

Creating Accessible Word, PowerPoint and PDF Documents

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Creating Accessible Word, PowerPoint and PDF Documents

- For this presentation we will be looking at Microsoft Office products, 2002-2003 (sometimes called Office XP) and Office 2007
- Adobe Acrobat Professional version 8 or higher is used to highlight accessible PDF creation and modification

For Microsoft Word:

- Using Styles and Headers
- Proper creation of hyperlinks
- proper labeling of images with alternate text
- Creating lists and using bullets
- Use of Tables and Labeling of cells

For PowerPoint:

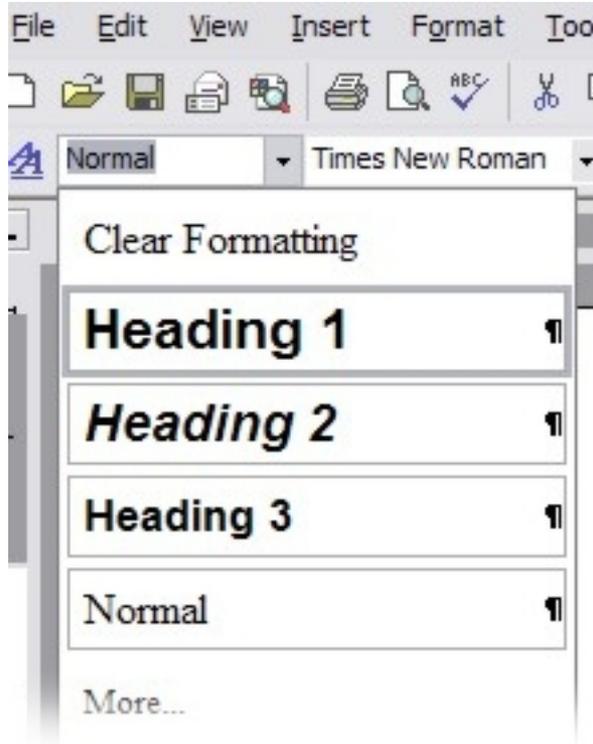
- Encouraging use of predesigned slide layouts
- Using the Outline and Notes Panels
- Use of Word Art feature

For PDF:

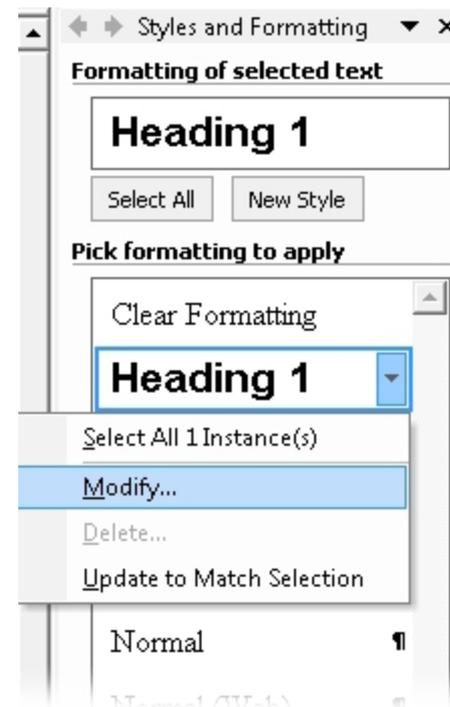
- how to create a tagged document
- How to run an accessibility check and how to solve common problems encountered
- Tables and Table headings
- Objects not in the Document Tree
- Language Specification
- Image with proper alternate text
- Proper Document Properties information

Microsoft Word Headers and Styles – 2002/2003

Click and drag your cursor over the text where you want to change the style. Then using the Styles and Formatting toolbar at the top of the document, choose the appropriate style for the text.

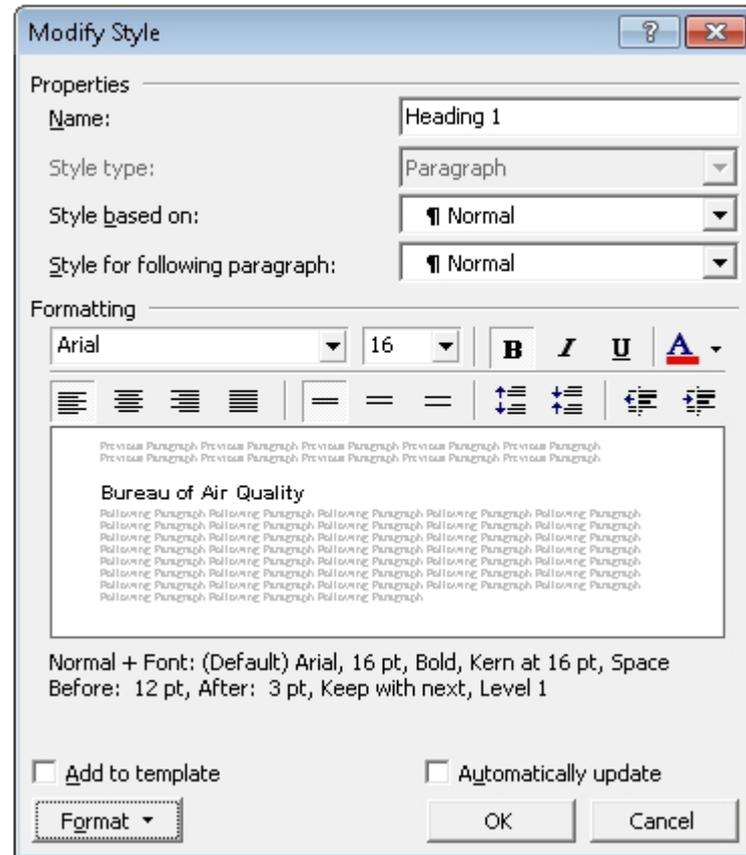


But what if the style stored in Word is not what you want your text to display as (maybe it is set as "Cambria" font and you want "Times New Roman" or you want to change the line spacing or font size and color)? At that point, you can click More... from the toolbar and it will open another toolbar on the right side of the screen.



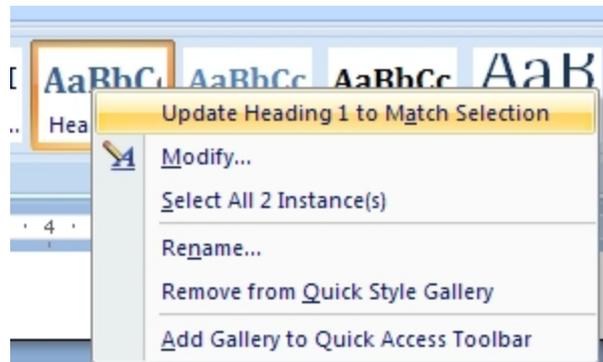
Microsoft Word Headers and Styles – 2002/2003

- Select **Modify** and it will bring up a dialogue box that will let you adjust the features of that style. If you want those features used on all future documents built on that template (which is most likely "Blank Document"), then check **Add to template** before saving your changes to the style.
- If you have already formatted your text to what you want it to look like, then choose **Update to Match Selection**.



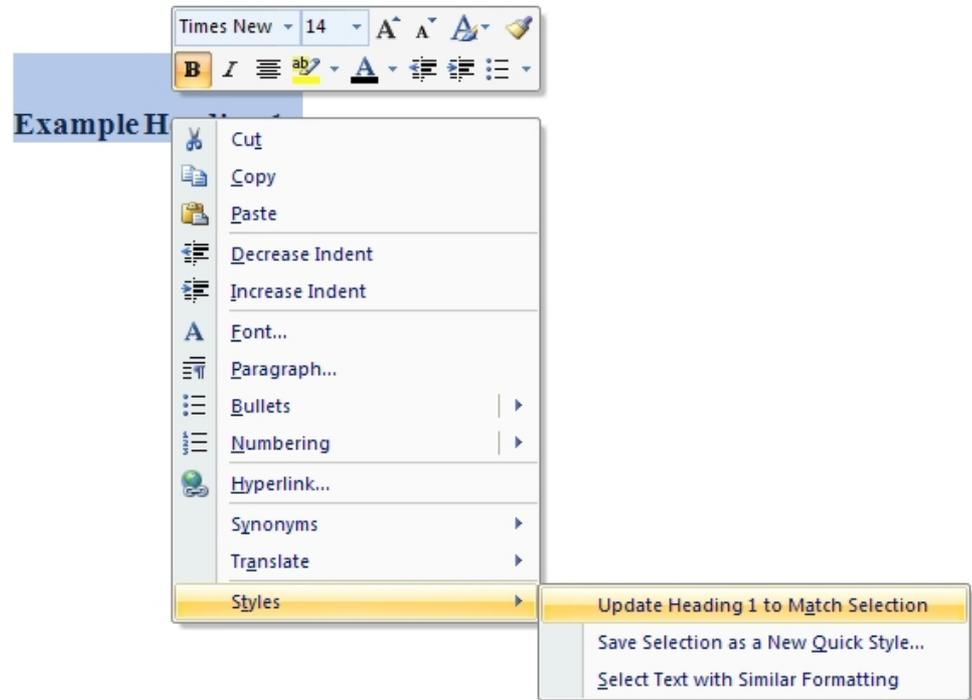
Microsoft Word Headers and Styles – 2007

- Click and drag your cursor over the text where you want to change the style. Then using the Styles and Formatting toolbar at the top of the document, choose the appropriate style for the text.



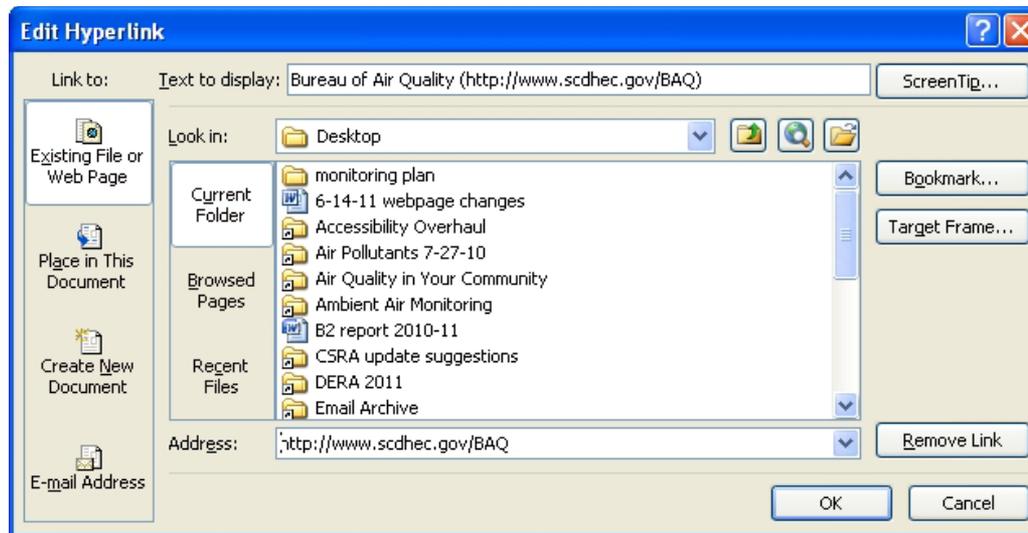
Microsoft Word Headers and Styles – 2007

- Select Modify to change the various options for the text, or if you have already formatted the text the way you wanted it, then select Update *style name* to Match Selection These options are available by using the ribbon at the top or by right-clicking on the highlighted text and selecting Styles.



Microsoft Word – Adding Hyperlinks

- There are two ways that you create a hyperlink in Microsoft Office:
- Type in a URL or webpage address and pressing the space bar, Enter, or some other key. This automatically creates a link with the **Text to Display** field already filled in as the text of the webpage address.
 - It's simple, but the URL may not make sense to the reader, especially if they are using some sort of assistive technology. To change the hyperlink text, select a link, right-click and select **Edit Hyperlink**, or select **Ctrl + K**. Change the URL in the **Text to display** field to something more descriptive (ex. "Bureau of Air Quality (<http://www.scdhec.gov/BAQ>).").
- Insert the desired text (what you want users to click on to access the link) and click and drag your cursor to highlight the text that you want to make into a link. Right-click on the highlighted text and select **Hyperlink**.

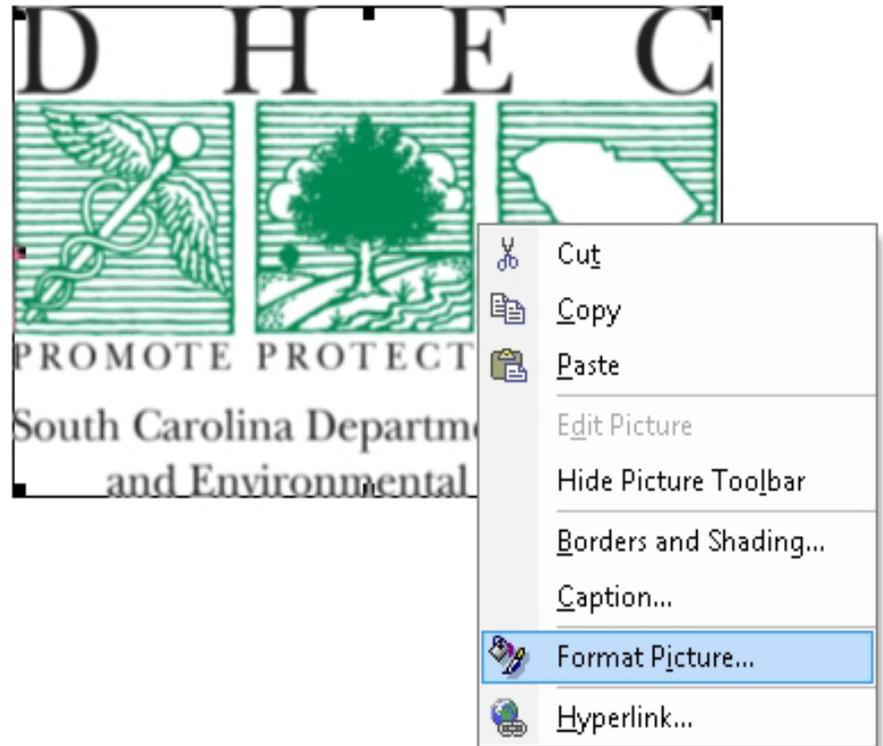


Microsoft Word – Adding Alternate Text

Microsoft Office, versions 2002 and newer, have the capability to add verbal alternate text descriptions of any images used in an electronic document. These are read aloud for users that utilize screen readers and similar technology.

To add alternate text descriptions to images in Microsoft Office 2002 and 2003:

1. Add an image to a document. Click on the image and a border will appear around it
2. Right-click anywhere within the image to bring up the options for images. Select **Format Picture**.



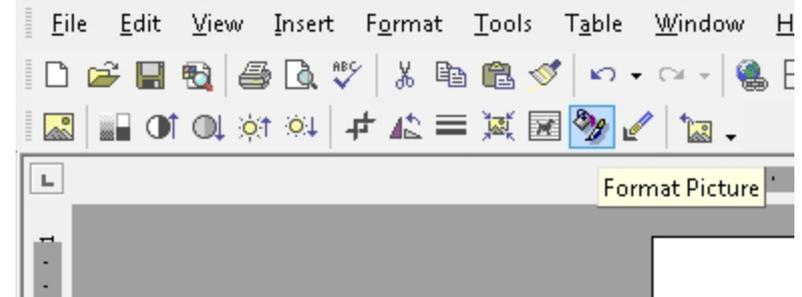
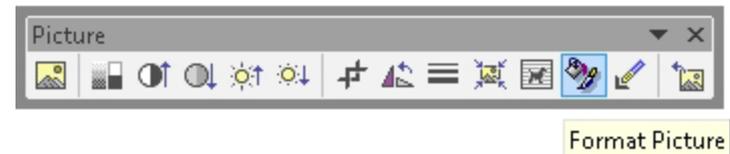
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2. Right-click anywhere within the image to bring up the options for images. Select **Format Picture**.

This can also be found in the toolbars for Pictures:

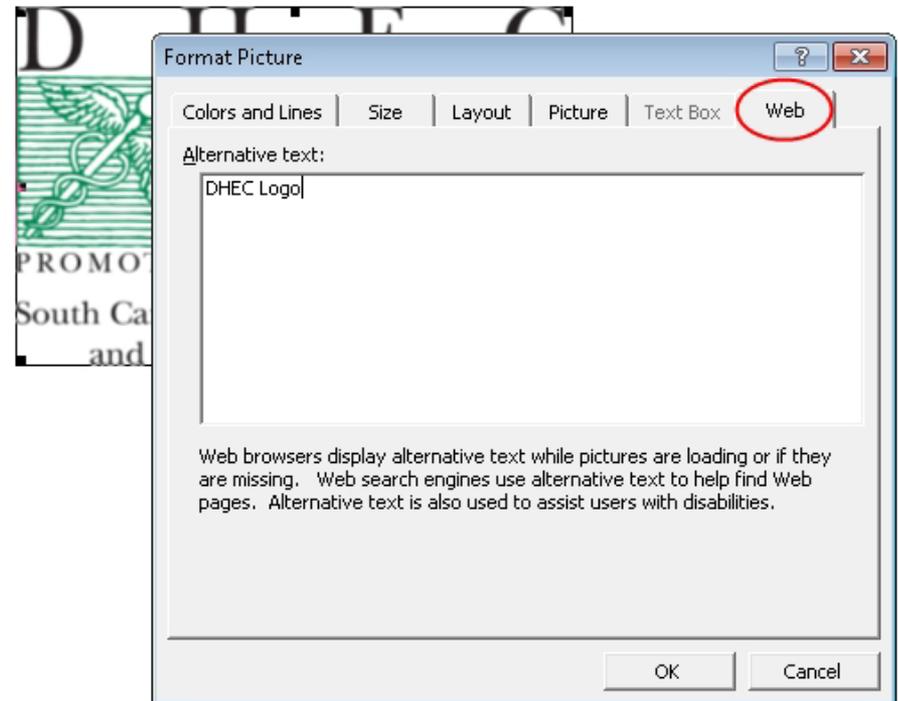


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To add alternate text descriptions to images in Microsoft Office 2002 and 2003:

1. Add an image to a document. Click on the image and a border will appear around it
2. Right-click anywhere within the image to bring up the options for images. Select **Format Picture**.
3. Select the **Web** tag, type in a description of the image, then click **OK**.

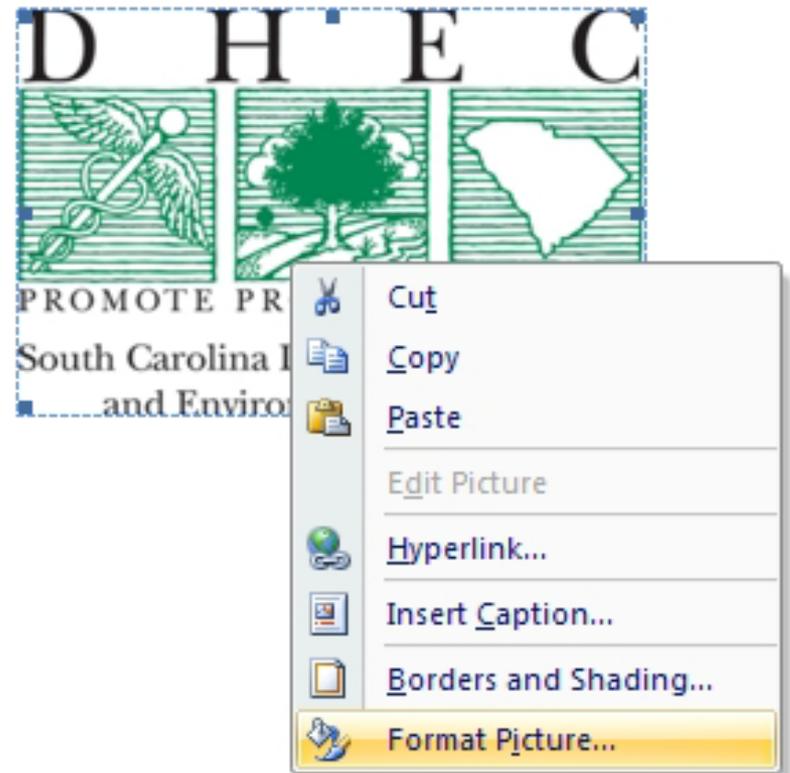


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To add alternate text descriptions to images in Microsoft Office 2007:

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2. Right-click anywhere within the image to bring up the options for images. Select **Format Picture**.

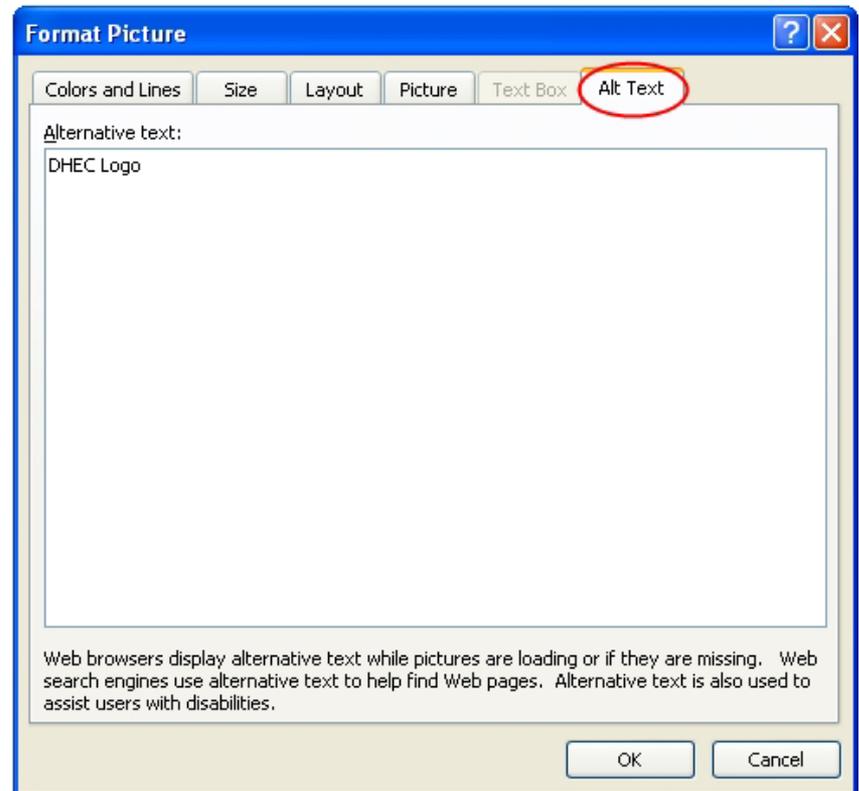


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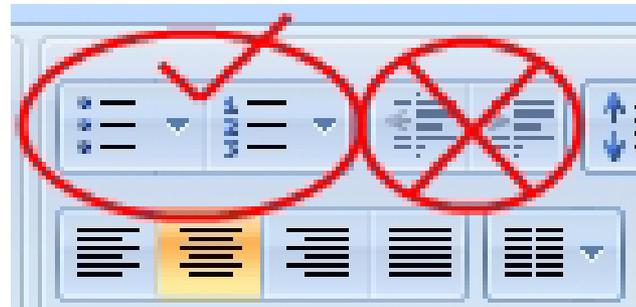
To add alternate text descriptions to images in Microsoft Office 2007:

1. Add an image to a document. Click on the image and a border will appear around it
2. Right-click anywhere within the image to bring up the options for images. Select **Format Picture**.
3. Select the **Alt Text** tag, type in a description of the image, then click **OK**.



Microsoft Word – Bullets and Lists

- Use the Bullet and Numbering preformatted lists as a tool to make your lists accessible.
- Do not use the "Increase Indent" or "Decrease Indent" features to create lists or tables.
- Try to use only the standard bullets of disk, open circle, square and open square. These are often the only types of bullets recognized and tagged correctly after being converted to PDF.
- Office 2002/2003 and 2007 have similar icons that are usually on the toolbars at the top of your documents by default. They are found in the Paragraph or Formatting toolbars.



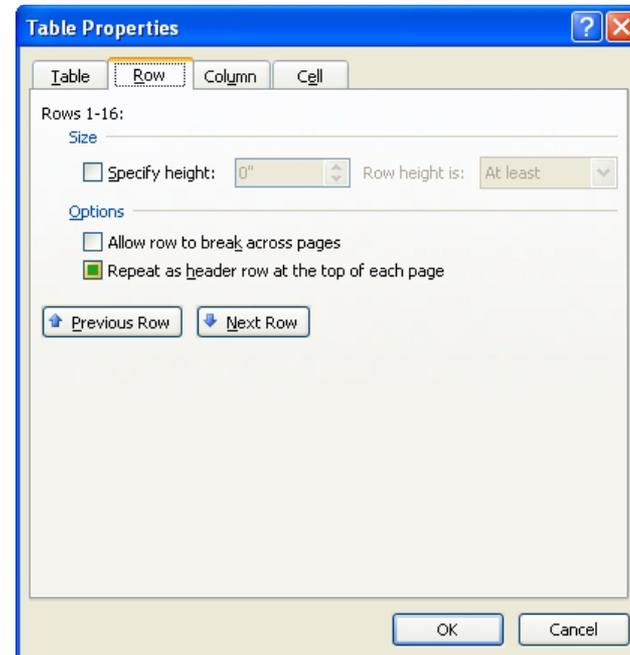
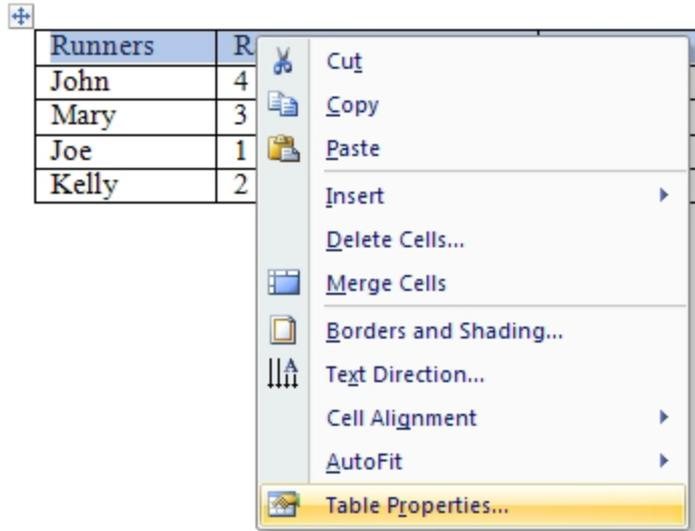
Microsoft Word – Tables and Labeling Cells

- ***Tables should only be used for including data and never for layout.*** Use Templates, Styles and Formatting, or Page Layout options to arrange text and images.
- Microsoft Office does not provide an easy method for creating accessible tables. If you have complex tables it is highly recommended that a description or explanation of the table contents be included in the text of the document. If at all possible, construct the table so it will read logically from left to right, top to bottom order.
- Tables with column headings in the top row must have the top row formatted as a header row. This often results in the table being read in the proper order and the structure being maintained if the document is ever converted to PDF format.

Microsoft Word – Tables and Labeling Cells

Create your table.

1. Highlight the top row of the table
2. Right click to display editing options
3. Select "Table Properties" from the list
4. The Table Properties window will be displayed; click on the "Row" tab
5. At the bottom of the Table Properties window, check the option "Repeat as header row at the top of each page"
6. Click on OK



For PowerPoint:

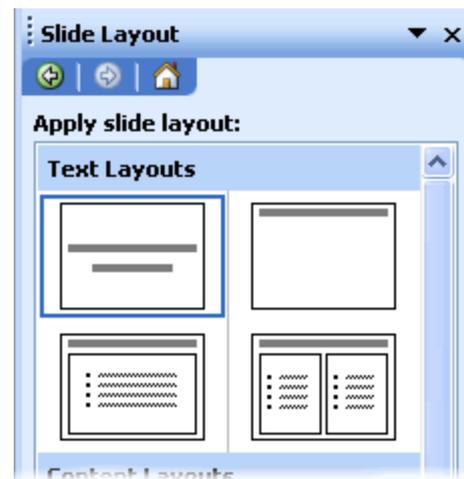
- Encouraging use of predesigned slide layouts
- Using the Outline and Notes Panels
- Use of Word Art feature

PowerPoint - Encouraging use of predesigned slide layouts

- Every version of PowerPoint since at least 2000 contains a series of highly-accessible slide layouts. PowerPoint is designed to encourage the use of these slide layouts, especially in newer versions. Using these templates will ensure that your files have correctly structured headings and lists, proper reading order, etc.
- The correct use of slide layouts is probably the most significant thing you can do to ensure that your content is accessible. It sets up the text to be interpreted by PDF creation software and accessibility technology similar to Styles and Formatting in Microsoft Word.

For PowerPoint 2002-2003:

Select **Format > Slide Layout...** or use the Slide Layout sidebar.

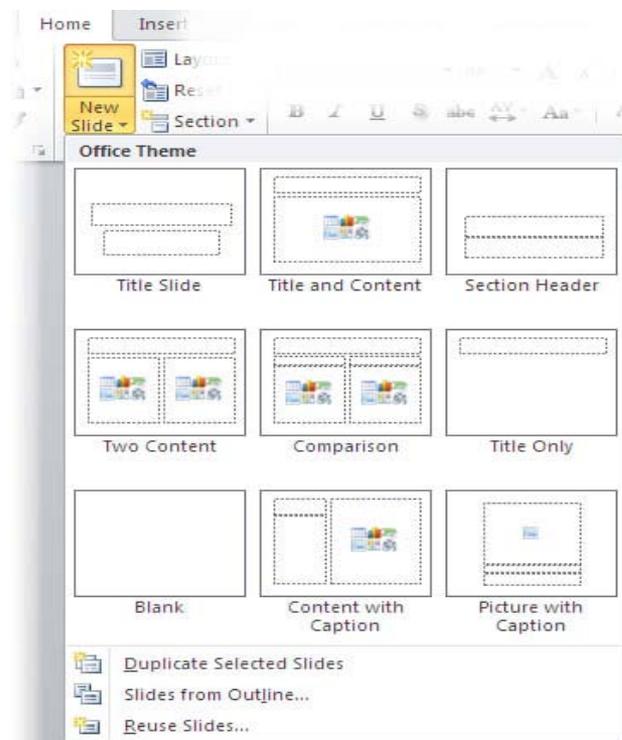


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For PowerPoint 2007:

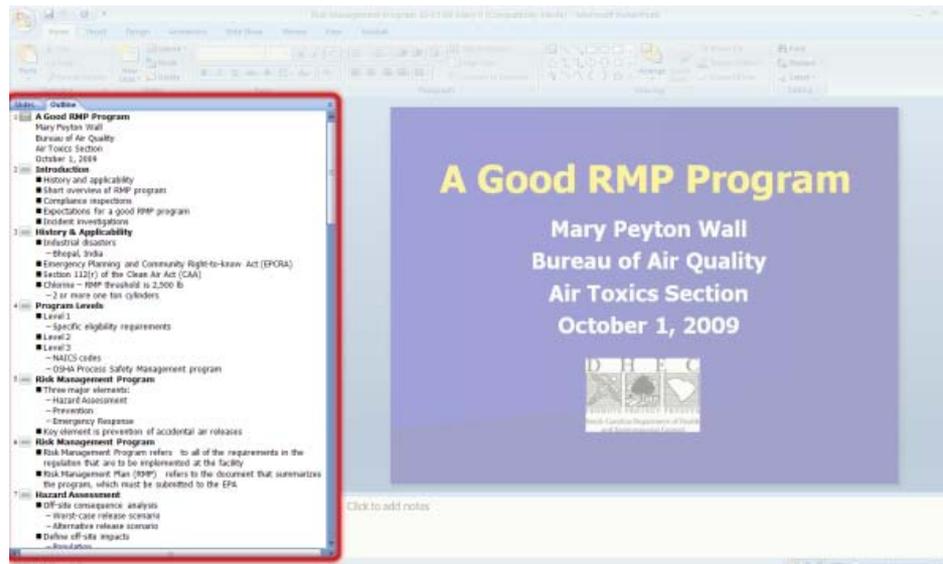
Select **Home > New Slide**, or select the **New Slide** button, and a menu of slide types will appear.



PowerPoint – Outline and Notes Panels

PowerPoint contains two panels that can sometimes be used to enhance accessibility: the outline panel and the notes panel.

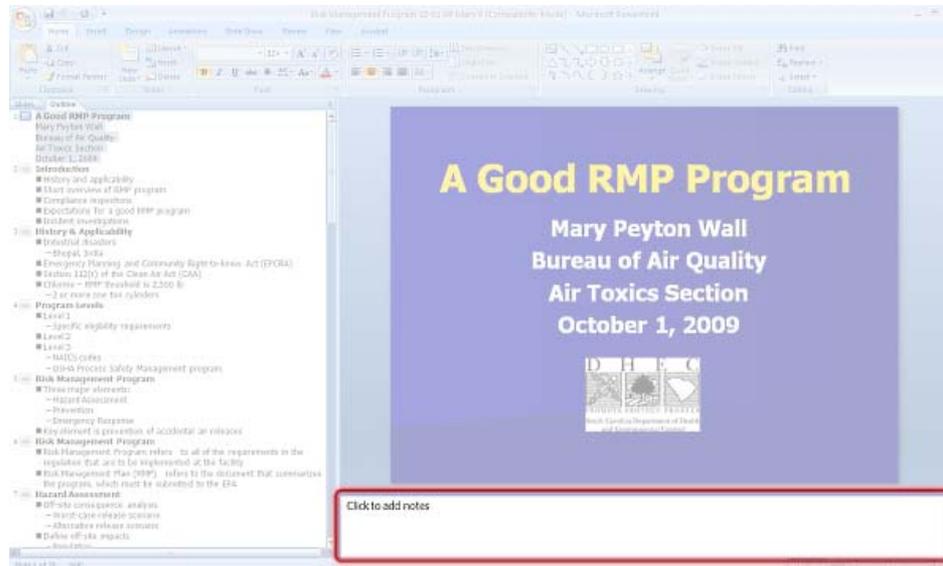
- The **outline panel** contains a text outline of the content that appears in your slides. Reviewing this panel can help ensure the content on the slides is logically sequenced, that slide titles are unique and meaningful and that reading order is appropriate. The text in this panel may also be a good starting place for handouts or HTML alternatives to slides. Alternative text for image and text boxes that are not part of the default layout will not be included in the outline view.



PowerPoint – Outline and Notes Panels

PowerPoint contains two panels that can sometimes be used to enhance accessibility: the outline panel and the notes panel.

- The **notes panel** allows the speaker to add notes and information that will not appear on the slides. It can be used to add additional information to printed handouts as well. Placing image or chart descriptions in this area is not reliable and should be avoided. This information may not be accessed by a screen reader, especially if the presentation is saved to PDF or some other format.



PowerPoint – Using Word Art

- "Word art" is actually converted to an image in Office 2003-2007 and must be given alternative text. It remains text in Office 2010.
- There is no way to add empty/null alternative text to an image in PowerPoint. If your presentation has decorative or background images that do not convey unique content, the best thing to do is to leave the alternative text field blank. If the image does not have alternative text, it will typically be skipped by a screen reader. There are also methods available in Adobe Acrobat Professional to tag images so that they are not used by screen readers.

For PDF:

- how to create a tagged document
- How to run an accessibility check and how to solve common problems encountered
- Tables and Table headings
- Objects not in the Document Tree
- Language Specification
- Image with proper alternate text
- Proper Document Properties information

PDF – Creating a Tagged Document

- *Accessible* PDF files usually are referring to "tagged" PDF files, even though there is more to an accessible PDF than tags.
- PDF tags provide a hidden, structured, textual representation of the PDF content that is presented to screen readers and other assistive technologies. They exist for accessibility purposes only and have no visible effect on the PDF file.
- PDF files are usually created in another program and *converted* to PDF format. There are dozens or probably hundreds of programs that can create PDF files, but very few of them produce properly tagged PDF files. The accessibility of the PDF depends on the accessibility of the original document.

PDF – Creating a Tagged Document

It is possible to create accessible PDF files in Office, as long as the following requirements are met:

1. The file must be accessible. That includes providing alternative text for images, proper headings, appropriate link text, etc. For more information, read the through the information on the other Office products before trying to convert a file to PDF.
2. Office 2002/2003 and 2007 users must have Adobe Acrobat Professional installed, minimum version 8.
3. The file must be exported correctly. If a file is created by printing to PDF, it will not be correctly tagged.

PDF – Creating a Tagged Document

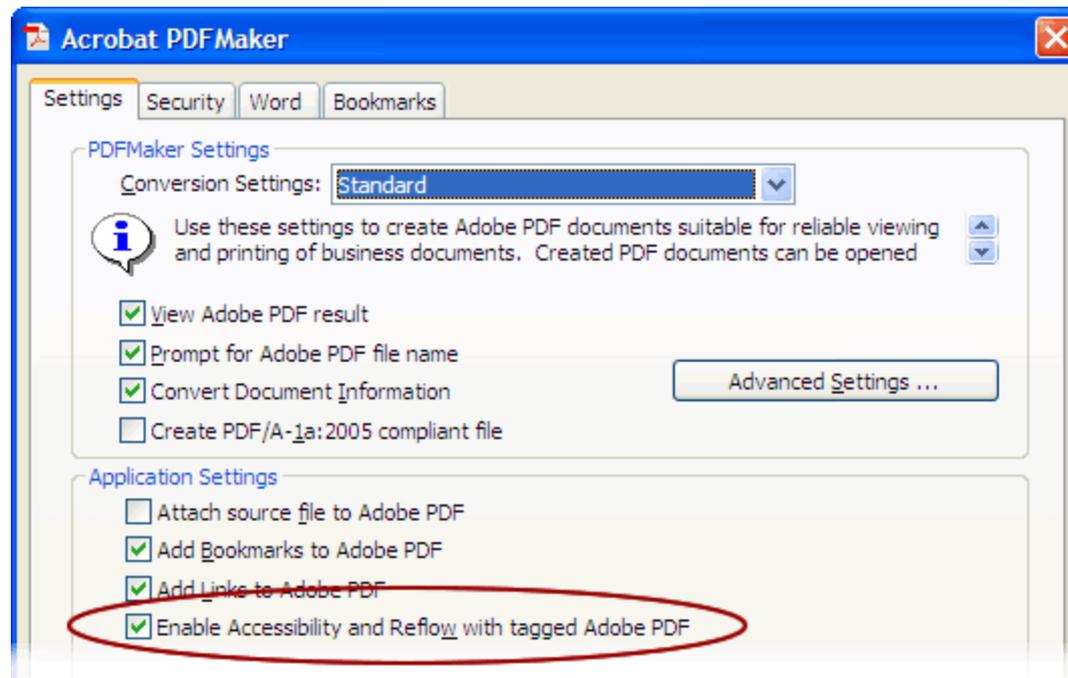
For Office 2002-2003:

- When you install Adobe Acrobat Professional version 8 or higher, an add-in for Microsoft Office is installed by default. The add-in allows you to convert Office files to PDF without opening Acrobat.
- This add-in also installs an **Adobe PDF** menu, which should appear in the Menu bar. To convert an Office Document to PDF, Select **Adobe PDF** then **Convert to Adobe PDF**.
- If your document is correctly structured, this should automatically create a tagged PDF.

PDF – Creating a Tagged Document

For Office 2002-2003:

- To ensure that files are being converted correctly, go to **Adobe PDF** then **Change Conversion Settings** and ensure **Enable Accessibility and Reflow with tagged Adobe PDF** is selected.



PDF – Creating a Tagged Document

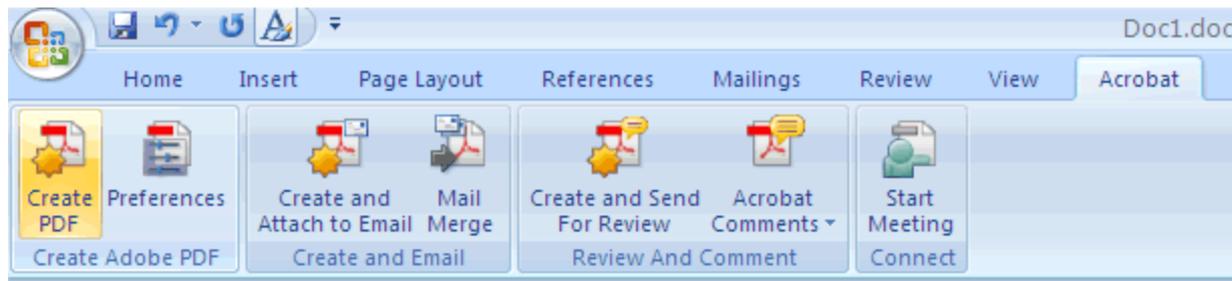
For Office 2007:

When you install Adobe Acrobat Professional version 8 or higher, an add-in for Microsoft Office is installed by default. The add-in allows you to convert Office files to PDF without opening Acrobat. This add-in also installs an **Acrobat** menu, which should appear in the Menu bar at the far right. You can then create a PDF file in one of two ways.

PDF – Creating a Tagged Document

For Office 2007:

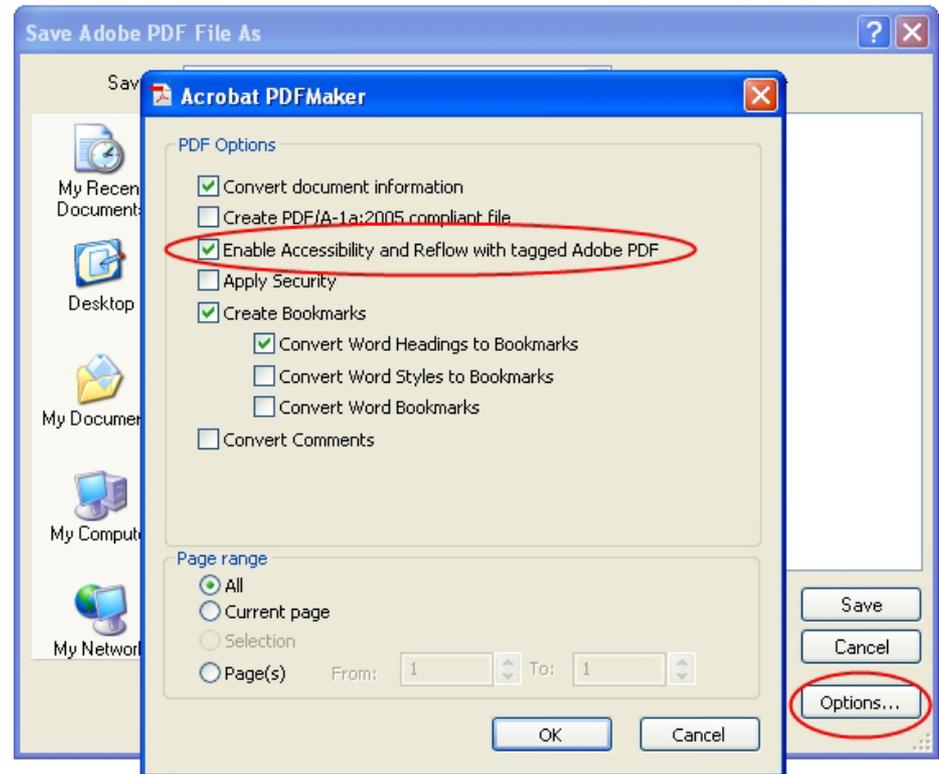
1. Click on the **Office Button**  hover over **Save As**, and select **Adobe PDF**, or press **Alt + F, F, A**.
2. Or you can select **Create PDF** from the Acrobat ribbon.



PDF – Creating a Tagged Document

For Office 2007:

- Either one of these options will open the same dialog box. The program should create a tagged PDF file by default.
- If this is not the case select **Options** and ensure that **Enable Accessibility and Reflow with tagged Adobe PDF** box is selected.



PDF – Creating a Tagged Document

Convert to PDF in Acrobat:

If you are having trouble converting a document to tagged PDF in Office, or if you want to merge multiple documents into one tagged PDF file, you can convert a file

to PDF in Acrobat.

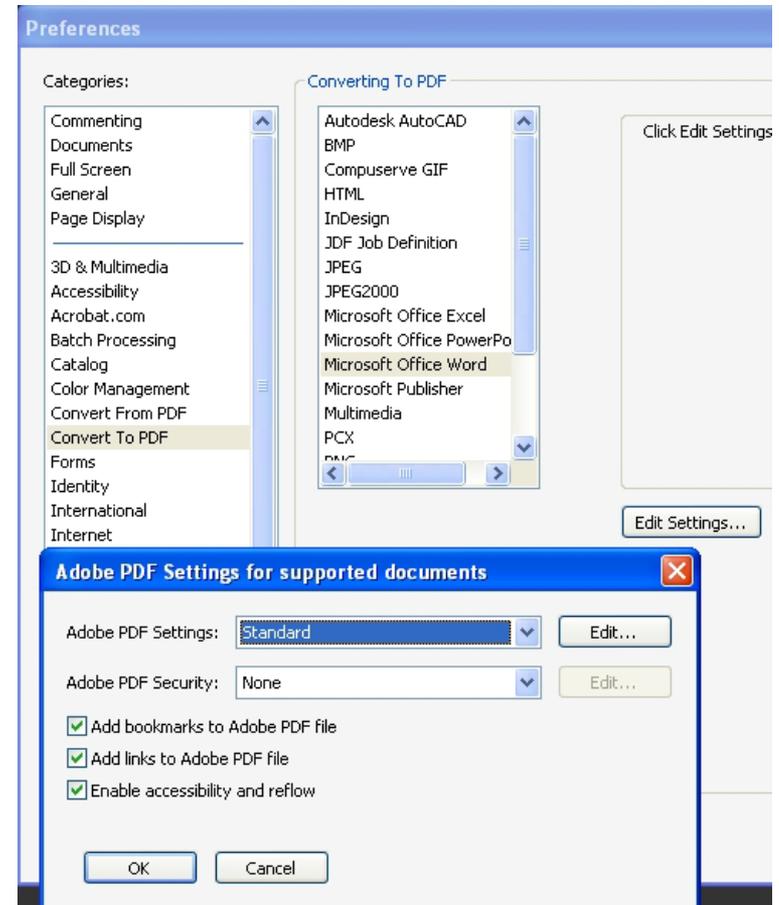
There are several ways to do this; one of the easiest is to select **File > Create > PDF From File**.

- If the file format is supported (i.e. the file is created in a Microsoft or Adobe product), the file should be tagged as it is converted. If no tags are present, select the **Edit** menu, then click on **Preferences**.

PDF – Creating a Tagged Document

Convert to PDF in Acrobat:

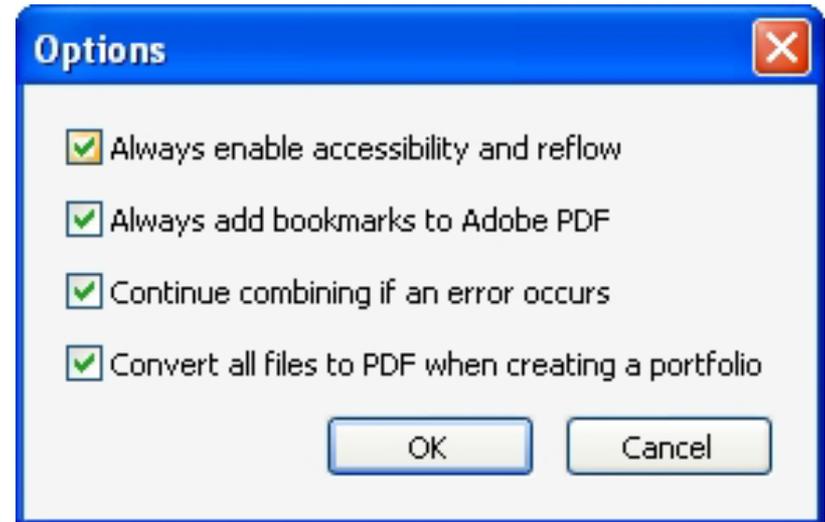
- Under the 'Categories' list on the far left, scroll down to and select **Convert to PDF**.
- Choose the correct program (Microsoft Word, Excel, or Powerpoint), select **Edit Settings**, and ensure that **Enable accessibility and reflow** is selected.



PDF – Creating a Tagged Document

Convert to PDF in Acrobat:

- If you want to combine multiple files into one PDF, select **File > Create > Combine Files into a Single PDF**.
- A dialog box will appear. Select **Options** and then select **Always enable accessibility and reflow**.



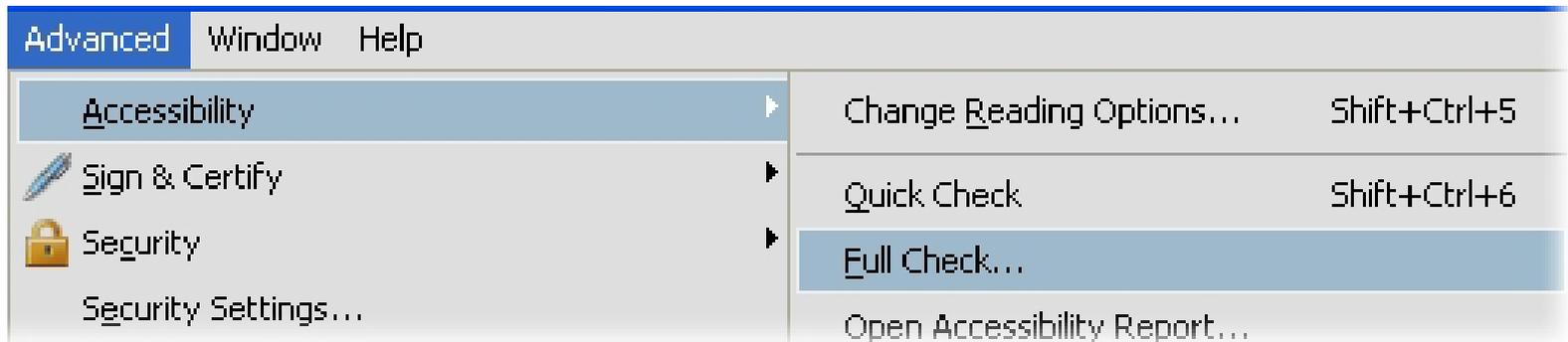
PDF – Accessibility Check and Fixes

Convert to PDF in Acrobat:

- If you have Adobe Professional version 8 or higher, this function is enabled to search for accessibility issues
- The accessibility check can check for different versions and standards of accessibility

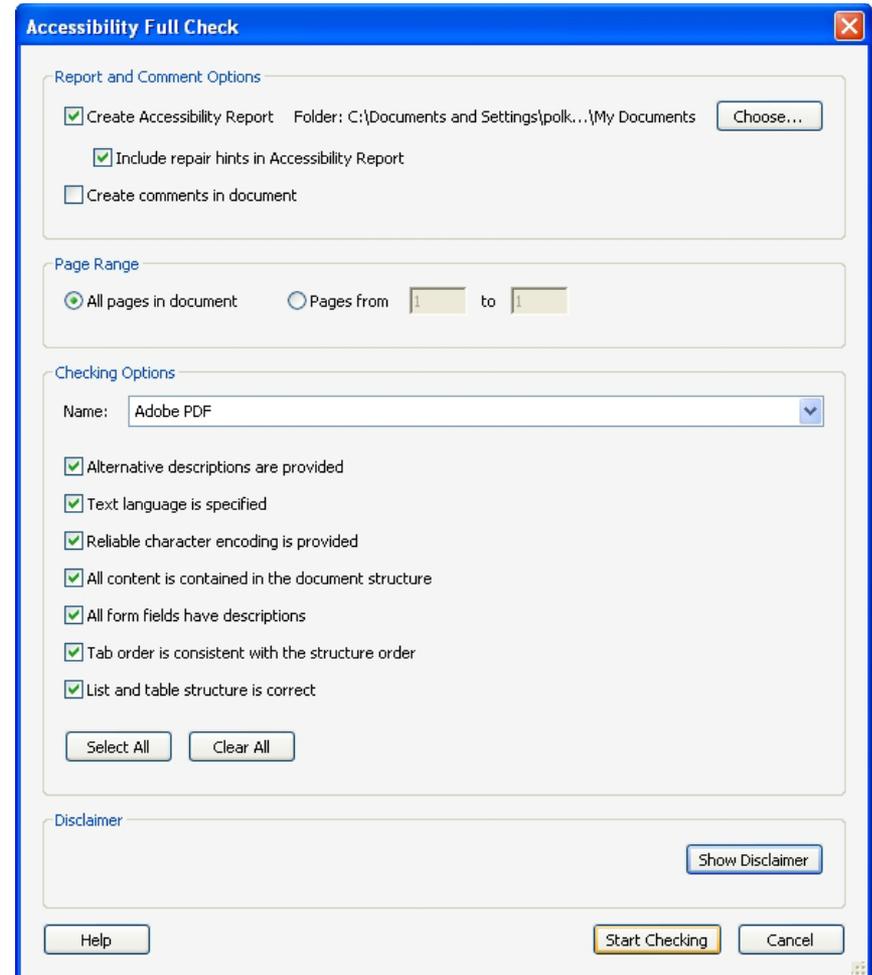
PDF – Accessibility Check and Fixes

- Create a PDF document using one of the 3 methods previously described
- Open the PDF you just created. Along the top of the window, you will see **Advanced**. Click on it to open the menu, select **Full Check**.



PDF – Accessibility Check and Fixes

- A window will be opened. All of the defaults should be selected already for you.
- By default, the Adobe PDF standards will be selected
- Below the pull-down menu, you can see the available accessibility issues that the Adobe PDF option checks
- Click the **Start Checking** button.

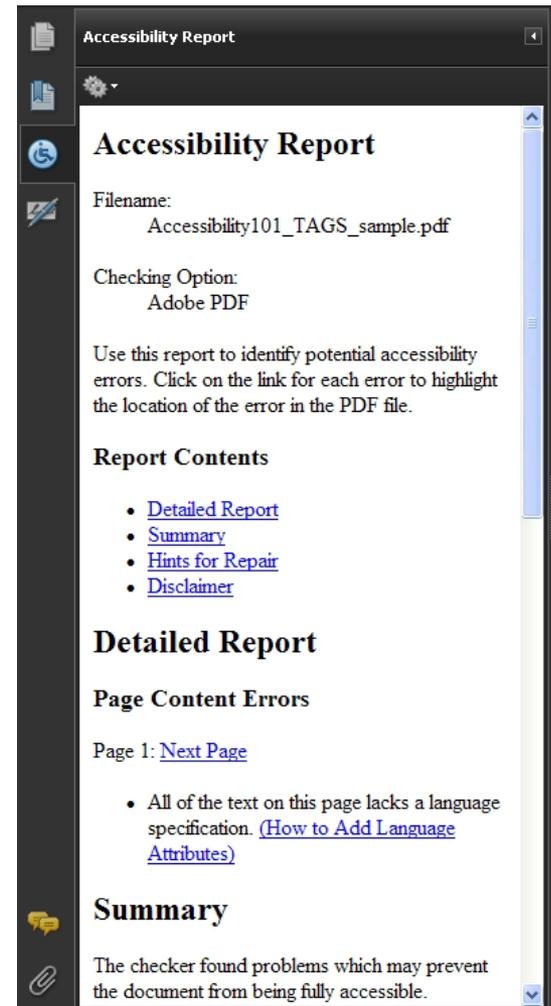


PDF – Accessibility Check and Fixes

- A small window with a progress bar will open in the bottom right corner of the screen as the checker runs through each part of the list that was pre-selected in the previous window.
- Once the check is completed, it will display a window that indicates one of two results:
 - The check found no problems in this document.
 - The checker found problems which may prevent the document from being fully accessible. Please see the report for more details.

PDF – Accessibility Check and Fixes

- After you see one of the above messages, click OK and the Accessibility Report will display on the left side of the screen.
- If your check generated the second response, then follow the prompts in the Accessibility Report to correct them



PDF – Common Issues and Corrections

After the Accessibility Report is displayed, you can scroll down to show a Detailed Report, Summary, and Hints for Repair. The following items are the most commonly seen from the documents that are created for BAQ.

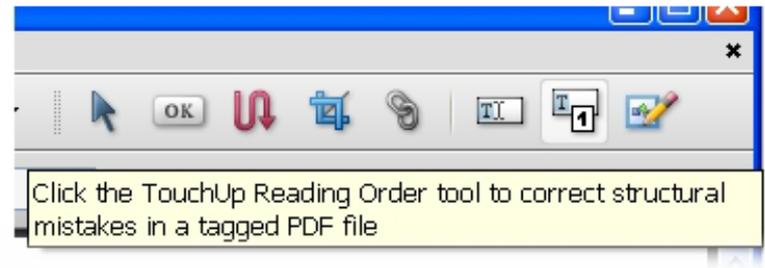
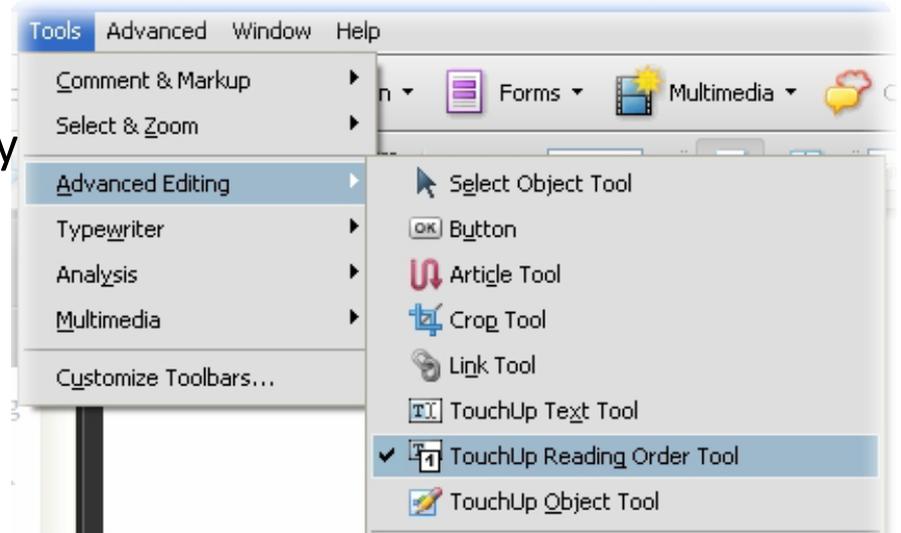
- Establish Table Headings for Tables
- Elements not contained in the document structure tree
- Tab order may be inconsistent with the structure order
- Image(s) without alternate text
- All of the text on this page lacks a language specification

PDF – Common Issues and Corrections

Establish Table Headings for Tables

Table headers are not always properly defined after the conversion from Microsoft Word to PDF.

- Open up the Touch Up Reading Order tool. Go to **Tools > Advanced Editing > TouchUp Reading Order Tool** or use the icon in the top right corner of your acrobat window.



PDF – Common Issues and Corrections

Establish Table Headings for Tables

1	Table
	John
	Mary
	Joe
	Kelly

	2
	1
	3
	4

- When you have a table that has been identified and tagged as a table during the PDF conversion, then it will display with the word "Table" next to its number in the reading order of the page that the table is on. Click on that reading order number to highlight the table.

TouchUp Reading Order

Draw a rectangle around the content then click one of the buttons below:

Text Figure

Form Field Figure/Caption

Heading 1 Table

Heading 2 Cell

Heading 3 Formula

Background

Table Editor

Show page content order

Show table cells

Show tables and figures

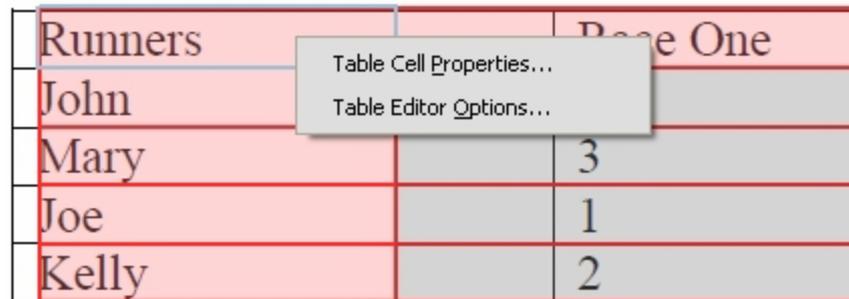
Clear Page Structure... Show Order Panel

Help Close

PDF – Common Issues and Corrections

Establish Table Headings for Tables

- In the Touch Up Reading Order tool window, click on the "Table Editor" button. The Touch Up Reading Order tool window will close and the table cells will be outlined in red. Right click on the table cell that you want to modify; there are two options available:
 - Table Cell Options
 - Table Editor Properties.



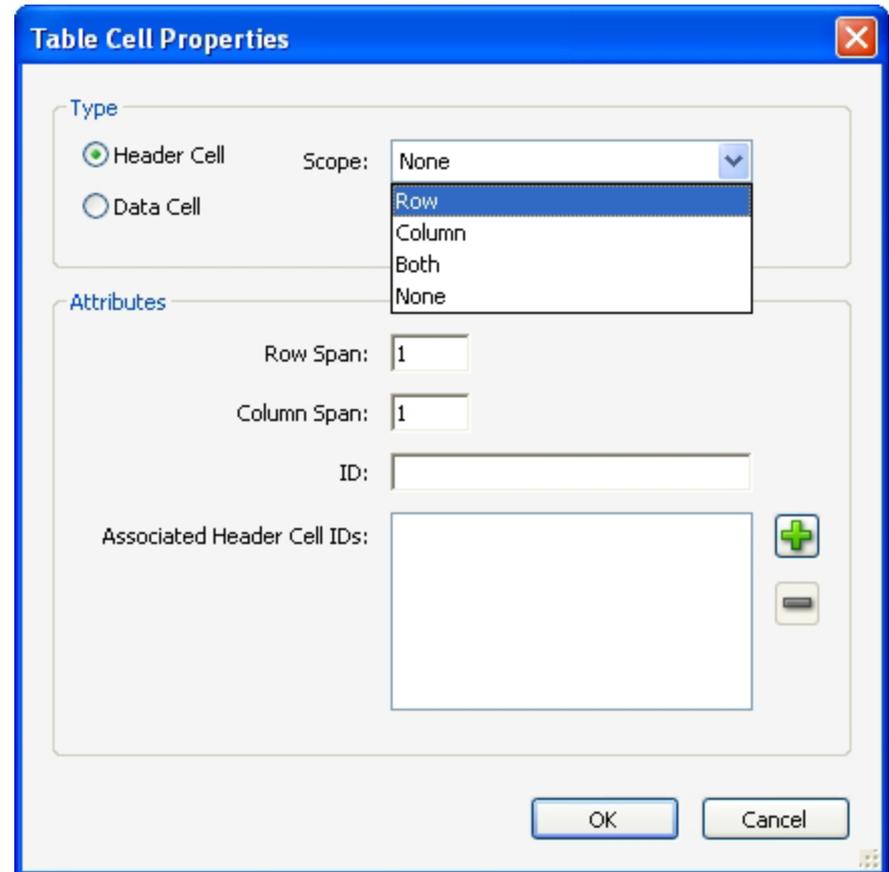
The image shows a table with three columns and five rows. The first row has the headers 'Runners' and 'Page One'. The second row contains 'John', an empty cell, and another empty cell. The third row contains 'Mary', an empty cell, and the number '3'. The fourth row contains 'Joe', an empty cell, and the number '1'. The fifth row contains 'Kelly', an empty cell, and the number '2'. A context menu is open over the 'John' cell, showing two options: 'Table Cell Properties...' and 'Table Editor Options...'. The table cells are outlined in red.

Runners		Page One
John		
Mary		3
Joe		1
Kelly		2

PDF – Common Issues and Corrections

Establish Table Headings for Tables

- Choosing "Table Cell Options" allows you to change the scope of your table headers as well as assign the header that is to be read in conjunction with your data cell.
- You must assign ID information for the table header for this to function.
- You can also change TD tags directly into TH tags without opening the tags panel.

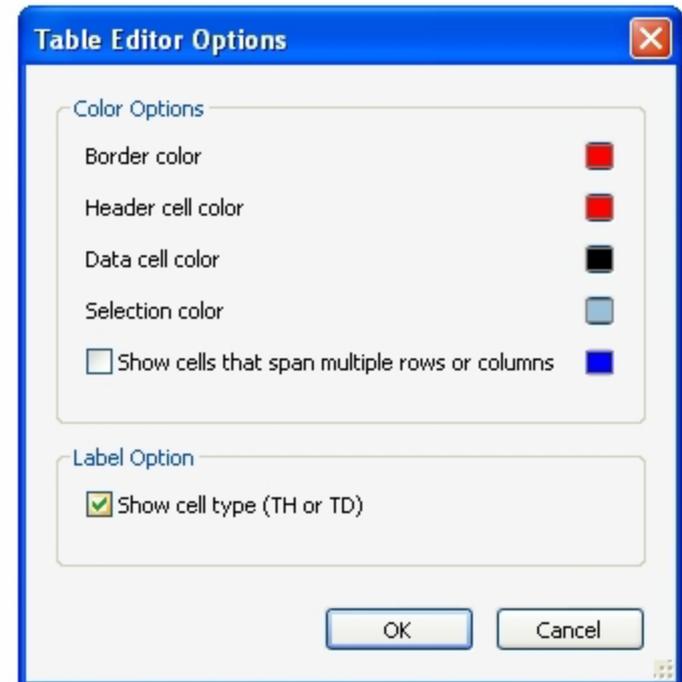


PDF – Common Issues and Corrections

Establish Table Headings for Tables

- Selecting "Table Editor Options" will give you the option to display each type of cell differently to help with editing and reviewing your table's reading order.

Runners		Race One
John		4
Mary		3
Joe		1
Kelly		2



PDF – Common Issues and Corrections

Elements not contained in the document structure tree

- This is the most complicated of all the common accessibility issues. It can have several sources. Most of these problems can be solved by creating a PDF from an accessible document to start.
 - Adding Tags to a PDF Document
 - Inaccessible Page Content
 - Inaccessible Link

PDF – Common Issues and Corrections

Elements not contained in the document structure tree

Adding Tags to a PDF Document

- Creating a tagged document directly from an authoring application like Microsoft Office Word, Excel or Powerpoint is generally the best way to make PDFs accessible.
- If a PDF was created without tags, you can add them afterwards. However, this often creates layout, reading order, and other issues that are much more time consuming to fix. If at all possible, try and get the original document from its source and convert it PDF.

PDF – Common Issues and Corrections

Elements not contained in the document structure tree

Adding Tags to a PDF Document

- To check for accessibility tags, view the document properties (**File > Properties** or **Ctrl + D**).
- If the document has accessibility tags they will be displayed under the Advanced section at the bottom of the Description tab as "Tagged PDF: Yes"
- If "Yes" is displayed, click "OK" to close Document Properties.
- If the Tagged PDF indicator is set to No, you must insert accessibility tags:
 1. Select Advanced from the Main Toolbar;
 2. Select "Accessibility";
 3. Then select "Add Tags to Document"
- After the process is complete, the PDF is tagged and -if any potential problems were encountered- the Add Tags Report appears in the navigation pane. Follow the instructions to correct and re-label any tags that are incorrect or out of order.

PDF – Common Issues and Corrections

Elements not contained in the document structure tree

Inaccessible Page Content

These are usually areas of a document that has unnecessary spaces added for layout or from documents that were scanned. It also comes up a lot when checking accessibility for any document that used Adobe for complete layout like flyers and brochures.

- To fix this, open up the Touch Up Reading Order tool. Go to **Tools > Advanced Editing > TouchUp Reading Order Tool** or use the icon in the top right corner of your acrobat window. Click and drag your cursor and select the portion of the document that is showing as Inaccessible Page Content (and nothing else)
- Then click on the TouchUp Reading Order Tool and select "Background" to assign it to the background of the document (which is not read by assistive technologies).
- Unfortunately, there is nothing we can do for materials developed and created externally. But for the files that are developed here, we can make changes to ensure that the page's content is accessible.

PDF – Common Issues and Corrections

Elements not contained in the document structure tree

Inaccessible Links

- For URLs to be accessible to screen readers, you must convert them to active links and make sure that they are correctly tagged in the PDF.
- Most of the time, you will create links in your source documents and these will be carried over into your PDF document. If created correctly, the links will be accessible. This means that the link provides a connection to the target site that can be operated by the user via assistive technology such as a screen reader.
- Inaccessible links are those that appear to be links to a target site but that do not link to a website at all leaving end users confused when navigating the PDF. If the links that are carried over into your PDF document are not accessible, or if you want to create a new accessible link, you can do that within Acrobat.

PDF – Common Issues and Corrections

Elements not contained in the document structure tree

Inaccessible Links

- It is easier to go back in the original document to make an inaccessible link accessible. Some hints:
- When you create a link in Office, the information should be transferred over to the tagged PDF that is created from it.
 - Do not create links within the header or a footer of a document. The tag information does not transfer over from Office to PDF as it would if you were to add it in the main body of the document.
 - If you link anything in a table, make sure the reading order is correct and that the link has been tagged by finding the table within the Tags panel. (**View > Navigation Panels > Tags.**)

PDF – Common Issues and Corrections

Elements not contained in the document structure tree

Inaccessible Links - **Adding or creating a link in Adobe Acrobat**

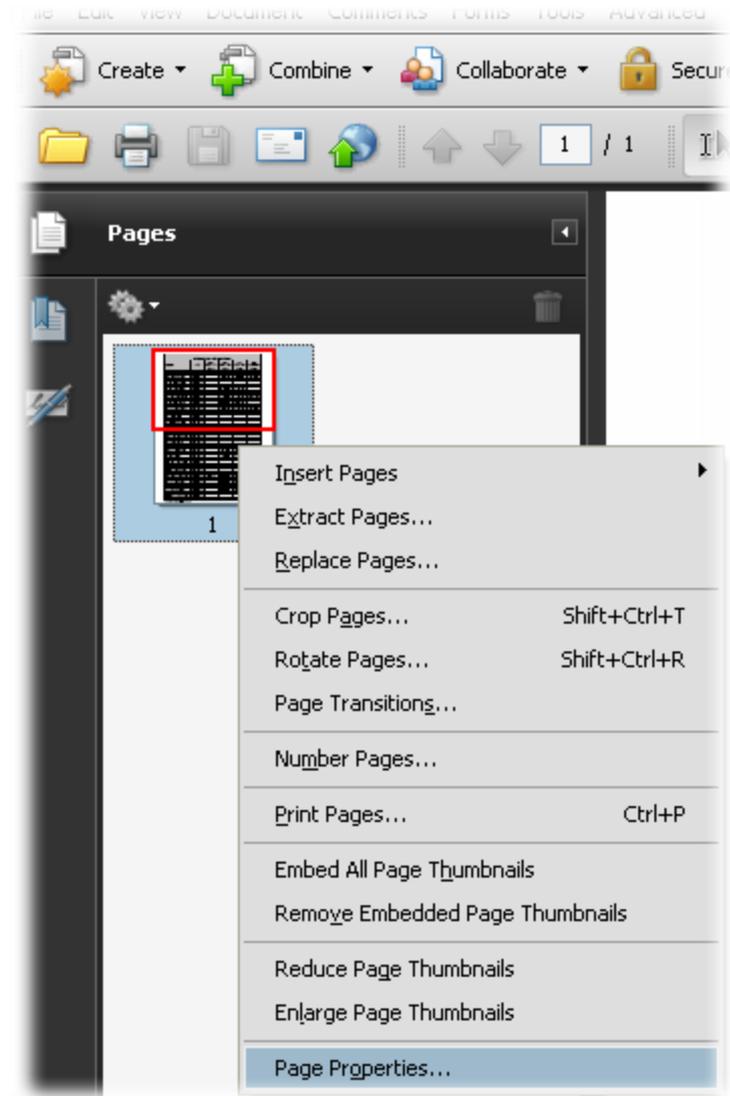
- If the tags for a link do not come through from the original document, you will have to add the link in Adobe Acrobat. To add content to the tree, use the **TouchUp Reading Order Tool** or use the **Tags Panel** (At the top of Adobe Pro 9, select **View** > **Navigation Panels** > **Tags**).
- To use the TouchUp Reading Order Tool, choose **Advanced** > **Accessibility** > **TouchUp Reading Order**.
- To use the Tags Panel, select the content in the document with the **Select Text tool**, the **TouchUp Text tool** or the **TouchUp Object tool**. Select its parent in the Tags tree, then choose **Options** > **Create Tag from Selection**. Drag the new tag to its correct location, if necessary. For comments, links, and annotations that are not included in the structure tree, choose **Options** > **Find**. Select the type of item to search for and choose **Find**. Tag Element will let you add the item below the currently selected element in the Tags tree.

PDF – Common Issues and Corrections

Tab order may be inconsistent with the structure order

In some instances, even though the tags have been inherited from the source file, the Accessibility Checker will indicate that tab order is inconsistent with structure order. To correct this issue, do the following:

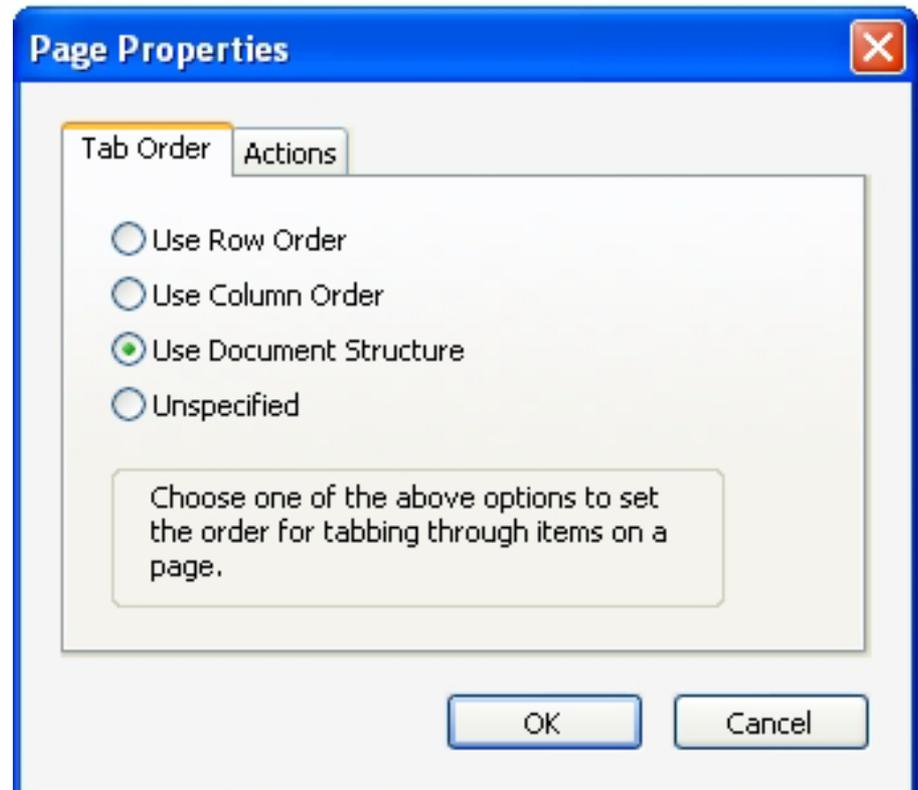
- Open the Pages icon or select **View > Navigation Panels > Pages** (ALT + VNP)
- Click on any page icon and type Ctrl + A to select all the pages
- Right-click on one of the selected pages and click on **Page Properties**



PDF – Common Issues and Corrections

Tab order may be inconsistent with the structure order

- Click on any page icon and type Ctrl + A to select all the pages
- Right-click on one of the selected pages and click on **Page Properties**
- In the **Tab Order Panel**, check **Use Document Structure** and then click **OK**



PDF – Common Issues and Corrections

Image(s) without Alternative Text

Check and add alternate text for images and figures

If you want screen readers to describe graphics and image that illustrate important concepts in a document, you must provide the description using alternate text. Content tagged as a "Figure" is not recognized or read by a screen reader unless you add alternate text to the tag properties.

- Go to **Tools -> Advanced Editing -> TouchUp Reading Order Tool**.
- Make sure that all the checkboxes are checked. They should be checked by default, if they aren't checked, then check all three.
- Right-click the figure (a blue border then appears around it) and choose **Properties** from the menu that comes up. Then choose **Edit Alternate Text** from the tabs at the top of the menu.
- Make sure that the image is tagged as **Figure** (It might be tagged as 'Paragraph' or 'Span' depending on the original document).
- In the **Edit Alternate Text** dialog box, type a new (or edit an existing) description for the figure
 - It is important to remember that someone that might have disabilities related to vision would need this information to know what the image is, so be sure to be descriptive, but concise in this information.
- Lastly, select the appropriate language for the alternate text from the **Language** pull-down menu, and then click OK.

PDF – Common Issues and Corrections

Image(s) without Alternative Text

Making an Image a Background Element

- Images that do not add value to the document and are purely decoration should be designated as a **background** object. These objects will not be announced by screen readers.
- To make an image a part of the background:
 1. From main menu bar click on **Advanced > Accessibility > TouchUp Reading Order**.
 2. The "TouchUp Reading Order" window will be displayed.
 3. Select the object that is to be made "Background" by clicking and dragging the cursor to create a box around it.
 4. Click on "Background."
 5. Click on Close.

PDF – Common Issues and Corrections

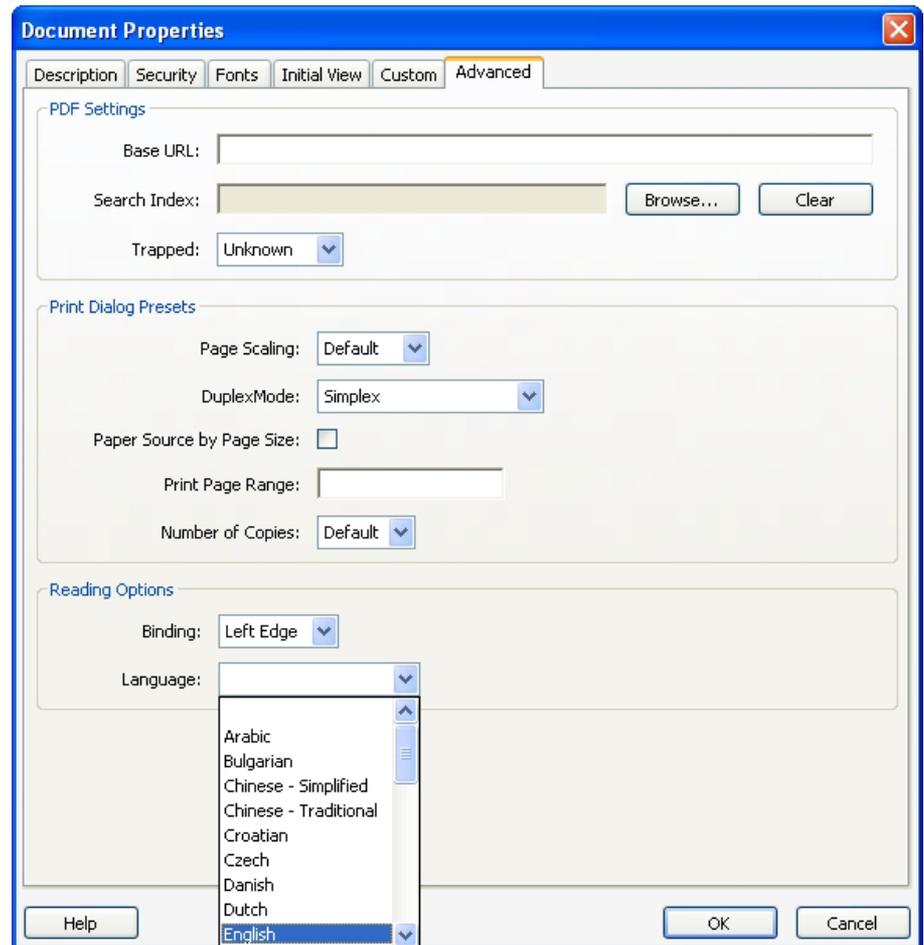
All of the text on this page lacks a language specification

- Both assistive technologies and conventional user agents can render text more accurately when the language of the document is identified. Screen readers can load the correct pronunciation rules. Visual browsers can display characters and scripts correctly. Media players can show captions correctly. As a result, users with disabilities will be better able to understand the content.
- Follow the steps in the Accessibility Report to correct them.
 - Choose **File > Document Properties** or click **Ctrl + D** to bring up the Document Properties window.
 - Select the **Advanced** tab.

PDF – Common Issues and Corrections

All of the text on this page lacks a language specification

- Use the pull down menu at the bottom under **Reading Options** for **Language** and select the appropriate language for the document.



Questions?

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