

Self-Assessment Procedure for PDFs

Portable document formatted files (.pdf) must be tailored to support universal accessibility. SFSU requires that documents published for students, faculty and visitors be accessible to assistive technologies in use by visually impaired people such as the JAWS screen reader. Those who publish documents for the SFSU audiences are responsible to evaluate their own documents to determine whether they are accessible or not. The Disability Programs Resource Center ACCESS group (access@sfsu.edu) is here to support the effort to make all documents published by the University accessible.

Procedure

Self-assessment of a portable format document (.pdf) has three parts.

1. Readability Review
2. Quick Read Aloud Test
3. Accessibility Full Check

After completing this self-assessment email your results to access@sfsu.edu. Note that you need to complete one PDF Self-Assessment Summary for **each** document that you assess.

The ACCESS team will review your results and help you with any problems you are having with the assessment. In addition, we might perform user testing with a screen reader or other assistive technology, as applicable. Our turnaround time is usually 5 business days from the receipt of your self-assessments.

On remediation: Since pdf formatting is commonly used by many different applications to create a stable, non-editable version of information the precise methods of re-structuring a document for accessible use of it will differ. It is almost always easier to start a document using an accessible style from the beginning rather than repairing it after publishing. Whenever possible it is desirable to repair the pdf in its original source application and then export it to pdf. For example: in Microsoft Word, Open Office, Adobe InDesign or LiveCycle. For some legacy documents this may not be possible and for others that require only small changes to remediate accessibility authors or technologists may work directly in Adobe Acrobat Professional (versions 8.0+).

What you need

For the self-assessment of portable document format (.pdf) files you'll need the following:

- Adobe Acrobat Professional, version 8.0 +.
Available from Adobe: [<http://www.adobe.com/downloads/>]
- PDF Self-Assessment Summary
Available from DPRC-ACCESS: [[URL](#)]

Self-Assessment

To begin plan to work methodically through each part. If the document fails at either *Part 1 Readability* or *Part 2 Quick Read Out Loud* you'll need to repair the document before going on to *Part 3 Accessibility Full Check*. In Part 3 you'll record responses for each checkpoint in the Self-Assessment Summary. Finish by e-mailing the completed Summary to access@sfsu.edu.

Part 1: Readability Review

Is the pdf text-based?

Find out by checking to see if it is possible to highlight a word. If not, the file can't be read by a screen reader and should be reopened in the application in which it was created, modified as text and exported again for assessment.

Part 2: Quick Read Out Loud Test

Does the *Read Out Loud* feature read every word and explanations (such as alt text of images)?

To find out, open the page that is being assessed in Adobe Acrobat.

- From the Acrobat toolbar go to
 - **View>Read Out Loud>Activate Read Out Loud**
 - Click on an area of text in the document and listen. Try clicking on a few different areas of the document, including an image or graphic element, such as a logo or picture.
 - If it doesn't read, the document should be reformatted in the application it was created in and exported again for assessment. Note: Do not "print file to pdf" as this will not create an accessible document.
 - If yes, proceed to Part 3.
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Part 3: The Accessibility Full Check

Begin the Accessibility Full Check:

1. Open the pdf (portable document format) document you wish to assess using Adobe Acrobat.
2. From the Acrobat toolbar select **Advanced>Accessibility>Full Check**
3. In the dialogue window that opens, select all the checkboxes and click "Start Checking" button.
4. After the Check is complete a dialog window may open to say that there are problems preventing accessibility, whether it does or not open the Full Check to determine which elements of your document require work.
5. Review each point in the PDF Assessment Procedure below and record results in the [PDF Assessment Summary](#) document (available from: [URL](#)). On each point determine whether your page passes, fails, or in some cases if the checkpoint is not applicable.

PDF Accessibility Checkpoints

Review each checkpoint (a – m) below and record your results in the [PDF Self-Assessment Summary](#).

(a) Language Specification

Is the language specified correctly for the document?

To check: In Acrobat, Select

File > Properties

Under the

Advanced tab in the 3rd section: [Reading Options](#)

Make sure the correct option is chosen in the Language field. It can't be left blank.

If the correct language is specified mark PASS, if not FAIL. This is always applicable, therefore N/A is not a valid value here.

(b) Tags

Is the document tagged properly?

The Accessibility Full Check will report a problem if the document is not tagged. But even if there are tags in the document this doesn't guarantee that it is accessible. Tags need to be checked for the following problems:

1. Are there empty tags?
2. Are there blank lines inside a tag?
3. Does the document's content hierarchy match the tag structure?
4. Is the relationship between parent tags (plaintext preceded by a "filebox" icon) and child tags (plaintext enclosed by angle brackets) correct?

Check these points in the **View > Navigation Panels > Tags**

1. If there are empty tags or extra lines after tags record FAIL.
2. If Chapters aren't preceded with "filebox" icon and the headers underneath them aren't tagged as <child> and in respective order, record FAIL.

Record PASS if the document is tagged and logical order is reflected in the tag structure.

(c) Structural elements

Are structural elements used to mark up the content consistent with its meaning?

Check by.... headers (<H1,H2,H3,H4...>) and paragraph tags (<p>) and listed items (marked up as true lists)

If title, headers, paragraph tags and lists (if present) are used in a manner consistent with the document's meaning record PASS, if they aren't, record FAIL. Since all documents will have structural elements N/A is not a valid option.

(d) Images

Do all of the images in the document contain alt text ?

Step by step description of how to test.

Conditions for PASS, FAIL, N/A.

(e) Forms

Are all form elements organized within the tag structure to follow logical tabbing order?
Test by using these keystrokes to navigate through the document.

TAB	go to next field
SHIFT-TAB	go to previous field
SPACEBAR	scans through options

Note that a form built upon a layout table must be tagged appropriately to its hierarchy. See section (f), below.

In addition,

- form fields must be labeled
- text fields or rules must be used to define fields
- form buttons must include descriptive alt text

If these conditions are all met record PASS, if not, FAIL, if there is no form in the document record N/A.

(f) Tables

Are tables used to organize information? Can all tables in the document be navigated with the keystrokes outlined in section (d) above?

Note that it is not recommended to use tables to control visual layout. Also, remember that table tags are hierarchic: <TABLE><TR><TD><TH><CAPTION> should be logically associated with the table's data. Use keystrokes to test logical navigation. Use **View >Read Out Loud** to see if the table has a caption.

Record PASS if keystroke navigation works and a caption is included for each table; if not, record FAIL. Record N/A only if there are no data tables in the document.

(g) Links

Do all the links contain descriptive text?

Scan through the document's links using View>Read Out Loud. If all the links have descriptive text record PASS, if any of them don't, record FAIL. If there are no links record N/A.

(h) Bookmarks

Are Bookmarks used to organize sections within the document?

TEST STEPS.

CONDITIONS for PASS, FAIL, N/A.

(k) Embedded media

Is all the embedded media in the document labeled? If there is video is it captioned?

If the media is labeled and captioned record PASS If it is not, record FAIL, if there is no embedded media, N/A..

(h)Additional Element Dummy Block

Question about the element ?
Step by step description of how to test.
Conditions for PASS, FAIL, N/A.

(c) Reading Order (This should be last test)

Is the document's reading order consistent with its meaning?

Check by keystroke navigation through the document with the "\$\$" panel open.

This will include headers (<h1,2,3,4...>), paragraph tags (<p>), labels for all form elements, including buttons and fields, descriptive alternative text for images, captions for tables and descriptive text for hyperlinks.

If the reading order matches the hierarchy and meaning of document record PASS, if not, record FAIL. Since all documents will have reading order N/A is not an option.

(any?) Additional SF State Accessibility Guidelines
