the same as coding a website. All of this provides essential content to people who are using assistive technologies. It also I find as a document creator, makes you think about your content and how am I breaking this up and what logical pieces does this need to be in? So I find you know structure helps assistive technologies, but it also helps us organize our ideas. And so I think it's really most important for us.

The fourth most common accessibility issue I talked about was fonts and a lot of you may have fonts that you're allowed to use and not allowed to use, and a lot of times that is based on what works, what's most accessible, and so if you already have that in place. Great! But if you don't, and your you know, you're very creative and you just you like to choose all sorts of fonts when you're working, there's, you know, obviously, the huge debate about whether serif or sans serif. So serif font,
Have tails. They have embellishments. They're usually more artistic sometimes, like New Times Roman is used in legal documents. It's just kind of like the font you use for legal documents.

Those are generally thought of as less accessible, but there are a few. So I've given some examples of both types of fonts that are easier to read for some.
So the real thing is, if somebody has a cognitive disability, they may mistake letters for each other. And so we don't want that to happen. Because it just makes it much harder to read the content.

And so if we have so for example here on Georgia, we have a tail coming off the A we have a G with you know tail on the end and kind of a squiggly instead of justice the G as we're used to reading it. But these here tend to be easier to read. And then we also have sans serif. So sans serif means without the tail. And so they're just the letter and that's it. And of course we use Century Gothic in our stuff. It's just a very umm open, very non embellished font. And so we want to just make sure things are as easy to read as possible.

Also, when your font, it's not just font, it's about styling that font as well. And so a lot of times what I know, I'm sure you all get dumped on your desk, it says here's 5 pages of content. Make it 3! And after you've worked hours and hours trying to consolidate the text, it's still 4 pages. So what do you do?

A lot of people go for let's condense the font. Let's push it all together and make it easier to fit on the page. Let's use really small text and what happens when we condense the font. Or we use small text. Is that the letters tend to start blending into each other, so I have learned more about this cool event and the R in the N looks like on first glance could be an M, the O and the L get so close that it could be D.
And it just gets really difficult. So it's, you know. Making multiple passes on the same line of text just to get the same amount of information. So condensed text you want to avoid. Bold text you can use but use it in moderation. It can cause that you know kind of the letter mushing. So here we have the R in the N and it could easily be mistaken for an M. And here the small text.

Small text, of course. Sometimes in like in that form it's necessary. Otherwise you'd have a 15-page form, and who would fill out a 15-page form. Try to avoid it. If you can, try to make your text you know 12 point or so. If you know your audience has low vision, I would bump that up 18 point and so make it make it really easy to read. Italicized, If we have italicized text a lot of times, that makes text more difficult.
So if you don't need to italicize, don't. It also isn't announced by screen readers, so you can use it, but they won't know about it. And then, of course, if you're using all caps, that makes things more difficult to read.

Aligning font so you don't want all of your fonts or your paragraphs. Long paragraphs after paragraphs to be just a perfect square like it is when you choose justified. We want these kind of line breaks where we have the inconsistency in the end. So that tracking lines is much easier.

And of course, I told you I would talk about color contrast.
I'm rushing before we get to our break, but I do want to get through this content.
So we have a color contrast and I use the colors from the MC.Gov website.
I have some tools here for you, so like I say, when you're starting your project, make sure you set up your color palette and make sure that you're using accessible combinations. So I'm not saying don't use color. I'm saying be smart about the way you use color. So I have a link here to create this color palette.

I have a screenshot and it's showing white, red and different Blues and black and then down here it'll output a table that tells you which combinations of these are compliant for regular text and so you can kind of get an idea of which colors you can use for Text in which you can't. We also have a contrast analyzer, which I'll show in just a little bit. And then the Tanaguru contrast Finder. So if you have a color that's almost there, almost Compliant. And you want to get it up to that color contrast ratio that's allowed. You can use the Tanaguru contrast Finder. So just some tools for you all to use if you want to set up your colors.

Of course, we don't want to use color just for information. As you can see in this example here, there's kind of a donut chart where half of it is green and half of it is blue, and it's indicating which are traded and which are local, but as you.
Can see when I apply grayscale. It's not clear, which is green and which is blue, and it kind of looks like the same thing. So, what we have to do is break it down and somehow couple 43% with traded and 57 with local.

All right, so now we have playing with color, the compliance rules for large text.
So I have the title here, the Carolina Beach State Park. Whenever I'm seeing colors change. So originally it was on white, but now we have it behind a body of water and so the background turns to blue.

We want to make sure that is compliant, so for large text it has to be 3 to 1. So I ran that contrast checker. The color contrast analyzer tool that I talked about. In the previous slide and it actually passes with flying colors. So for large text we have a contrast ratio 4.5 and it even passes for level AAA compliance. And so this is an OK contrast.
Let's see, I do have a hand raised, Arielle

 **Arielle Gines** 54:08
Sorry, Kim. Just before we get too far from fonts, we did have quite a few questions about it. So I just wanted to add a little clarification on when we were discussing using particular fonts.
Especially I know a lot of discussion about sans serif and serif is happening and really one of the things that we wanted to kind of point out about that, that will save you a lot of time once you get to the other side of the document so.

 **Arielle Gines** 54:33
When you're creating the original document, if you choose your fonts wisely.
It'll save you a lot of heartache when you get to the PDF side and you start remediating the document. Not only will we ensure clear readability for the user, but it will also help clear tagging structure on the other side.
And that's what's created from all of the fonts that you choose and the words these are going to create accessibility tags that we're going to remediate in the PDF. And sometimes if we are, you know, squeezing those words together or we are using.
Sheriff fonts. It'll connect those letters together and then you will end up with a version of, you know, gibberish that aren't really words that you're trying to remediate within the document.

So if we're making sure we're choosing clear, easy to read fonts that also have enough spacing in between each letters, we're not going to worry about those.
Kind of connecting to one another and creating new words, which also is what happens. You know within different users brains as well when they're trying to read these fonts. And it causes reading comprehension issues, especially with different disabilities such as maybe dyslexia or something like that. People won't be able to clearly see those letters apart from one another, and they kind of connect.

 **Kim Casey** 55:51
Great point, Arielle.
Yes, so many times we'll get to the final step of her meeting at PDF and there's really nothing we can do unless we can get the person to agree to changing that font because Adobe tagging does not properly translate what that text is and said it just becomes Gibberish. So you may play with the font, but you may end up with extra work at the end. And all of this is fine. But you know all of these recommendations we are giving to you so that you have less time on the back end.
All right, I'm going to continue on with color. I have just a couple more slides and then I will give you all a quick break to stretch your legs.

So we have color. We also have here. Now I'm talking about regular text and so we have smaller text here where we're just designing or defining where the rivers are.
So we've got Cape Fear River Snows cut, Intercoastal waterway and this also needs to have a ratio of 4.5 to 1. Just to be compliant for regular text. Regular text if you want to go to AAA like that large text example I just gave, you have to go to seven to one now. Bear in mind the maximum contrast you can get is 21 to 1, and so when we ask for 4.5 to one.

 **Kim Casey** 57:18
I'll just go ahead and bring out the tool and what I found when I took a sample of the text and a sample of the background, we had a 1.9 to 1 ratio. And So what that tells us is this is going to be very difficult for people to read.
So we've got regular text, we've got large text that's even failing large text.
So even if we made it bigger, it still wouldn't fix this color combination.
And so, of course, we probably want to stay with the blue theme, but maybe we use a dark Navy so that it pops out a little bit better.

And then finally, color is information. In this we have the legend where it's showing you the pathways for all the trails. And of course we have a orange diamond indicating the flag trap trail. An orange circle indicating the Sugarloaf Trail. So there's kind of dots and diamonds and dotted lines between just indicating where the trail is on this map.
So when we have blue circles, we have red diamonds and orange diamonds.
If we were to apply Grayscale to this, indicating somebody with a severe color deficiency, they can't see color at all, it becomes very difficult to tell orange from red, from blue, from yellow, green on the map.
And so this is one of those instances where, yeah, probably we have to go back to the drawing board and think about more creative ways using different shapes or different types of dotted lines or things like that so that we can differentiate the pathways. In a different way than color.

All right, I'm going to take a break just a little bit early.
I don't want to try to rush through tables, so I'm going to give you all a few minutes to stretch your legs and then we'll be back. We can talk about tables and then we'll continue on with the rest of the agenda. So I will be back.
Let's go. Since we're behind schedule, I'm going to give everybody 10 minutes.
We'll just, we'll just keep going. I want to make sure you all have 10 minutes, so we'll see you all here at 10 after the hour and have a great break.

All right, everyone. If you're not back, let's start making your way back. We're going to start here in just a little under a minute. Hopefully you had a nice stretch break ready to another hour of fun content. We are at 10 after I'm just going to go ahead and go forward. We have fallen behind, but I think I'll catch up. Some great interactions in the chat. Thank you Arielle for answering questions. As we go along.
It's looking great and we do have a session, a quick session for questions coming up at the end of this hour. So hopefully we'll have enough time for all of that, but let me go ahead and just jump right back in.

We're going to talk about Tables. The last item that tend to cause a lot of problems.
So if you have been working with PDFs, if you have been working with document remediation. I'm sure this has come up multiple times for you.
So just like images, there are different types of tables. There's not just one type, so we have layout tables where we're using it to arrange content.
I think somebody asked when we were designing forms. Does it make sense to do columns? Does it? And a lot of times I see forms arranged in tables.
And that can cause various problems. So we'll talk about that. Obviously, probably in tomorrow's session where I dive deep into forms.

But the first type of form or table we have is layout tables and so here I have information that looks like a table, but when I'm talking about tables and when screen readers and other assistive technologies are talking about tables, we're talking about diving into some serious data sets. So when we're just using things to a lot of times, people take away the outlines and make it not even look like a table.
So we don't even know that we're dealing with a table till we get to the last step.
And Adobe's coded this thing as a table and so we don't need this to be a table.
It just has information. So logically, if I were to read it, I would read unit name Pilot Mountain voted vote needed, yes. And so that would be a lot easier for me to read than if I were to try to read it in table format. We also have simple data tables and these are great. These are easy to do for the most part, as long as you're working with them correctly in your source document, you know and following the general guidelines for simple data tables. We're OK here. Not a whole lot of remediation happening. We get into a little bit of trouble when we have complex data tables and this'll take a little bit extra time in Adobe remediation.

So no matter how careful you are in your source document, you are always going to have some sort of remediation with tables in Adobe, this complex table data table is called such because it has merged cells and sometimes these merged cells need to be associated with multiple layers of information in this doc. And so they become obviously complex.

So data tables can be tricky, but they're essential for conveying large amounts of information of data, and so you know, there's often times there's no way around it.
So some tips to remember when we are creating tables. You know, obviously before we create a table, we're going to take a step back and say, do I really need a table?
And then if I do, then let's establish those header cells. So in a simple data table, we'll only have header cells across the top. In a more complex, we might have header cells in the top and on columns. We may have merged cells.

It gets really messy at some point, so of course if you can avoid merge cells and avoid blank cells. So this table as opposed to the data table on the previous one, we had a column page number completely blank. That can cause problems when we get to the end, so we want to avoid blank cells. And we want to keep the information simple so when we can have one table. Broken out into two or three and it makes it much easier to read.
I have an example here of a table that kind of goes on, and then there's a separator section heading and then more table. So what I would do just for simplicity sake, obviously if we don't have access to that source file, you can't break up these tables.
You just have to make do and I'll show you how to do that when we get to remediating this document. But what we're going to do is we could separate this out into one table here, make miscellaneous action items a heading and then create a whole new table, and what's great about that is if you think back to that magnification user where they're reading, you know, with did their flashlight beam, I guess I'll call it that. They're going to miss these title headings and So what they have to do is navigate all the way back up to see. Oh, yeah, that was for unit name.
So if we're creating more compact tables where the essential information is closer.
It makes it a lot easier to comprehend.

And I've actually worked with a gentleman, Western Michigan University, and he was just amazing with tables. He could take any sort of table. I mean, he was an academic, obviously. So he dealt with tables all day long. But his screen reader, he had this ability to memorize all of the columns and not really get tripped up. But the average user is going to get tripped up on data tables and so we need to make them as easy as possible for them.

So when we're when we're working with tables, we need to determine. Like I said, take a step back. Are they really a table? What is the main purpose of this information? Is there an easier way for me to present this information?
Maybe it looks great visually, but if we think about what we're going to have to do at the end when we're remediating this PDF. Or maybe it's a document that we are reproducing over and over again, so it's agenda notes and we have to use this table over and over again.

That means that somebody's time may seem like, oh its only a minute to, you know, to remove the table tags and put in paragraph tags. It's no big deal that over time becomes very tedious. And you know when there's a way that we can do it differently and make it so that they don't have to go in and make that correction, we're going to be saving time across the board. So one good question to ask yourself is if I had to summarize this information if I had just a limited amount of time to tell people, how would I summarize it?

That may give you, you know, like I would summarize this unit name Pilot Mountain
Vote needed, Yes. That's the only information I need from this whole presentation. How can that a little bit more streamlined? Because when a screenwriter gets to it, it's going to read row one, column one unit name, and then it's going to say column two vote needed and then it going to say row two, column one pilot mountain and then by then we've forgotten that it goes with unit name.
And so it's it gets very confusing. So we don't definitely don't want to make our content more confusing.

So let's see if we get there's a faster way to get this information out there.
It may look great as a table, but certainly if you don't go back in and correct it so that the reading order is better, you're going to have a lot more work and on the back end. And then just I want to reiterate tables you know sometimes they're necessary, but they will require a considerable amount of remediation and just being making sure that you're getting it right in Adobe Pro.

All right, so on to those source files. So this training will cover Microsoft Word and PowerPoint. There's obviously many more sources. A lot of the same principles apply, but each program has its specific you know ways of structuring content.
So we just wanted to give kind of a quick start, if you're using Microsoft Word or PowerPoint.

For the longest time when I first started making documents, I didn't have access to In Design. So I used a PowerPoint quite a bit to make accessible documents and there is a way to do it because what I liked about PowerPoint is it was just like InDesign where you could plug and play content and put it wherever you wanted in Word. You're kind, of more limited where you have to make it very linear.
But if we are in Word my second tip of the day is going to be consider making a template. So behind all of this is you have to turn out documents all day, every day.
And so to make that job easier for you. Set up something where you have the skeleton of the document and all you have to do is plug in content.

That skeleton, we know because we've tested it before is going to be more accessible, so as long as we're not breaking the structure of that document, so we're not taking out heading structure and we're not inputting things here and shifting things everywhere, it's going to be pretty easy to create. Accessible documents if you just follow the same template. And you'll have less clean up at the end.
Also, when you're in Microsoft Word or any creation software, try to use the built in formatting so styles can be applied consistently and formatting means that when you go to Adobe it's going to pick up those tags and it's going to create image tags instead of paragraph tags when we have an image. It's going to create heading tags, and all sorts of things, so. We're talking about saving you all time at the end of the day.

And then it also makes things repeatable. So the less we have to, like, recreate the wheel every time we make a new document, the easier it is on us as well.
You know, I know you all have very busy schedules.
Probably lots and lots of deadlines. If you want to kind of just crank these documents out, create a few templates that you really like and stick with them because it's going to be so much easier for you. I know a lot of people like to be really creative, but when we're talking about distributing information. You know, we want to make sure that we don't have to spend hours and hours making sure that you know the content is accessible.

So the source document is key. It's key to the end.
So if you have a crummy source document, you're going to have a piece of work over in Adobe Acrobat to fix up. So of course, just have your checklist. Make sure that you're kind of taking it easy on yourself. You're giving yourself enough time. Like I said at the beginning, you're choosing the right font.
You're choosing good colors. You have structure for your content. You have an idea of what you want to do and why those images are there. And of course you've structured your links. So I want to give kind of a quick demo of setting something like this up in Word.

Because a lot of people don't know they use word every day and they don't know that these functions actually exist. So I'm going to show you how to create a template. How to establish your outline how to use styles and avoiding manual formatting. So I'm going to go ahead and bring up a document.
It happens to be one of our templates, for contracts. And So what I have here,
Is I have it all structured out, so if I click on the heading it jumps me straight to the styles and it has heading level one. Now you're probably all familiar with the title heading as opposed to heading level one. Sometimes the title heading gets converted to a heading level one in Adobe and sometimes it doesn't, so it's usually best to use your heading level one.
Specifically for that, what's great about this is when you're creating a template.
So say you didn't like that color. All you have to do, let me actually do it for heading level 2.

So I have here my heading level twos and so I've already structured my content and so this is kind of how we want to approach what you can do is just have a skeleton. Where just the headings are here and then you put in this content the regular text because maybe it changes for each time you create this document.
But let's say I didn't. Didn't like that for sure, so I undo. What I'm going to do is I'm going to modify this style, and when you're working with documents that have, you know, hundreds of pages, when somebody comes back and says the color’s not good on this. If you've done this through the styles, all you have to do to fix all of the heading level twos in this entire document is. Let's go ahead and pick Navy, is do it once and then notice how all of them updated all at once.
So having a template having something that is easily repeatable is going to be much easier for you.

And so I have heading styles here I have heading level 4. It's italic probably wouldn't want it italic, So what I'm going to do is undo that. Then it's all fixed. I can also set my normal text. And so all of this is here. And so when you have this.
You have a lot less work to do when you're creating templates. Now if I wanted to just have this be a complete skeleton document. You could put things like in square brackets like enter company name here. Name enter name and then.
So there's these kind of placeholder text for your things, and that's where I was talking about.
Oops, I pressed alt instead. And so we'll have that there and then everything there.
So this can be your skeleton document I guess is what I would call it. The other thing I wanted to show here is it has what looks like a list, but when I hover on it there's none of these are activating. It's showing me this is just normal text and that is exactly what we don't want. So what we need to do here is, in this particular document, I have to make a line break because it thinks it's all one piece of document and then actually this is actually an interesting one.
So you'll find all sorts of strange things with documents as you start digging into them. This particular document generator is comes from Microsoft Dynamics and it does a really strange thing.

So what I have to do is make these lists and so now it's actually coming up as a bulleted list, and so if I were to create this as a PDF, just doing that.
Saved me hours of creating list tags and I'll show you what creating list tags mean a little bit further on when I get into my process, but all of these small things that you can do here in the source document will save you hours and hours of time.
In Adobe and so creating that template, establishing your outline using the styles. So if your style here, like I said doesn't match these paragraph formatting. You're going to want to make sure that they do. So I don't want to use if I don't want to make a heading.

Let's pretend this is a heading. If this was a heading, I wouldn't want to just increase the size and bold it and call that a heading.
Because when that gets exported, it's not going to be a heading.
So I'm going to make that normal again. And then of course, when you want. So if I wanted to start this whole section on a new page a lot of times people are tempted to enter, enter, enter, enter. Perfect. Now it's on another page.
It did a weird jump thing there once it got to the other page, which wouldn't be ideal, so I'm sure a lot of you have been in that situation where words not behaving like you want it to, but instead of pressing enter because what happens when you press Enter. Is now when I pull up the structure of the page, I'm just pressing this little paragraph tag it shows me all of these extra enter. And so when this goes to Adobe.

Guess who has to clean out these empty returns in Adobe tagging structure and when we have I've seen up to like 16 17 of them. You have to clear them all out one at a time. And so you're not going to want to do that, of course.
So what we're going to do instead of adding those extra line breaks is we are going to just use the built in formatting. We're going to insert a page break.
Now there will be a blank line that you'll have to delete this. Sometimes I just do that and that sometimes gets rid of that empty space that I have to get rid of in the tagging structure, but we're getting rid of 1 rather than.
15, 16, 17 and so it makes it a lot faster, and all of these things, you may think, oh, that's so trivial. No big deal. It's going to take me two seconds. Really, you're not going to want it to take that much time. And over time this is going to save you hours. And so we have notice how it has this little down arrow to the left.
It means these aren't actual line breaks, and so the formatting on this document is a little bit strange. I'd have to clean it up. Before I went to PDF for it.
But we have this template just so that it's much easier for us to create accessible documents at the end, because obviously you churn out a lot of proposals in a company.
And of course, don't just use highlight, don't use bold, just as the only source of information. Another thing.
Oh, go ahead, Arielle.

 **Arielle Gines** 1:26:18
I just wanted to plead the case again for using the styles and formatting within the original document. Unfortunately, sometimes we have these rare documents that like to be extra troublesome.

So when Kim was saying we could go into the PDF and remove it in the tagging structure, sometimes strange things happen.
And it might just completely get rid of, for example, those line breaks and change.
The formatting of your document all strange, so you just never quite know what's going to happen.

And once you get into the PDF accessibility with the tagging structure. So the more we can get ahead of things in the original document, we can avoid these odd things popping up later on.

 **Kim Casey** 1:27:02
We are very superstitious when it comes to getting to the last step there because if you do it right, it just slides right through. If not, you've got hours of, you know, hopefully you're not banging your head against the wall, but it gets it gets really, I mean. Sometimes Arielle and I have to pass the same document between the two of us because it does one thing in my Adobe and a different thing in hers.
So the less we can anger the Adobe, the better here.

 **Arielle Gines** 1:27:29
Yes.

 **Kim Casey** 1:27:32
Thank you, Arielle.
And I'm sure I think there was a question about charts and graphs. And like Arielle said, if like ideally we want to put that information in text because not everybody appreciates graphics.

Same with You know, not everybody appreciates text. So some people will prefer that graphic. And so having both isn't terrible as long as it fits in your design.
What we can do here is if we have a simple smart art. I have a bubble that says accessibility and a bubble that says usability and a plus sign between the two of them and then the output's awesome. So when we have these smart arts, this is a known bug in Word. It will make a quite a mess of the tagging structure, So what it likes to do is to individually tag each one of these.

So we'll have a decorative image of a circle. We'll have text. We'll have a decorative image of a plus sign. We'll have a decorative image of another circle 3 circles.
Let's just get there fast text and then an arrow and so as you can imagine, that's a huge mess. And sometimes it's even more than that.
Sometimes it breaks it up into multiple things. If you have an outline on your circles, then it adds another tagging structure. So what I do for that is I will create a graphic. So what I do is I copy the whole thing. You just select all copy and then when you paste it back you're going to paste it as an image rather than as your SmartArt.
So the thing with that is of course you're kind of at the final stage at that point. So make sure you have your colors in line. Make sure you're not going be making any changes to that smart art, because once you paste the bag as an image, there's no editing it.And then you may find out later on, oh gosh, I wanted to turn this purple into an orange. Can't do it. You have to start all over making this graphic all over again, and of course this one wouldn't take me too long, but. I'm sure you're all creating graphics that are way more complex than this.
And yes, it would be a big deal.
So before you do this process, make sure you like it, and then we're going to create decent alt text for it.
And when we are creating these graphics again, keep in mind that color contrast. So you know if you do have that visual learner who has low vision, they're still going to be able to use it even though they can't modify the image with their magnification, or with their text spacing or whatever they need to apply to it.
So let's just make sure it's as readable as possible. If we are creating these smart arts and graphs.

And then I have for you all again, I'll reiterate, we are distributing this PowerPoint, so you'll have access to all the links. I wanted to provide you some checklists, so make sure for Microsoft Word, make sure your file name is descriptive.
A lot of the files I got and I don't know if you deal with this on a daily basis dealing with, you know, a lot of the files that were sent over to me where letter and number series they weren't actually what is the purpose of this document. And when you have a whole folder full of, numbers and letters.
It's cognitively you have to remember what that for what file name goes with which document. So if you do have a file name that's descriptive, let me go ahead and show you what my folder of it'll show. Yeah, so this is what my folder looks like of some of the documents that were sent over.
So the Carolina Beach State Park map, that's great.
I knew exactly what I was getting into when I opened that one.
BC-786 sure if that's your job every day, you know. But if you download this file on your computer and you're just a consumer of this document, you're not going to know what you're opening. And then you might even go where was that document?
And you'll never be able to find it. So if you can make that file name is descriptive. Make sure your headings are formatted in the styles pane. Not just by using bold. The one thing I didn't show you is that when you have a great structure for your document, you're going to be able to see it here, in the I'm sorry, in the view panel.
So I'm just clicking on the view in the ribbon up here in Microsoft Word, and I click on the Navigation Pane. I have my proposal as my heading level one.
I have company name as a heading Level 2 estimate, purpose, methodology, investment. Those are all heading level twos.
So here in Word, if I wanted to jump to any of these sections, let's do this.
I can easily do that and so that same structure is what we give to our screen reader users if they want to jump to a section, they can. And it's really easy.

So This is why you know heading structure is super important.

List columns, indenting, line space, page breaks are created with the built in paragraph formatting, so I did talk about that. We want to make sure we're not just saying, oh, I want billing contact to go on the next page. This is what I'm going to do.
I think it's doing a funny thing because this is coded as a heading and headings don't like to be on a page by themselves. But instead of doing that instead of just doing blind break, we're going to just go ahead and insert a page break. We can insert a section. We can do all sorts of things that won't make the tagging structure go crazy.
Check all your alt text for your images when you're in Microsoft Word.
Let's see. This one does have an image at the top. All you have to do is right click the image and select view alt text and it says Ablr logo. Great! If you want to get more descriptive, you can. Most people don't really care what the logo looks like for the you know for the purpose of this document.
They probably wouldn't care, so I probably wouldn't describe it, but I do want to let them know that they're not missing out on something.
It also duplicates this text, so I could just as easily market decorative.
And it wouldn't read, but it would say Ablr here. So are we missing any content? Probably not.

Check the text color. One thing that Microsoft won't do it kind of sets up sometimes a warning when you run the automated checker, but not all the time. So what you want to make sure is that you're kind of eyeballing it. When you start thinking about color contrast you may look sideways at this color, and that's perfectly normal, so you'll want to double check that this is dark enough orange. And then everything else here is black and dark Navy. So we know we're good.

You check links. Sometimes links get to be a really funny color.
So just kind of scan your document, make sure all your text color is looking good.
And then make sure your links are descriptive.
Make sure no essential information is contained in the header and footer. So if I wanted to put the Ablr logo and the date in here, make sure that at least once on this document the date is in text a lot of times when you take documents out of
Word and you put them into PDFs that header information or footer information, or even watermarks get ignored because they're considered as decorative. And a lot of times they are in documents a lot of times when you have, let's open up the another sample document that I had, the agenda.
If this were to repeat on every single page, it would not be essential information for every single page.

And so it's OK. We may want to announce it the first time it appears, but we don't want to announce it every time it appears. So if that makes sense.
But just be careful because a lot of people put important information in the header and then when you go to Adobe, I'm sure Arielle's going to smile now. You can't pull it out because it's just considered from Adobe as artifact.
It's not even information she can pull forward to put it in a tag to make it discoverable.

So if there is that question, don't put it in the header. When you are making data tables, don't make them a picture please. Let them be tables. I know it's challenging or tempting. To just take a picture of a table and plop it into a document.
But it's going to be a readability nightmare. There's going to be no way for people to be able to get to it. And images objects and text boxes are in line with the text.
So for Microsoft Word, you don't want to do the whole stacking because the reading order gets really funky really fast.
And make sure you code in support for multimedia files if you have them and run your accessibility checker. So this would be last step on your on your checklist.

Here so and I always put the accessibility checker the automated accessibility checker as last because it's that last step. Let me just double check my work, because the idea is that you're going to be creating this content with accessibility from the beginning and so when you get to the end, maybe you have 1,2,3 issues. No big deal, but a lot of times, if you're not thinking about accessibility, the automated checker won't even catch the issues that are there. And then you'll find yourself in Adobe with errors.
And there'll be no clear way to figure out what's going on and why it's happening.
Because the accessibility checker didn't call it. So what you can do.

I actually have the accessibility tag here. We don't have to do that, but you can also go to review and check accessibility. So if you just click this icon here, it'll go ahead and bring up another area here. So it just looks good. No issues found.
So notice here too in Word when you are working through documents, you can do alt text and accessibility. You can have these things all running at the same time, so when you're doing your final checks at the end of your document, you can, you know, a lot of times it'll say no issues and this may not be labeled. Or, This may be labeled nonsense. And that's not how you spell it, but.
Call an error, so if I go back to my accessibility checker, you're doing wonderful.
So double check your images. So even if it is telling you there's no issue. So this is an example of you ran the accessibility checker. You have a false sense of everything's perfect in your document. We do have to run those manual checks.
Make sure we're not putting in nonsense. So there's that. So there's your accessibility checker for word.

This is a really quick overview, but I do want to give you some pointers.
Just moving forward and this is all moving forward, of course if you don't have those source documents, we'll have to dig in and do PDF remediation.

Same thing with PowerPoint. We're going to want to create a template.
Let me go ahead and go out of presenter mode here. You can do the same thing.
So when you do have your templates set up, you can have them. You'll have them here. So I have an Ablr PowerPoint template, but you can also use these if you see one you like. You can pull that up. Let's not do that. Actually, let me pull up.
Well, let me just go back to this one. So here what I have is. This is a template and I've saved myself a lot of time because all I have to do is put in the slide content and then if I want to use a new layout, I have all of my pre defined already accessible styles and so as you can see that will really save you a lot of time.
If you're using your templates, if you want to when you're setting up.
Let's do this when you're setting up your template and, say, maybe you picked one from the generic list. Or maybe you have one. What you can do is this Ablr logo is not part of the slide.
It's actually part of the slide design and so you can get back to this if you say I wanted to make the logo bigger or I wanted to put it in a different corner.
You can go to the slide master and this is where you can get to that.
I've also marked it decorative because I don't want to overwhelm people with the Ablr logo 100 times over and over again.
I can also here. I'll show you, here mark this as there's no alt text on it.
Here we've got this marked as decorative, so you can create your own styles and then the background.
This won't come into any of the tagging structure, so you won't have to delete the fact that there's a rectangle there.
So if we didn't make this part of our template, we'd have to delete the rectangle that we put on the slide.
So all of this has to do with saving you time at the end of the day.
All of these rectangles, rectangles would be tagged by PDF, in Adobe.
And so if it's part of your slide master, then you're good to go.
And you don't have to do any of this extra stuff when you go to create your PowerPoint.
Again, use the styles on here. Of course I have a numbered list, and of course this is highlighted, so you want to make sure that we are using those so that when this is pulled out to a presentation PDF that we have these styles already in, so we want to make sure we have a slide title. That's very important and that we're defining lists.
Unfortunately, you can't do headings in here, so when you do export a PowerPoint, you do have to establish your headings as the slide titles and then of course here, just like we did in Word, you just right click any image and I mark this as decorative because am talking about everywhere you find all the templates on the home panel.
And then of course, you want to. There's one extra step in PowerPoint.
You want to check your slide order. Your order of reading and so let's go ahead and review. Check accessibility. We can pull up the reading order page, so I just selected the drop down here and check accessibility brings up that accessibility wizard that I showed you earlier. Alt text brings up the alt text window. That's visible right now on the right side of my screen. In the reading order pane is something that's very important to make sure that you have right.
Because if you don't have this structured in the correct order, so let's say the page number somehow got to be the first item in this list when the screen reader comes to the slide, it's going to read 39, then it's going to read the title, then its going to read the content and so we want to make sure that reading order on this is the same as we've intended it to be. So I may go through multiples.
So we've got that. We've got that. We've got a decorative image that it's not going to announce, that's not checked.
And then we have the page number. If I wanted to, I could make this page number decorative as well because, like I said, screen readers announced the page number as the slides change. So you can do that. But here's your reading order. You're just going to want to go through each slide and quickly make sure each one of these is reading in the order that you wanted it to.
Same thing goes for Google Sheets. If you're using that, it has the same idea of reading order except for you can check that you just tab from element to element. So you click on the slide and then you'll tab and it'll take you like this tab and tab.
And that's how you can verify the tab reading order.
Alright, let me go back to.
I've given away my presentation here. I'm jumping all over the place, all right.
I also gave you a checklist. So again, filename's important.
So we know what we're opening before we open it. When you have a whole file full of tons of documents, having that descriptive file name is really helpful.
Check the reading order on all the slides.
Check the alt text for all of the images. Adobe Microsoft really hasn't got on they they're using AI and other things, but the AI in the Microsoft suite isn't great yet.
And so it makes really crazy suggestions for what your images are so technically.
Your PowerPoint may be accessible, but your alt text may be complete ridiculous gibberish, and so you want to make sure you're checking those to make sure.
Also, make sure you're using color contrast. Good contrasting fonts so that people can see your presentation.
And then links are descriptive again.
No pictures of data tables again.
And support for media files and run your accessibility checker.
So let me go out of accessibility mode. I can run my accessibility checker. I'm going to just check.
And it says so, the great thing here is I can fix them here. So shapes can be marked as decorative, so it's giving me. It's getting smarter and smarter every day, which is great, but we want to go ahead and review these. So it's going to say this one's marked. So what I did is to hide things on this slide. I made this little white box to cover up the text that was still there. So what I can do in this case? I'll go to the alt text. I'll mark it as decorative, then I'll go back to the accessibility checker and we'll go back. Make your document inclusive. So it's giving me I've got duplicate slide titles, It doesn't like that. I have multiple slide titles that say quick break.
What I can do is click break one quick break 2 and that would help out.
So this is probably our second break. Whoops. And approve, there we go.
Then I have reading order. So like I said, I must not have checked my reading order on all of the slides. So I have to go through and justice double check all of them on this particular one. It wants me to put the title first, but I've put the logo first, so sometimes you argue with the technology, but you don't necessarily have to fix that.
So now it's gone from 10 to 9 reading order issues, so sometimes it's something little. It's no big deal, especially if that logo's, decorative. We don't have to worry about it, but just make sure you check your reading order.
All right. Let me get back to where we were. Our checklist. Alright.
And of course, check accessibility in your source file. So use your built in accessibility checker as I showed you for both PowerPoint and Word, Excel has one, even your outlook has one.
So I know you're also probably sending hundreds of emails if your e-mail has anything fancy in it other than text, run it and you may be surprised that maybe you forgot to tag a image or something, or make it decorative.
You're going to find as you go through this, you're going to have your common, usual suspects of issues that you tend to introduce and you don't want to.

Make sure you create a checklist for that.

You can check your work with a keyboard. So if you're creating a form you can tab through that form. Let me show you what that looks like.
Let me make this a little bit smaller so I can access the rest of my programs in Windows switch.
Here's a form if I want to see if my form is at all accessible, I can just press tab through the form fields and make sure that I get to all those form fields.
This is usually a first step when I get to Adobe to see if these form fields are even correctly ordered and in tab order. So far so good.
Whoever made this document put a lot of work into it because it's not an easy document. One thing I will say is radio buttons, only the first item gets focused.
Whereas check boxes because you can check more than one or all of them. If you wanted to check a different radio button here you just use your aerial arrow keys.
I'm not going to do that because it'll go ahead and select it, and then I have to clear out the form and all that fun stuff.
So a simple test with your keyboard is just tabbing through your document and notice it looks like I skipped from authorized agent to here. This may be expected behavior. Maybe I have to check this or this to get to those boxes. I'm just not sure.
But you, as the document creator, know what's expected.
And so anything that's unexpected see it just jumped from note up there to there.
So we've got some reading order issues there.
Focus order issues, so that's a quick, you know, like whoops. OK, now I need to go back and make these changes.
You're going to want to do this before you put in any significant amount of time in checking that tagging structure.
You just want to tab through your forms with a with a keyboard to see what's going on.
And then of course you can check with the screen reader. I'm going to have a little bit on that tomorrow, but it's a very advanced skill.
And one thing that we do as sighted people as we fill in the sighed details.
And so we don't actually see the problems that are there. So we don't actually see from the point of view of somebody who uses a screen reader all the time, there is an option to make your screen black and just use the screen reader.
But I am still not brave enough to do that because I'm afraid I won't be able to turn it back on.
But I do my best to block out any visual cues that I get so that my screen reader reviews are helpful.
We do have a team of people who use screen readers on a regular basis and have no vision. So they are the best people to ask when it comes to making sure your accessible.
And then of course, checking existing documents. Again, looks like a duplicate slide.
I have all sorts of resources for you all this is going to be a dig in process.
You're going to have all sorts of questions. There's going to be, I'm sure, I've spurred a lot of information. I saw the chat when I was on the 1st break and people were going nuts. So there's a lot of stuff I'm covering. There's a lot of stuff, like I said 20 years ago, I didn't see myself here. But I'm here and I'm still learning something new every day.
And so, you know, there's it's just unending. And then because you know, everybody's so different, you know, you're going to come across a different person, a different need, a different situation almost every day.
And so you may feel like creating documents is a really monotonous task, but it's going to be something different every day. And having the right resources in your in your back pocket are going to help you through. You know, like the really intricate issues of like, should I do this or this or what's better?
And so there's all sorts of how to meet web content accessibility guidelines.
There's a quick reference link here for you. There's also Microsoft has a lot of support documents on how to make your documents accessible, creating slides. You can find all sorts of free resources as well, so if you want to dig into anything that I've kind of just scratched the surface on, of course.
I'm happy to do additional training but If you want to go on your own, there's all sorts of links here. The section 508.Gov also has a great series on creating accessible documents, and then I have a link here for the screen reader download. I would recommend not downloading the screen reader unless you know what you're doing.

We've had a lot of people be very ambitious and say I'm going to learn screen reader today and they load it and without knowing how to unload it and it doesn't turn itself off even if you restart your computer, you have to know how to turn it off.
I'd be happy to show you that tomorrow. So at least hold off till tomorrow before you start whipping out the screen reader.

And I'm back on time. So does anybody have?
Call out some of the questions that could use a little bit of discussion here.

 **Arielle Gines** 1:51:04
We did have quite a few questions about Alt text.

 **Kim Casey** 1:51:07
OK.
Ha, yes, I could spend a whole hour on alt text.
What? What specifically are we asking?

 **Arielle Gines** 1:51:18
I think the main point of this is going to be a lot of times you may be duplicating the information, especially if again back to those diagrams and charts. As well as making sure that that alt text is going to be relevant to the image and as brief as possible. So we don't worry about that screen when you're getting cut off.
But I did see somebody just raise their hand as well.

 **Kim Casey** 1:51:46
I saw a clapping.
I don't know if that was the same.

 **Arielle Gines** 1:51:52
But yes, and then of course programs.
Which allow you to use alternative text and just about every program.
At this point is going to give you the option to add alternative text.
Some will let you mark them as decorative as well, but that is, you know, dependent on the platform.
But I think just about every platform now allows you to add that alternative text in there. **Kim Casey** 1:52:20
I did mention Canva.

 **Arielle Gines** 1:52:20
I know we had some questions about different programs.

 **Kim Casey** 1:52:23
I don't know if anyone's using Canva.
They recently got a lot of heat for being not accessible.
And maybe a year ago I exported one of the projects that a coworker was working on and it came out with zero tags, so it came out with a blank slate.
So they're working on accessibility. I think at this point, I don't think they have the option to put in alt text. But of course that's something you can add pretty easily on the back end when you get to Adobe.

 **Arielle Gines** 1:52:54
In Canva when you export, you also have to select the option for tags, otherwise it won't automatically export it with those accessibility tags. You need to make that selection in the export settings.

 **Kim Casey** 1:53:07
Yes, that's actually going to be part of my process presentation for the third hour here because that's a very good point, depending on how you export or convert your document to PDF, you will have a different experience in Adobe.

 **Kim Casey** 1:53:23
So there's a very strict process for all programs. Microsoft has its way InDesign has its way. And so if you don't follow that, you're all of your wonderful work, especially in InDesign. If you don't export in the right way, all of your accessibility work and creating structure and labeling things is going to be wiped and so you might as well just start all over again, which is not something I advocate.

 **Arielle Gines** 1:53:46
And then we also had another question about naming conventions.
They were asking if we should use an under score or a hyphen to connect words.

 **Kim Casey** 1:53:56
That maybe. Yes. So as far as like file names, I think is what we're talking about.

 **Arielle Gines** 1:54:03
Correct. Yes, sorry.

 **Kim Casey** 1:54:05
That's OK. I think it used to be a requirement that you had to have an under score to have it read correctly, but now I'm pretty relaxed about it and it seems to have OK results. If you're more comfortable, I would do the under score or dash, I don't think.
The screen reader reads. Either it just reads the words as they're intended.
So you can do no dash, no under score. If your system requires it, then under score or dash seem to have the same results as far as how the screen reader announces them.

 **Arielle Gines** 1:54:38
Perfect. Then we have a question about do you have any tips for images that have alt text and captioning?
So for this one, I'm assuming you're referencing like the caption below the image, like a little. For example, we see it a lot with photo credits.
If you want to clarify that one, but of course we always like seeing a caption below the image just because not everybody has access to the alt text.
Screen readers are going to be able to access whatever alt text there is, but there is such a wide range when we're talking about vision loss and a lot of times people may not have reached the point yet to where they are utilizing a screen reader.
So of course, having that caption would be helpful.

 **Kim Casey** 1:55:24
Yeah, I always feel like if it's important enough and you spend enough time on the alt text, I would sub out alt text with captions.
So if you do have a caption, you can mark it as decorative so you don't have double.
You don't have the alt text and the caption because the screen reader will read the caption, It's text on the screen.

 **Arielle Gines** 1:55:42
And then we have in the screen reader example it says methodology heading Level 3 and training heading Level 3.
Do we need to include this somehow in our setup or does the screen reader add the heading type automatically?
That is a great question.

 **Kim Casey** 1:55:59
It does. And that's the great thing about it.
So let me pull up. I didn't grab any. OK, so here in the tagging structure, if this, let's find out where it is, I'm going to, OK.
Here it is perfect. If this is marked as an H1.
The screen reader will announce it as heading level one.
So all we have to do is make sure on the back end and same thing goes in Word.
If, go back to my structure. This is marked as a heading level one. The screen reader will read it as a heading level one.
What's really great about word is if you're distributing word documents, you probably aren't. But maybe for colleagues, they can turn on read only mode and navigate it just like it's a web page. And so it makes navigation really easy.
So all of this is built in images because it's coded as an image. We put this in using the image insert. And so just by default in the coding in the background, it'll either come up as an image or, as you saw in the, let's see if there's any.
Probably one here. Pull up this tagging structure.
Oh, we have no tags available.
I'll I have to, I have versions of it tagged and versions of it not tagged.
Let's see this one. Does this have any figures? This is a figure.

And it thinks it's a span. It's not quite sure what it is, so we have some documents that are being problematic, but we will as long as these tags are in line.
Yes, same thing with lists.
We don't have to do anything for them, and that's the cool thing about screen readers is that it picks up on that formatting. That's why it's so important to establish it.

 **Arielle Gines** 1:57:43
Yes, and it'll already add that tagging structure in there for you.
So it'll say H1 or paragraph, or if it's an image, a list, the list ones are imperative.
It will save you so much time when you are remediating your document. If you use the list formatting in Microsoft Word, it'll generate that tagging structure for you in the PDF because lists are quite extensive and tables.

 **Kim Casey** 1:58:01
Yep.

 **Arielle Gines** 1:58:08
When you are remediating the document in PDF.
So if you are creating those within the original Word document.
It's going to generate those tags for you, and you won't have to do the plentiful tags associated for that to be conveyed to the screen reader later.

 **Kim Casey** 1:58:24
Here's a list that I was talking about that's not coded as a list, so just the simple select all make list is going to save you. I would say what? 5 minutes, Arielle, per list.

 **Arielle Gines** 1:58:38
Oh, sometimes more than that, especially depending on the list. If you're getting into a long one, you're just constantly clicking to add those additional tags.
And sometimes, depending on how that list was structured, you might have to really get in there and break it up in making sure that those words end up in the right tag because they might combined all into one.

 **Kim Casey** 1:59:00
Let me just show you here.
So this tiny little tag of list has all of this behind it.
So we've got list item, list label, list body.

 **Kim Casey** 1:59:11
So you can imagine having to do this manually because Adobe doesn't let you just do again.
You know the control with Y if you use keyboard shortcuts. It lets you repeat the last action. Adobe doesn't do that, so you have to right click, click new tag, put in the new tag. And then do it every single time. For each one of these tags.

 **Arielle Gines** 1:59:32
And then you have to pull in the text associated to those.
So if you can make it a list to begin with, it's going to do all that for you when you convert it into a PDF and save you a lot of time.

 **Kim Casey** 1:59:35
Yes.

 **Arielle Gines** 1:59:42
I did notice somebody was asking about the captions. The caption should be turned on for you.
You just need to enable them from your side as well. If they're not populating.
And then yes, we will send the transcript along with the recording as well.
But you should be seeing captions if you have them enabled on your end as well.

 **Kim Casey** 1:59:59
Exactly.
I will put instructions on how to enable those transcripts in the chat as well, just so we have a verbal.

 **Arielle Gines** 2:00:03
Please let us know if that's not working.
Yep. So you could do that during break if it's and let us know if that's not populating for you.

 **Kim Casey** 2:00:17
All right. And Speaking of breaks, you all have one. Enjoy.
Stretch your legs. Get something to drink. Take care of yourselves and we'll be back in 10 minutes.

Alright everyone, we have just about another minute. So wrap up what you're doing.
We'll be back in just a minute. If you are not speaking, go ahead and put yourself on mute. Make sure there's no background noise.
It's really just flying by. Hope you guys are all holding on for dear life there.
So glad to have you all here.

All right, it looks like we're at 10 after I'm going to go ahead and jump back in. This may be the part that Spurs the most questions. I want to make sure we have enough time for it. We're going to go into my process of generating a PDF file.
And so we kind of hinted before the break about having a very specific process for exporting PDF files. So if you don't follow this, it's at your own peril.

So of course I'm going to reiterate, start with an accessible source file accessibility at the start saves you time. There'll always be some work, so you can do the best work possible, but you will definitely minimize your work, especially in that example with the lists where you know who wants to call up, it's probably like 40 tags per list.
It's really insane. So, Umm OK.
So we first, we've created our Word document or whatever source document that we have, we're going to and the process is the same for all Microsoft documents.
And so you're going to go to the file menu, you're going to select file menu, then you're going to select, save a copy, and then instead of and, you're going to choose where you want it saved, of course. And then instead of just using the save as Adobe.
PDF. You're going to do the save as a copy and then select PDF from the save as type list. I'm going to show you what that looks like here really quickly, just because it's very specific.
So I've already done my accessibility. I've worked through all of those issues. I've checked my alt text. I'm going to close down navigation.
I like the structure of my page and you'll notice it really off the bat if your heading structures are all over the place because it looks something like that when your heading structures aren't correct. So I'm going to go to the file menu. And I'm going to select save a copy, do not select save as an Adobe PDF. I don't know why this doesn't work very well, but it doesn't. So for now save a copy and then I'm going to use this drop down and I'm going to select PDF and of course I wanted to save in the training folder with my PDF samples and so that's all I have to do. And then I can save it there.

But if you don't do this, then it won't, I think I actually have. Let's go ahead and do it.
I already have a file. I also, I'll just go ahead and replace it. And then now if I go to that file, let's go ahead and open it. Show you what that looks like. Form example. And you can enable editing. But now I have my tag structure. I have a paragraph tag, so sometimes that can't be avoided. I need to artifact it. That's fine. Then I can delete my empty tag. I start with my H1. Remember we made this decorative, so there is no figure tag here. It's not going to recognize it if I want to pull it back in, I can't. And so that's another thing with word. And if you're marking things decorative, make sure you really want them to be decorative, because sometimes you can't pull them back in. And that's where I was talking about the header and footer. And watermarking, sometimes you can't pull it back in. So you do have to create kind of on the back end tags that pull it back in, even though that's, you know, has varied results. So then I have, you know, I have another. I have a line break here. I'll artifact it.

So really, if I hadn't put in all of this effort, if I had made those enters, I would have had, you know, probably 25 paragraph tags that I need to delete right now. So I'm saving myself time. And I just have one to delete. Notice this one has 2 heading level twos. I would probably turn this one to just a paragraph text because that is not what this document is about. And then I have my heading level one being the proposal.
So you can see I've already got a good way done. I've got my list created out.
It looks like it's, here's my list and everything is good to go and I have all my list structure. And everything is nicely placed where it's supposed to be.
So let me go down the document farther and let's see if we can go to another place where it has a list that's not a list. So this is all in this entire thing is in a paragraph.
I did not fix this, So what I would have to do then? So this whole thing is 1 block of text, so you can see how much time I'd save myself if I just took the time to make this an actual list. So that's kind of the skinny. So if I do, if it had been correctly remediated from Microsoft, I showed you a bad example. But if you do the save as PDF then you'll be good to go. Not, I'm sorry, Not save as PDF, save as a copy and then select PDF.
All right, Arielle.

 **Arielle Gines** 2:14:15
I just wanted to mention the difference between the save as an Adobe PDF versus the save as copy that Kim was mentioning because. We do have some questions in the chat about that.

Yes, you can do the save as an Adobe PDF, but what we have found is it doesn't make the best accessible tagging structure when we do that. Unfortunately it can, It tends to like to like a runaway train a little bit versus when we. Just put Kim demoed here with the save a copy and changing it as PDF there.
It tends to stay truer to that structure that you created in a Microsoft Word.
So those headings and lists and all of those tags tend to convert better than when you use the save as an Adobe PDF.

 **Kim Casey** 2:14:59
Like I said, we tend to be a little superstitious when it comes to Adobe just because we've been stung so many times.
So we found what works better based on, you know, hundreds of documents, and we just stick to it. And when we find out when someone tells us authoritatively that you can use save as PDF, we'll start doing that.
But for now, we found much better results with this workflow.

 **Arielle Gines** 2:15:22
Yes, this is. This is just our recommendations based on all of the errors we've seen throughout the years.

 **Kim Casey** 2:15:28
Yep, documents are slippery fellows.
So we want to make sure we keep it under control.
This is a very you have to be very structured in your document creation to make sure that things run smoothly.
It's kind of like planning of an event.
It's the same amount of making sure all of the loose ends match up.

 **Arielle Gines** 2:15:48
Same with the print we've had somebody mention about print PDF when you do that, it tends to make it as an image instead of a document.
So then you kind of have to go backwards.
Use OCR additional steps to try to create that original document and then again you lose all of those styles that we did within the word. So the heading the lists, all those options when you do it that way.

 **Kim Casey** 2:16:13
So if you aren't going to do any accessibility modifications in Microsoft, that's fine.
Export it however you want, but if you have put in the work, this workflow will make sure all of that work translates out to Adobe PDF or Acrobat.
All right, so we converted.

So now you have this PDF and your Step 2 is determine the best course of action.
So you may have access to the source file if you find that your source your PDF is just a mess and you do have the luxury of going back to that source file, go.
That's probably your best step. If you don't and you have.
Let's say you have a PDF dropped on your desk and it has no tags, so you can either auto tag it. Or manually tag it. And it'll depend on the document.

I can't say here when we're getting to this, we're getting kind of in a gray area.
I can't say one option's better than the rest. You'll have to make that judgment once you dig into the document. Auto tagging and using the make accessible tool actually, make accessible tool generally has the best results and then followed by auto tagging and then followed by manual tagging. I would use manually tagging on a document that was really simple that I thought the auto tagging was over complicating. So if you auto tag and you're like, this is just a mess. I could easily tag this in like 5 minutes if I didn't have to clear out all of this extra tagging, then feel free, delete those and manually tag it. So what you're going to be doing.
Every time you get a new PDF, you're going to be kind of triaging. Where do I put this? How do I get through this as efficiently as possible? And so you may find on one document this works on another this works and some days. The same document, one thing works and then the next day it doesn't work.

So you know and like I said, Arielle sometimes will pass back and forth her Adobe does something different than my Adobe. So we just don't know what we're getting. And so we you have to be very flexible and ready to move with whatever comes your way because the documents are going to do unexpected things and it's best, you know, and that's the whole reason why I introduced this presentation with.
Know your audience, because then at the end of the day, your decision's going to depend on how well are the people that I'm sending this document to going to be able to read this document?

And then of course, if it's just a total mess, I've had a lot of clients just decide, hey, there's no reason this has to be PDF. We could make this a web page, so I'm not distributing this. I'm not printing it out. I have no. It's not being distributed other than it's a download off of our website that's usually PDF. That's a good candidate for making it into a web page. It also helps if you make it a web page. We can make that accessible and then it's much easier to update the content.

Again, because we have those templates, so you have to fit your content into those templates when it is a web page, so that could cut out a significant amount of steps if it's your constantly updating, I would say and let's say the PDF takes you 20 minutes to remediate each because you're updating it every month. Web page could work better in that situation, but of course this is a training about making PDF's, so I want to really dig into what makes PDFs accessible.
So we have tagging.

So Arielle and I've mentioned tagging, if you've done any sort of preliminary work on tagging or remedying PDFs, you'll have seen this tag panel. They are essential. So if a document has no tags, that means assistive technologies have no idea what to do with it. It has no idea what type of content it is. You're basically handing it a blank slate with a bunch of characters, letters, words, numbers on it and it won't really know what to do. It'll do its best job, but we haven't told it what anything is.
So it just doesn't know and it guesses. The tag tree will form the logical structure of the document, so you don't make sure this. I've showed you the tag tree a couple of times. It really just if the tag tree is clean, concise as you can see here in this document, I have very descriptive tags, so I have first a figure.
I'm not showing the document of course. I hopefully you'll be able to connect the dots here with other examples that I have. But I have an image, then I have a paragraph and I have a heading level one. A couple of paragraphs a heading level 2, A table of contents.
So all of these tags mean something to us as document creators, and they mean a lot to the people reading the content. And so I can show you. Let's do pull up this, our friend. The IRS disaster assistance PDF and as we can see, I pulled up the accessibility tags and it says no tags available. So if I had had a screen reader loaded when I loaded this document, it would run, kind of a wizard. Saying this has no accessibility tags. What do you want me to do? And Adobe has this built in and it does the best with what the document structure gives it. But that's not always readable or understandable. So what you can do is like I said, you can start adding tags. You can also auto tag the document, so I just right clicked on the no tags available and I clicked auto tag. But now Adobe is becoming more and more sophisticated. And they have this option here. This is my quick toolbar. I'm not sure which version of Adobe you all are running.

This is the latest version. Some of the other versions have accessibility tags like the whole thing's flip-flopped. The interface has changed quite substantially, so hopefully a lot of you are on my version, but if you need to see an older version or yours doesn't look like mine at all, Arielle can show her screen with this.
But the older version has accessibility tags over here it actually made a lot more sense to me. I don't know why Adobe switched it up, but I'm getting used to it.
It's been a year so I get very in the groove and this was a huge shake up for me.
But so what's great about this new interface is you've got your quick toolbar here and I have all of the items that I do on a regular basis here so on any document I can run an accessibility check, I can run discover form fields. I can run make accessible if I need to.

I can also automatically tags. This is if I just wanted to tag and I didn't want to run the whole make accessible wizard. This is checking the reading order, so there's all sorts of things, and these here editing and things like that. Those are going to be there for default for you in your instance. If you want to add the ones that I have, you can always customize the toolbar and you're going to. There's a section here for accessibility. I believe it's towards the bottom. Guided actions, You're going to find the make accessible wizard in the guided actions and all you have to do is just add it. You can. It's just like any other menu. You can reorder how you want the tiles to go.
So if you wanted, you know check recognized form fields to come first, you would just select it and move it up in the line and then it would update my box. Although this is I like mine, the way it is. I like having the form second, so I'm going to save that. Also, you want to go into tools in here and make sure everything that you need is selected so it used to be in the older version. You'd have to enable prepare for accessibility.

It looks like it's automatically included in your tools, but you may have to go inside your tools and add those if you have an older version. Alright, so let me close this down so we have a little bit more. What I'd like to do here is run the make accessible wizard. So what it's going to do is it run me through a multi step process? And it's going to kind of walk me through what some of the most common accessibility issues are and structure it's going to try to find all of those structures things. So when I'm going through that wizard, it's going to ask me for a title or it's going to. Ask me to confirm the title that's on the document. And I would recommend this is where you want to make sure you have a great title for your document. This is what's going to be announced to the screen when they open the document, and so you also detect figures.

So without further ado. Our document we're going to run the make accessible.
Here it's this I it looks like a computer screen with a check box in it. It looks very similar to the check accessibility. So this is my first step. So if I find something that has no tags, I'm going to run them make accessible. So it goes through the guided actions. It tells me what file's going to be processed, and then I'm going to go and these are all the steps it's going to go through, so I'm going to hit start and here I have the title. I can either leave it as publication 3067, but if I'm thinking about my end user. I may want it to say IRS. And then leave that. You can add a subject. This is the subject here. The screen reader will read the title, so if you've put it in the subject, you may want to bump it up to here the author, if this matters, you can leave it as is.
It this doesn't mean anything to me, but maybe it does to your audience and then keywords if you want them. So this kind of is like sets the stage for your documents. This is step one. I'm going to hit, OK. It's going to jump me to the next one, it says.
I'm going to recognize text now. What is the language that we're looking at?

One of the most common accessibility issues. Just overall for digital content as the author has not established the language and it's very important screen readers and other assistive technologies don't know what to do with other languages unless we specifically told it it's another language. So let's do this. I usually leave all the defaults, unless of course I'm working with a document in another language. It says this is this document intended to be used as a fillable form? So this if I knew this form or this document had form fields, I would click yes, detect the form fields. I'm going to click no, because there are no form fields on this. I know this about my document because I've already reviewed it before I started the wizard. But it will detect form fields and I'll show you how that works in your benefit and sometimes how it works against you so. But when you have form fields, you do definitely want to detect the form fields, so we're going to skip it for this. And then it says. The reading language again, we're going to English. Then it gives you this error message hit OK. Is it not going to let me go? OK, now we're going to figures with missing alternative text, and it's going to highlight the image. So if I wanted to say IRS logo if I thought this was essential, I would do that. Then I'd move to the next image. Now it
shifted the screen and I have no idea what it's doing where it is. so I could guess, I don't necessarily I don't want to market decorative because once you do that, it gets artifacted and it gets put away. So let's be cautious here and not artifact it.

Let's go ahead and just leave it blank. We'll deal with it when we deal with the accessibility checks or when we go through the tag structure. Here again we have this logo. Does it need to be announced again? Maybe, maybe not. Let's say it doesn't, go next. Now this time it's the QR code and this is the Spanish page, so I may make my alternative text. Escanee el codigo. And I can't do the accent. So this is going to make it interesting.

I would make it more so it's scan the code to obtain more information. So I would put that in as the alt text for this one and then again I don't know what it's highlighting, so I'm just going to leave it. It looks like it might actually be highlighting this small little space here, but I don’t know and I'm not sure, so I'm not going to artifact it. And I'm going to hit save and close. Then it moves me to the next step.
Now it says it's going to run an accessibility checker. Now this is the default of the accessibility checker. At this point I would feel it's way too early to run this accessibility checker, but I don't have to.

I definitely don't want to report, so I'm going to uncheck that and I'm going to say start checking. Then it gives you the accessibility check results and we can see we do have some issues, but before we even get to this. I'm going to check my tags. So let me jump back to my slides. And so I've just finished the make accessible wizard.
Now I didn't have tags. Now I do have tags, so we need to deal with those tags and make sure that they're cleaned up. So we've auto tagged them and it's just a start. So it gives you some access, but it's obviously it's not going to nail it. So now I have tags which is great. Notice I have two tags which I have a figure and I have a part.
But this is not anything that makes sense if you remember what I had for tags elsewhere.

 **Kim Casey** 2:29:33
So this is a good example of how auto tagging kind of lets us down. We want to make sure that we have these tagging structures, so before you even deal with any of those accessibility issues that it showed you here. It's advisable to go and work through the tags. This is also where you're going to go. Oh my gosh, this is going to be so much work. Or I've got this. This is no problem. And so again, you're going to have that kind of, you know, decision making. Do I PDF this? Do I not PDF? Does it need to be a PDF? Is there something I can do better to save myself time?

Because obviously that tagging structure isn't ideal. And so if you don't have to do PDF, if the information is meant to be read online, so if it's only distributed on a web page, you don't need to PDF it. If it's an application or a survey or form. Generally, it's much easier to do it as a web page. I think somebody had questions about Google forms. We use Microsoft forms. So there are alternatives. And then if the information is going to be updated frequently, you may want to make it a web page again. So, like if all of these conditions apply, you could probably save yourself a lot of time making it. A web page instead and then can this information be printed just as easily from a web page? So a lot of people say, well, we have to make a PDF so people can print it, but you can also print a web page. So as long as formatting and it doesn't look too funky when you print it, you know all the arguments against making things a web page rather than PDF kind of fall. And when you think about time of your staff and time your time not having to go through that process over and over again, making PDF's accessible.

So we kind of take a step back again before we take a step forward and say you can make it a web page because web pages have HTML, it has a lot of accessibility built in. We have a lot of, these things that we can skip and then the document behavior excessive technologies is more predictable. We have in Page links that help people access content efficiently. So if you are kind of on that fence of do I keep moving forward? At this point I know I've got a lot of work ahead of me. Is there an alternative? Can I make this easier for everyone? If you know your audience doesn't really surf the web, then yeah, let's do PDFs.

So we're in that boat. Let's pretend we're in that boat. We're going to go back to our document. And here we have the document. So what I do my next step is I just start tearing apart the tags here. So we have heading level one, that's great. What I also like to do in my tagging structure. So these part there's also sect short for section tags and they just tend to be a lot of noise. What I also want to do. In all accessible documents is you want to create a new tag at the top and create document.
So everything is going to be in my document tag. I'm going to put it in there and I'm going to even just pull part in. And so now I have an overarching. The whole thing is encapsulated in the document here. Then I have my figure. What I can do here is I can right click it. This is where you check your alt text. You want to make sure my alt text is good. It says IRS logo it communicated over from that make accessible wizard. We've got one less thing to do. If this was blank, I could type in IRS. Uh, let's make it right. Here capitalization matters. The screen reader will read IRS instead of IRS.
So if you do have an acronym, I would say use all caps. It's more likely the screen reader's going to read it out as an acronym rather than a word it thinks is misspelled.
What you also need to do here is click out of that box. Otherwise for some reason this doesn't save, so make sure whenever you add things in that you're clicking to another box and then you can hit close.

Now I have my part, so I'm going to start pulling these tags out so that my structure looks a little bit more obvious and I've got my H1. Now I've got a sect. I've got a part and a section. I don't like either of those, so here I've got another H1.
One what I can do here for this H1 is because this really is just one heading, I can pull these up and so you can see you kind of just start manipulating the tags and you have to go line by line.

Notice this arrow here. This indicates I have more inside this tag. A tag without anything without an arrow means you don't have anything inside this tag.
It's a blank tag, so it can be deleted. What you don't want to do is if you don't like something. Say I didn't like this figure. You can't just delete it if it has something inside of it, you have to archive it. If you decide to just Delete. You're going to end up at the end with issues of like ghost tags. And that's the worst thing to do at the end of a project because you're at the end. And it says we can't find content, but there's content there and we don't know where it is and it's a whole process. I can show you how to get a hot water, but to avoid that hot water, don't delete, just hit the delete key on any of these tags that have content in them, so I'm going to delete there and then I have a paragraph and that looks like it's all in line. This is actually taking it easy on me.

The other thing I do is I expand collapse, at will. So here I'm going to pull this paragraph tag up. This one looks good too. What I'll also do, since I have some links in here, is I'm going to hover over them, make sure that they're good to go. And then I'm going to make sure I also have link tags in there, so that's tagged as a link that's tagged as a link and that's tagged as a link. So far this has done a pretty good job for me. And then I believe I have a period as A tag, OK, that all looks good. I'm going to collapse it and pull it up. So this is kind of my process for cleaning up these part and SEC tags. Now I have another paragraph tag. That's great. Now notice what happens.

Is here we have another section. We have an H3. We add an H1 before what I want this to be is an H2. If I change that now we don't have any gaps in heading levels so I don't have a user who jumps from heading Level 1 to 3 to 5 to 2. Wondering what content they missed. So I'm going to pull this up and then I'm going to see I have a list.

I'm just going to double check that everything is in its right place. So Arielle made a good point earlier. Is that sometimes these things get characterized in the wrong thing. So for all lists, what I'll do actually let me go ahead and collapse all. I'm going to first off notice how it puts that pink highlight and so that tells me what this encompasses. So this list encompasses the entire list. That's a check good #1.

Next is list item. So I want to make sure everything's good there. If you want to be super careful, you make sure that everything is in its label. So this is either a bullet point or a number. If it's a numbered list or a bulleted list. And this is the body L body list body. So for each list item LI you're going to have label or and list body.
The only one that's required is list body. So if you want to couple everything up, you don't have to leave the bullet there. You can mark the bullet as decorative, so if I didn't want the square meter to read bullet before every list item, I could make this decorative. But if you want to just leave it as is, that's perfectly fine. So I'm going to go through this entire list and make sure nothing looks strange. We're making sure the boxes are capturing everything we want. Again, I'm going to go back through and make sure all of those lists links are linked. So we have looking pretty good there as far as this list was created. So this is good.

That first line it has in the list body. It has text and link, so I'm going to make sure I have text and a link and that link is irs.gov. So these are all the required tags so that the screen reader knows. So there's a lot going behind the scenes and so now you can really see why that source document is so important. Because there's so many little things that if they're not coated properly in the source document, you have a lot of work ahead of you. So I have this link objr and then I have what the link is going to say. If you have a link that doesn't have any text to it you are going to have to select properties and then say actual text. So if you wanted this not to say www.irs.gov to the screen reader, you could put IRS homepage. And now the screen reader instead of reading www.irs.gov is going to read IRS homepage.

And again, you have to get out of this box, so click into another box and then close.
And then, yeah, if you're lucky, you wave a cat around your head three times at midnight with a full moon, and it all works out great. But these are all the little tricks that Arielle and I have learned over the years that you just, it's a very particular you'll find it. You only take you like one day of forgetting to click out and all of your information being deleted to never forget it again. So this list is actually looking really good, and if I had more time, I'd go through each list item. So it's a very careful line by line process when we get to this. I'm going to pull this out. And then I'm going to move on. Notice this section went blank. So now I have no content in it and that means it's OK to delete. So I can right click on it and select delete tag. You can also press the delete key once it's highlighted so you'll find keyboard shortcuts are very helpful here.

Now I have another section, so I have a section inside of section so you can see why these part and sect tags really get on my nerves after sometimes because now I can clearly go to whatever section I want. And pull it up. So here we have an H3 again.
But it's really the same level as this first one, so I'm going to change it to an H2.
And I'm going to just kind of speed up the process here really quickly.
I'm just going to let you watch. I'm pulling up the heading. I'm pulling up the paragraph. I'd go back and check to make sure those links were properly coded.
Now, strangely enough, the forms and publications looks the same as this other heading text, but it's not marked as a heading and I'm going to fix that.
So we got H2 and pull that up. And now I have a table.

Why do I have a table? Remember in my discussion about tables?
Why does it do table? It's because of the way this was created, so I imagine behind the scenes there's a table here where the outlines were the outsides were saying don't bother with those. And so we have a table with one row and two columns which we don't necessarily want. So what I do is I'll expand this out. And now here's where tables come in. Remember how I said tables? Consider. Take a lot of extra work.

If you have a table and you don't have this markup, it's just like lists. Where I'm going to expand this out, we have the table row TR. We have the table data cell TD and then we have the content inside that. And so I have a lot of work to do here.
I would have to pull each one of these out. I'd have to put them in as I'm going to make a list out of this. I don't want it in a table at all because table markup is going to be very strange and it's not going to let the user know that this is a list. So when?
We see these kind of inconsistencies. We have to pull it out. At this point I might think let me go back to that source code. Or that source document. So really the best first step is to go through all the tags. To see if you have any gotchas here. But here maybe I found something that oh gosh, this is going to take me a ton of time.
Maybe I can just fix it in the source document and get it to stop reading as a table, so I might do that at this point. But what I've done? Let me go ahead and pull up a document that I've gotten farther in. And this is page one, accessible.

One thing I will also tell you is if you can see from my files I have the original I have make accessible and I have page one. I recommend saving a million times a day, save every few minutes that whole time that I was remediating. I probably would have saved two or three times each section I'd save when I finished one section I'd save.
Next section I'd save because if you get into a big enough document, Adobe's going to crash. You might lose some work. You might want to revert.
So you might not like the fix that you made and have to go back and have to go back to the first step is going to make you pull your hair out. So if you're saving as you go along the way, it doesn't matter how many files you have. I usually do. I'll make a draft folder here and I'll put all my drafts in there, so it just doesn't become a nightmare and I'll make a folder for the originals and I'll put them in there. So you always have that fall back. You can revert to a previous version. And save yourself a lot of time. So I have the first version here. Let me get this. Sorry, my toolbar is in the way. So I have this file, here I'm going to open up the tag structure and notice how. Let me go ahead and collapse. I have this all formed out so I have H1. I have paragraph, paragraph and really this is what I do when I come to any document I check the tagging structure. So here I've got my list H2 paragraph. FH2 and now I have a list instead of that table. So what I've done is I pulled all of that information out of that table and I made them individual list items. Make it expand less. So now I have that I have my list item number 1,2,3,4 and five and so for a screen reader user that's going to read a lot better than if it was in a table with just paragraph text like it had it had it all in. A table data cell.

So it would be very confusing to read through, then what I have is just this regular text and then I have my figure. And what I found out was the figure was this QR code. So then what I've done here. As I've added scan QR code to get additional disaster information and download forms and that is my alternative text. So as you can probably jump ahead of me and say well, how's the screen reader user going to scan that QR code? And that is a common question we. Do use these QR codes a lot.
Ideally, we'd also want to give the direct link to it, so maybe you can make this a clickable link.

This image a clickable link. So that they don't have to find it with their phone. But really, technology has gotten so much better. Where you can just line it up with the document and the phone will hone in on where that QR code is. But I would say definitely make this a link so that the person can just activate this QR code and it'll go to the same link.
And then I have a paragraph tag of this here in the footer. I was able to pull this out.
And that is what the first page looks like when it's completely remediated. You can see there's a considerable amount of effort and that is really why I spent so much time on source files because it just gets to be so overwhelming.
All right, Arielle, you have a hand up?

 **Arielle Gines** 2:45:25
Yes, I just wanted to mention this point in here instead of the chat. It's been a question brought up talking about going back and fixing the source document, especially with tables.

For example, we do recommend before you start editing any of the tagging to kind of just arrow through that tag tree. Review how it did populate versus the document and kind of just make notes of anything like that. Before you start editing the tags in the tagging tree and going back to that original document to make any edits. Then because once you start making those changes in the tags tree and then you decide to go back to that original document, it will create a whole new document and you will have to start over again, so if you do that first initial review to see if there's any changes you want to make in that original document first before you make any edits.
That way you're not going back and forth and having to redo work.

 **Kim Casey** 2:46:26
Content after the next break we have is going to be basically my process.
So this is just kind of an introduction if it feels like this, I might be moving too fast.
I am going to slow down and I'm going to go through my exact process because like Arielle said, you don't want to put in that work and realize Oh no! Now I have to go back to the source document and fix it.

 **Arielle Gines** 2:46:45
And there are a lot of questions about tables.
We will pivot to tables later on in the training and dive further into those as well, so I'm going to hold off on those questions about tables until we get to the table area.

 **Kim Casey** 2:47:00
Yeah, we're actually a little ahead of schedule. I had my next, I think I had my next break scheduled at, the hour. If you want, we can keep powering through and then I promise you, I will give you a break in 10 minutes.
Up to you all.

 **Ebron, Rebecca G** 2:47:20
Sounds good.

 **Kim Casey** 2:47:22
OK. So we'll keep powering through.
So here we had review the document, then the tag. So I've got step one. Let's reverse. Actually, that's going to be very difficult. Let's escape out. Our step one, if you remember, was make sure you have the source file. So if you have the luxury of that source file, that's your step one. Your Step 2 is going to be. Where did I put Step 2, here. Determine your best course of action. And so this is kind of in that whole triaging where we talked about making sure you know what can we do. Do we have the source file? Can we manually tag auto tag? Run the accessible tool. You may run the auto make accessible tool and find that the auto tag gives you better results. So you can do that. Or you can or you can convert to a web page.

Then Step 3 is going to be review the document, then the tags. so this is where that process goes. So I perhaps could have presented this a little better. A little more streamlined. It's just so much content. To present to you all. This is years and years of practice and working. So what we find sometimes. So if I go back to inspect the file to make sure nothing is lost or displaying incorrectly, what we find sometimes is in InDesign or some of those other fancy creation software is that. Things get layered. You might have like a blue rectangle layered with a white rectangle layered for an effect. You know you've got your visual effect going on. What happens sometimes if maybe on top of that blue rectangle, we put an image. Sometimes when we auto tag, that image might disappear altogether. And so we need to make sure that nothing is totally lost when you run that automated checker.

So what I would do. Let's let me pull up another file that I've run. The auto checker on or the make accessible wizard pull this one up. So in the agenda. Pull this guy up.
You might have run the make accessible wizard and let's say something funny went here, where a big dark blue rectangle came over this logo or something weird happened. So we want to do first kind of a visual scan of all the pages. Let me make sure this document looks like it did before I ran that make accessible. Things might go missing. And things might, you know, kind of go crazy there. You're going to scan every page. Just go through every page. I don't need to do that. This isn't probably one of your documents, but you would know your document if it was misbehaving.
Then you're going to open up the tag structure, because now we have tags and we're just going to kind of arrow through it and see what's going on. And you're going to kind of take an inventory of, OK. I see there's a part there. There's a heading there.
There's a table there, but that doesn't look like table content. And then you're just going to keep arrowing through as you go through. Whoops, sorry, there was a little bit of a delay, so I'm going to down arrow H4. These are all things I'm thinking.
I'm. I'm in my mind, I'm going. Is this easy to fix in the tag structure or hard and whenever I come up against hard like notice this table came up as a figure. That's very strange. So then again here table, so you may find you know troublemakers right off the bat and go. I just I need to fix this. And so I just keep going through all the arrows.

Notice how when I ran that Forms wizard. It picked up anything where there was a blank space next to text and so that's why I cautioned you about using that discover form field. It's a great help because if you create your form fields manually in here, if you leave this completely blank and you don't run that discover, you have to automatically or manually tag all of these form fields.
So if this actually all of these blue boxes were in the right place and they were supposed to be fillable, you would definitely want to run that form.
Because they're not I'm going to have to delete all of these, which is fine, but these are just things you're keeping track of as you go through these different things, so that's interesting. Somehow that was broken up. I probably can just artifact that. That's perfectly fine. Now I've got another section tag, but this really looks like it should be a table depending on what the content was, might actually work out as paragraph text, because this isn't really a data table.

And I'm just going to keep going through and see what I have. So now this whole page is one big table. And so you kind of just evaluate how much work is this going to be and how much trouble am I in really is what you're going to be thinking? And so you're going through the tags. What you're looking for as well. You know, as you're going through this tag structure, you're looking for empty paragraph tags that you're going to have to artifact. You're going to look for headings that are tagged as paragraphs. So these are easy fixes that you can make through. These are all the things that are like, no big deal. I can keep going. No problem. I don't have to go back to the source file.

You're going to look for lists that are tagged as paragraphs. This is where we're getting into a little bit more tagging. You're going to check figure tags to make sure they have all text, but you don't have to do that on this first pass, of course. And then of course, we want to pull actual tags out of part and sect.

So we're going to just be doing a lot of that as we go through a lot of this is kind of like make sure this file is workable before you put time into it. So then after we review the document, everything looks good and OK, we can handle what's going on with the tag structure. We're going to go ahead to the next step and that would be checking for. Actually, that's way too far. So let me go ahead and give you examples here. So let me go back.

To the make accessible, so the make us accessible has been run on this. What I would want to do so like I said, I noticed right off the bat there's all sorts of things that doesn't need to be forms. It's really, really gone wild on that. So what I can do is pull up the forms and then I can pull up, prepare a form and this is where you can go ahead. And this is what a form looks like. I'm going to get into a lot more on forms tomorrow. This is just kind of a sneak preview, but on all of these where I'm like unit name that. There's no fill in there. There's the purpose of this forum was not to fill in all of these sections. So for all of these, I can quickly delete if I know there's no fill in. If this is supposed to be just a static document, I can just quickly highlight all of the form fields. Here we don't have to worry about any of the tagging structure or any. Like that we can just delete how we want. There's this is not the tagging structure.
This is the form fields that have been discovered by the automated tool. Very different from the other one, so none of these are form fields. So I'm going to delete them and you're going to get to see. Now it it's just basically a table with information on it. So none of it was in the form.

So the automated tools will make mistakes and you have to be ready for those. And then on the rest of the page, it looks like the same thing happened here. So I have item vote needed. None of these are fillable forms. This is this is just meeting notes. This is the agenda, so nobody's expected to come in here. And fill anything out. So this is all just things that I need to remediate in the tag structure. What I might find is when I delete these here, I might have to delete some form tags in the tag structure. So we'll be on the lookout for that, but that is obviously really easy to do. So we'll go ahead and delete those out. And then again, I'm just going to go by the assumption that all of this is just a read only file and not fillable. And that makes my job a lot easier. So what? I probably would have done if I knew it was all read only from the beginning. Remember when we were in the make accessible wizard? I would have said no, skip this step. None of this has anything filled out. This is all just for information purposes. So once I've done that then I can go back and I kinda have a clearer view of the tagging structure. So I noticed this whole thing is coded as a paragraph, where it's probably the heading level one.

 **Kim Casey** 2:55:53
So what I might want to do is add a new tag here and because actually I'm going to add my document tag, we'll start there. Pull this into it. Notice as I pull them in there is inline or nested under. We want to nest everything under. Under the document.
So all of these have. So here we have lists nested under. Are the list items nested under? Are those so we have this structure too where it kind of goes down a stair step? And so all of these and then under here then we have the actual content.
I'm just going to pull the rest of these. I can highlight all and pull them in, but depending on notice how there was a delay there. Depending on how much content is in each one of these tags, your Adobe might get cantankerous with you. So as I'm dragging, make sure you're not nesting, but you're actually having it inline with that and now it's giving me that little timestamp.

This is where your heart kind of jumps. If you put in a lot of time remediating the tags because did I just lose my work? Is it going to it? Sometimes it just stalls out forever and ever. If this was a much longer document I'm I would be a lot more careful here. I would maybe only just pull one tag at a time, but here for this one. Now I'd want to add more tags. So really, before you run your accessibility checker, before you go crazy with anything you want to make sure that you're happy with the tag structure as it is. So now I need to add a couple of tags because I don't like how this is heading level one and I'm going to anticipate what else I'll need. I'm going to put this in a paragraph text and I might put this as a heading level too. So I'm going to add another tag and I'm going to select heading Level 2 and I can do that. And now what I'll do is I'll pull heading level one up and heading level 2 up. I've found better results pulling items up rather than dragging them down. I don't know why, if you find the dragging to be very difficult, you can always right click and click cut.
It'll cut it. And then when you get to where you want it to be, I can right click and because I want it paste it under. Document I do paste child, but if it was just inline I'd hit paste so then it puts it there. So now when I want to pull in that heading level one, I highlight the heading Level 1 tag and I'm going to whoops. I'm still in edit.
I need to get out of edit. Let's do that and I will pull up this again and then we'll highlight this so that this is actually very careful. You have to highlight this. Highlight the text you want to bring in. Right click. Bring up this additional menu create tag and then it pulls it in. Notice how it pulled in the whole documents. OK, it's on two lines. It's in one H1 tag. So we're OK still. I'm going to highlight the H2. Actually I need to pull up the paragraph tag and the paragraph tag is May 6. That'll get fixed once I fix the H2, so I'm going to fix the H2 and pull it in. Right click create content.
And now we have that. So now we have H1. Paragraph H2 and I have my list so I'm good to go and I have paragraph text and so I'm good to go there. Now, before I do anything else, before we take our break, I'm going to do the most important thing of all and I'm going to save it. Make sure it is what I want it to be. Whoops, it was already saved. You're going to. It's going to ask you. It's going to take you to this whole thing. You're going to. I still want to put it in here, and then I might give this now.

It's not make accessible, it is first page remediated and I'm going to do page one and you give each one a separate name so that if you need to revert if you make a mistake in any of the tagging structure, you can always go back to this version and you don't have to go. Back to square one. All right, now we are on the hour. I'm going to just continue on this line and we'll see how far we get. And then once we get through the tagging structure, we will check for accessibility in the break and we come back.
So take 10 minutes.
I'll see you all.
Back refreshed, stretched whatever you need and look forward to it.

 **Kim Casey** 3:09:22
Alright everyone, so time seems to go a lot faster as we get closer.
Now it's getting close to lunch break for everyone, so I just want to keep going on.
We're actually getting into the meat of this.
We'll have a lot more time tomorrow to work on some more specifics, and I also saw in the chat there's a lot of really specific questions and for those I'd love to work with each one of you individually. So I'll have my contact information at the end of.
This, and maybe we can work together. You know, kind of get your team up to speed because I think having a unified team really helps this process along.
So we can work with you to create that process and answer those specific questions.

All right, so I have. I did say there was a lot of questions about tables and so this document eventually has a table and before the break I was going through the tag structure. And you know before everyone gets kind of their hearts broken. Document remediation, there's no quick fixes. It's a very methodical process and not always resulting in the same thing.

So we're in it for the long haul.

We have to really be that kind of person who's going to be determined enough to keep through this to the end. Arielle and I love doing it just because it's one of those things where it feels like you just cleaned out the messiest garage ever, and you did a fantastic job. And now, especially when we listen to it with a screen reader, it's like, so rewarding, because now we know we've created something that was unreadable to begin with, and it's now easily digestible. And so it's working. So nice thing too is we have those clear buckets and we know where everything's supposed to go and we make sure it goes where it's supposed to go.

So for let's see. That seems like an older version. Interesting, something happened to my conversion for a night the gremlins took my tags away. I’ll figure out what happened there, but you guys all saw me put in the H2. Interesting. OK, but I don't want to go too far ahead because I kind of have this document broken down into pages.

So we do have our list listed out. We have paragraph text and I would ask if this was not my document. I might go back to the document creator. And say, does this make more sense as a heading? Do we want to make style this as a heading? So these are all the things that we're going to be looking for when we scan our document before we jump into the tags. But let's assume it isn't. It's just paragraph text and we're good to go.

So here we are on the second page, the first, I've remediated half of this document.
Because what we found out on the first page was here. Now we go to part. If we start digging into this, this is marked up as a paragraph, so it's not marked up as a list.
This is marked up as a table. This is another table and so we have really awkward stuff going on here.

So this is going to create what I'm going to have to do is I have my H2 that's my ground. But what I also want is a list. So I create one list with two list items.
So for number one and #2 then I'd start pulling in the information from list one.
So I'd pull in this text as the list body. And then inside that list body I would pull in another list. So I'd create another list and you'll see how it layers in the next screen.
And so you just keep pulling and what I either can do is if it's easy to pull out of here, I can pull the one I can pull the text. And so that works out. I can pull it out.
Sometimes you have to do the highlight the text. You know the select the item, highlight the text like I did in the previous before the break. But thankfully here it's pulled out. So what I would do is. New tag like I said, I'd create a new list. I kind of do list, I do these tags in bulk because it just helps my brain and so I know I need two list items and I do two list items at the same time because it leaves it on the last selected. That saves me some time.

In each list item I need a list label because I've got that label. And I got another label here, so I'm going to create another one. And in here I also after the list label,
I need a list body. And I'm going to do another list body.
OK. And so here I've got my list and I want my list items to be nested under it.
So I'm going to highlight all of these tags and I'm going to pull them into this list.
We'll call it parent tag. Pull it in, It's good. Now for each list item I want these nested, so I'm going to pull these in kind of just have to pull it in and that's how I would do it. Now I just keep going through this process. I still have this separated out. What I can do is drag this up. If I didn't have this, I would highlight listbody. I would highlight what I want to pull in. I would right click create tag. It has to be that exact sequence. Just so you know. And so we have now our list body. That's great. But we also in this list we have another list we need to create.

So what I might do here and notice how I'm clicking on the one that I want this new tag to go under. That'll save you a lot of time too. Then you drag less. Here, I'm going to create my new list. I need 2 items. Two list items, so I've got a list in list body. So let's go ahead and pull it in there first. So it's at least a little bit less. Now I'm going to do 2 list items.

And as you can see, it gets. It gets very tedious, but these are things that you can do.
Like right now I'm talking when you get used to this, you just kind of run through it.
You can hold the conversation. You can multitask in a meeting. I don't recommend it, but if you have to, needs must. Then you just kinda create these list item list body.
So I have kind of the fast forwarded version again. I'm going to pull all these tags in so it's the same thing. We've got a list nested in a list. So we have this list and then this. List starts underneath it so we can see where we're duplicating the visual here. You know nest these and nest these and then I need to pull all that information in.
Then once that's done, I need to work with list item number 2.

So I'm going to go ahead and Fast forward after I've pulled all that out. You can imagine it takes some time. Here we have the list properly, so I have my H2 and then I have my list. I'm going to pull this open. And then I have my list item and then notice how I had my list body and then my list again I have two list items A and B.
So you can see I'm just kind of like slowly going through the tag structure here. Now I go into list item two and now I stopped here on purpose because I wanted to show you what this was doing. So now I have part here. I've got an empty paragraph tag because I pulled information out of it. So I can delete that. Notice there's no triangle OK to delete.

And now I have a table. Why do I have a table? And the table is going to make it so that let me go ahead and pull up the table. Table so that is table row and I have table data cell that contains all of this information. So if I was using a screen reader, what this would read like is table one row, two columns, column one and it would read all of this information all at once. Then it would read column two and all of this information all at once and it would take. The really sharp screen reader user to successfully associate these labels how they're supposed. To be read so I know I've got a whole mess of items here. What I want to do here in my list item is I expand this out, I've got my two. Then I have my body under here. I'm going to create a list. I'm going to create 1,2, I think it's 16. I don't create all the list items. I'm going to create all the pieces. And so all inside this list body. So there's going to be another listed nested list like this and you can see. It just takes time.

And so This is why, you know, you might go back and say, OK, I need to make this much faster. So I'm going to speed up because I don't want to show you the right clicking and ending. It's all the same process over and over again. Just get in a rhythm. You can even put music on. This is a great time to listen to music. Now we have when I down arrow I've got my list all squared away. Look at that. It's all lit up, so I've got my first list item. Let's expand this out. I can press right arrow instead of clicking. I get tired of clicking. I'll tell you that much. We've got our label. That's the number one. We got our body. That's all of that. Let's list go into that I write arrowed down arrow the text. Great, now I've got another list, so I'm going to right arrow list item one. I've got my A and information. My list item two. I've got my B and my information. So all that is great and this is what you want to see. And before I do any of those accessibility checkers, this is what I do. I dig into the tags. I make sure this is clean.

Then I'm going to go list item 2. It's not in the part anymore, so I'm happy about that. I'm going to down arrow. I've got my list label and I've got my list body and it's the whole thing. But I want to break it down, so I'm going to right arrow. Down arrow. I've got my text. Great! I've got my second list, so this is what that list looked like. This is what I ended up doing, and for each row what I had to do actually was let me just go back to the previous version. Let's see if I can make a mess of anything. This is where I want to put my list. Let's do that. Do list item. On this one I chose just for simplicity sake. I did however many list items these are so I've multiplied that for simplicity sake because these are bullets I decided I was going to artifact the bullet. So I created a new tag and this is like these are. The judgment calls. You need to make as a document creator. Am I cutting corners? Is this going to affect the user experience? If no, then go for it. If yes, then put the time and make it right. But here I've got my list body. So what? I had to do and when you are copying multiple pieces of information, so I want to pull this in and this in into one list body element.

Arielle's got a great analogy for what this is like. It's like putting layers. Into a bucket and it it puts it just keeps pushing things down. So what you want? It's really interesting. So if I were to scan this, I'll show you 2 examples. OK, scan this first because obviously logically to me. this comes first. So I'd want this in the bucket 1st and that's not the case here in Adobe. So what we want is we want to put the bottom text in first. We want to put the layer in. We're going to create the text and it puts it there. Then I'm going to go to here. And I'm going to put it in there.

And so now I've got that I've got my list item and it's that whole line of text. You want it to be reading in this order. If it reads. So if I had scanned it the other way, if I scanned this, put this in. This would be on. Top of that. So you want to make sure this is reading in the order you have it here in the tag structure and that's why that tag structure is very important. It has to be in this order, or it's going to read out of order. Notice down here, An interesting thing is that as I pulled those in. I've got a random bullet here by itself. I also still have all of these, but as I pull them in each one of these gets pulled into these list tags and so when we get done with our whole list, this TD is going to have a bunch of orphaned bullets to which I am going to.
Highlight change to artifact. I leave the defaults on this and I hit OK because I don't feel like that bullet is something that needs to be announced. I want people to be able to get to this information. The screen meter will let it know list item, one list, item two list item 3. So we don't have to add that bullet in. Actually, it won't actually announce it like that, but it'll read it by item and so it'll separate it out like that. And that bullet is just extra information. It really sounds funny on the screen meter, so might be my personal preference, but I do consult with a lot of native screen reader users and they say I don't need the bullet, so I take the bullet out. Do you do that however many times till you get to here.

Now we've got our list items over and over again.
Make sure everything's reading properly and then you're done.
So we have that.
And now I'm on this part again.
So I still have the table.
Notice my table is very empty.
I've got an empty table data cell you can delete and then I've got this one here.
I don't know what's going on, but it's just a blank space at the end of federal revolving loans, so I have to artifact . If I delete this when I get to the end, my accessibility checker's going to say you have, undiscoverable items and it's not good.
So we're going to artifact.

 **Arielle Gines** 3:22:41
Yes, thank you for pointing that out. We just had that in the chat.

 **Kim Casey** 3:22:41
A lot of this artifacting is so important because we don't want to have messy tag structures in the end, so now that it's empty, I've double, triple checked.
There's no arrow there. I can delete now that's empty. I can delete and now the table's empty. Good. And this is where we're like, OK! We swept out one corner of the garage. Keep going, you know, and there's really no fast way about it. It's just what it is. This is how we make accessible documents accessible. If source file doesn't give us much to work with, this is really the workload that it is.

 **Arielle Gines** 3:23:17
Yes, and you can delete those tags as long as they're empty.
There's no arrow next to it, but as Kim was showing, there's like those little icons that shows there's content in the document, those you cannot just delete.
You need to artifact those out, so just wanted to make sure we differentiated the two different.

 **Kim Casey** 3:23:34
Yes, even yes. That's right. Yeah. So let me, I can find another one. No. Yes.

 **Arielle Gines** 3:23:43
You can see there's like a little box there though, and anytime there's that little box icon. It's referring to data in the document. Versus the tags. So an empty tag versus those boxes are separate anytime there's the box we want artifact and then empty tags, we'll know it's empty because there's no arrow next to it. Those can be deleted.

 **Kim Casey** 3:24:08
I'm trying to see if there's another box.
Hopefully I'll come across another one.
Like this box? Here's the box sometimes.

 **Arielle Gines** 3:24:15
If you delete the tag with the content, it can deletes the content as well.

 **Kim Casey** 3:24:19
Yes. Sometimes yes. So we don't want to do that.

 **Arielle Gines** 3:24:22
So it will delete, but you'll get issues.

 **Kim Casey** 3:24:26
Yeah. So sometimes this will not have any text next to it and it'll just look like an empty box and you'll think you can delete it, but you can't. So this content block, I guess we can call it the content block. We don't want to delete it, we like it. It's here for our help.

 **Arielle Gines** 3:24:44
And in the chat it's saying I'm seeing that you. Can you physically, Yes, you can do it.
It will let you do it, but you will get in error when you're done with the document, and then you'll be at the end and you'll be struggling trying to figure out where this error is coming from.

 **Kim Casey** 3:24:53
Yes.

 **Arielle Gines** 3:24:59
And then it's a lot of extra steps you have to go through to kind of pull that information back into the document to artifact it correctly and that will cause issues with the screen reader as well.

 **Kim Casey** 3:25:10
Yeah. Thank you for that point.
The arrow is usually a generally a good indicator that you can delete something, but here like you see there is no arrow. So you might think that I could just delete this with no problems, but you can't. Even if this text is blank. So yes these content block.
Don't just delete them, artifact then delete them. Then your tag is going to be empty and you can delete it.
Good point out.
Thank you list and everyone contributing, because that does that's a very fine point to make. So I have A tag here. Go ahead.

 **Arielle Gines** 3:25:42
And I would also like to point out with that as well, if you delete it instead of artifact, it sometimes like we said, these PDF’s they have a mind of their own. They like to cause problems. Sometimes it deletes the content visually as well. Why it does that I don't know. It should do it. But those gremlins get in the way. And all of a sudden you'll be missing a word visually as well in the document.

 **Kim Casey** 3:26:05
Yep.

 **Arielle Gines** 3:26:06
So it's just with caution.

 **Kim Casey** 3:26:09
And as Arielle was talking, I was collapsing my list because these tree structures get out of hand really quickly, so I like to keep things clean, but I also like to dig in when I have to. I'm going to go ahead and delete it now. I'm going to delete empty part and we're going to go to the next part.

So this is where we get into tables. Now you all are. And it's thinking so I didn't save.
That's rule number one. I should have saved at the end of Page 2. Actually, I'm not going to save. Because I want it to stay where it was. So I have that stepping stone.
Here we are. Let's see, actually this is Page 3 remediated, so I will stay on this page.
Now we have part, we have H4. This individual discussion item we've got a span tag here that we don't necessarily need. It's there because this is a different font and so sometimes it puts those in. What I can do is I can pull it up and I can clean out the span tag. Whoops, sorry. I did the wrong thing. I will delete that. And now I just have my H4. But it shouldn't be an H4. It should be an H2. And I'm going to pull it out of the part. So now I have that. And now I have this figure. Remember how when we went through the thing, we had a figure? This is our layout table. And so I have a combination path, path means there's some sort of image there. A lot of times it's the background color of the table. Actually what I need to do. Is delete out all the form fields again in this document? I didn't do it on this document. Did I do it on this one? Which one did I do it on? Oh good. I must have closed it while we were at break. So what I don't want the remediated one.
OK.

Let me one thing here is I'm going to show you something you must never do.
Do what I say, not what I do, right? So I'm going to open up tools. I'm going to open up forum. This is something I should have done before I started jumping into the tag structure for this document because I already did it and I'm you know, I'm not seriously working on this document. You do not want to make any changes to editing, to the visuals to any of these form fields. So you want all of this locked in before you start working with the tag structure. I'm going to delete all these form fields that are not supposed to be there.

The reason why I say that is because when it puts me in edit mode and that's probably where the gremlins came in because I keep going back and forth from edit mode to tag structure fixing, let me go back.So if I go to edit. Notice how it puts these little boxes around all of the text. These correspond with all of my tags. Now, if I've already done page two look it did it again. It undid all my work. And it made these two boxes instead.

So This is why you want to be able to ensure that you have all of the visuals. So all of the color contrast all of the font issues, all of the tagging it like, make sure everything is being read and all of that sorted out all of the forms deleted. All of that because you don't want to edit once you start working in the tag structure. So this is where the gremlins came in. I think I just found the culprit. It's decided to go ahead and now it's box this again. So if I went back to the tag structure, if I save this, which I'm not going to do and went back to the tag structure, I'd see all my work had been undone. This is where you start crying and go take a break. Do whatever you have to do because you didn't do it in the right order. We don't want to do that. We want to save tears. So I'm not going to edit, but know that like once you start working the tags, you're like there's no editing going to be happening. So you have to have everything cleared out. So now here I have my figure.

 **Arielle Gines** 3:29:57
That includes forms.

 **Kim Casey** 3:30:00
Yes, forms. I'll go over forms tomorrow. Forms have to be in the correct order. Everything has to be happy. Before we get anywhere. So we have path, we can probably delete these paths, but we need to get unit name pilot needed. All of these, all of this text out of here, and it's not a figure. So what I need to do is start creating how I want this to be read. So let me go out of it so we can actually see what the content is. What I would might do is if this is a heading, I would make it a heading I this plain text. But what I did in my next page, you'll see I just made it all paragraph text, so the unit names pilot mountain boat needed, yes. So there's no table structure. I just pulled it all out of the table. There obviously no table. Here it just thinks it's a figure. All right. So then we did that. Then we have this as a paragraph.
We'll change this to a heading. But before we do that, we'll pull this up. Get rid of the span so it's a lot of repetitive work here. Then I'll change this to an H2 because it appears to me to be the same level as the other one that I pulled out. Again, I would fix this.I'm not going to for the purposes of time.

Notice how I'm not putting it under here because that would nest it in the figure.
You have to go back up to the tag and this is where a lot of times. Collapsing the tag structures helps out so that you know exactly where you're pasting it, because it's really easy to get turned around, on this stuff. So now we have a table. So you all wanted to know about the table. I'm just going to pull it out so we get rid of that part all together. Now we're just straight table. Now in each table we have rows.
Let me go ahead and collapse this out. Oops. And then I'm just going to show you. So we have 1 row, 2 row 3,4,5 rows. The screen reader's going to announce this table of 5 rows, 5 columns, and so all of that background information that we just get visually, the screen reader needs to convey the information properly in this first row because this information is associated with all the information. All the data down here we need to make sure that all of these as heading table headers. So if we go here, we notice Y is unit name table data cell. Sorry, mouth is not working. Table data cell we need to make all of these table heading cells and notice how when I change it, it was kind of blue and then it went to red. So this is telling me this is this is priority information. All of these need to be header cells. And if you've done any basic HTML, I did many moons ago. This is kind of similar to that structure. So in each of these table headings we want unit name.

Now notice I have an orphaned form here. This tag is empty because remember, I went back in and I deleted all the forms. You can clean up the tag structure and should what I would do here is I would expand this out and I'm pressing control. The different ways it expands is if you press control and click the arrow to expand it. It'll expand every single tag, so if you don't want all of that to do, you just press regular click and it just leaves that. So you can have different things. But I do want all of them, so I'm going to control with click and I'm going to select multiple forms 1, 2. Whoops, sorry. You can press control and select multiple. This will be your friend. All of them are A tag. All of them don't have an arrow. I can delete every single one of them. Now we're good. This is the content in the table header cell. This is all cleaned up. So now we have that squared away. We're going to open this up. We've got.
Table data cell. And we're just going to make sure all of this matches up.
So now we have something weird going on here. I don't have any pink, so if I expand this out, it just has a form. Delete it, now here because we have an empty cell.
This is where I was saying with tables we don't want to have empty cells and This is why because now we're going to have a table and we can't delete this table data cell because if we do, it's going to tell us that we're inconsistent. We have a table header here of page number.

So we can't we have to leave it either blank or we can add a span tag to it. So what we would do here, so I think it works either way. Arielle I there is an error that gets thrown if you put a span tag in here. But those I feel like are messages that we can ignore, and so again we've got the gray area of accessibility. Because what it's going to do if I do put a span tag, let me show you what that looks like, span tag. Now this span tag. Usually I try to get rid of them because they don't really add any context. But if I have a span tag here, I can open up the properties I can put in actual text and I can put N/A. Now if I had access to the source file, click out of it, don't. Click out. I'm going to close. I would be able to put N/A here. You could put NA as invisible text. That's perfectly fine. What we want to convey to the screen reader user is that they're not missing information. So now when they read through this, they're going to say unit name Norwood, debt type FA, project title, and it's going to read the project title, amount and it's going to read the amount and here when we get to page number it's going to read N/A. Instead of column five, page number or I think it says page number column five and then it doesn't say anything else. Now, most screen reader users, they'll be OK with that. But now we're going to specifically tell it to put in an N/A there. And I can do that for all the rest of them. I'm going to keep going down. And here we are to our second table.

I'm going to show you the fully remediated page here. We're getting kind of short on time. I want to make sure we get through another example of a table. So this is a simple data table. We do have the blank cells that we do need to deal with. Span tags will probably work. You will have to ignore that error message. It does improve the screen reader experience. So here we have a part tag. We've got a paragraph tag again. We want this to be a heading. And then we've got multiple span tags which we don't need. So we'll pull this up and then we can get rid of this span tag. And we can get rid of that tag and then we can pull this up and out. But because I don't want to mistakenly put this in the wrong spot, I'm going to go collapse. I want it right under that table. There we go. That's exactly what now I've got another table, but note when I come off this table I have this table. Then I have kind of a break. Is this another section? Should this be another table? What's going on? So what I would do because this may not be associated with the same thing. So what's going to happen? Is it's going to read this miscellaneous action items as a row in the table and so things get confused that way and we don't want that to happen. We don't want merged cells. So what you can do is one go back to the source file and I actually had that worked up. Let me show you what I have. Open. So I remade this and you can see here I've changed the styles to kind of look neat. Whatever I wanted to do. And then I've got my list here. It's all coded as a list. I've got this instead of making extra spaces. What I would do here, we're going back to the source document. I'm going to add before spacing. Let's do that so it's still visually the same. I'd have to go higher number then I've got my agenda. Notes. I've got this. This coded as one single line, not as a column or a table. So what I was trying to do is save myself time. So you may at that point when you were going one by one on each of these lines, you might have just thought I'll go back to word fix it.

Here I have a table. What I've done is I've created it as a table and then I separated it out. So now I have two separate tables. I have the unit named debt type, Project title. The benefit to this type instead of doing the long table that you saw in the original.
Is that now I have. So if I'm somebody with low vision and I'm extremely zoomed in on this, let me go ahead and simulate that.

Now I have this and all I can see is this and I can't see what the titles are.
I'm going to have to go back up. Unit name, OK. Unit name, Good! Con Rev, Good!
What's that for? Debt type. OK, good. Now we go master trust. Let me go to my other screen indenture Amendment, project title, OK, so you can see having those labels up close and you know right next to each other would be very helpful. So in this one we have the you have to search the document and this reworked version we have those right there for everybody. And I was able to get it to all fit. I also repurposed this.

I made a whole new thing, so this is if this is something you can go back to the source document. You can do that. But if we have what we have to do here, what I did is let's say I didn't have that source document or I didn't have the time to recreate that document in Word, which is what I did, and we don't necessarily want to do that all the time. What I did here was I have my H3. I created a table with this. My table row. I've got all my table headers, so everything's, you know, looking great.
I'm gone by table row. I'm going by table data. Make sure it's all in order. You will find the strangest things like things get jumped around. So I always go very granularly through this tag structure as I'm making sure my tables are coated properly. And here we want to make sure if we have 5 table headers we have 5 table data cells. So throughout there, otherwise we're going to get an error at the end that our table has issues. We're going to keep down arrowing. Now what I did on the back end is I made this. I can make this an H2, but I think it might be an H3 or an H4 because it could be nested under this heading here. So let's make it an H3, because the previous heading was an H2. And I created a new table.

Now the trick with this is visually we don't have unit type, so I'm not going to be able to help that person with low vision with this current design. But I can help people with screen readers and I've put in invisible span tags for the heading so the table headers are ghost. They're kind of ghost headers and I put unit name in the actual text and so I've done that with all of these and so now when the screen meter reads through this table, it actually has this reference and it can pull it in. So that works out really nicely. So that's how you can do. If you're really stuck with this design, or if you can redesign even better. But this is how you can work with it. I have this table row and then now it's going to read all of these.

You can also you know, if you did leave this as like one big table and you didn't want to do this, heading the ghost headers. You could play around with the span and the column type things there too if you wanted to. Arielle all can talk a little bit about that. I would say, for simplicity's sake, make it 2 separate tables so that I know that these are specifically the items dealing with miscellaneous action items. It just kind of puts that mental space between the two tables. And I really don't know the end purpose of this content. So knowing that having that background would also help me make a decision on what's best for the end user here, what would make it most easy to understand. Alright, so that's kind of a sneak peek in tables. Again, list, tables they have tons of tags that we want to get them right in the source file. And then I would just keep going through this entire document. We've got 36 pages, so you know, like I said, if the more you can kind of just do in the background and adding tags and making sure things go, I mean, I don't. I don't know, Arielle, if you like to have a quiet room, but I like to have some sort of auditory thing going on in the back. You could listen to a podcast or something while you're making these tags. Because it really doesn't require anything except for, you know, your visual input and making these tags line up.
All right.

 **Arielle Gines** 3:42:58
We did make have somebody mentioned previously that they use the table features in Word for layout.
Kim, can you talk a little bit about that? I believe there's a layout checkbox in Word, so that way it's not conveying so much into a data table. Once you get to this section.

 **Kim Casey** 3:43:16
There is.
But I find that it doesn't do what I want it to do. So I actually have there is an accessibility document plugin that you can throw into your word. I'm not sure if it's approved on government laptops, but this accessibility tool here gets installed into my word. I can highlight the table and then it gives me the option to set the type.
And so I've played with this a bunch of times. Let me pull this over. It allows you to say it's not a data table, it or it only has the header, the row headers or the column headers. For this one I would do column headers and then I would assume that it would come over with the right tagging structure. But like for this, when this was a data table, you can set the type and it says not a data table. But I find I still I still get those things exported as tables sometimes. So it's really not predictable. It's an option and if you can get it to work great. But a lot of times you'll have to pull that stuff out too. The other thing too with tables, let me just highlight this again here in Word. It's a great point, Arielle.

Table we've got header row and 1st column checked. If I didn't want first column and I actually explains now why I didn't fix this before I exported it. Because it was marking the 1st row. Column as a header as well and I didn't like that. So now I have it set as just header row. So you can uncheck these and notice it looks like that accessibility thing is not communicating, so that may be the problem. I wonder, though, I've never have you played around with this and unchecked header row? Does it come up as a data or let's try it. Let me file save a copy PDF. See what happens and I'm going to make this see layout, Test. And you may find that when you go to remediate one document, you end up on topics like this. You know, kind of just exploring options and I like to say that none of this is wasted energy because you may find something that saves you a lot of time in the end, you may find nothing. You may have just wasted 30 minutes, but now you know it not an option. And that 30 minutes you wasted, you know there was the return, the potential return of hours of time, back to you. So I feel like as long as you're not getting lost in those, you know, rabbit, you know, rabbit holes, then eventually it pays off and you find something that actually lightens your workload. So let me just check the tagging structure here.

 **Arielle Gines** 3:46:09
This is also why we recommend just saving often.
because, if you went down the wrong rabbit hole, you broke something.
It's not that big of a deal. You could just revert to a previous version of the file.

Especially after tables, lists anything big that might take you a lot of time. You can always save a new version and just add, you know 2,3,4.
Just keep the numbers going up in your version history whenever, especially when you're doing something complex that took you a lot of time.

 **Kim Casey** 3:46:40
Yes, on any big decision point save before and save after. So you can revert just in case. Here is a content block that's empty that we want to artifact, so you cannot just delete this even though it's blank. You have to artifact it now. This is a P tag. I can get rid of it all right, so this is what it looks like here. For some reason it's skipping that information. So I'll have to figure out why I broke that. Then we have P. This is not.
I didn't code this as a heading, I'd have to fix that, but now I have my table so it's still pulling it in as a table even though I took out all the, That's unfortunate. Yeah, but OK. So it's giving it table data layout but it's saying all of the boxes are the same weight. It's not giving it any header status. So all of these are TD rather than TH. So that actually isn't going to save us any time. And so, like with these throwaway copies, feel free to delete them. Keep things clean because things are going to get very messy if you're not careful with your version control.
All right.

And I want to show you just really quickly before we wrap up today checking PDF’S for accessibility. You can use the accessibility checker. All of the stuff I was showing you is manually checking the reading order. So going through that entire tag tree and making sure everything is tagged in the proper order, we'll make sure that it reads properly. And manually checking color contrast before you mess around with the tags. And also if you want to get advanced you can check with the screen reader.
And this is really Arielle and I. It's our go to or we'll call in a colleague and just say, hey, does this sound right or does this is this better? The most common issues you're going to find when you are checking for accessibility issues are untagged, Incorrectly tagged PDF’s, Incorrect logical reading order, so all of these things when we go through the tagging structure, we'll fix it. And so when we get to that automated checker, all of these are taken care of. Missing incorrect image tagging that may be caught by the automated checker, which is fine. We make mistakes. We forget to tag things. Lots are going on in these documents. That's perfectly fine. That's exactly why this automated checker is there. Heading structure, that's something we have to manually check. Table tagging it will let you know if your table has a problem. And sometimes, frustratingly so, because you don't know how to fix it. And it's not really giving you great instructions, but I'll show you how to work through that and then use of color. So we want to check color, we want to check heading structure. All of those are manual checking.

So here we are. We're going to let me go ahead and back up a little bit. Checking for PDF so I have the accessibility checker open, so I'm going to pull up. See that last one I open. Let's see. So this is one I think I've gone through all the tags we know I haven't because it has items that are not quite right. So we've got this blank text, but let's see what happens when we run our accessibility checker. I'm going to close the tools I'm going to run my checker. I have mine set to not create an accessibility report. If you are creating this document and they do need this report. Check this, otherwise it just keeps creating a bunch of files that you'll probably never even look at, because you can look at it all right here in the program. So I'm going to hit start checking and I have three issues here. Logical reading order. It needs manual. Check this will always be here. You'll never get rid of it. The title failed. How do I fix the title? I'm going to right click sometimes. It'll have fix. Sometimes it doesn't. This time it does, and I'm going to say this is NC Local Agenda. And I can fill in the subject, author, keywords, whatever I want. And now it passed. So notice how that's easy to click check out. So if you run this, If you want to run this right when you first run this, check your logical rating order. That means go to the tags, make sure everything reads in order. Color contrast, make sure everything has good color contrast. So use your contrast checker tools. This is the contrast analyzer that I showed on the slides.
You can just pull it up. You can use this dropper to pull if there's anything text over image. Anything like that. If you're getting fancy like that map, you might want to check. I use this tool to check that. Once you're finished checking these and you know you're good, you can hit pass. But you know, of course, that's you checking your own work. So make sure you're right before you check this this pass. I usually just leave it because it's usually not a big deal, but if my client wants this to be completely clean. I mean, I will clean it out. Now we have page content, it says Tab order failed. I can right click, hit fix. This one's usually really easy. I don't mind this one. So now we've got. Let's go ahead and pass both of these. So we're going to get a clean bill of health here. And then, forms we don't have any issues with. Forms we don't have any issues of alternative text. We do have an issue with the table.
Let's find out. Headers failed on this table. It doesn't like our table because we told it didn't need headers. So what I can do? I can explain it doesn't have fix. It won't fix it for me. That would be nice, if it would. I can hit explain or I can show in tags panel and that's probably what I would do once I understood what it was. Explain I'll bring up either a page. Of relevant information for you to how to tag tables. Or sometimes it'll bring stuff down here.

Here what I'm going to do is just go to the tags panel. Now if I expand this out. I'm pretty sure I know what its problem is, so I'm going to say these are all table header cells. I'm going to fix that and then we can rerun. The you can also, if you're not comfortable with knowing what letters these are, you can right click and hit properties and then you can change it here from table data to table header. There's so many years of experience here, guys. I'm trying to fit it all in in four hours, so I hope you appreciate I'm trying to fit it all in. I want you all to be comfortable at least. Remediating simple documents after this. So we have header cells. Then we get that. Now we'll rerun our accessibility checker again. Right click it, check again. Boom, we fixed it. Now this one has like an alert. It wants me to put summaries of these tables.
So if you feel like that would help, then you can put in the caption for these tables and let people know what they're what this table contains. If it's not obvious in the text on the page, you can do that and that helps out. But here we are. We have a perfectly accessible. But as you know, it's not perfectly accessible, at least to my standards. I've got blank lines that the screen reader's going to announce as blank, so I would fix this. So you can't just rely on those automated checkers. I don't even know what this alt tag is. I put this in here, North Carolina Department of State Treasurer and state local department. But what I might do if this was essential information is break it up into multiple images on my source file so that I could make them smaller Alt text. So it would say one would say North Carolina Department of State Treasurer logo and then the next would say state and local government finance. What's really cool about this text is I can actually pull it into. It's coming up as actual text, so that means I can tag it so it's not even an image at all, which is actually makes my job much easier. So I could, if I wanted to pull it out and make it text like I have in this version of this document. I only have it reading on the first page and then of course it reads the heading level one there. Let me pull this out of the way. There we go. And then I'll go just go through my heading structure again.
This is the document that I created to make. Now I've got my empty there artifact and then my last step of course would be to go through it with the screen reader to make sure nothing reads funny, but that again is a very challenging and takes years to learn skill and you know, it's really amazing, Arielle. I don't know if it just resonated with you, but you started using a screen reader and then like within weeks you were like I got to speed this thing up. I got to make it read faster, and really that's how screen readers work.

You know the people who use screen readers for their day-to-day work as they speed it up and up and up and up. So that doesn't even sound like English to us, but it reads the content so fast that they can keep up with the pace of work. So Arielle within weeks was like I got to speed this thing up. And, you know, she really embraced the document stuff. So all right.

So that is kind of the overview of tagging structure fixing, tagging, structure, checking using an accessibility checkers. I talked about the most common and again you're going to resolve the issues and you're going to check your tags again.
So I showed that, you know, once we fix the table issue, we were able to clear that out. We knew it was great, but again, that kind of last step, if you get somebody with, you know, maybe with low vision or somebody with a screen reader that's going to tell you. So could you, you know kind of tweak this? This would be much better. All right. And I know there's been tons of great questions, great conversations today.
Thank you all for all your attention and just even coming to this. I know you have a lot of work ahead of you with making documents accessible with all the Title 2 stuff coming around. We want to make sure people can have access to our documents.
Hopefully I've given you some ideas on how to work through that. I wanted also wanted to provide our website so we can be found at www.ablr360 com.
I also have a QR code that you can scan. It'll take you to our contact us form. We do have a toll free number. I'm not manning it. So if you do want to get a hold of me, you can e-mail me at Kim.Casey@Ablr360.com. And just like I said, with the QR codes when I was talking about them before, you can make them a link. So I can make this a link. Let's see if I did. I didn't, but I will. Before we distribute this and I can link whatever website I want it to go to, I press control with K to bring that up. So it's a link and I also gave it alt text. Scan QR code to the Ablr contact page.

 **Arielle Gines** 3:57:20
I hope we didn't scare you off. Don't worry, it gets easier with practice. It's just a lot of information up front.

 **Kim Casey** 3:57:25
Exactly lots of information, but the more you practice, the more it just becomes something that you do everyday. I hope you all have a wonderful day. Look forward to seeing you all tomorrow. I'm ready for just as much information. Have a great day.