2022

Document Conversion and Accessibility: Word to PDF

Contents

Introduction

This is an instructional manual on how to convert different types of Microsoft Word documents to PDF format and make them accessible.

A Portable Document Format (PDF) is a file format invented by Adobe that is used to reliably present and exchange documents, independent of factors such as software, hardware, or operating system. PDF is now an open standard maintained by the International Organization for Standardization (ISO). PDFs are able to contain various features, including links and buttons, form fields, audio, video, and business logic. A popular feature of a PDF is its ability to be signed electronically. PDFs can be easily viewed using the free Adobe Acrobat Reader DC software, or other PDF reader applications.

Adobe Acrobat Pro DC is the latest subscription PDF solution offered by Adobe that allows you to work from anywhere with your documents. View, create, edit, and share PDF documents on both desktop and mobile devices.

Adobe Acrobat Pro DC will be used throughout this manual.

Winston-Salem State University is currently using Adobe Acrobat Pro DC version 2019.010.20100.

Accessibility

A document or application is considered accessible if it meets certain technical criteria and can be used by people with disabilities. This includes access by people who are mobility impaired, blind, low vision, deaf, hard of hearing, or who have cognitive impairments.

All users deserve the right to interact with documents to its fullest extent, without limitations due to barriers created by inaccessibility. Making PDFs accessible is an important step in preventing what could be considered a discriminatory situation for a business, institution, organization, or individual. The Web Content Accessibility Guidelines (WCAG) 2.0 (ISO/IEC 40500:2012) and the PDF/UA (ISO 14289-1) standard cover a wide range of recommendations for making content more accessible to people with disabilities.

Accessibility features in Adobe Acrobat, Adobe Reader and in the PDF make it easier for people with disabilities to use PDF documents and forms, with and without the aid of assistive technology software and devices. These features should be used by the creators and distributors of PDFs in order to be fully effective. When creating PDFs, to allow users of all varieties access to the document, remove any barriers that may be in place. See the _Making PDFs Accessible_ section of this manual for more information.
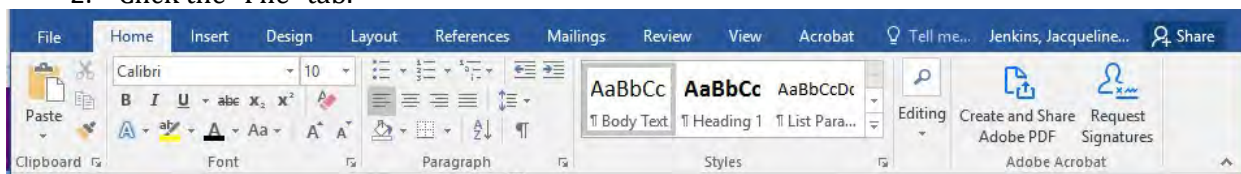
Microsoft Word Accessibility

All documents must be saved to a local location for the below instructions to be successful. (i.e. Desktop, Network Drive, etc.) Theses instructions should work for any of the Microsoft Office Suite Applications.
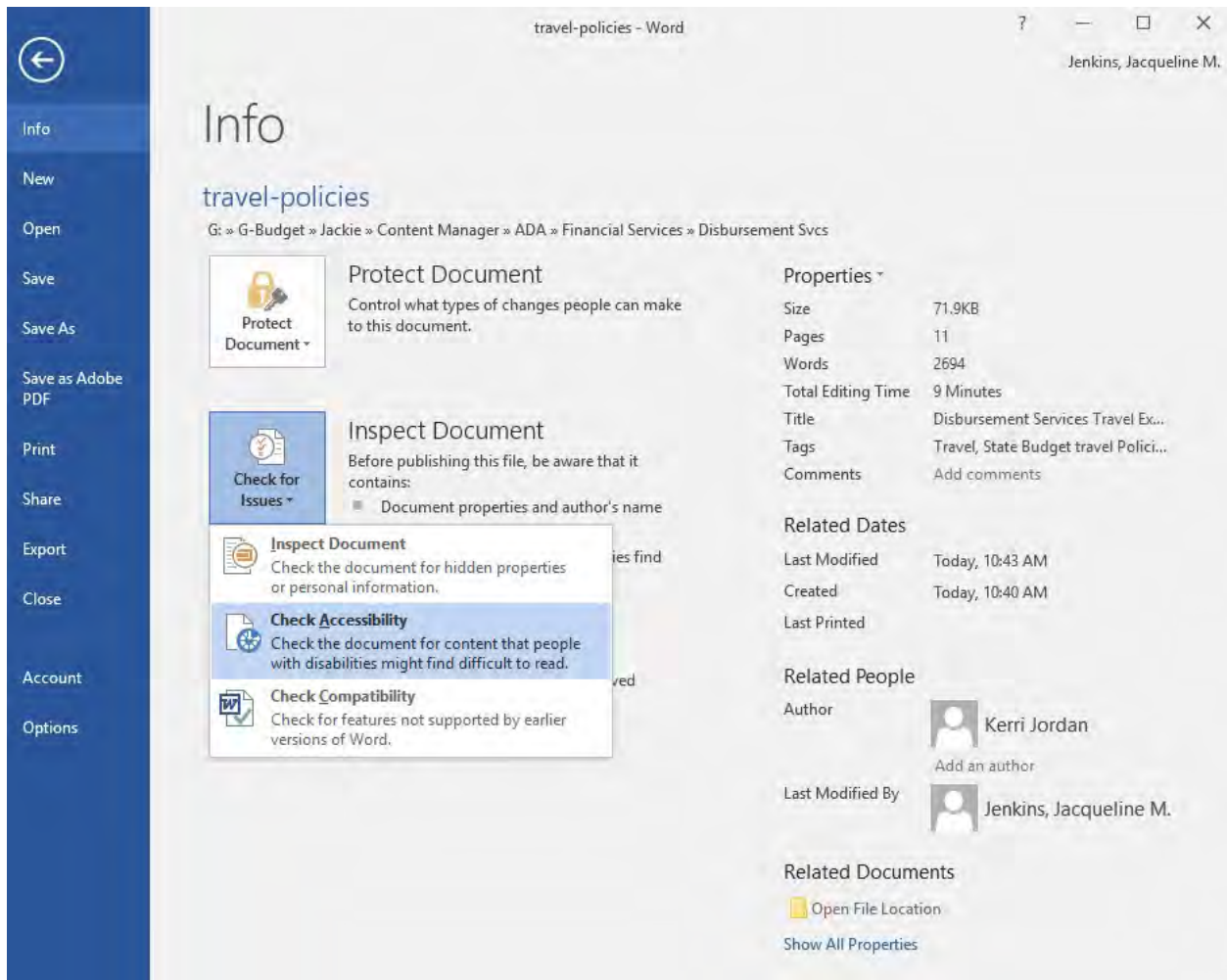
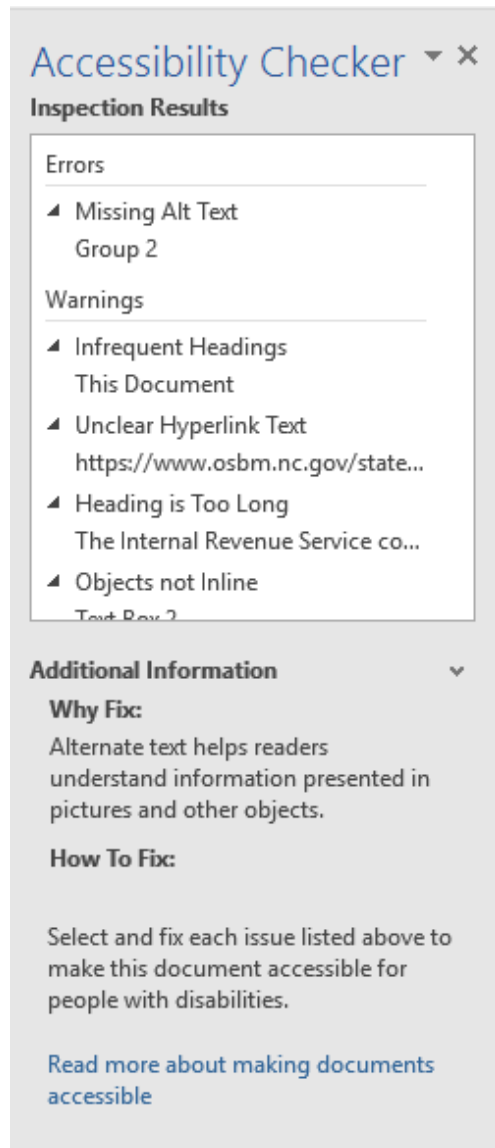1. Open document in Microsoft Word.
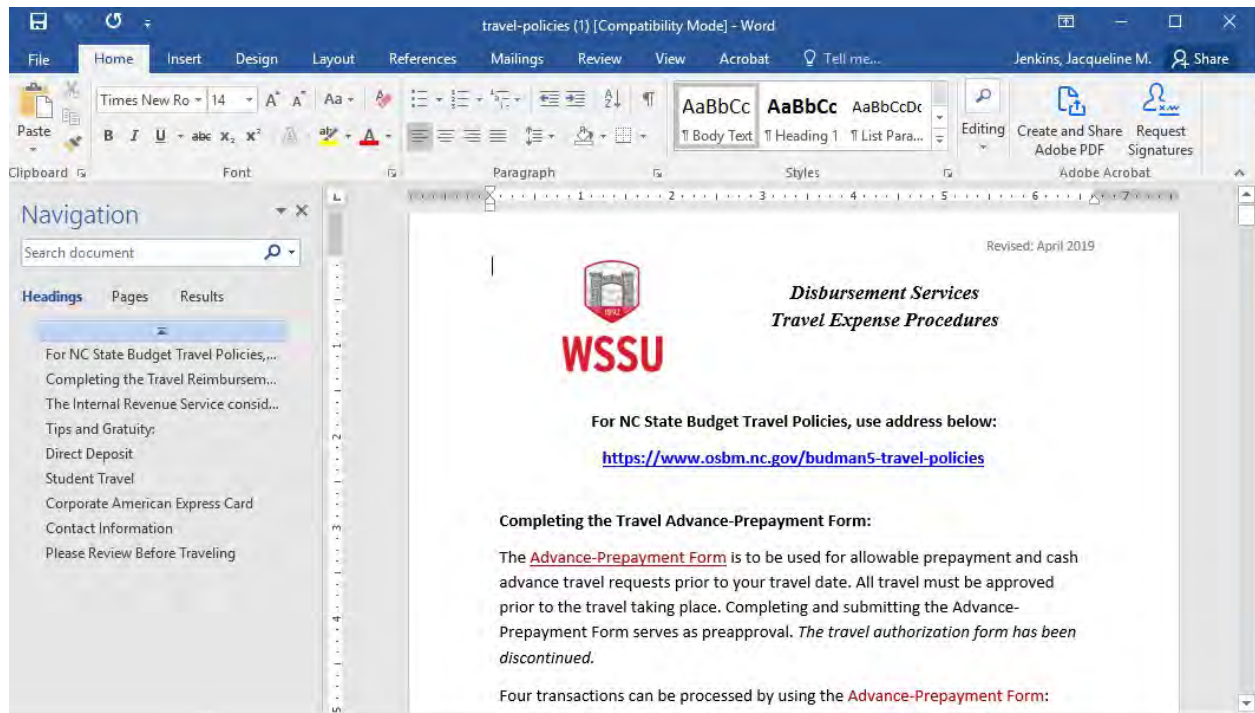
2. Click the "File" tab.

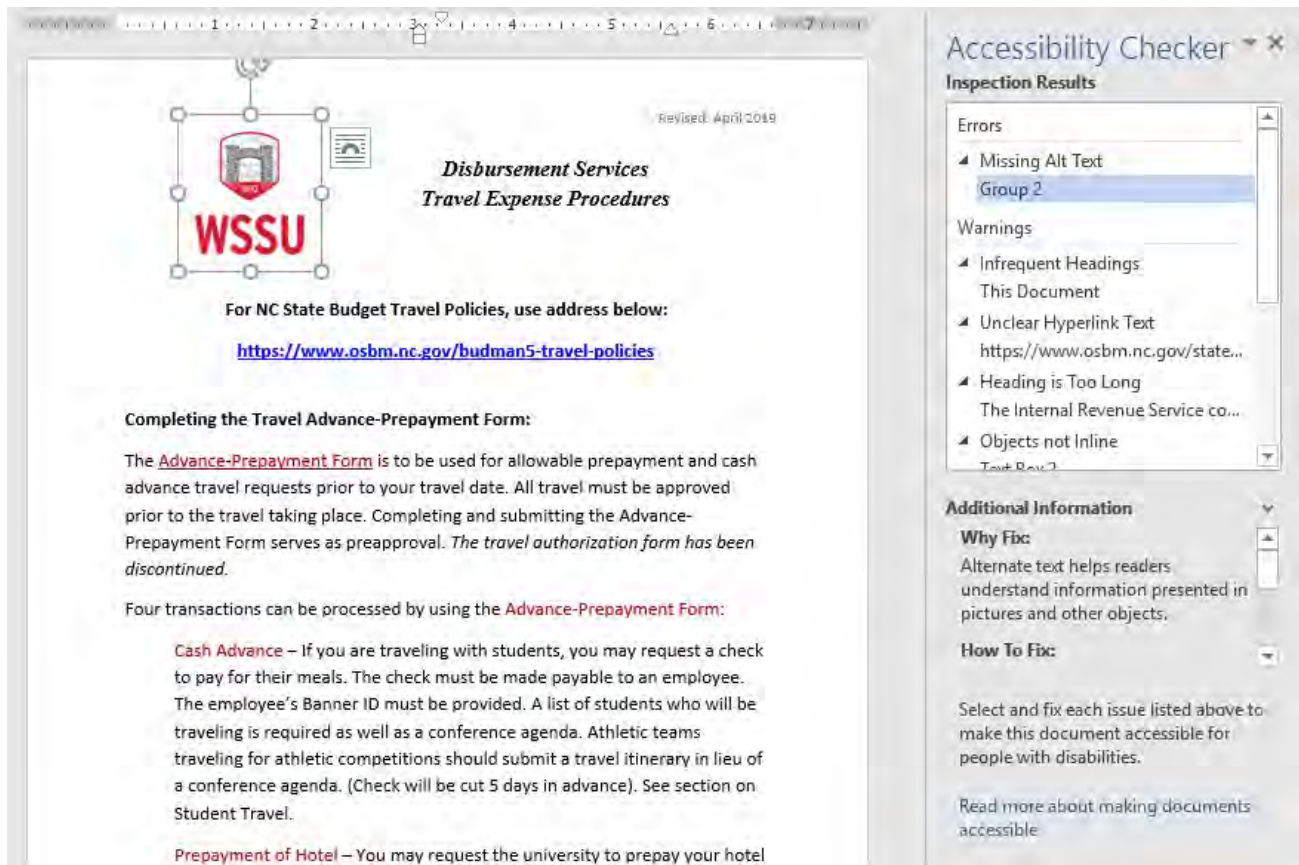3. Select "Check Accessibility" from "Check for Issues" list.

4. A list of Errors and Warnings appear. (Only Errors have to be corrected at this time.)

Accessibility Checker ▾ ✕

Inspection Results

Errors

⊿ Missing Alt Text
   Group 2

Warnings

⊿ Infrequent Headings
   This Document
⊿ Unclear Hyperlink Text
   https://www.osbm.nc.gov/state...
⊿ Heading is Too Long
   The Internal Revenue Service co...
⊿ Objects not Inline
   Text Box 2

Additional Information ⌄

Why Fix:

Alternate text helps readers understand information presented in pictures and other objects.

How To Fix:

Select and fix each issue listed above to make this document accessible for people with disabilities.

Read more about making documents accessible

5. Select a "Error". The object containing the error will be highlighted.
6. Use the scrollbar to read steps on how to correct the error.

Revised: April 2019

Disbursement Services
Travel Expense Procedures

WSSU

For NC State Budget Travel Policies, use address below:

https://www.osbm.nc.gov/budman5-travel-policies

Completing the Travel Advance-Prepayment Form:

The Advance-Prepayment Form is to be used for allowable prepayment and cash advance travel requests prior to your travel date. All travel must be approved prior to the travel taking place. Completing and submitting the Advance-Prepayment Form serves as preapproval. *The travel authorization form has been discontinued.*

Four transactions can be processed by using the Advance-Prepayment Form:

Cash Advance – If you are traveling with students, you may request a check to pay for their meals. The check must be made payable to an employee. The employee's Banner ID must be provided. A list of students who will be traveling is required as well as a conference agenda. Athletic teams traveling for athletic competitions should submit a travel itinerary in lieu of a conference agenda. (Check will be cut 5 days in advance). See section on Student Travel.

Prepayment of Hotel – You may request the university to prepay your hotel

Accessibility Checker ▾ ✕

Inspection Results

Errors
▲ Missing Alt Text
   Group 2

Warnings
▲ Infrequent Headings
   This Document
▲ Unclear Hyperlink Text
   https://www.osbm.nc.gov/state...
▲ Heading is Too Long
   The Internal Revenue Service co...
▲ Objects not Inline
   Text Box 2

Additional Information ⌄

Why Fix:
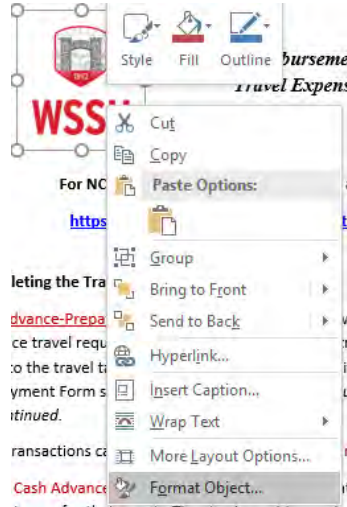Alternate text helps readers understand information presented in pictures and other objects.

How To Fix:

Select and fix each issue listed above to make this document accessible for people with disabilities.

Read more about making documents accessible

Missing Alt Text Error

1. Right-Click on the Image.
2. Select "Format Object".

3. The "Format Picture" window should appear.
4. Select the "Layout and Properties" icon .
5. Expand the "Alt Text" Section.
6. Updated the "Description Box" with a description of the image. (Type "Decorative" if the image is not displaying any information.)
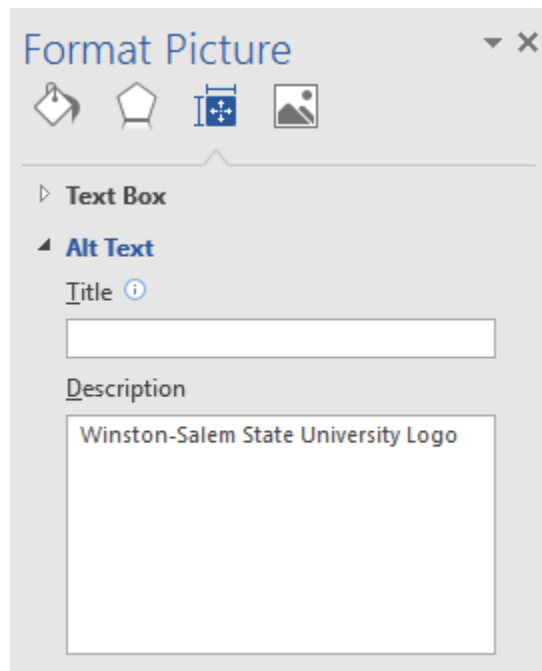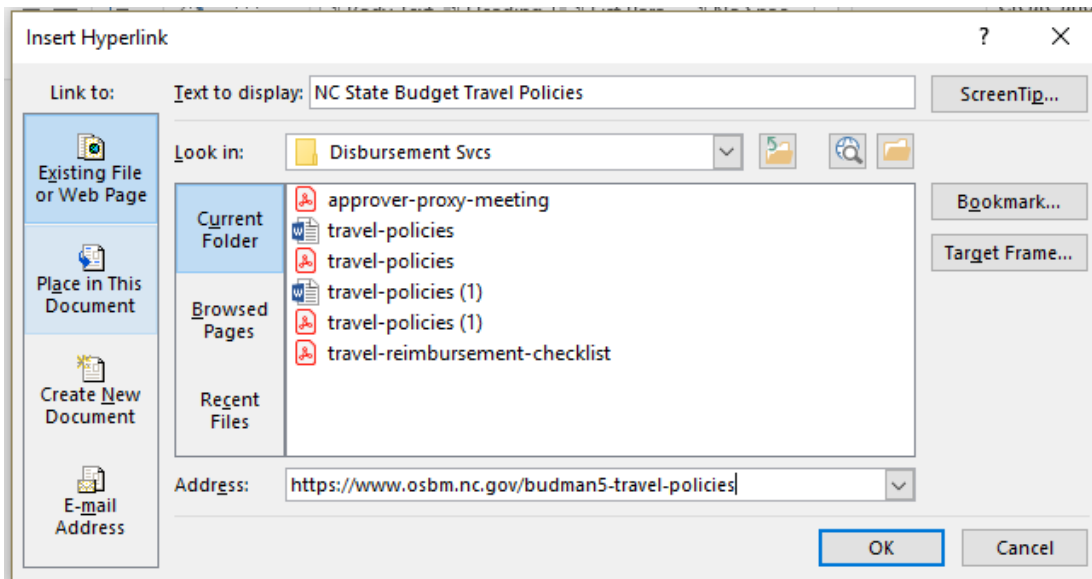
Updating Links

All links should display text describing where the link will take the user to. **NO** www. Should be present in any documents.

1. Copy the web address that should be present with the document.
2. Highlight the text that should be displayed for the link.
3. Right-Click the highlighted text.
4. Select "Hyperlink…." from the drop-down list.

5. Update the "Address:" field with the web address. Click "OK".

6. The text should now be updated to a link.

7. Update the document to text as needed to reflect the new hyperlink.

Table Header Error

1. Highlight the header row or add a header row if it is not present and highlight it.
2. Right-Click the header row.
3. Select "Table Properties…." From the drop-down menu.

4. Select "Row" Tab.
5. Select the "Repeat as header row at the top of each page" checkbox.

PDF Conversion

1. Save document.
2. Select the "Acrobat" tab.
3. Select "Create PDF".

4. Click "Save".

5. Now the document should open in Adobe Acrobat Pro DC.
6. Follow the PDF Accessibility Steps to complete accessibility check.

Adobe Acrobat PDF Accessibility

Gaining Access to Adobe Acrobat Pro
(if you already have Adobe Acrobat Pro Installed you may skip this section)

Students - Actively enrolled students receive Adobe Creative Cloud automatically

Faculty/Staff - Download **Adobe Creative Cloud** using the following two steps.

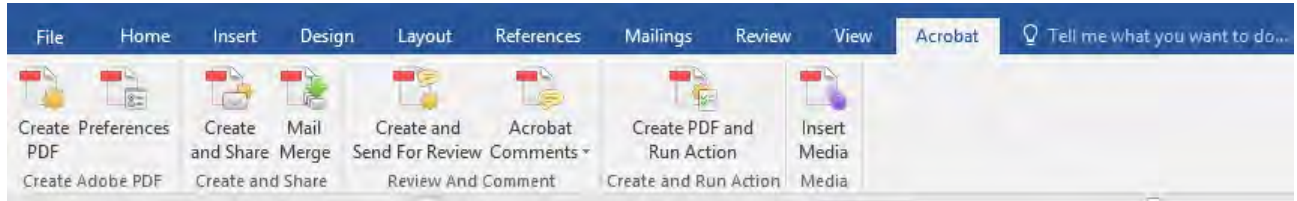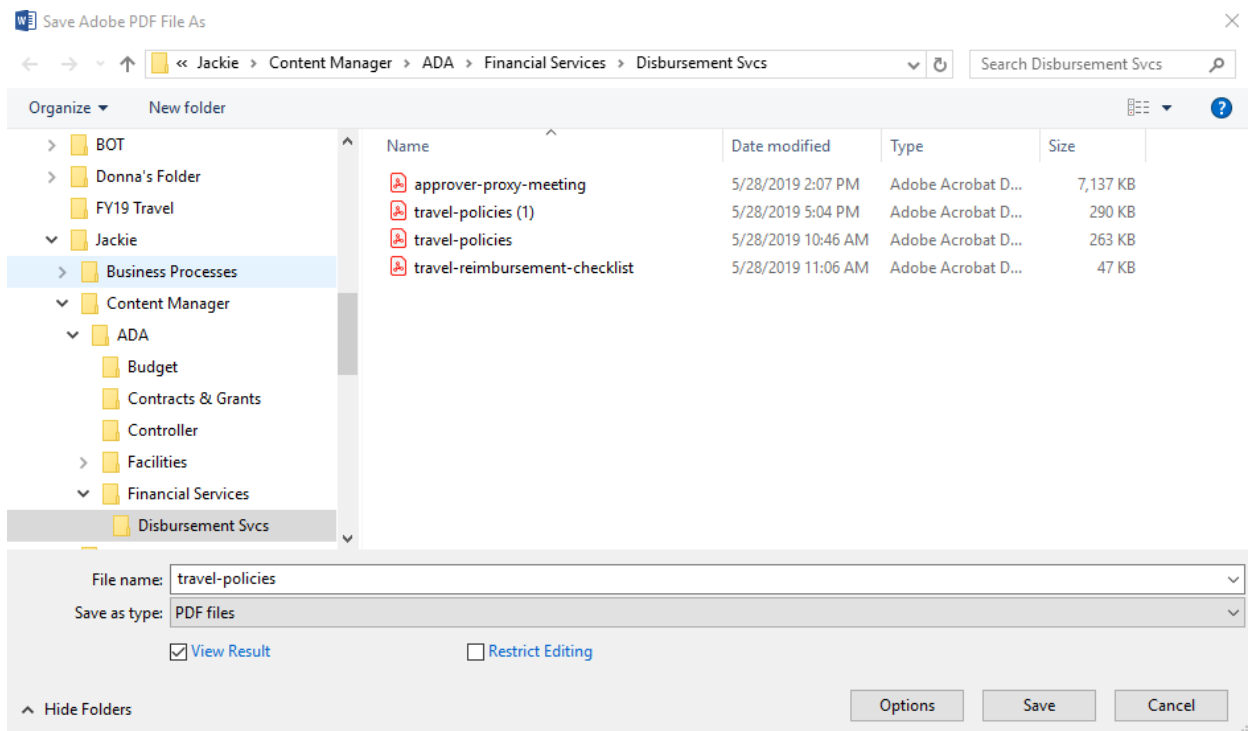### Step one - Submit a RAMTech Request for Access

1. Open a web browser and go to https://ramsupport.wssu.edu/.
2. Login with your **RAM ID and password**.
3. Click on **Services**.
4. Click on **Non-Banner Enterprise Applications Support**.
5. Click **Desktop Applications**.
6. Click **Request Desktop Application Support**, to begin filling out the request form.
7. In the software name field, select **Adobe Creative Cloud (Acrobat Pro, Photoshop, InDesign, etc.)**
8. Complete all of the necessary fields.

Step Two - Download the Create Cloud desktop application

1. Locate the Self Service Client on your computer using the application list or using the search feature.
2. Install Adobe Creative Cloud.
3. Once it is finished downloading, open Creative Cloud and sign in.
4. **Install Adobe Acrobat DC**.

   NOTE: A RAMTech service request needs to be completed to obtain an Adobe account.

Note: Access to Adobe Creative Cloud is lost when users are no longer enrolled or employed at WSSU.
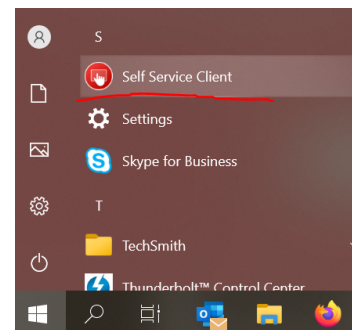
Installing Adobe Acrobat DC Pro

1. After Adobe Creative Cloud has been downloaded to your machine open the application.
2. Type in your WSSU email address.
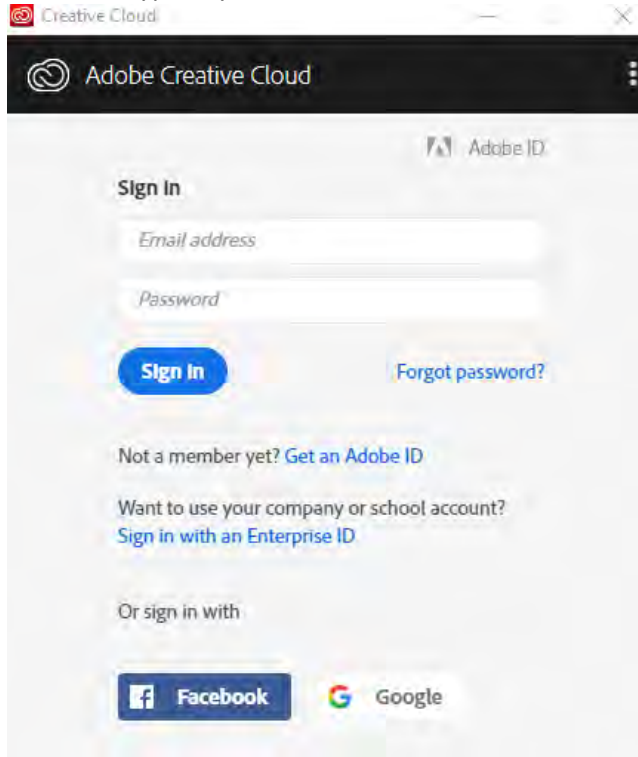
3. When you click in the "Password" field, the following screen should appear, select "Enterprise ID"
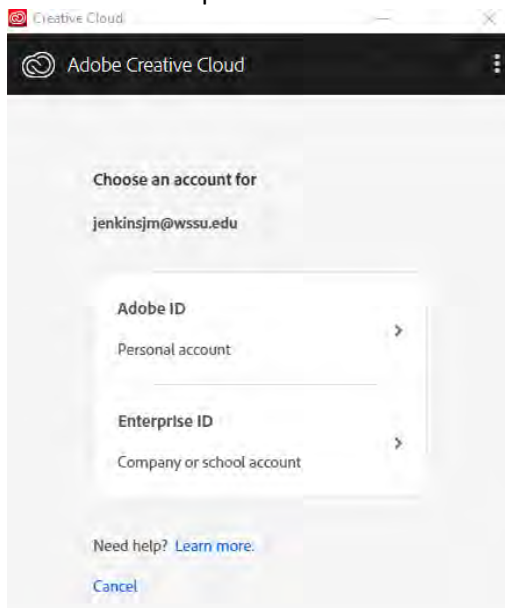
4. Login using WSSU credentials when the login window appears.

5. Click on the "Apps" tab.
6. Scroll down and click on the "Install" button beside "Acrobat DC".

7. It may take several minutes for the install and may require for your machine to be restarted.

8. The icon should now appear in your start menu.

Making PDFs Accessible

The key considerations to have when creating a PDF accessible form are:

Language: For screen readers and other assistive technologies to correctly read the document, there should be an overall designation of the language in which the document is writ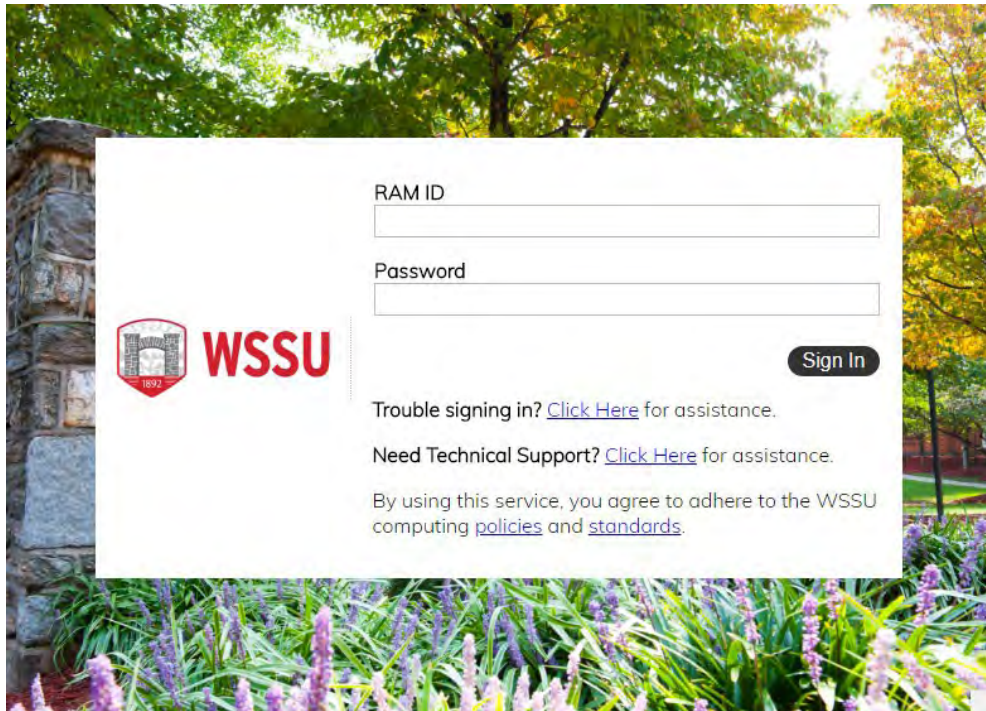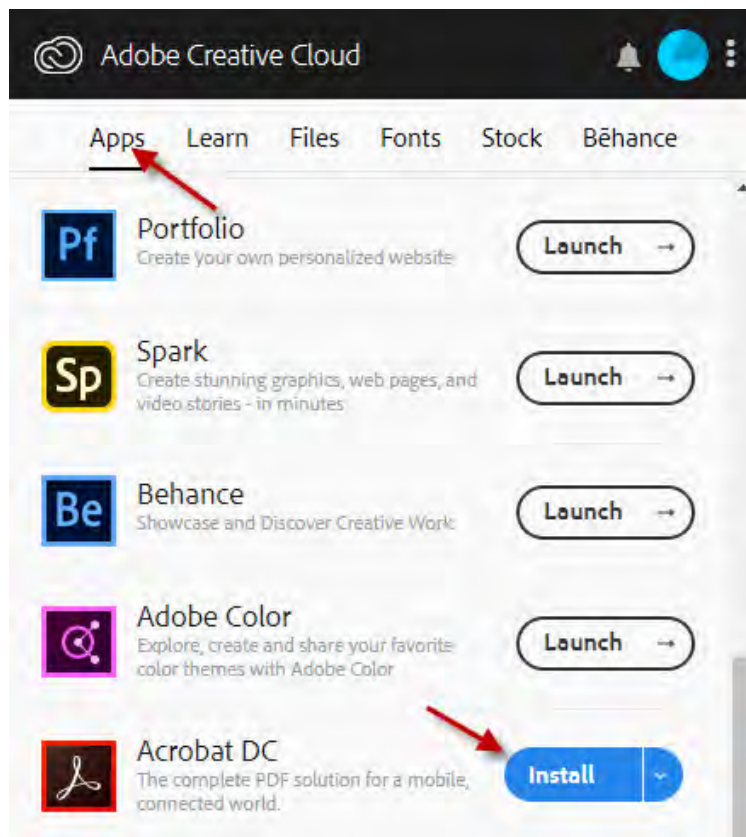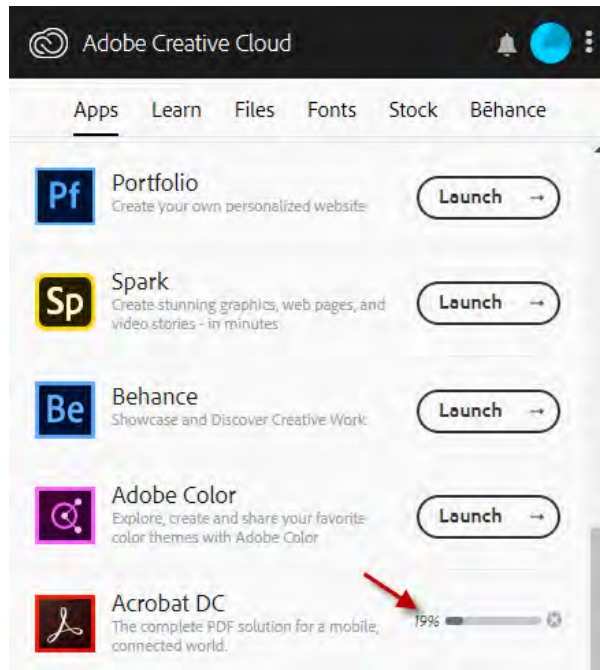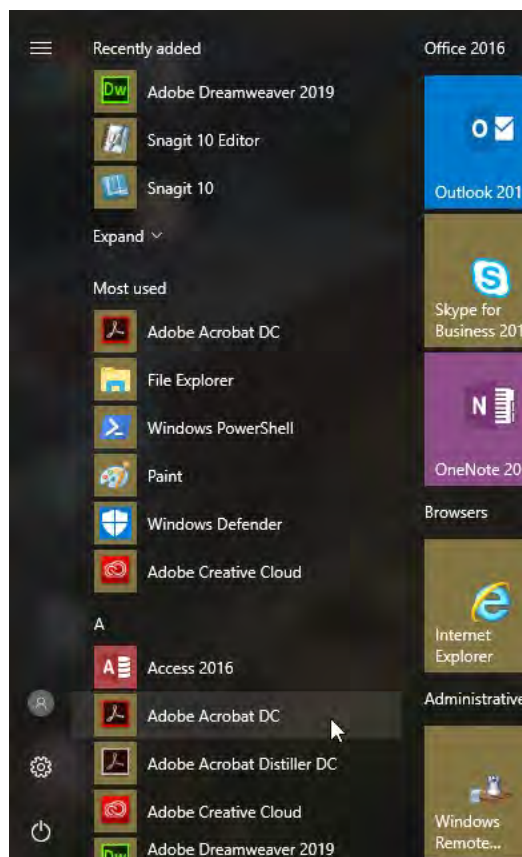ten. Furthermore, if lines or blocks of text within the document change language, that text should be tagged separately.

In MS Word, you can define the language of your document in the options menu. Additionally, you can change the language of individual sentences if the natural language for part of a document changes. In most cases, you will be able to see the selected document language at the bottom of the window.

Document Information: At minimum, documents should include basic information like a title. It is also a good idea to provide the name of the author, a description, and a few relevant keywords.

Document information like title, author, and keywords can also be added. For instance, in MS Word 2013 this feature is available in 'Document properties,' found in the file menu.

Tagging Text: All text in a document should be tagged. Whether it is paragraph text, a heading, a list, or similar it should be labeled as such. This not only makes a visual distinction between various text types, but also clarifies your site for all users by providing the correct tagging for assistive technologies to use.

Text that is not actively tagged by the author will automatically be tagged as paragraph text. If the text is a heading, make sure you select a level of heading (Heading 1, Heading 2, etc.), rather than just changing font size, color, or format. The most efficient way to tag the various elements of content is by using the "Styles" feature in the "Home" menu of MS Word toolbar. Simply highlight text and select the style needed to tag each section appropriately. After structuring your content, you can then change the font types and colors of these headings by modifying the heading style within the "Styles" menu.

Images: An image can have different purposes depending on how it is used in the document. Many images are purely decorative, which should be conveyed with alternative text. It is important to define such images as ''artifact', described further on. Other images may have some sort of function or convey important information and, therefore, need a different kind of description in the "alt" text.

To make images accessible, you simply must provide the correct alternative text. In 'Format Picture' there is an 'Alt text' tab available. Please note that in versions of MS Word where you have both the "title" and "description" option, to use the description. Unfortunately, it is not possible to define images as 'artifact' (decorative) in MS Word. To do this, you'll have to use a remediation tool after converting the document to a PDF.

Tables: When data tables are used, it is important to tag their structure. At minimum make sure you define which the column and row headings are. Keep your table structure as simple as possible; try not to merge rows and columns as it complicates navigation for assistive technology users.

When using tables, make sure to define table headings. In MS Word, simply label the top row as column headings. Then, in table properties, use the setting 'Repeat as header row at the top of each page' to tag these table headings, making them recognizable for screen readers and other user agents.

Columns: If you wish to present content in columns, there is a built-in "Columns" feature most often available directly through the top menu. Avoid using the tab key to move content in a position that looks like columns. This method of creating columns is not only more difficult for you, but also makes the reading order very poor for assistive technologies.

Reading Order: Assistive technologies rely on logical reading sequences to present content to users. During a document's creation, it is extremely important to ensure there is a sensible reading order.

A document's reading order can vary depending on software version and conversion type. If the document originates in MS Word it will often have a logical structure. However, in some cases, images are prioritized last. This means if an image with alternative text conveys information and its position in the reading order doesn't make sense, it should be moved to the correct position in the sequence. This is also possible through remediation tools.

Bookmarks: For many users, the easiest and most accessible way organize a table of contents is to provide bookmarks based on document headings. This gives users the ability to navigate the PDF using bookmarked headings, rather than having to read through the entire document to find what they need.

Conversion: When the document is complete and you are ready to turn it into a PDF, there are several options available. Depending on the method, it will create either a tagged PDF or a non-tagged PDF (the latter being less accessible). For instance, if you choose "print to PDF," you are telling the program that the document only needs to go on a piece of paper and that tagging is of no importance. Therefore, tagging is not included, and the file size is smaller. If reducing the file size is your goal, there are other ways to accomplish this without removing accessibility features. To retain tags in the document and preserve accessibility, use the "save as PDF" or "convert to PDF" features. In later versions of MS Word this is readily available from the file menu. In older versions, there are various plugins to download for this purpose.
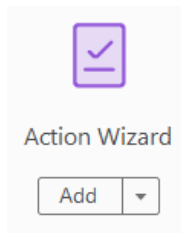
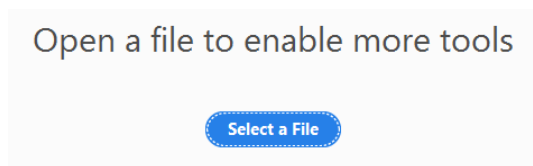## Full Accessibility Check

Step-by-Step:

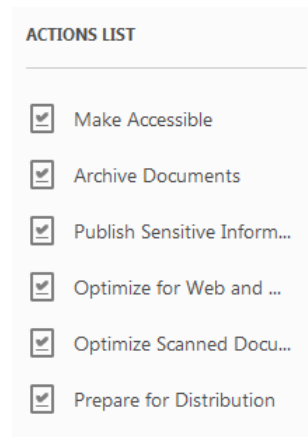1. Open Adobe Acrobat Pro and choose **Tools**.
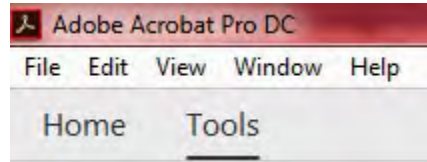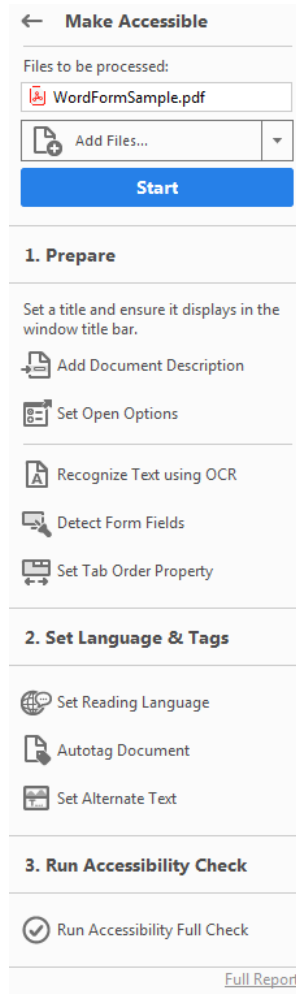
2. Under **Customize**, select **Action Wizard**.

3. Open the file you wish to make accessible by clicking **Select a File**.

4. After opening the file, on the right-hand side of the screen under **Action List**, select **Make Accessible**.

5. On the right-hand side of the screen the **Make Accessible** action panel shouldbe open. Click **Start** to begin the process as ordered on the screen.

← **Make Accessible**

Files to be processed:

WordFormSample.pdf

Add Files...

Start

1. Prepare

Set a title and ensure it displays in the window title bar.

Add Document Description

Set Open Options

Recognize Text using OCR

Detect Form Fields

Set Tab Order Property

2. Set Language & Tags

Set Reading Language

Autotag Document

Set Alternate Text

3. Run Accessibility Check

Run Accessibility Full Check

Full Report

6. Fill in the fields shown in the **Description** dialog box. To make edits to the fields, uncheck **Leave As Is**. You must fill in the **Title** field, the others are optional. Click **OK** once you are done.
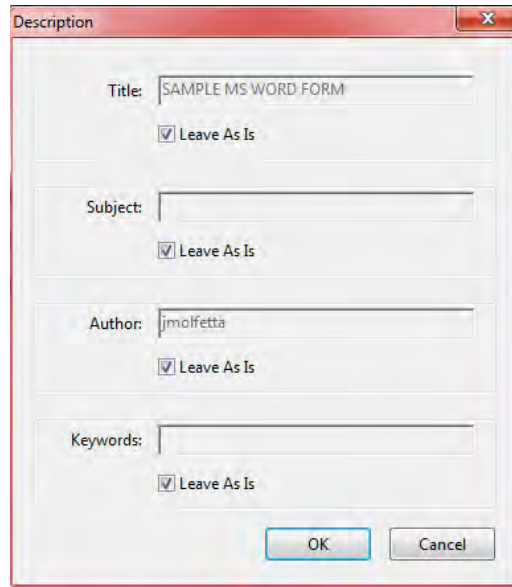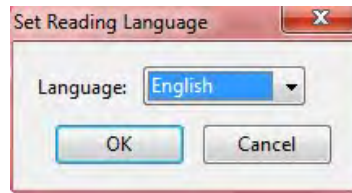

7. The next dialog box involves modifying general settings that relates to being able to recognize text on the document. For most cases you can leave these settings as is, otherwise make the modifications that fit your needs. Click **OK**.
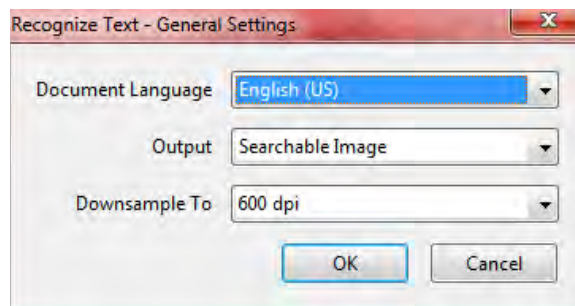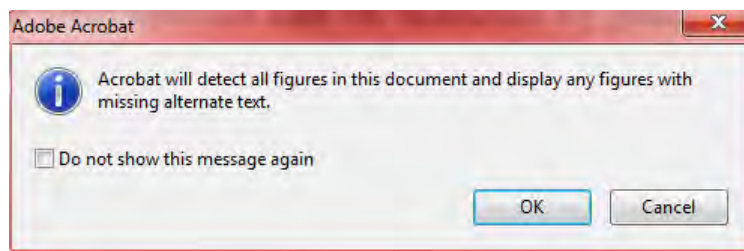

8. Select whether or not the document is intended to be used as a fillable form.
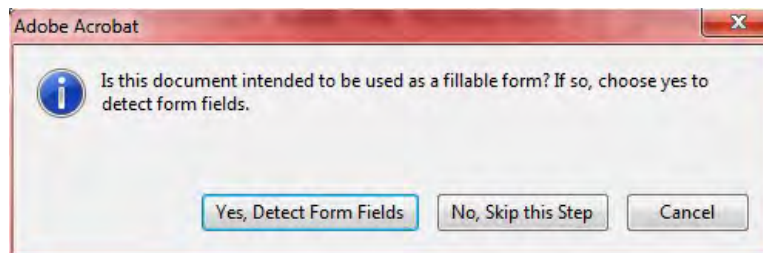
9. Set the reading language for the document. Click **OK**.

10. Read the notification in the next dialog box regarding images and figures, then click **OK**.

11. The next step will identify images within the document and present you with the opportunity to provide the alternate text. Use the arrow buttons in the dialog box to go through all of the images identified. Click **Save & Close** when done.
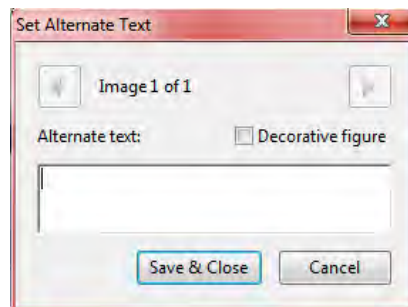
12. The **Accessibility Checker Options** dialog box will appear next. This box allows you to select the items you want the **Accessibility Checker** to check for. In most cases you can leave the settings as is, otherwise go through the options and change them to meet your needs. Click **Start Checking** when done.

13. On the left-hand side of the screen the **Accessibility Checker** should appear. Based on the options selected in the previous step, the Accessibility Checker will relay whether or not the document passed or failed each of the items that were checked.
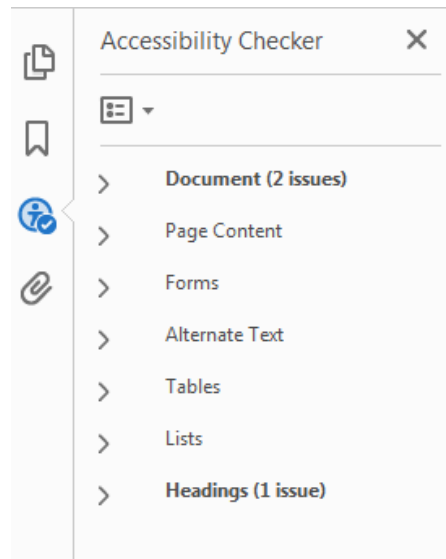
14. Click the arrow beside each section to see which items passed, failed, or raised an issue based on the accessibility check.
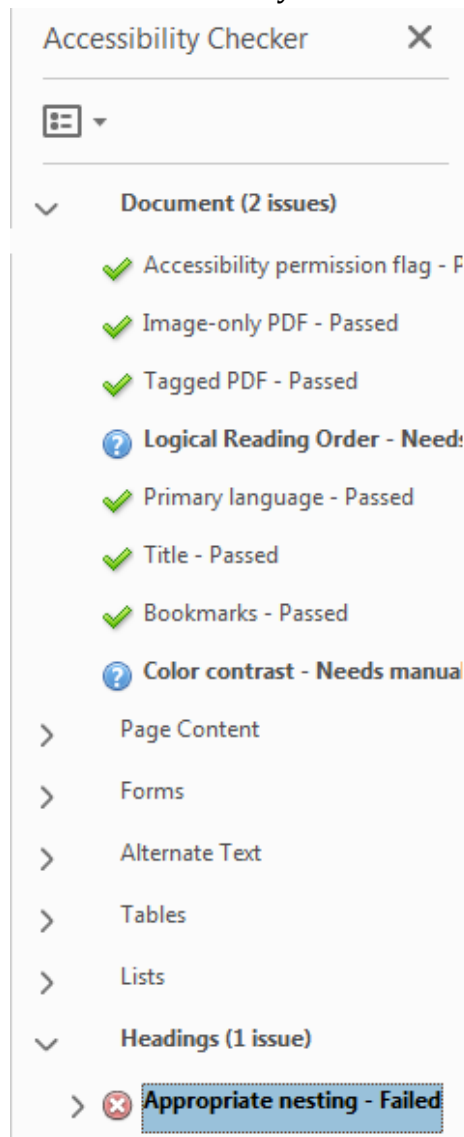
15. Right-click an item to see the available actions that can be performed in relation to the item.
16. Make necessary changes to fix the items that did not pass the accessibility check.
17. To find out more about a particular error, right-click on it and select 'Explain.' This will take you to an Adobe web page that will help to describe the error and how to fix it.
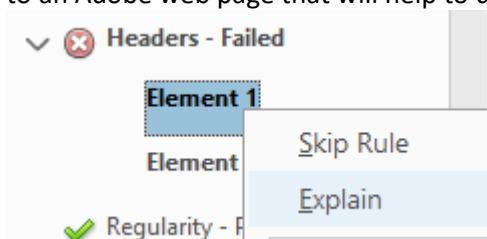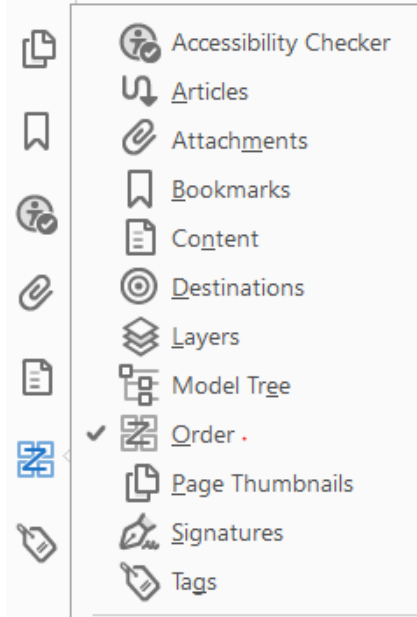
Reading Order

Reading order is an extremely important part of the accessibility process. It determines the order in which words and other elements of the document are read by a screen reader.

To fully control the reading order you'll need two tools.

The Order Pane

Right-click the pane at the left-most part of the screen. Select the Order button.


This shows a numbered list of the reading order along with corresponding numbered boxes around the content in the document. Items in the Order list can be dragged and dropped to correct the order.

The Reading Order Tool

Click the Reading Order option within the Accessibility Toolbar that should be open on the right side of your screen.
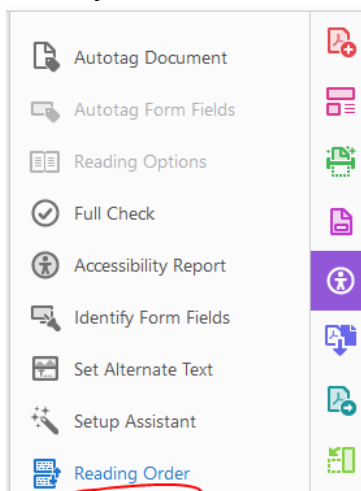
This will open the Reading Order dialog box. **Important:** _uncheck_ the box that says "Display like elements in a single block.
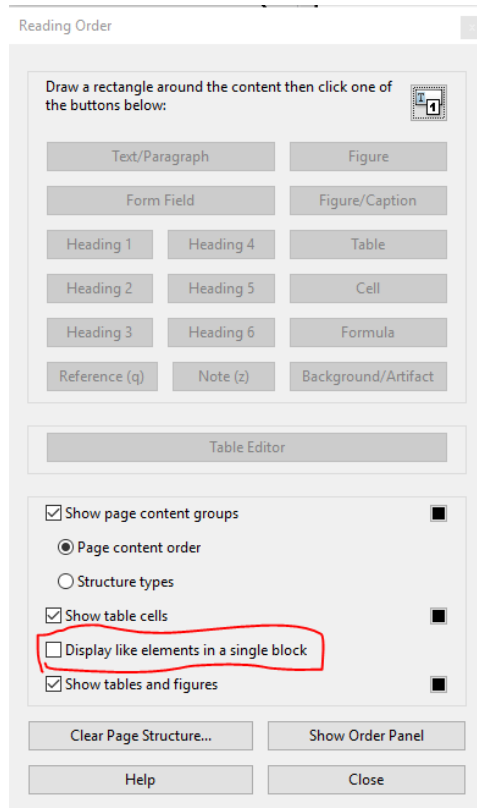
If needed, while this box is open, you can use your mouse to draw a rectangle around elements on the page and press the "Text/Paragraph" button (or others as appropriate) to either break up blocks of text that should not be read together, or to group blocks of text that should.

Use the numbered list in the Order Panel to ensure screen-readers read the page properly.
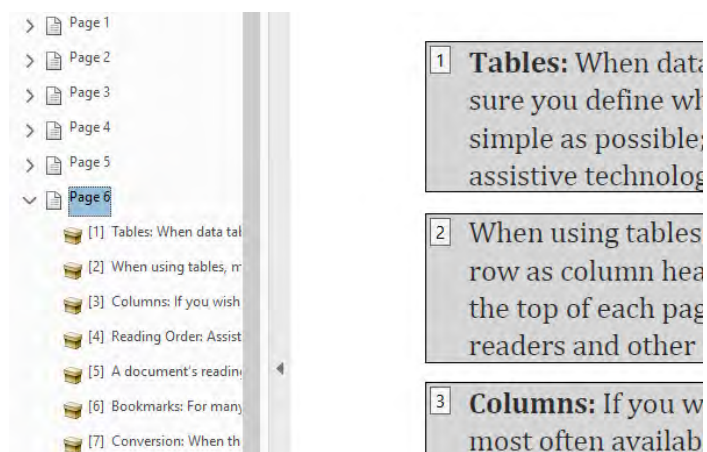
Forms

Adobe Acrobat Form Fields

Adobe Acrobat Pro fillable PDFs are designed by adding form fields to the document in the desired and/or appropriate location. The form fields are accessible when **Prepare Form** is selected under **Tools**. The form field icons will be located on the tool bar menu.

There are two ways to add a field to the PDF document:

1. Click the icon of the field you wish to add from the tool bar menu OR
2. Right click any blank space on the page and select the field type desired

Move the mouse to the desired position on the page, then click once to add the field to the page.

Edit properties of the fields by right clicking the field and selecting **Properties**.

The "tooltip" field on the *General* tab of the field properties is the most important item for form fields. This property will provide the document user with information and instructions about the field. Tooltips should be short and descriptive and should not include the type of field or text such as "Click to enter".

*Options* will allow you to modify the features of the field such as style, values, item lists, button choices, etc.

The following are the types of form fields that can be added to a PDF document:

| Input Type	Icon	Description of Input
Text Field		Enable the input and edit of text pertaining to any kind of data
Check Boxes		Enable selection of one or more options
Radio Buttons		Enable selction of only one option from group
Dropdown List		Enable selection of only one item from a list that drops-down
List Box		Enable selection of only one item from box that contains a list
Button		Enable the initaion of an action in the document (*Advanced*)
Image		Enable attachment of an image (*Advanced*)
Barcode		Enable the translation of form entries into visual patterns that can be scanned, interpreted, and incorporated into a database (*Advanced*)
Digital Signature		Enable the input of e-signature that includes a digital certificate issued by a third-party for independent identity validation
Signature Field		Enable the input of a signature from the signer
Signature Block		Enable the input of signer information including signature, email, title, etc using a group of specified fields (*Advanced*)
Initial Field		Enable the input of initials from the assigned signer
Title Field		Enable the input of the name (title) of the signers work position (*Advanced*)
Company Field		Enable the input of the name of the company that the signer is representing (*Advanced*)

Input Type	Icon	Description of Input
Name Field		Automatically populates with the name value entered into the signature field (*Advanced*)
Email Field		Automatically populates with the email address that the form is sent to (*Advanced*)
Date Field		Automatically populates with the date of when the form is accessed (*Advanced*)

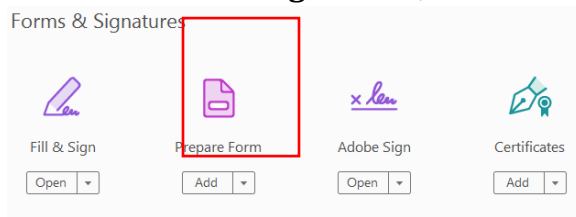## Auto Conversion: Word Form to Fillable PDF

This section provides step-by-step instructions on how to automatically convert forms created in Microsoft Word to fillable PDF forms in Adobe Acrobat Pro.
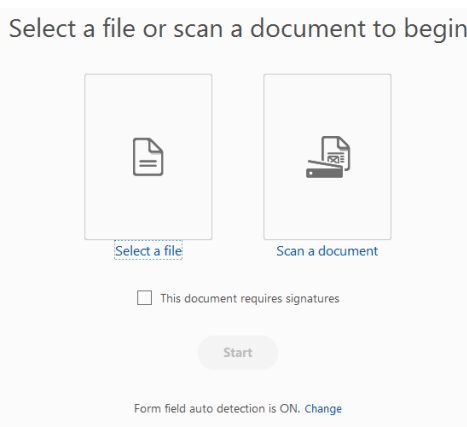
Step-by-Step:

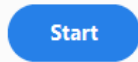1. Open Adobe Acrobat Pro and choose **Tools**.
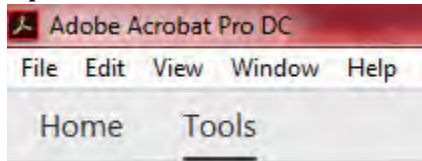
2. Under **Forms and Signatures**, find and click **Prepare Form**.

3. Click **Select a file** to browse for the file that is to be converted.

4. Once the file is selected, if the file being created will require a signature, check the box next to *"This document requires signature."* Click **Start**.

Start

Note: Acrobat will automatically detect and create interactive form fields from the file uploaded. If Acrobat cannot detect a particular form field automatically, it can quickly and easily be added.

5. (*Optional*) Add custom form fields if Adobe Acrobat cannot automatically detect fields. See *Form Fields* section.

6. Using the **Prepare Form** tool bar, select the type of form field to include on the document.

Note: Hoover over each icon to identify the field type.

7. Drag the form field to the desired location on the document. After placement, the following basic properties should appear:

8. Enter a new field name that will allow for the field to be easily identified at later times.

9. Define which users are expected to sign the field.

10. (*Optional*) Input the signers email and make the field required.

11. To edit more properties for a field, click **All Properties**. If the basic properties box has closed, right click the field and select **Properties**. A similar properties box will appear when selected for each field.
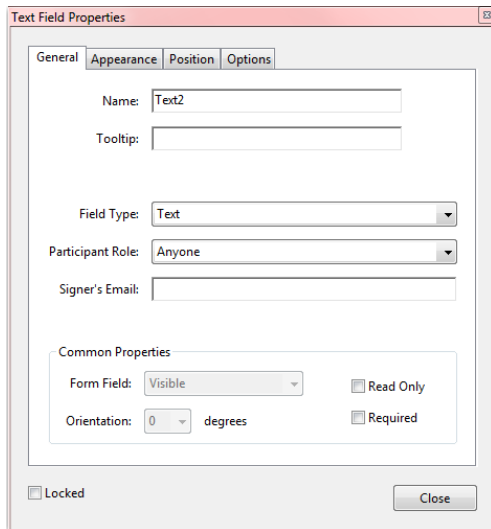
> **Note:** Some fields may have more tabs on their property box than others, but each will contain the main tabs of General, Appearance, Position, and Options.

The **General** tab is where the main field settings are located (as shown in image above). Be sure to fill in the *Name* and *Tooltip* property with a label for the field that will adequately describe its contents.

The **Appearance** tab allows you to modify features of the field box such as the border, color, font-size, font-color, and font-style.
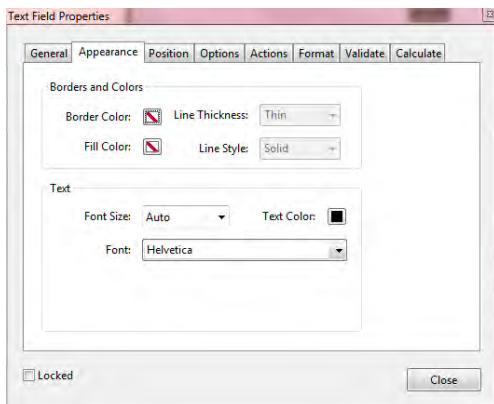
The **Position** tab allows you to modify the position of the field box on the screen, as well as the width and height of the field box.
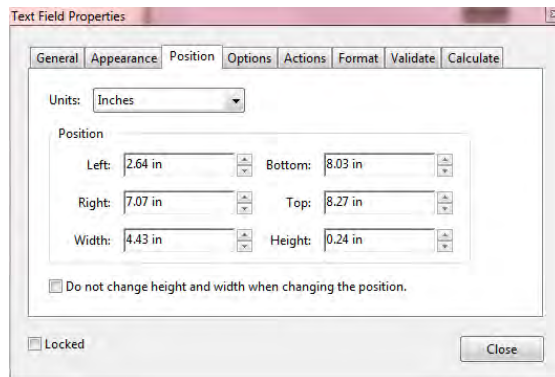
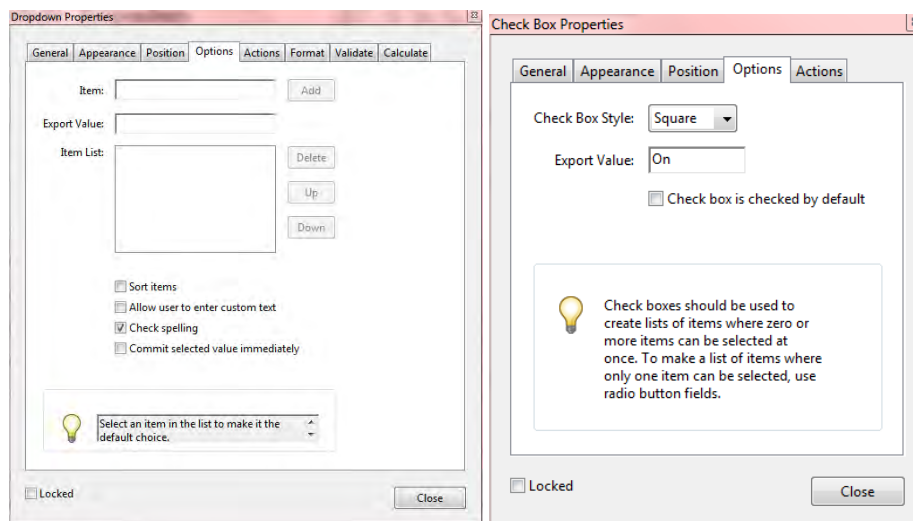The **Options** tab allows you to modify features of the field box the impact its function such as the style of a checkbox or the item list for a list box. The settings on the Options tab vary greatly between each field type.

12. Click close once you finish editing the field properties.

13. Add as many fields as needed for the document and edit their properties.

14. Test the form by clicking **Preview** in the upper right corner of the Prepare Form toolbar and filling out each field.
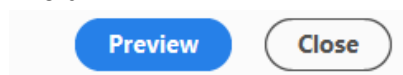
15. To return to edit mode, click the **Edit** button that now appears in the upper right corner of the toolbar.

16. After you finish editing, be sure to save the file by clicking the save icon in the upper left corner of Adobe Acrobat.

Auto Conversion: Word Form (with media content) to PDF

This section provides step-by-step instructions on how to automatically convert forms created in Microsoft Word with media content to fillable PDF forms in Adobe Acrobat.

Step-by-Step:

1. Follow the instructions in the *Auto Conversion: Word Form to Fillable PDF* section. This will cover making sure that the form is fillable.
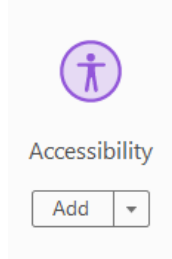
2. In the **Tools** tab, under **Protect and Standardize**, select **Accessibility**.

3. On the right-hand side of the screen, select **Set Alternate Text**.

4. A notification will appear informing you that the images in the document are about to be detected. Click **OK**.

5. The next step will identify images within the document and present you with the opportunity to provide the alternate text. Use the arrow buttons in the dialog box to go through all of the images identified. Click **Save & Close** when done.

6. After you finish editing, be sure to save the file by clicking the save icon in the upper left corner of Adobe Acrobat.

Distributing PDF Forms
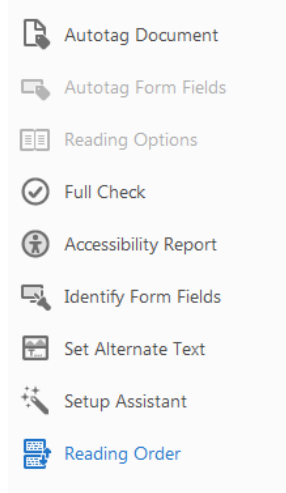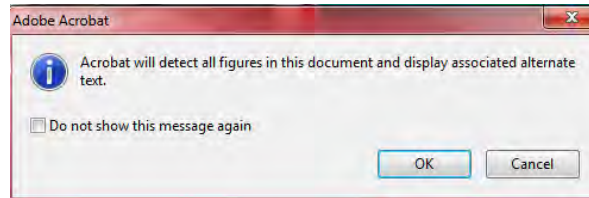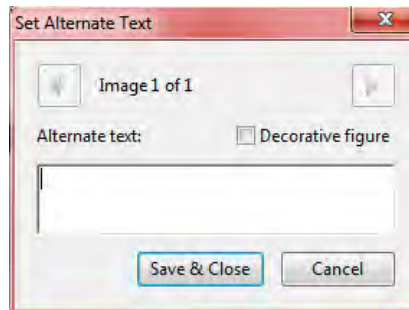
This section provides instructions on how to distribute your PDF form to the recipients through the Adobe Acrobat application. This feature allows you to continue the process of sending out documents without switching between multiple applications on your device.
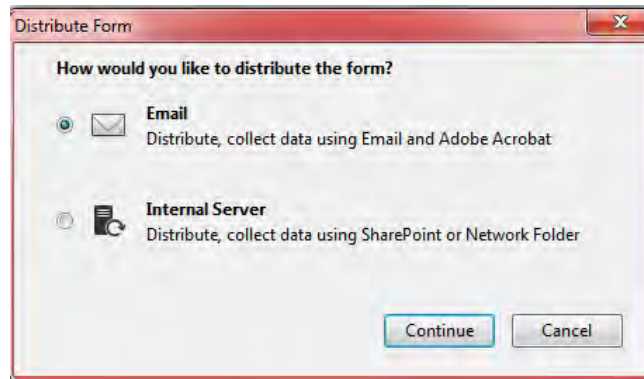
Step-by-Step:

1. Once all edits are made and you are ready to distribute the form, click the **Distribute** button at the bottom of the right-hand pane.

    Note: The **Adobe Sign** button appears if a document requires a signature (see step 11 of *Create PDF Fillable Form* or step 4 of *Conversion from Word Form to PDF Form*), otherwise the **Distribute** button will be displayed.

2. Select how you would like to distribute the form, then click **Continue**.


3. Proceed with the steps that follow, based on your choice.

Adobe Sign

This section provides instructions on how to distribute your PDF form to the recipients through the Adobe Acrobat application using Adobe Sign. This feature allows you to continue the process of sending out documents that require e-signatures without switching between multiple applications on your device. It also provides features that allows the document creator to add and modify required signing fields for the recipients.

1. Once all edits are made and you are ready to distribute the form, click the **Adobe Sign** button at the bottom of the right hand pane.

   Note: The **Adobe Sign** button appears if a document requires a signature (see step 11 of *Create PDF Fillable Form* or step 4 of *Conversion from Word Form to PDF Form*), otherwise the **Distribute** button will be displayed.
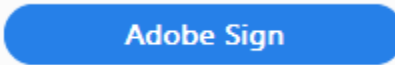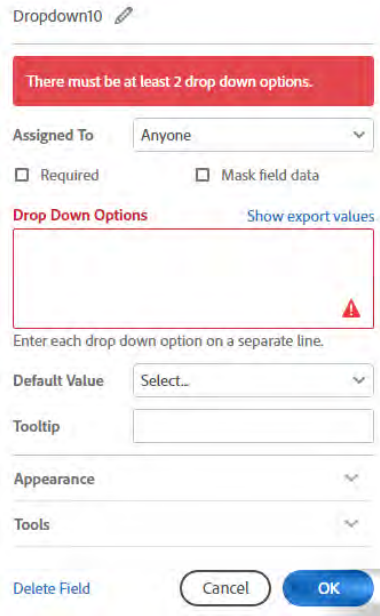

2. On the next screen, input the recipient emails and a message if desired to send document for signature using **Adobe Sign**. Click **Continue**.
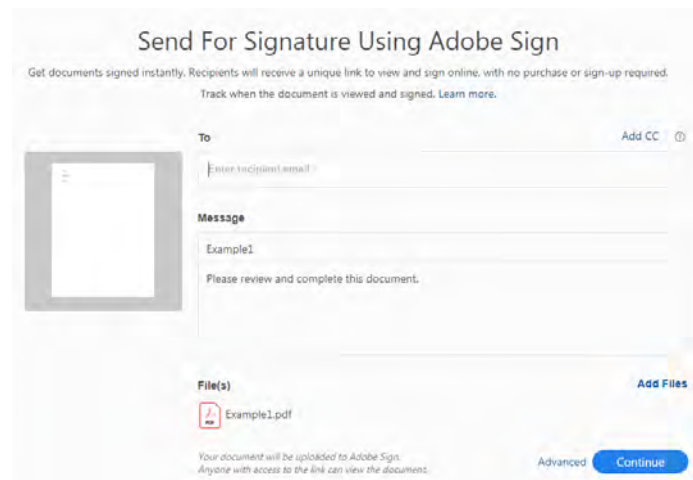
Note: If there is an error with a form field, the following message will appear at the top of the screen:
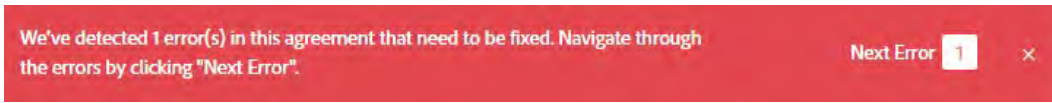
Clicking "Next Error" will take you to the error on the page, as demonstrated below.

3. Review the PDF form. To add Adobe Sign form fields that are only assigned to the recipients, use the tool bar located on the right of the screen. Click the field you desire to add to the form, then drag it to the desired location on the document.

4.   To edit certain properties of the form fields, double click the field.

Text6 ✎

Assigned To	Anyone ▼
Field Type	Text Input ▼
☐ Required	☐ Read Only
☐ Mask field data	☐ Multi-line data entry
Default Value	
Tooltip	
Validation	None ▼
Appearance	▼
Tools	▼

Delete Field   (Cancel)   (OK)

Note: The *Assign To* property allow you to decide which recipient is allowed to interact with that specific field. Fields marked as *Required* must have some content entered before the recipient can complete their part.

5.   When finished editing with Adobe Sign, click **Send**.

Send

6.   The following formatted message will appear on your screen if no errors occur.

"Example1" has been successfully sent for signature

A copy has also been sent to you at aabdurraheem115@rams.wssu.edu for your records.
"Example1" was sent for signature to aaminah4sure@gmail.com.
As soon as the agreement is complete, all eligible parties will be e-mailed PDF copies.

Reminders
There are no reminders set for this document.

All agreements that are not completed within 365 days will be automatically expired.