PDF DAY

WASHINGTON DC

PDF Accessibility:

Organizations' Challenges, Pitfalls,

and How to Address/Avoid Them

A CommonLook® Presentation - January 2018

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Agenda
Document Accessibility: Towards Compliance in 2017

1. Understanding Accessibility

2. Standards and Regulations

3. Challenges

4. Creating and Implementing a Plan

5. Tips for Document Accessibility Success

Questions and Answers

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Disability … Part of The Human Condition

*"Disability is part of the human condition.
Almost everyone will be temporarily or permanently
impaired at some point in life."* W.H.O.

Over 1 billion people(1) live with some form of disability.

- That's 1 in 7 people, or 15% of the world's population.

- 285 million people are visually impaired.

- 360 million people suffer from hearing loss.

1. Global Disability Action Plan 2014-2021 WHO - World Health Organization

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Equal Access for People With Disabilities
Made Possible by the Web, but Accessibility Barriers Exist

Vision

Low vision, blind, color blind, etc.

- Screen readers
- Braille display

Hearing

Deaf, hearing impaired, noisy places

- Closed/open captions
- Transcripts

Mobility

Muscular dystrophy, arthritis, RSI etc.

- Keyboard only
- Speech to text

Cognitive

Learning disability, dyslexia, ADHD, etc.

- Digital content layout
- Information organization

Massive quantities of documents are added to websites each year. PDFs remain the most popular "final-form" electronic format. Documents authored using Microsoft Office are also pervasive.

The critical challenge is in ensuring that documents are accessible and usable by everyone.

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Section 508, WCAG, and PDF/UA

- Section 508 – PDFs (minimum) conform to WCAG 2.0 AA

- Authoring tools that export PDF must be capable of exporting PDF/UA conformant documents.

- PDF/UA (PDF/Universal Accessibility) - ISO 14289 - is the International Standard for accessible PDF technology.

- Provides definitive terms and requirements for accessibility in PDF documents and applications.

- Conformance with PDF/UA ensures:
  - Accessibility for people who use assistive technology to navigate and read electronic content,
  - Appropriate software is used.

Challenges on Journey to Document Accessibility

○ Understanding the areas at risk of non-compliance so the possibility of legal action can be avoided.

○ Knowledge of accessibility, compliance requirements, and status of PDF holdings.

  ○ Severely impacts ability to plan, execute, and track remediation projects, efficiently and quickly.

○ Lack of internal resources to focus on document accessibility.

  ○ Limited staff, expertise, and tools to meet higher volume needs consistently and in the required timeframe.

○ Financial concerns related to compliance costs:

  ○ Many unbudgeted projects are triggered by unforeseen events (e.g. new legal precedents and actions).

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Multi-Phase Document Accessibility Plan

1

Review & Assess

- Review corporate goals and business environment, requirements
- Audit/test digital assets against standard(s) for compliance
- Set priorities for document remediation
- Develop document accessibility policy for future

2

Strategy & Plan

- Leverage Phase 1 data
- How document accessibility and compliance is attained
- Prepare project plan – with prioritized assets for remediation
- Do internal (software), outsourced, or hybrid remediation approach
- Commence communication and training of team

3

Implement

- Execute a pilot program
- Integrate accessibility into design (document authoring), development and testing process
- Prepare best practice document accessibility checklists and processes

4

Expand Program

- Scale up document accessibility program
- Raise exposure and awareness through communications
- Increase capacity through training
- Document and provide accessibility guidance to other departments, business units, and LOBs

5

Monitor & Report

- Monitor for compliance with accessibility laws and regulations
- Test and report on PDF holdings: # of PDFs and % in compliance
- Reports will guide document creation and future remediation projects

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Phase 1: Review and Assess
Audit and Test Documents Against Standard(s) for Compliance

- 508 states WCAG 2.0AA for PDF is acceptable (as a minimum).

- Use an assessment service or software?

  - Use a service:

    - <u>To assess</u> documents, when number, and location of PDFs on networks, are known.

    - <u>To discover</u> documents, and then <u>test</u> them, if their locations are unknown (e.g., CommonLook Clarity, others).

  - Use software (accessibility checker):

  - If document holdings are known, ample time exists, and standards can be interpreted.

    - There are a variety of tools available.

    - There's a learning curve!

    - Some tools may be more thorough or accurate than others.

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Phase 2: Strategy & Plan
Determine Remediation Approach: In-house or Outsourced

Internal Project	Outsourced Remediation

Internal Project

- Advantages:
  - Software enables productivity & effectiveness
  - Builds internal capacity & awareness
  - Long term approach to maintain compliance
  - Combines with outsourcing as required
- Disadvantages:
  - Staff time and effort
  - Limited staff knowledge and experience
  - Learning curve for existing staff & new hires

Outsourced Remediation

- Advantages:
  - Easier to implement, scale, & support
  - Increased speed & agility
  - Cost-effectiveness (with certain vendors)
  - Vendor guarantee can reduce risk
- Disadvantages:
  - Higher costs in some project scenarios
  - Time required to contract with vendor
  - Wide range of vendor service accuracy & quality levels

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Phase 3: Implementation
Integrate accessibility into Document Development and Testing Process

- Invest in education for designers, developers, authors - accessibility concepts, standards, creating documents.

- Internal processes guide content creation and dissemination.

- Document accessibility is applied at multiple stages:

  - **Creation:**
    - Use integrated accessibility tools to verify and correct.
    - Select tools for authoring software (e.g. InDesign, Word, etc.).
  - **Review:** Prior to disseminating content (e.g., to web).
  - **Finalizing:** End product at last review - PDF to be posted.

- Higher costs may be incurred if accessibility is added late in the development cycle (e.g., post-authoring stage).

Document Accessibility Basics

- ✓ Reading order & formatting
- ✓ Using color, italics, symbols
- ✓ Impact of contrast
- ✓ Headings & styles, alternate text for images

Accessibility Tools

- ✓ Many programs have built in accessibility checkers
- ✓ Additional Programs & plugins are available to help.

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Phase 4: Expand the Program
Audit and Test Documents Against Standard(s) for Compliance

❖ Reminders for this phase:

 ❖ Scale up your internal document accessibility program.

 ❖ Raise exposure and awareness through communication.

 ❖ Increase capacity through training.

 ❖ Document and provide accessibility guidance to other departments, business units, and Lines of Business.

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Phase 5: Monitor & Report
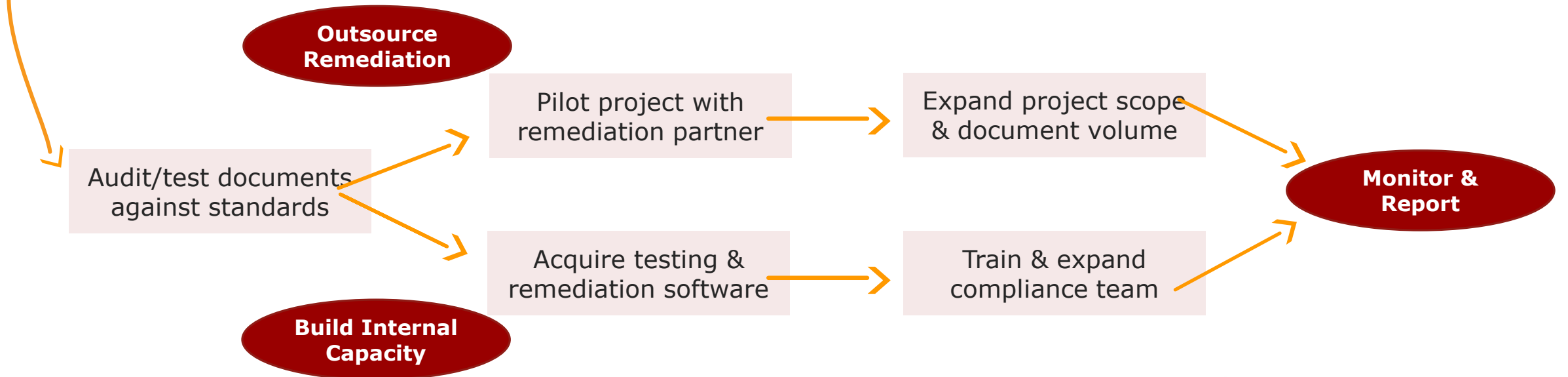## Monitor for Compliance with Accessibility Laws
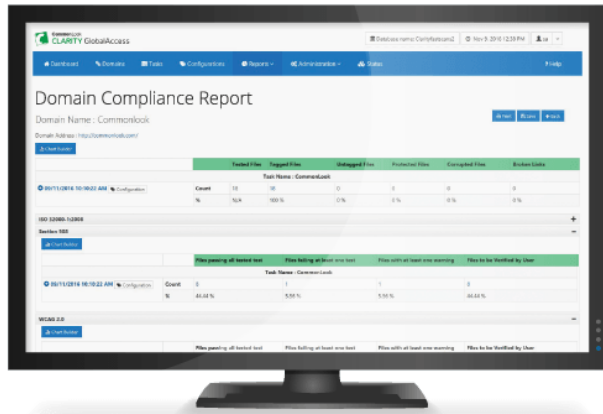
- Goal: assess compliance status/ monitor progress.
  - Confirm PDFs are remediated/ new PDFs are accessible.
  - Assist in cases of litigation.
- Goal: prioritize documents/ manage remediation projects.
  - Track and test new documents/ organize compliance efforts.
  - Create reports to guide document creation.
- Use tools and services to monitor and generate reports to be shared with the team.
  - Many companies test and monitor web HTML content.
  - Make sure your vendor*really* knows PDF!

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Starting on the Path to Document Compliance?
It's time to take action …

After verification, many organizations use outsourced remediation services to fix documents while getting up to speed on accessibility standards and practices.

If there is ample time and resources, in-house capacity is built through investments in software and staff training.

Outsource Remediation

Build Internal Capacity

Audit/test documents against standards

Pilot project with remediation partner → Expand project scope & document volume

Acquire testing & remediation software → Train & expand compliance team

Monitor & Report

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Tips for Document Accessibility Success
Organizational Considerations

1. Create a cross-functional team, with a mandate to act proactively.

2. Gain executive support early in the program.

3. Invest in staff, software tools, and training to build internal capacity.

4. Choose an outsourcing partner for remediation services, to handle overflow workload, and complex projects.

5. Embed accessibility practices as important values, through communication and training.

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Tips for Document Accessibility Success
Prepared for today. Ready for the Future.

1. Maintain a document inventory according to priority, importance to customers, relevance to compliance standards, etc.

2. Select a partner with proven remediation process and practices and with the ability to guarantee results.

3. Tackle low hanging fruit: fix document issues with highest impact on customers and other stakeholders.

4. With a large remediation project, try to show quick wins.

5. Design with accessibility in mind – Reduce the time involved, and cost required, for future remediation.

6. To stay compliant, do periodic maintenance accessibility checks.

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Questions?

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Thank You!

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