

Guidance for making PDF documents accessible

This guidance shows what needs to be done to make a PDF accessible, if you don't have the original document in Word etc.

1. Give the PDF document a meaningful descriptive file name separated by hyphens (avoid abbreviations)

e.g. Community-transport-door-to-door service-Leicester-area-2.pdf

2. Check / amend the document properties

In Kofax, go to File or click Ctrl D

Document Properties

Description Security Initial View Custom Fonts **Reading**

Description

File: Coronavirus information for ASC Providers Issue 29.pdf

Title: Issue 29 - Coronavirus bulletin for adult social care providers

Author: Leicestershire County Council

Subject:

Base URL:

Keywords:

Created: 2020-06-26 18:26:02 Additional Metadata...

Modified: 2020-06-26 18:26:02

Application: Microsoft® Word for Office 365

Advanced

PDF Producer: Microsoft® Word for Office 365

PDF Version: 1.7

File Size: 103.23 KB (105,707 Bytes)

Page Size: 8.27 in x 11.69 in

Location: \\ccfp9\L\CCHOME\AzAl\Documents\

Number of pages: 2

Tagged PDF: Yes

Fast Web View: No

OK Cancel

Give the PDF document a descriptive and meaningful title

This will show when a document is listed in a google search.

Go the 'Description' tab to add the Title – this should be more than 3 words long, without abbreviations tries to match the H1.

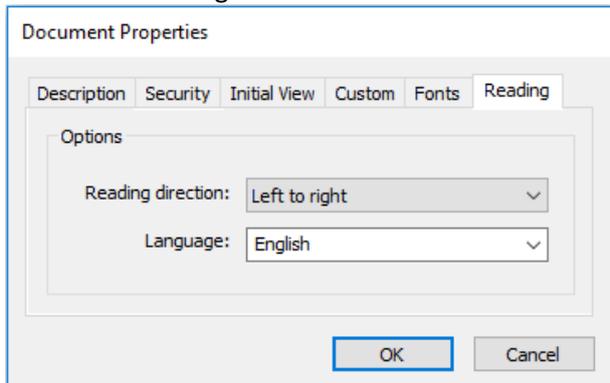
Add the Author as the organisation

e.g. Leicestershire County Council

Also added in the 'Description' tab.

Check / Amend the language

The language must be English.
Go to the 'Reading' tab



Set the language to 'English' if it's blank or shows English US and click 'OK'.

3. Ensure the PDF is tagged

In Kofax, the left hand panel should be set up with:

- Bookmarks
- Pages
- Tag
- Compliance

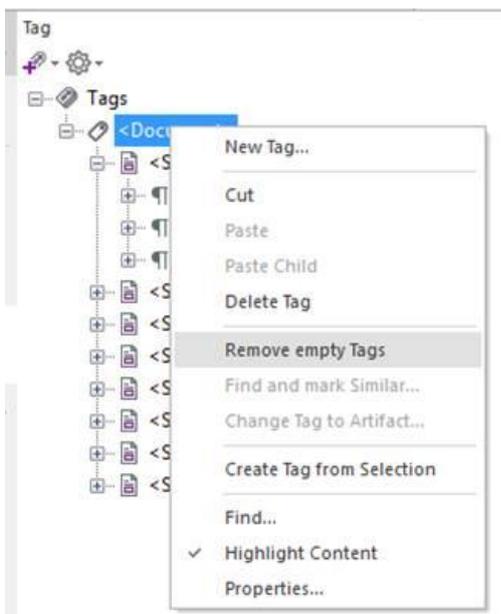
Click on the Tag icon



If the document hasn't been tagged it will say no tags and give you the option to retag document. Click on 'retag document.'

Some old PDFs may already be tagged but contain <P> tags that are just blank lines – these should be deleted.

Right click on 'Document' and select the 'Remove empty tags' option to delete them.



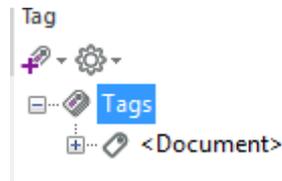
4. Check / Add Heading tags

It is important that documents have a H1 tag as the first title of the document, and H2 tags for the subsequent subtitles.

Heading level 1

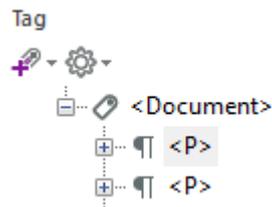
Click on the Tag icon  and go to the first tag.

Click on + next to Document to expand the menu.

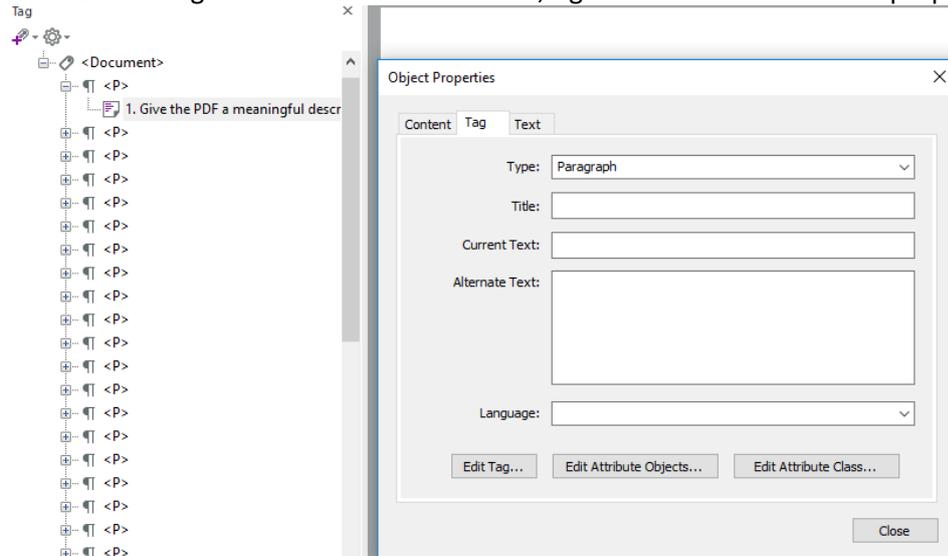


NOTE: It is also helpful to have 'highlight content' ticked as this shows you which content it is referring to.

Expand the 1st <P> tag.

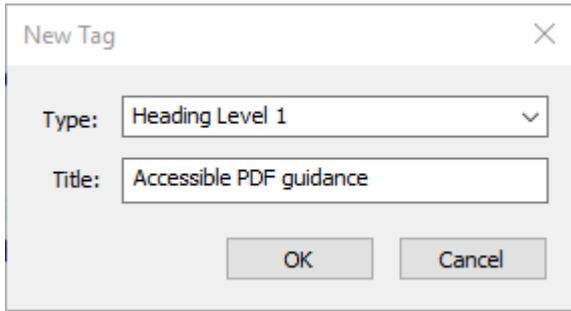


If the 1st <P> tag is the title of the document, right click on it and click on 'properties'.

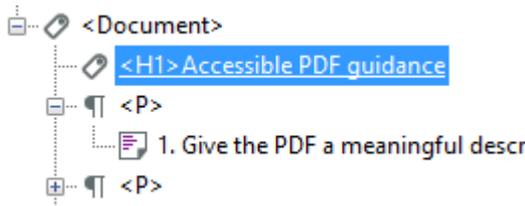


In the dropdown, change the 'Type: Paragraph' to 'Heading 1' and click 'close'.

If the 1st <P> isn't the title of the document and is text further down the document or there isn't a heading that can be identified on the document. Click on the <P> and select 'new tag' and change 'Type:' to H1 and add the title.



Then drag it in the structure to the top



Heading level 2 (onwards)

Find the sub headings in the document and amend the tags for them to be H2, in the same way.

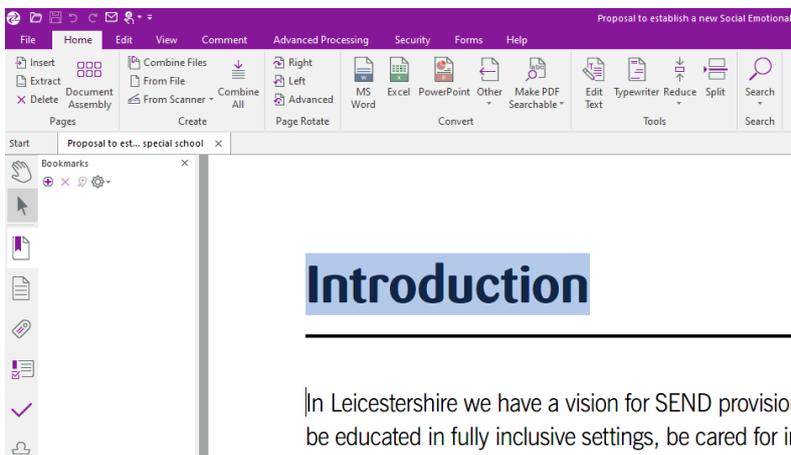
If possible, add more heading levels in, but if time doesn't allow H1 and H2 are sufficient.

5. Bookmarks

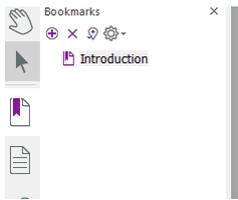
Check the key sections (Heading 2's) of the document are bookmarks.

Go to  to see the bookmarks already listed

The add a bookmark, select the text you want to use as the bookmark using the 'arrow' icon and a pop up menu appears which includes the option for 'New bookmark' (alternatively right click and select 'Add bookmark')



The bookmark will appear in the left hand column



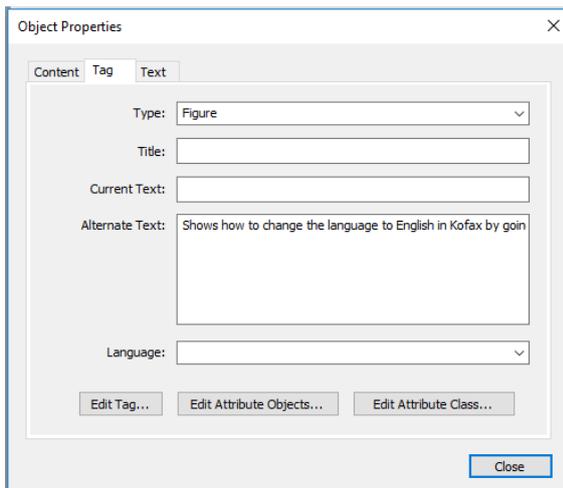
Introduction

Continue through the document to add the rest of the Heading 2 items

6. Check / Add Alternate (Alt) text for images

In Kofax in tags, find anything that is labelled as a 'Figure'.

Right click and select 'properties'



In 'Alternate Text', type in a description of the image.

Or if an image isn't labelled as a figure, amend the tag to 'figure' and add the 'Alternate text', as above.

'Save' the document.

7. Check that the document is machine readable

If a document contains a text heavy image (text and image is merged), a screen reader won't be able to read it.

To check, select the arrow icon and go to the image and try to select the text.

If you can, that is fine.

If you can't, you will need to amend the source document in the original software so that the text and image are separate, and convert the document to PDF again.

8. Do the Accessibility check

In Kofax, click on the 'compliance' icon  in the left hand toolbar.

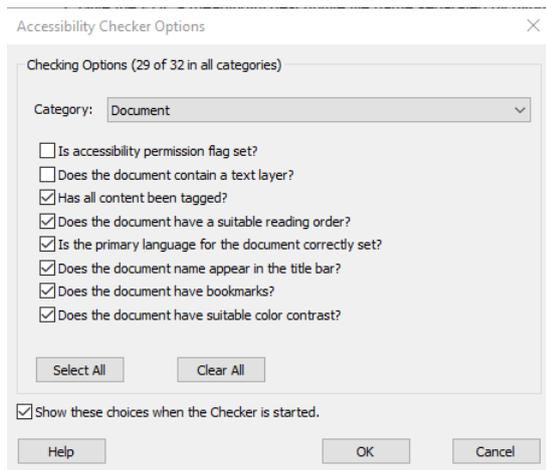
Go to the Cog at the top and check that it's checking for accessibility (a tick next to it).



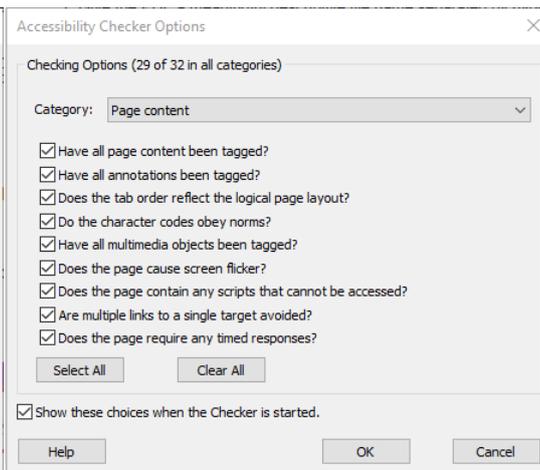
Click on the tick at the top.

Check your settings to ensure the following are ticked.

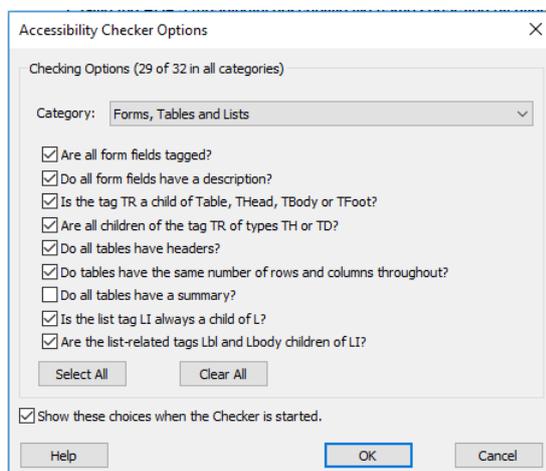
In: Document



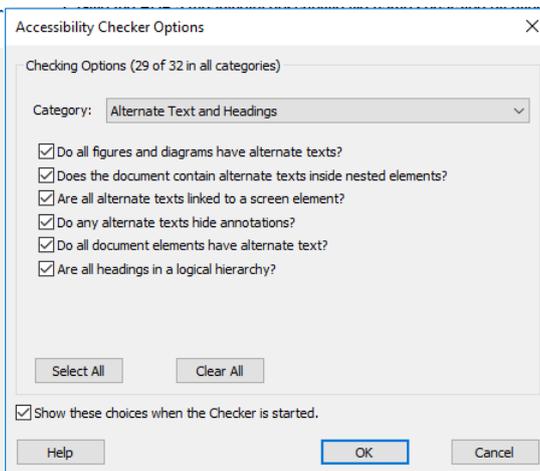
In: Page content



In: Forms, Tables and Lists

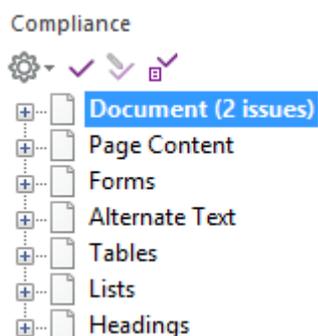


In: Alternate Text and Headings

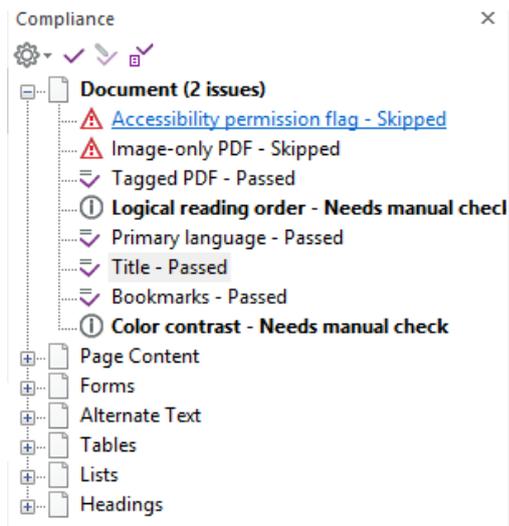


Click 'OK' to run accessibility test.

Go through the results, by expanding the + where there are issues.



Mainly looking at the whether the Tagged PDF, Title and Bookmarks are all Passed.



You may need to right click on them to fix them.

9. Save the document

Save the document to ensure the changes you've made are saved.

Things to note

Source document

It is always best if the document is set up as accessible in the source document e.g. Word, before being converted to PDF.

If the PDF is as a result of having to scan a document to PDF - ensure your scanner settings are set to scan the document using OCR (Optical Character Recognition), rather than as an image so that it recognises the text within the document and it will be readable by screen reading software.

Web page content

- Make sure the hyperlink is meaningful, unique and describes where the link is going to (**don't** use here).
- Add the file size and file type so people know the link is going to a PDF.