Accessible PDF Usability

Considerations for Accessible documents from an Authoring and User Perspective

Agenda

- Discussion on Accessible PDF

- Accessible PDF Usability

- Demo on usage

- Remediation Classifications – Manual to Auto Tagging to Automation

- What else can we do with tagged content
  - Accommodations to other Accessible Formats – Braille, Large Print

Accessible PDF

- Why Accessible PDF?

- PDF/UA and Accessible PDF to WCAG 2.0 (A/AA)

- Aimed at electronic readability on Assistive Technology devices

PDF/UA

- ISO 14289-1
- Hardware and document based compliance
- Stringent requirements – over 200 points to test
- Harmonization of software and hardware

WCAG 2.0

- W3C Standard for Web Accessibility

- Globally the accepted standard for web and document accessibility

- Test Gates
  - Level A 25 test criteria
  - Level AA – Additional 13 test criteria points

- Majority of all accessibility requests are based in WCAG 2.0

Assistive Technology

- JAWS (Job Access with Speech)

- NVDA – Non-visual Desktop Access

- Refreshable braille displays

- VoiceOver (iOS) or Talkback (Android)

- ZoomText

- Cobra Pro 10

- WYNN

Usability

- Person consuming the document
  - Person who is blind, partially sighted or has a cognitive disability
- Document Authors
  - IT departments – Transaction documents
  - Desktop Publishers – published office to In Design output
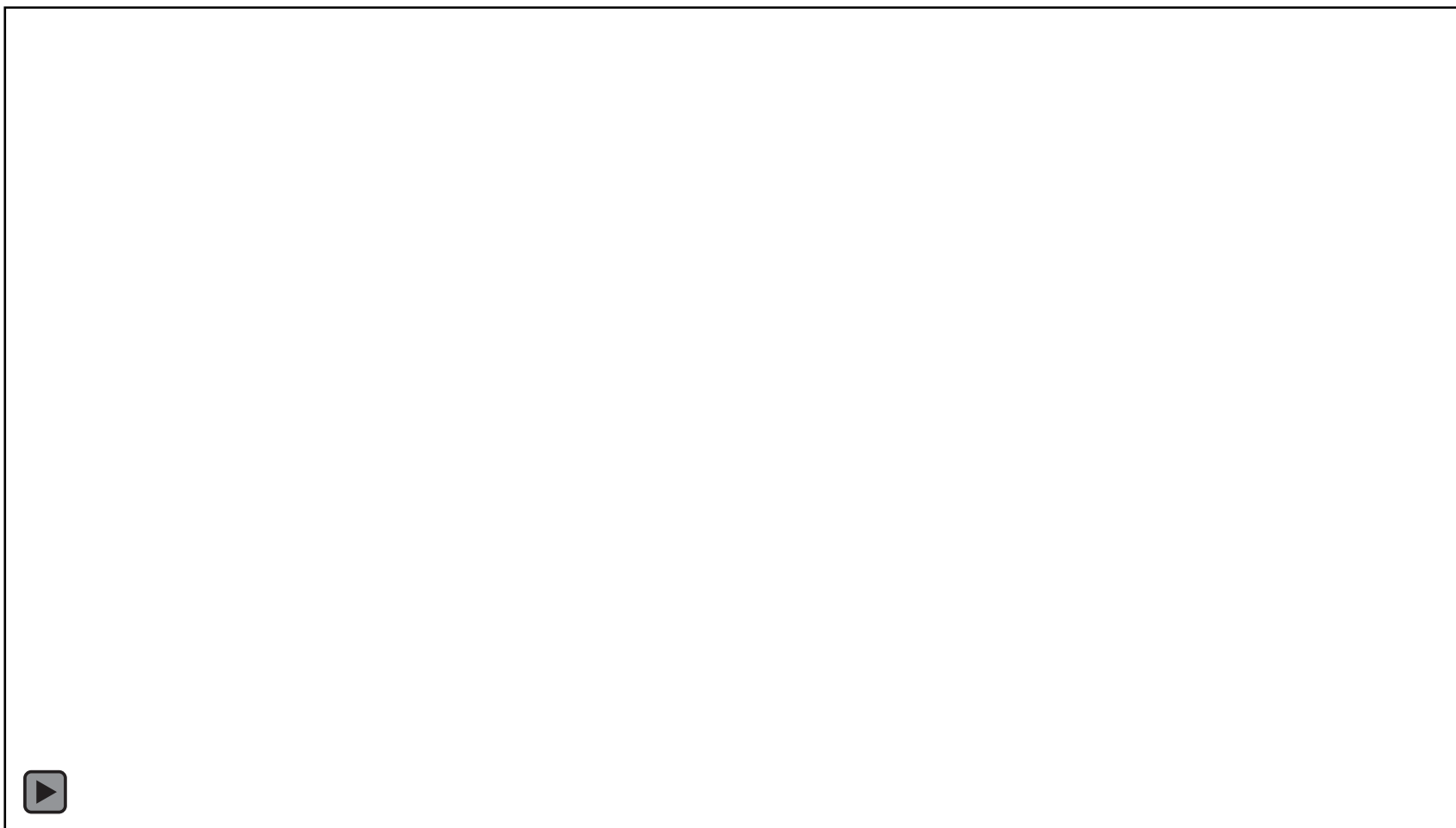 - What are tools?

Assistive Technology

Refreshable Braille Displays

Notetakers with Braille keyboard

Other Assistive Technologies

- Connected AT Devices – refreshable braille display

The Challenge

- Training accessibility for all web / documents across the enterprise
- Ensuring compliance
- How best to deliver
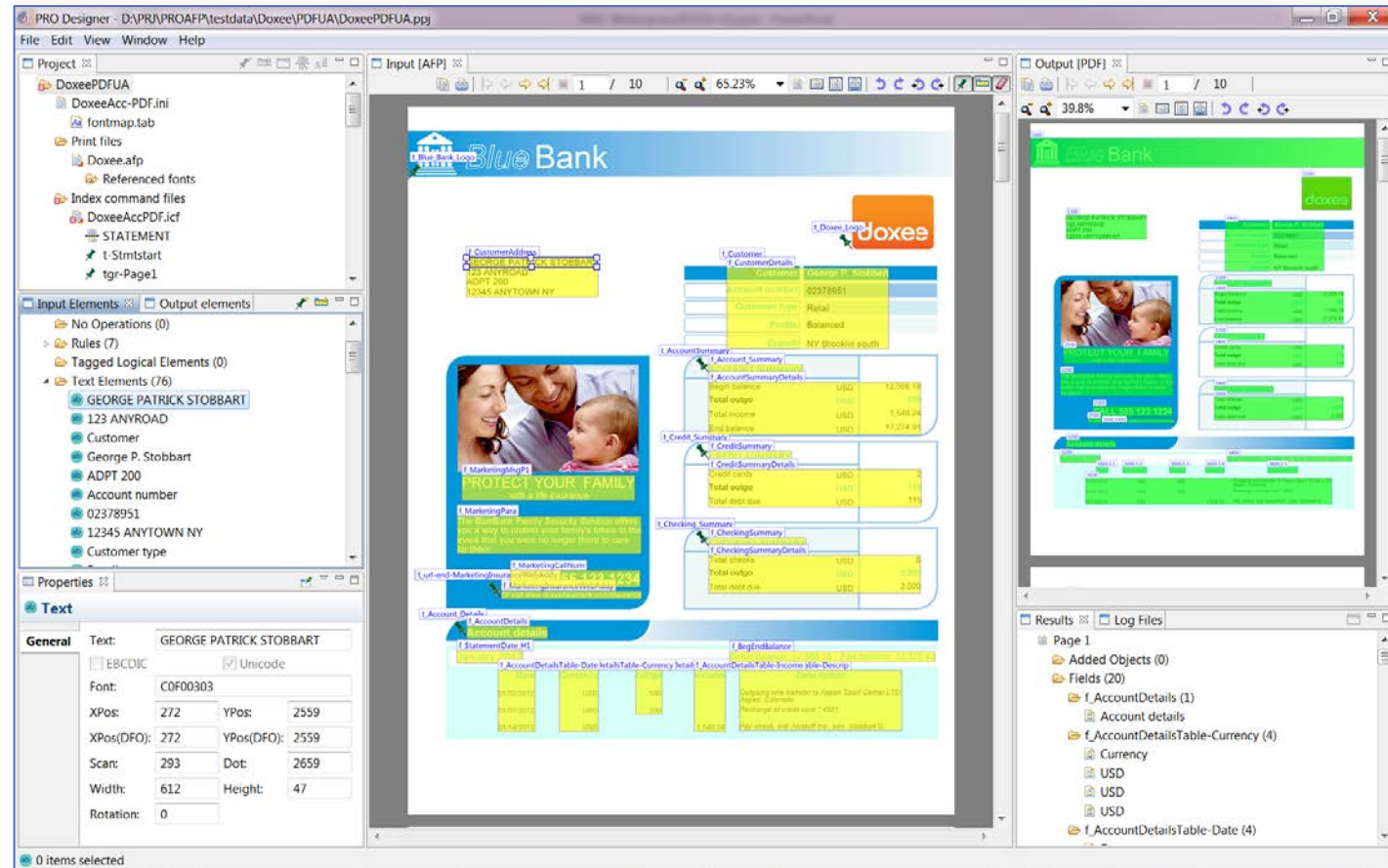
What do I choose?

- Choice for inclusion and doing the right thing
- Compliance – no one has been sued for trying to make things accessible
- PDF/UA is a good technique for achieving WCAG compliance
- WCAG seems to be the global standard – Section 508, AODA, EN 301-549, AODA

Ways to Remediate Documents

- Manual Remediation

- Manual Remediation with tools

- Auto Tagging – high volume, high speed

- Automated Business Rules – High Volume
  - Post Composition
  - At Composition

How are documents remediated?

- High Volume - Using Templates
- Tools – Adobe Acrobat PRO, Axes4, Netcentric CommonLook
  - Software is reasonable
  - Remediating is costly
  - One document at a time
- New Auto Tagging tools
- Outsourced providers – Cloud or service bureau environments

The Right Solution for the Document

Transactional and Variable Content Customer Communications

- **Business Rules based Post Composition tools – High Speed, High Volume**

Marketing Information/Brochures/ Flyers/ Whitepapers

- **Auto Tagger Solutions – Adobe Acrobat, NetCentric, Auto Tagger for Accesibility**

Publications/Books/Magazines/ Annual Reports

- **Auto Tagger Solutions – Adobe Acrobat, NetCentric, Auto Tagger for Accesibility**

Documents by Industry

Healthcare

- Letters/Notices
- EOC (Explanation of Coverage)
- Brochures
- Welcome/Enrollment kits
- Newsletters

Insurance

- Notices/Letters
- Static policy documents
- Welcome/Enrollment kits
- Regulatory documents
- Brochures

Financial Services

- Letters/Notices
- Brochures
- Welcome/Enrollment kits
- Investment fund information
- Retirement/benefit overviews

Marketing/Publishing

- Brochures
- Marketing Collateral
- Books
- Newsletters
- Annual Reports
- Manuals

High Volume Transaction Documents

- Invoices and statements – produced for print or electronic in thousands to millions of pages

- System output

- Accessible Transforms that take in print ready files to Accessible PDF

- Transformations occur at hundreds to thousands of pages per second

- Template based on triggers that allow for unlimited variability

- Custom, variable and compound content

- Print shops – print and mail for personal and confidential information

Ad Hoc – On Demand Remediation

- System documents -
- On-the-fly remediation in real-time for electronic presentment
- Forgoes the need to store tagged PDFs and resources
- Dynamic presentation

Auto Tagging

- Aimed at traditional published content however applicable to transaction based dynamic content
- PDF content is pushed in and tagged at hundreds to thousands of pages per second
- Accuracy – needs touch up
- Dynamic messaging from external sources can be tagged on the fly through composition engines
- Future consideration around AI based tagging
- High volume, high speed

Usability

- Preference management
  - Accessible PDF meets a lot of accessible criteria but not all
  - Companies need to consider accommodation – braille, large print, eText and audio in addition to language support

Usability

- Tagged PDF for other formats
    - Braille
    - Large print
    - eText
    - Audio

- Accessibility – smart phones / tablets

Testing

- QA and testing is a very important part of accessible documents.
  - Automated Testing – PDF/UA – PAC 2.0

- Documents need to be checked both using electronic tools and with testers using assistive technologies
  - Certain test cannot be performed by tools
    - Color contrast
    - Alt-Text

Questions?

Learn More

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