

Accessible PDFs from Microsoft Word

Table of Contents

What's the Purpose of a Tag?	4
How Do I Add Tags to a Document?	5
Microsoft Word	6
Adding a Document Title	6
Defining Tags	7
Default Styles in Word	7
Custom Styles in Word	8
Bulleted and Numbered Lists	9
Navigation Benefits	9
Creating PDFs	10
Microsoft Method	10
Adobe Method	11
Tables	12
Hyperlinks	13
Screen tips	14
Creating a Table of Contents.....	15
Working with Images	17
Tag Order	18
Reading Order	18



Accessible PDFs from Microsoft Word

Microsoft Word

Microsoft Word is a good choice for creating accessible PDF files. This is because of the popularity of this authoring application and also because Word provides a number of tools that can be leveraged in facilitating the creation of an accessible PDF file.

Because Word contains a natural top-to-bottom flow, it's easy to define the tag order, provided you leverage that natural flow. Inserting elements such as text boxes can cause order issues when exporting to the PDF format from Word.

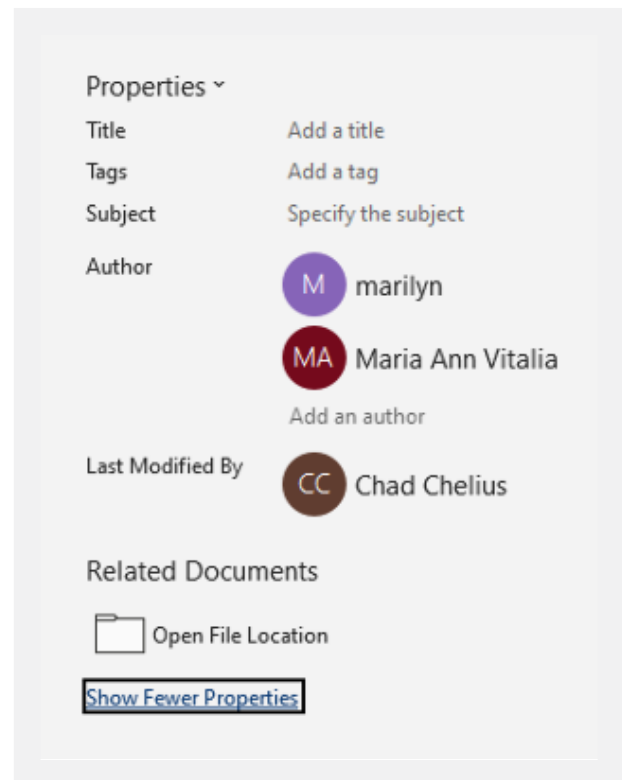
Adding a Document Title

All accessible PDF files need a document title and that title needs to be displayed when the PDF file is opened in a PDF reader such as Adobe Acrobat Pro or Adobe Acrobat Reader. Word gives us the ability to add a title that will be included when creating an accessible PDF file.

To add a title in Word, choose File > Info. In the Properties category on the right side of the screen, you'll see an area where you can enter an appropriate document title. Although the title is the only required metadata element for accessibility, because these documents will likely be published online, it can be beneficial to add other metadata that will carry over to the PDF file, including:

- Title
- Subject
- Author
- Company
- Tags (Keywords)

Word defines the logged in user of the person creating the document as the author. This typically doesn't make sense for a published document. You can right-click on an existing author and choose "remove person" and then type in a new author in its place.



Metadata properties can be added in Word by choosing File > Info.

Bulleted and Numbered Lists

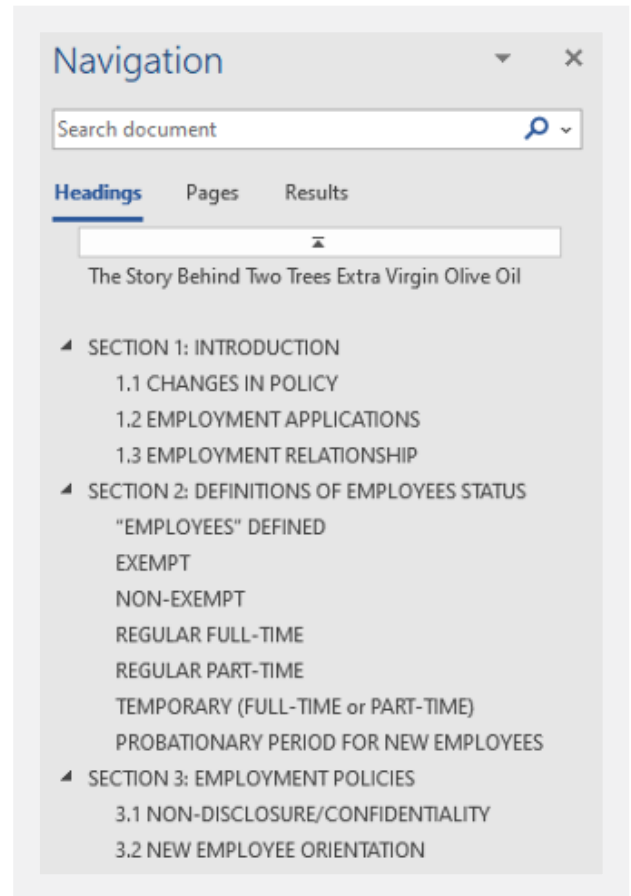
When creating lists in Word, it's important to leverage the bulleted or numbered list formatting buttons located in the Home tab of the ribbon. Using these buttons will automatically apply bullets or numbers to selected text, and also ensure that they will be tagged as a list in the exported PDF. Lists can be customized in Word to use items other than a standard bullet or to use letters, roman numerals, etc. for numbered lists.

However, when doing so, please keep in mind that very often screen readers vocalize icons, symbols, emojis, and more much differently than you may anticipate. Testing your PDF document's bullet-pointed lists with a screen reader will ensure a much smoother listening experience for your readers.

Navigation Benefits

A side-benefit of using the default heading styles in Word and customizing styles to use outline levels, is that the Navigation pane in Word populates with the text that has those styles applied.

The benefit of the Navigation pane is that it makes it easy to see how headings are applied in a document and how the document is structured. In addition, the Navigation pane can be used to quickly and easily navigate throughout the document by clicking on an item within the Navigation pane.



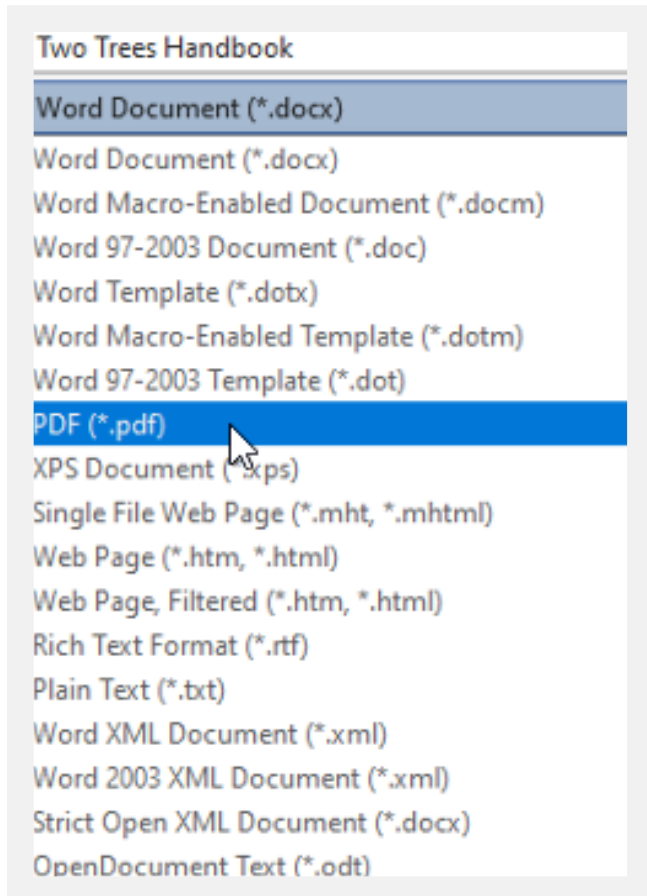
Heading styles in Word appear in the Navigation pane for easy structure analysis.

Notes

Creating PDFs

Microsoft Method

Depending on your setup, Word provides at least two methods to create an accessible PDF file. The first method is achieved by choosing File > Save As or File > Save A Copy and choosing PDF from the format drop-down menu. To define the accessibility properties of the PDF, click on the More options link below the format drop-down menu.



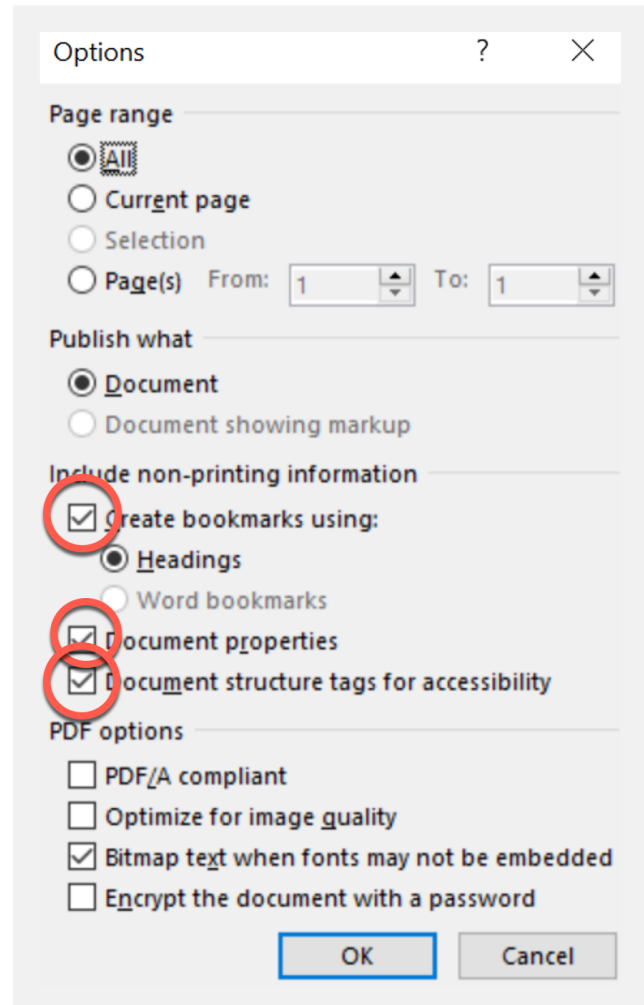
Choose PDF from the Format drop-down menu.

Now click on the Options button at the bottom of the dialog box. In the Options dialog box, make sure that the following options are chosen:

- Create bookmarks using headings
- Document properties
- Document structure tags for accessibility.

These three options do a lot, including adding the document metadata from Word to the PDF. Adding tags to the PDF, and adding bookmarks in the PDF file based on the heading styles used. With these properties set, click OK and save the PDF file. The resulting PDF will be tagged, contain bookmarks, and include the metadata added from Word.

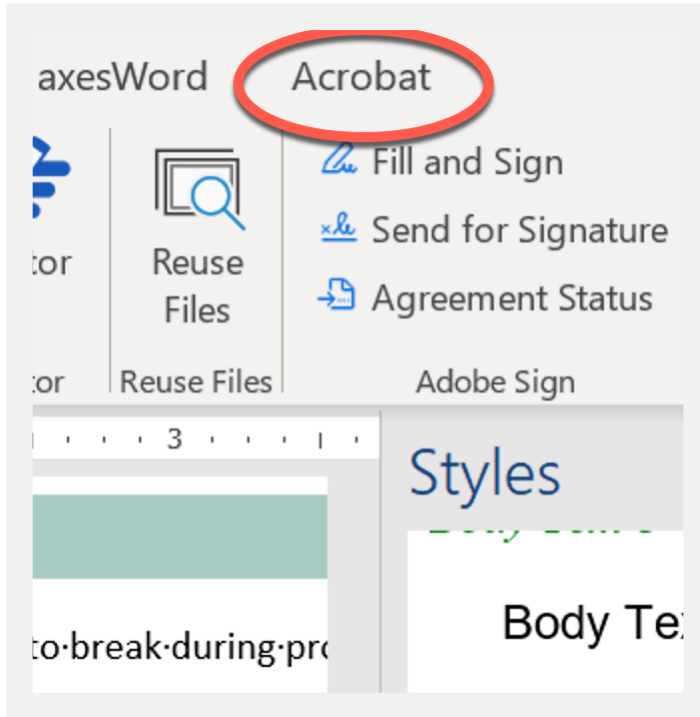
As an aside, bookmarks are required for documents containing 9 or more pages. Including bookmarks in the PDF file satisfies this requirement.



Defining the accessibility properties in the Options dialog box.

Adobe Method

If you have Adobe Acrobat Pro installed, the installer will add a component to Microsoft Office applications on your computer (including Word) called the PDFMaker. This is an Adobe plug-in that adds the capability to create accessible PDFs from Microsoft products. If PDFMaker is installed, you'll see an Acrobat tab above the Ribbon.



The Acrobat tab in Microsoft Word indicating that the PDFMaker has been installed.

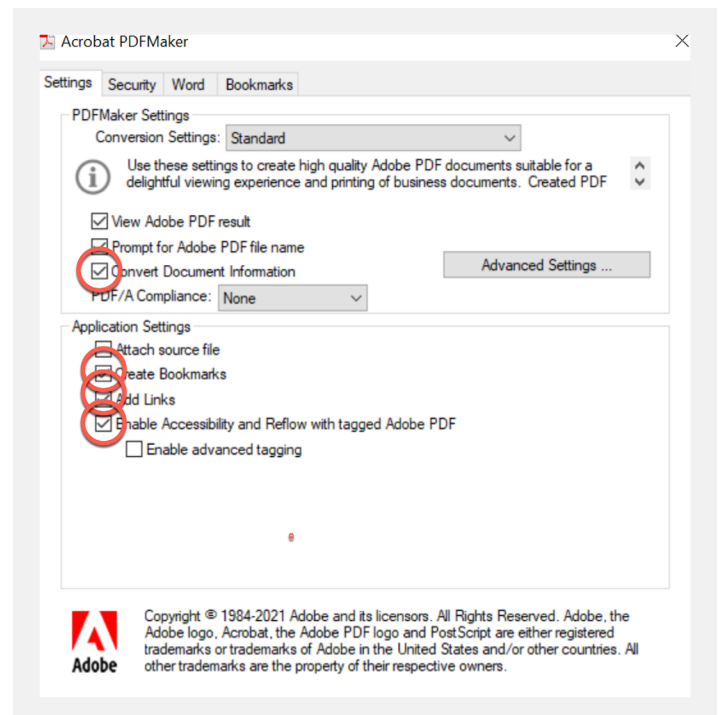
Click on the Acrobat tab, then click on the Preferences button to control the properties of how the PDF file will be generated.

In the Acrobat PDFMaker dialog box, make sure that the following options are enabled:

- Convert Document Information
- Create Bookmarks
- Add Links
- Enable Accessibility and Reflow with Tagged PDF

Enabling these options will ensure that you create a tagged PDF with all of the necessary accessibility elements. Notice that this is where you control whether bookmarks will be created in the exported PDF file.

Note: We don't recommend using Word's Create PDF option, as it can cause tagging errors or loss. Instead, use File > Save As > PDF, which preserves structure and reduces cleanup.



Setting the appropriate accessibility options in the Acrobat PDF Maker dialog box.

Working with Images

Images require special attention when it comes to accessibility because fundamentally images contain no relevant information. Assistive software will voice an image as “graphic” but beyond that there’s no information about the image that can be read.

That’s where alternate text comes into play. Alternate text or alt text is text that describes an image in its context. The job of alt text is to describe what you are seeing in an image.

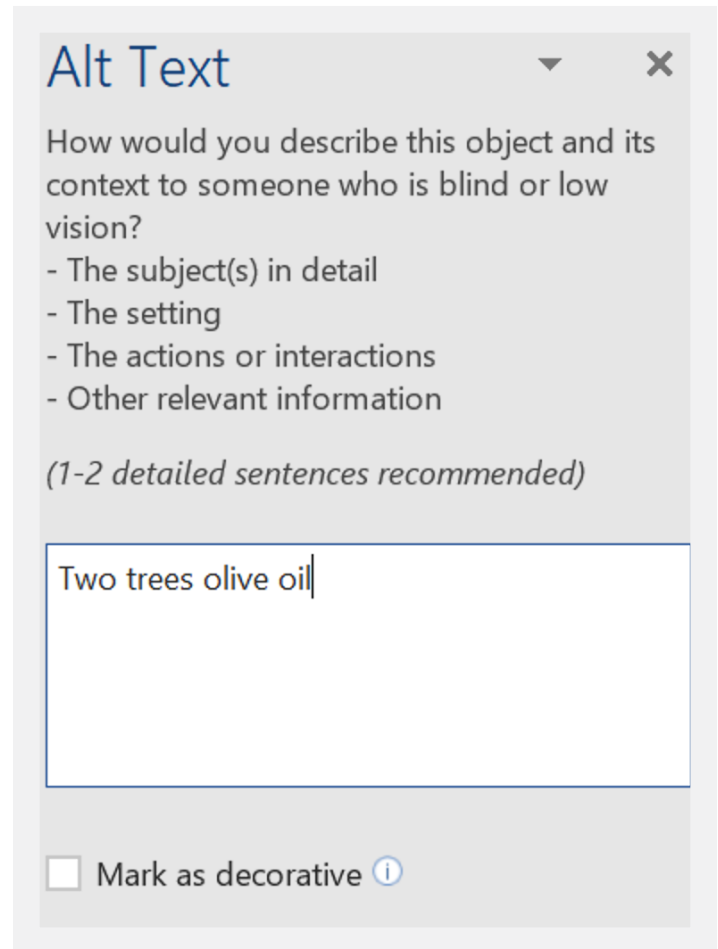
For more information on writing good alternate text, read this article from WebAIM that discusses the topic in more detail.

Conversely, sometimes images are used in a document strictly for aesthetic reasons. They’re used to add visual interest in a document but they really don’t have much value in the context of the content of the document.

For these images, a common practice is to artifact them. Artifacts are a term used to describe images that should not be read by assistive software. When an image is artifacted, assistive software ignores it as if it weren’t in the document at all.

To add alternate text to an image in Word, click on the image to select it, then right click on the selected image and choose Edit Alt Text. The alt text pane will appear containing a field in which you can type the alt text for the selected image.

If you’re using a recent version of Word, you may also notice a check box at the bottom of the Alt Text pane called “Mark as decorative”. This check box will artifact the image so it is not read by assistive software.



Adding alternate text for an image in the Alt Text pane in Microsoft Word.

Accessibility is a Journey

Continue Your Learning



Scan to visit our website to view all upcoming courses.

Or visit 7je2.short.gy/courses





solutions@chaxtc.com | Follow us   

Chaxtc.com