

Creating Accessible PDF and Word Forms

2014

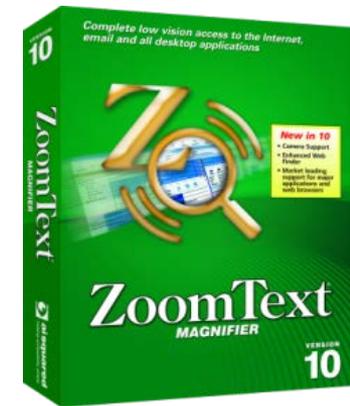
Prepared and Presented by: Joseph Krack
Digital Accessibility Consultant
Department of Rehabilitation
Disability Access Services

Assistive Technology

Screen Readers



Screen Magnifiers



Word or PDF

Word Forms

PROS

- ▶ Use Word to create.
- ▶ Work well for Simple forms.

CONS

- ▶ Limited Text Help.
- ▶ Not everyone has Word.

PDF Forms

PROS

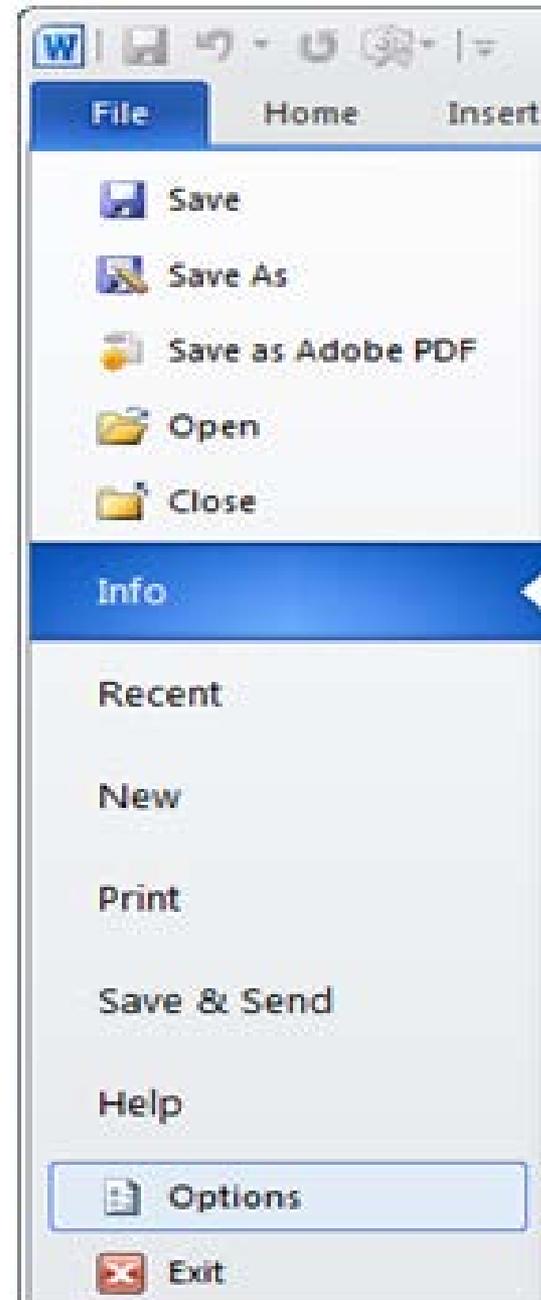
- ▶ Can make more complex forms.
- ▶ 'Read Only' boxes provide understanding.

CONS

- ▶ Fewer People have Adobe Professional.

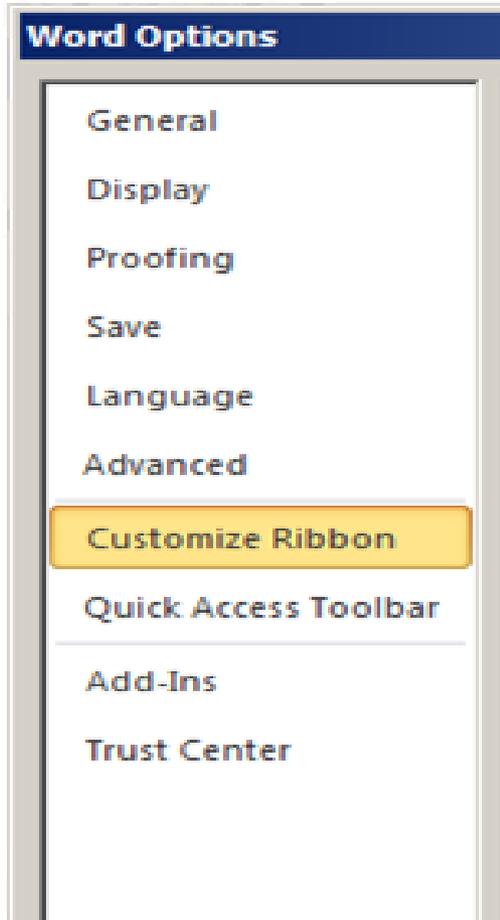
Developer Tab

- ▶ First you must add the 'Developer' tab to your Ribbon.
- ▶ Click:
 1. File
 2. Options

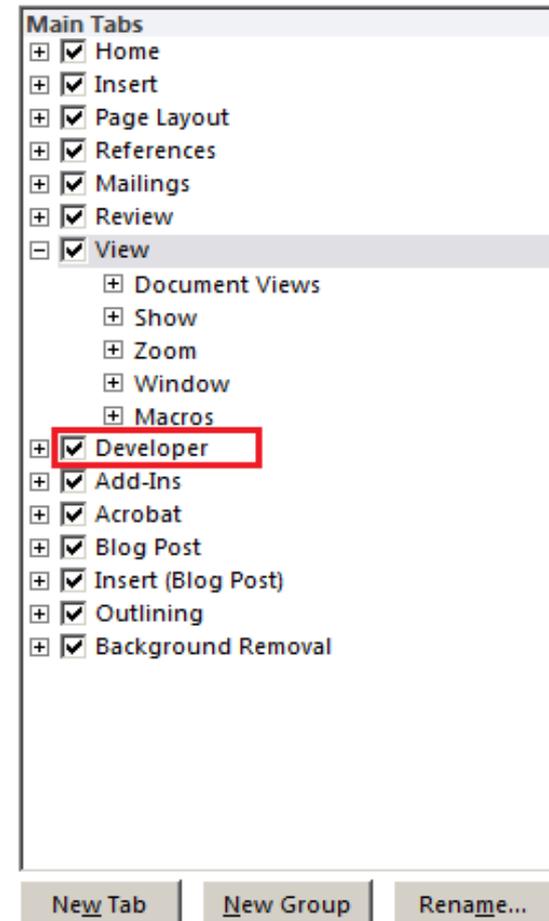


Adding the Developer Tab

3. Click on 'Customize Ribbon'

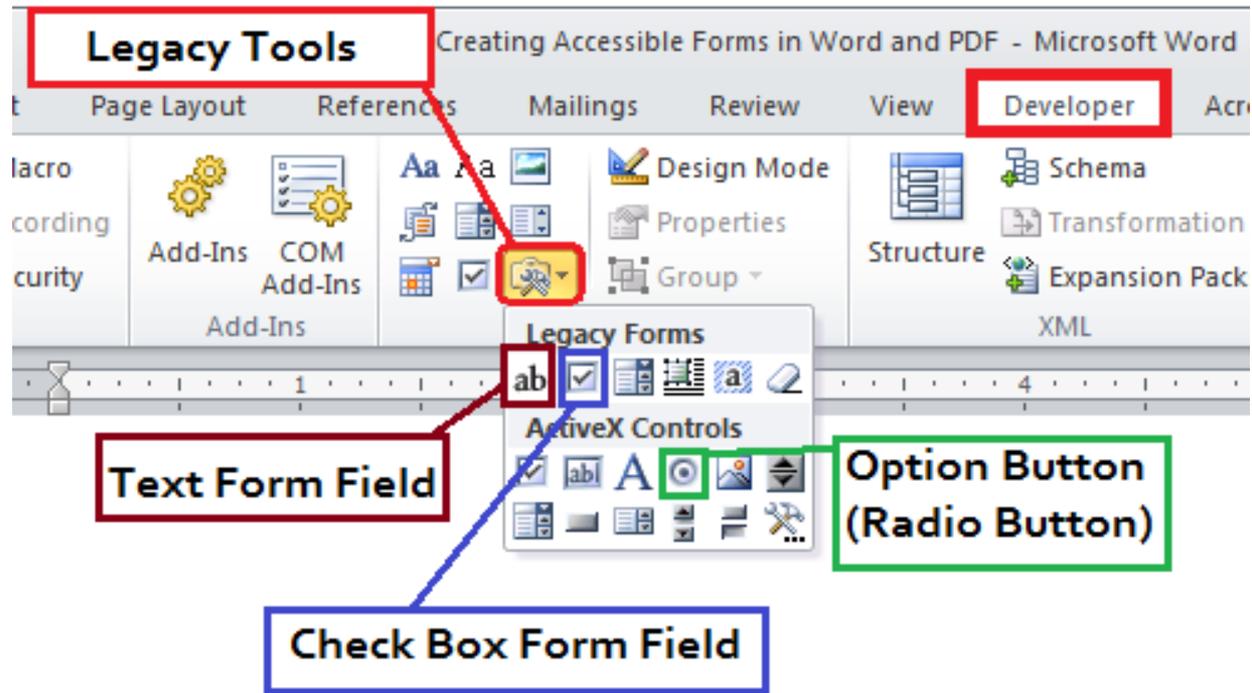


4. Check the Developer checkbox.

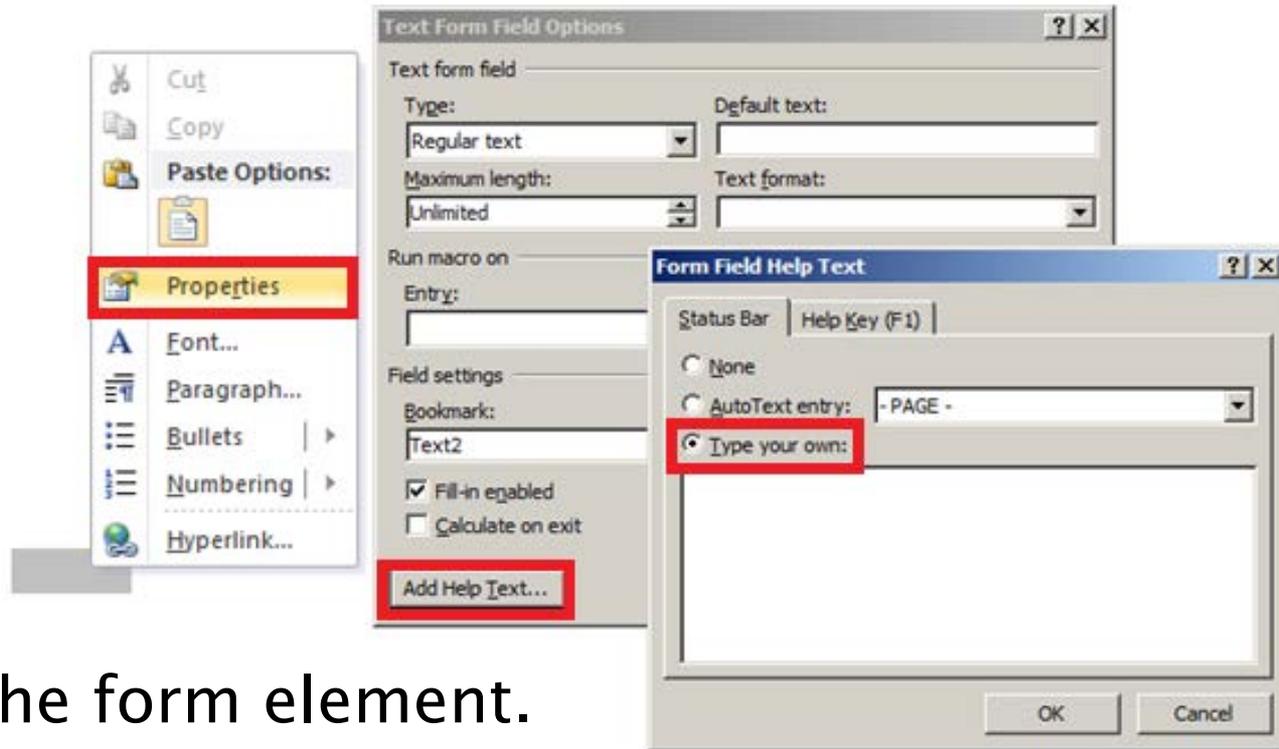


Add Form Elements

1. Developer Tab
2. Controls Area
3. Legacy Tools



Add 'Help Text'



- ▶ Right Click the form element.
- ▶ Choose, 'Properties'
- ▶ Add Help Text...'
- ▶ Choose, 'Type your own:'

138 Character Limit

Simple Word Forms

- ▶ Word forms work well if they are simple, with short sets of instructions and questions.
- Instructions or questions that have more than **138** characters necessitate that a person using a Screen Reader switch in and out of 'Forms Mode' as they fill-in the form.

Help Text Limitation

Supervisor:	Email:	Phone:

Section II: IT Equipment Needs

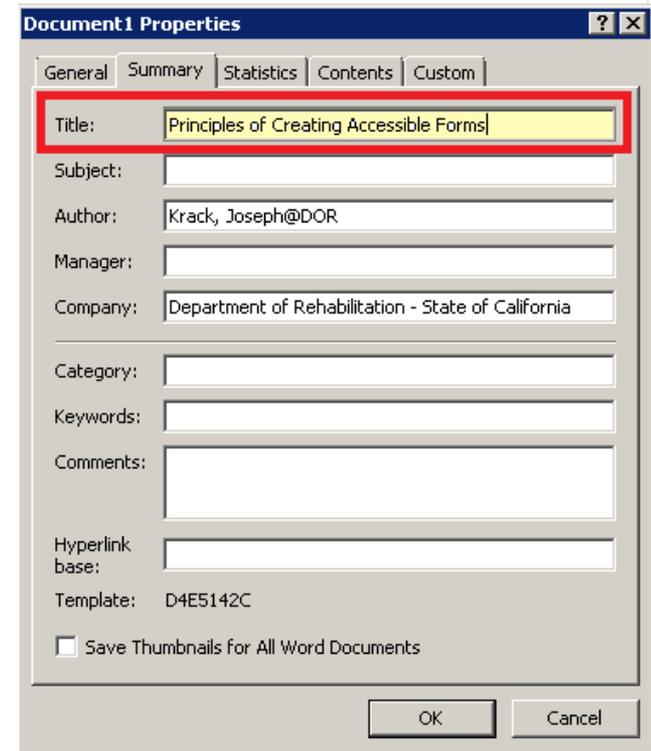
In the section below please:

- Check all that apply from the list below regarding requests for IT Equipment for this client.
- When finished submit this form along with a completed **form JK 002**.
- Mail signed copies of both forms to: Joe Krack at 721 Capitol Mall, Sacramento, CA 95814

Computer	<input checked="" type="checkbox"/> New	<input type="checkbox"/> Replacement	<input type="checkbox"/> Desktop	<input type="checkbox"/> Laptop	Qty
Monitor	<input type="checkbox"/> New	<input type="checkbox"/> Replacement			Qty
Printer	<input type="checkbox"/> New	<input type="checkbox"/> Replacement			Qty
Telecom	<input type="checkbox"/> DSL	<input type="checkbox"/> Cell Phone	<input type="checkbox"/> Other	Explain:	Qty

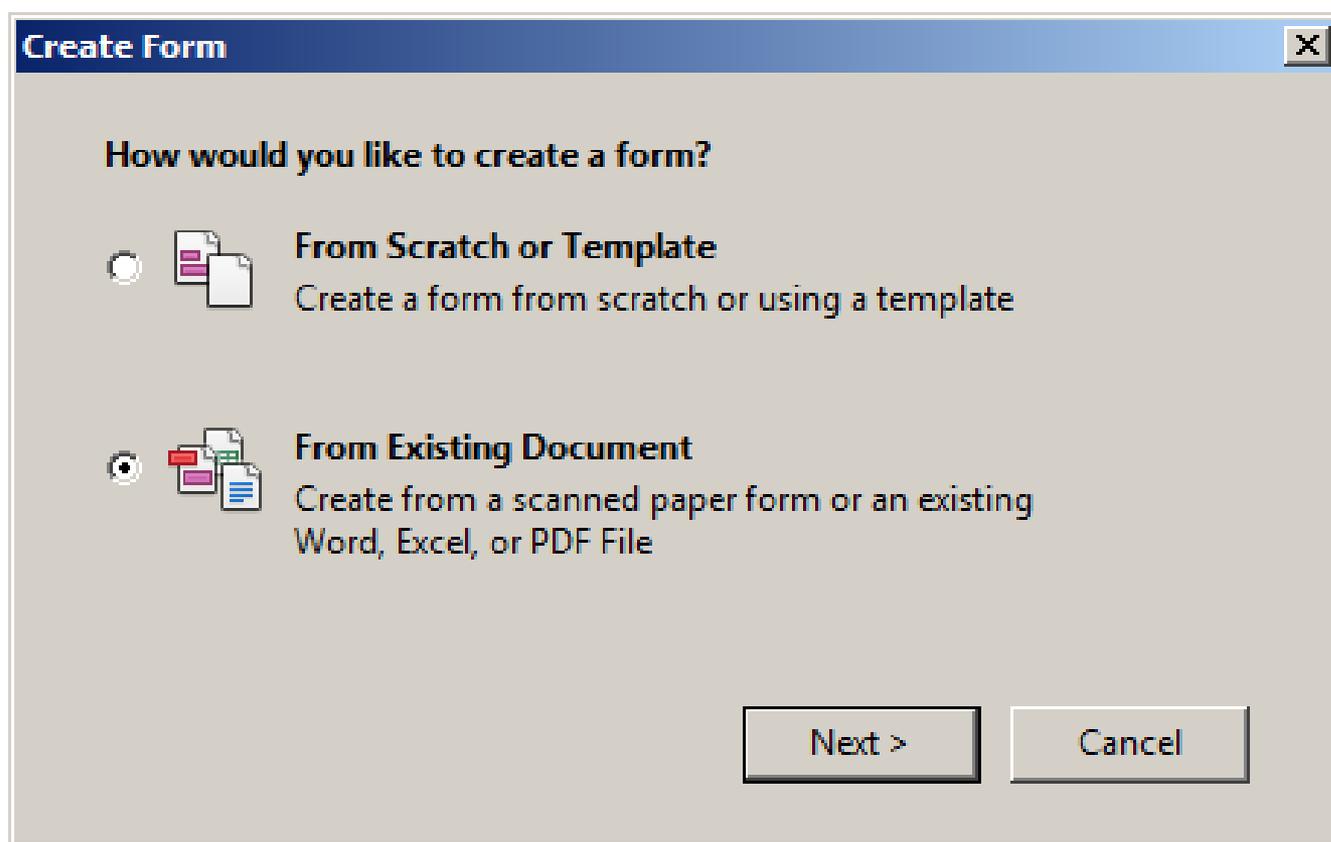
Word Form Title

- ▶ As with all documents, ensure the Title of the Document makes sense. When persons have many files open at once, an appropriate Title helps make each form easier to find.
- ▶ This is especially true for person using Assistive Technologies.



PDF Forms Creation

- ▶ Most PDF forms start in another file format.



Adobe Pro Adds Fields

- ▶ Adobe Professional will add form fields, and checkboxes where it assumes they belong. It also names them from text that is adjacent.

Service/Action Needed:

Complaint's Signature:

Telephone Number

Title:

Date_2

Telephone Number:

Date:

TO BE COMPLETED BY DOR CONTRACTS AND PROCUREMENT STAFF ONLY

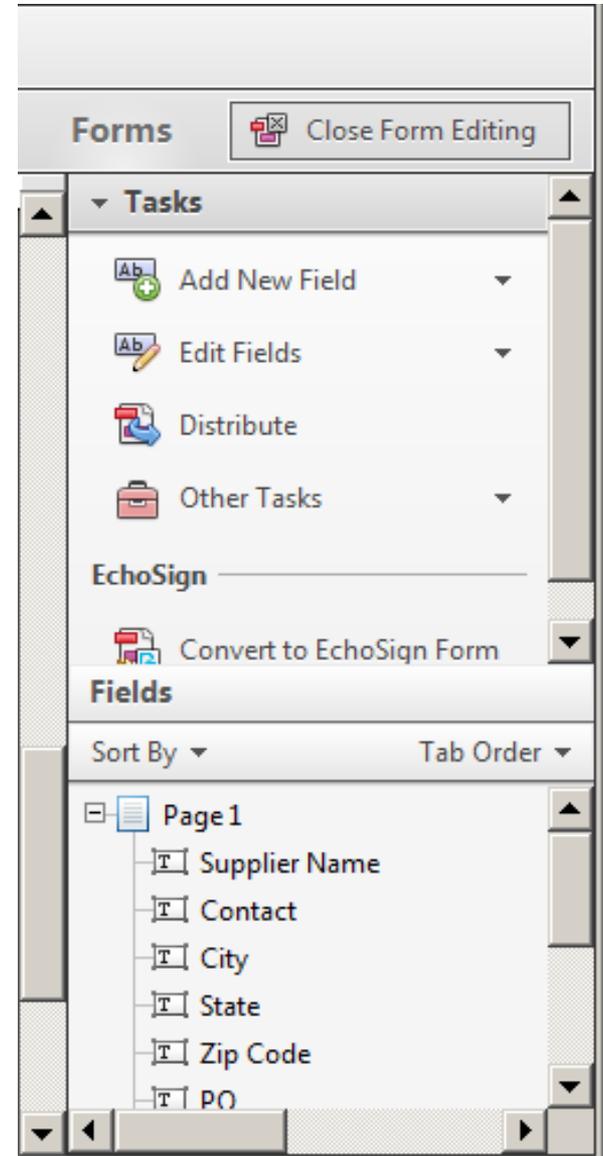
TO BE COMPLETED BY DOR CONTRACTS AND PROCUREMENT STAFF ONLY

Action Taken by Buyer:

Create or Edit Form Elements

In Forms editing mode, you can edit or add form elements, such as;

- ▶ Text Fields
- ▶ Check Boxes
- ▶ Radio Buttons
- ▶ List Boxes
- ▶ Dropdowns
- ▶ Buttons
- ▶ Digital Signatures
- ▶ Barcode



Ensure Tooltip is Helpful

- ▶ Once in 'Forms Mode', only tooltips are read.

Optional Questions:

To assist in having a diverse staff reflective of the delegates selected, please answer questions a & b below:

a) Do you have a disability? Yes

- Bli Blind/Low Vision
- De Deaf/Hard of Hearing
- Int Intellectual/Developmental Disability
- Le Learning Disability
- Ph Physical/Mobility Disability

b) Please specify your ethnicity:

Radio Button Properties

General | Appearance | Position | Options | Actions

Name: Optional Ques 1 Yes

Tooltip: nal Question A, do you have a disability? Yes

Common Properties

Form Field: Visible Read Only

Orientation: 0 degrees Required

Locked

Close

'Read Only' Option

- ▶ When in Forms Mode, Instructions and other important pieces of information will not be read, unless you add them into a text edit box.

Supervisor Name:	Supervisor Signature: 	Supervisor Phone:
Chief/DA Name:	Chief/DA Signature: 	Chief/DA Phone:
ITSD IT Coordinator Name:	ITSD IT Coordinator Signature: 	Date Signed:

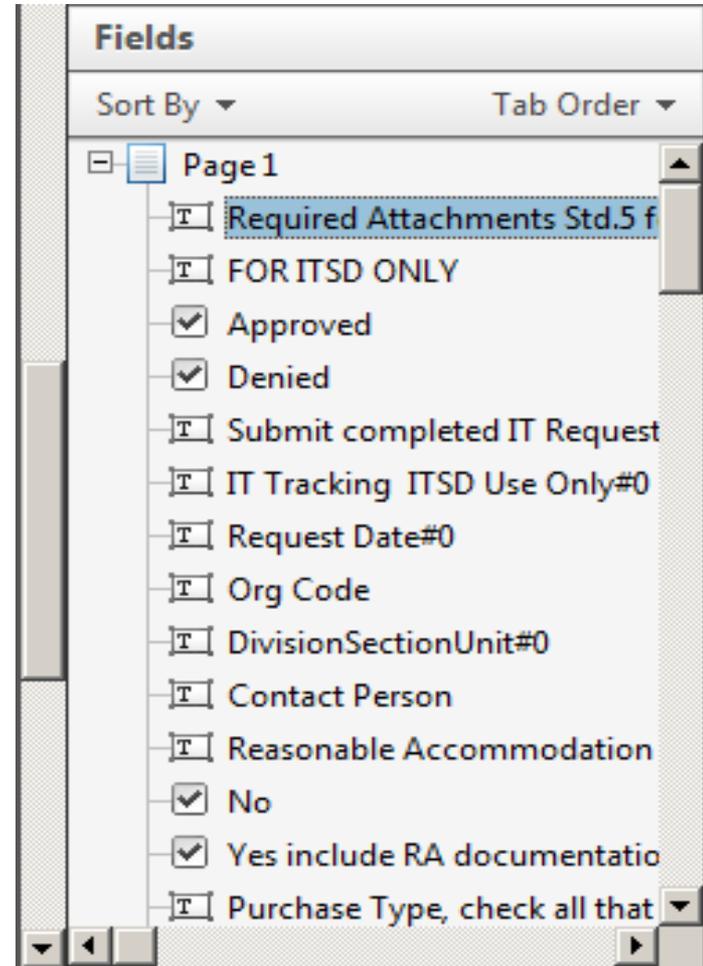
CERTIFICATION (if \$100,000 or above) - I certify that I am the agency director or designee, that the matters described herein are consistent with this agency's current information management strategy and information technology infrastructure; that these matters comply with this agency's approved Desktop Mobile Computing Policy; and are in conformity with the criteria and procedures for information technology prescribed in SAM; and that the foregoing statements are true to the best of my knowledge and belief.

Name/Title:	Director or Designee Approval: 	Date Signed:
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Put this important information in a 'Read Only, Text Edit' field.

Check Tab Order

- ▶ Ensure your Tab order is correct.
- ▶ For accessibility all on-screen navigation is done via the keyboard. The tab button moves focus, and so the 'Tab Order' must make sense.



Also Check for Usability

INSTRUCTIONS: *This form shall be completed for any work-related incident(s) involving DOR employees or State property which occurs at any work location, including off-site or home. This report must be submitted within three (3) business days from the date of discovery of the incident.*

Distribute as follows:

ORIGINAL - DOR Health & Safety Officer

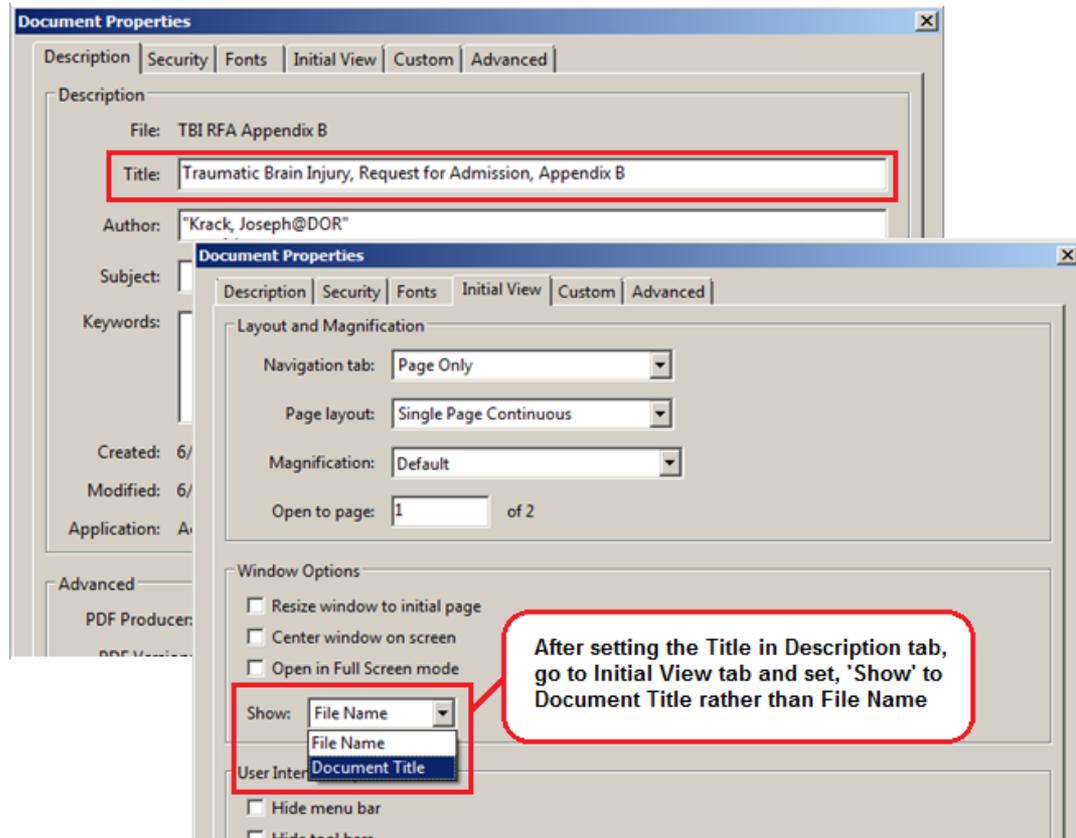
COPY - District Administrator/Section Chief

COPY - Manager/Supervisor

DATE OF INCIDENT	TIME OF INCIDENT	PERSON REPORTING INCIDENT
INCIDENT LOCATION (<i>Office Name, Business Name, etc.</i>)		DIVISION/DISTRICT/SECTION
INCIDENT ADDRESS		ADDRESS
CITY, STATE, ZIP CODE		PHONE NUMBER, INCLUDING AREA CODE

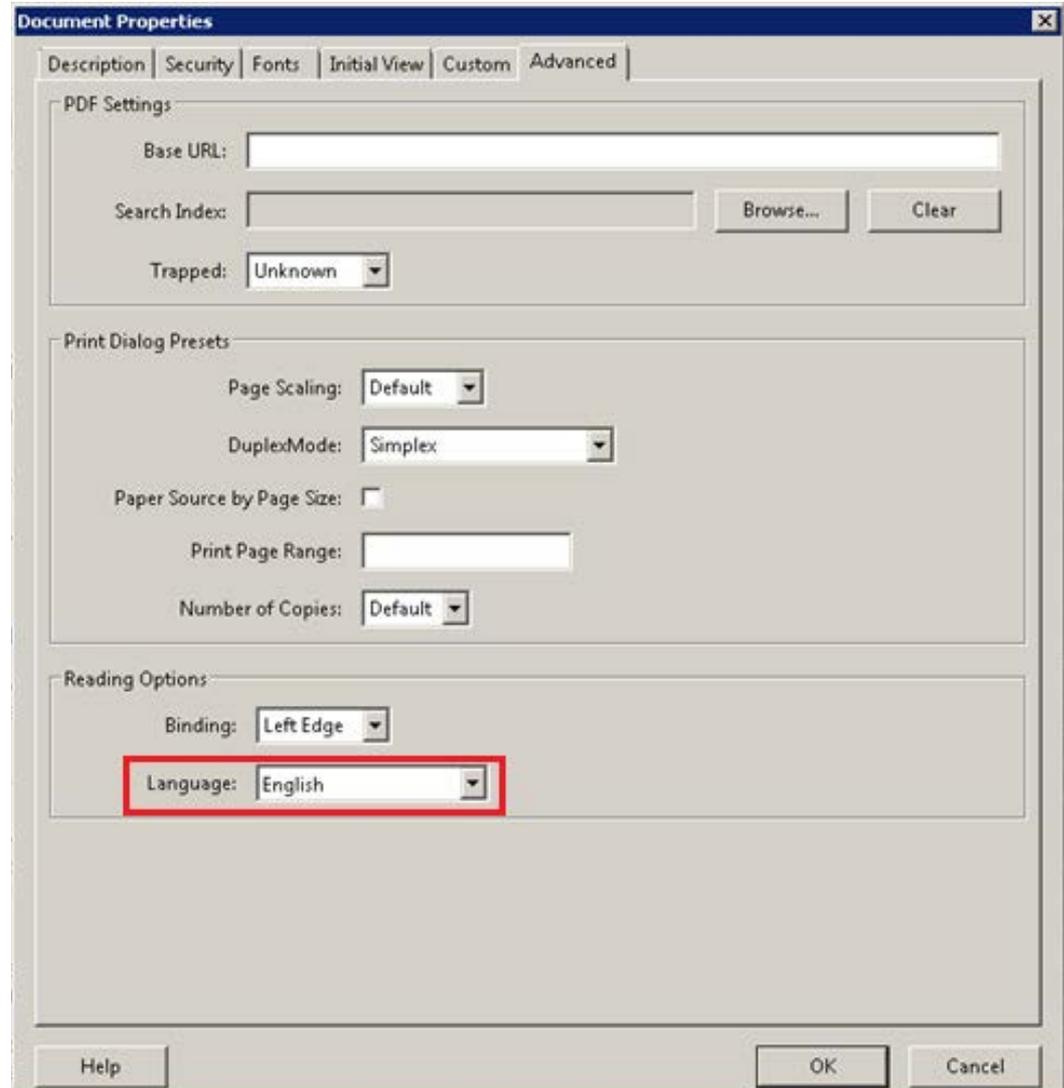
Create PDF Document Title

1. File
2. Properties
3. Description tab, enter Title
4. Initial View tab, set 'Show' to 'Document Title'



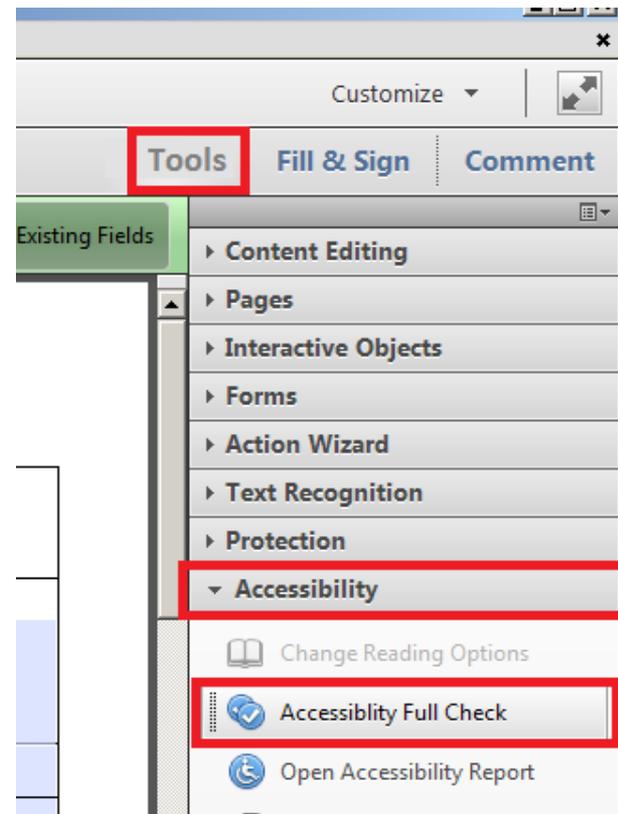
Set Document Language

- ▶ Set the documents language in the 'Advanced' tab.



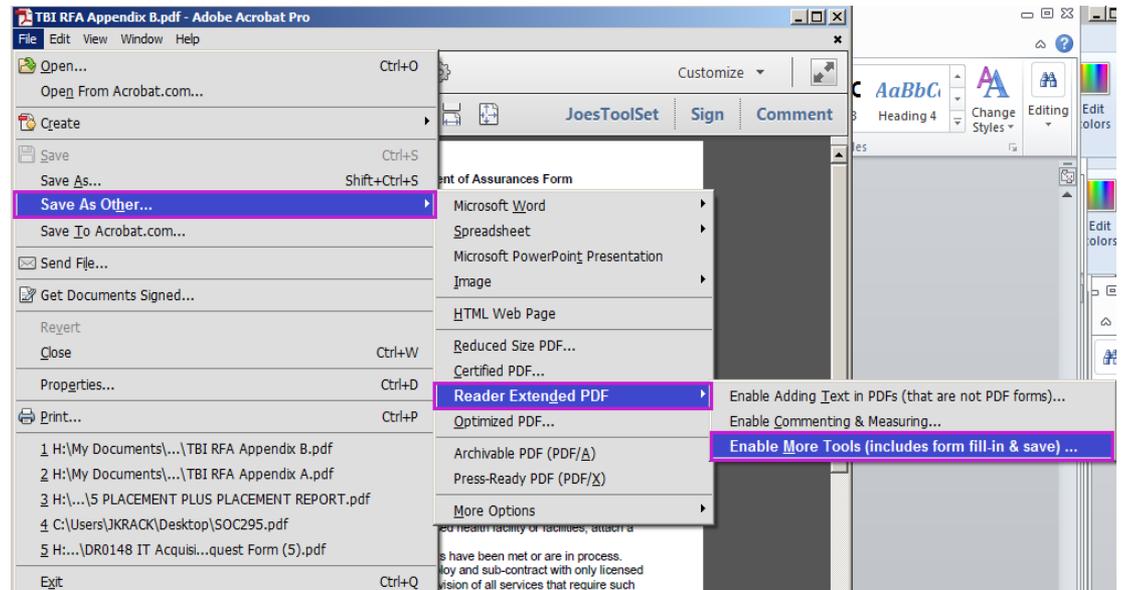
Perform Accessibility Check

- ▶ If you constructed your document accessibly prior to creating a form in Adobe Acrobat, than most of your accessibility will still be in tact.
- ▶ Acrobat Pro X and XI offer an Accessibility Check tool.
 - Tools > Accessibility > Accessibility Full Check



Save as 'Reader Extended PDF'

This will allow others to Save and Print the form.



1. File
2. Save As Other
3. Reader Extended PDF
4. Enable More Tools

Don't Forget These Resources

- ▶ Available at: [Disability Access Services](http://dor.ca.gov/DisabilityAccessInfo/How-do-I-Construct-Accessible-Documents.html) website

<http://dor.ca.gov/DisabilityAccessInfo/How-do-I-Construct-Accessible-Documents.html>



Questions

Thank You!

Joe Krack

jkrack@dor.ca.gov

916-558-5766

**721 Capitol Mall, 4th floor
Sacramento, CA 95814**