

CommonLook Office Quick Start Guide –

Microsoft PowerPoint

Welcome to CommonLook Office! This guide is designed to take the user step by step through the process of using CommonLook Office and Microsoft PowerPoint to create an accessible and compliant PDF. Along the way, we will address accessibility issues in the presentation itself. **Note:** While the current version of CommonLook Office will prepare documents to be Section 508 compliant, there are additional checkpoints in the software to help the user approach conformance to HHS and WCAG standards as well. Future versions of the CommonLook Office software will support conformance criteria for HHS, WCAG 2.0, and PDF U/A.

Although this guide will show the user how to fix many accessibility issues in PowerPoint presentations, it should not be taken as an all-inclusive guide for using Microsoft PowerPoint. For more information, or to become more familiar with Microsoft Office and/or CommonLook Office, please contact us at training@commonlook.com to discuss the various training options.

In addition, please note that this guide assumes that CommonLook Office is properly installed and activated on your computer. To obtain the software, please contact us at sales@commonlook.com. For help with installation or activation, please contact support@commonlook.com.

A note on converting PowerPoint to PDF

The objective of CommonLook Office for PowerPoint is to create an accessible and compliant PDF. While changes made to the PowerPoint from within the CommonLook Office interface are saved, and do make for a more accessible PowerPoint, the main focus of this guide is to create accessible PDF from PowerPoint presentations.

An Important Distinction

Accessible and compliant are not interchangeable terms. In fact, a PDF document can be Section 508 compliant and still not be very “user friendly” (accessible). For example, according to Section 508, heading levels and lists are not required structural elements. (Note that in HHS, WCAG 2.0, and PDF U/A, both heading levels and lists are required.)

Consider this scenario: A screen reader can be set to scan through a document by heading levels and then switched over to read the information under a particular heading, similar to using bookmarks. Consequently, if a document is particularly long, a person using a screen reader can skip over irrelevant content to more quickly get to the

important material. Without heading levels, the user is forced to listen to all of the information presented, before getting to the content that he or she wants to hear.

In addition, if lists are not properly identified in the PDF document, individuals using screen readers will not get the same structural information (for example, a list of five items being identified) as will someone who can look at the physical view of the document and see the list on the page. (Lists are very common in PowerPoint presentations.)

CommonLook Office will not only help users assure that their PDF document is Section 508 compliant, but will also help make sure the document is as useable (accessible) as possible.

Who Should Use CommonLook Office?

Ideally, PowerPoint presentation authors should be using CommonLook Office as part of their presentation creation process. This is because content authors have the best knowledge of the material in their presentations. They know where the sections are (requiring heading levels), they know where the lists are, and they know why particular images are being used in the presentations (and what the most appropriate alternative text would be for those images). Furthermore, content authors also know whether or not images are being used simply for decoration, in which case the images should be artifacted so that they are not read by screen readers.

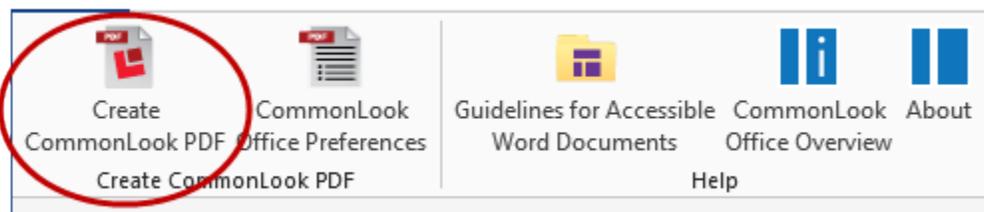
Let's Get Started!

This guide will take the user through the CommonLook Office software using the Quick Start PowerPoint presentation. After opening the PowerPoint, start CommonLook Office using the following steps:

1. On the PowerPoint ribbon, near the right side, click on the tab for CommonLook Office.



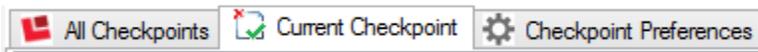
2. In the CommonLook Office tab, there are a number of options for help and preferences. Click the first button, "Create CommonLook PDF," to open the CommonLook wizard.



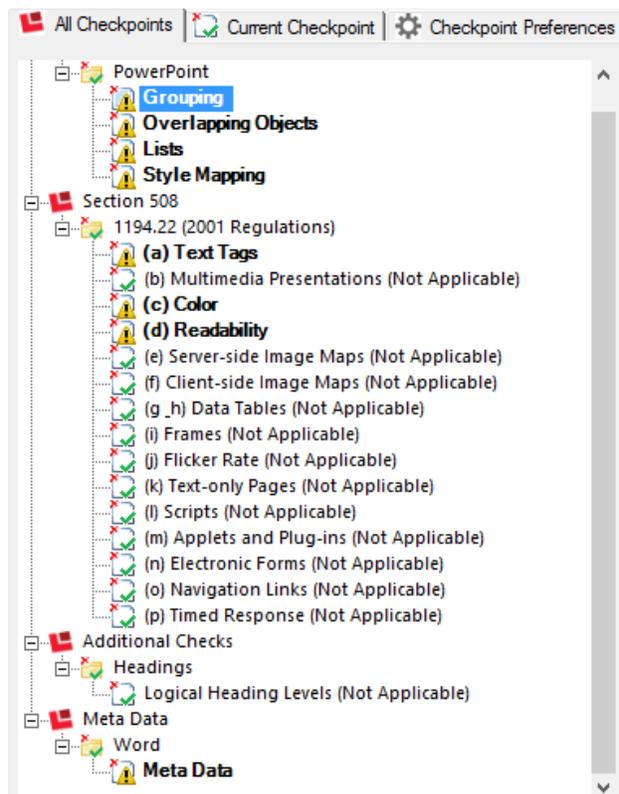
3. CommonLook Office will open and begin checking the presentation, running through various accessibility criteria and checkpoints. **Please Note:** the “Create Commonlook PDF” button is not like “print to PDF” or “export to PDF” in Microsoft PowerPoint. The last two options (in Microsoft) will simply create a PDF document from the current presentation. In contrast, choosing “Create CommonLook PDF” will take the user through the various accessibility checkpoints to ensure that the resulting PDF is accessible and compliant.

When CommonLook Office opens, the left side of the screen displays the thumbnails of the slides used in the presentation, the middle panel displays the currently selected slide, and the CommonLook wizard is shown on the right.

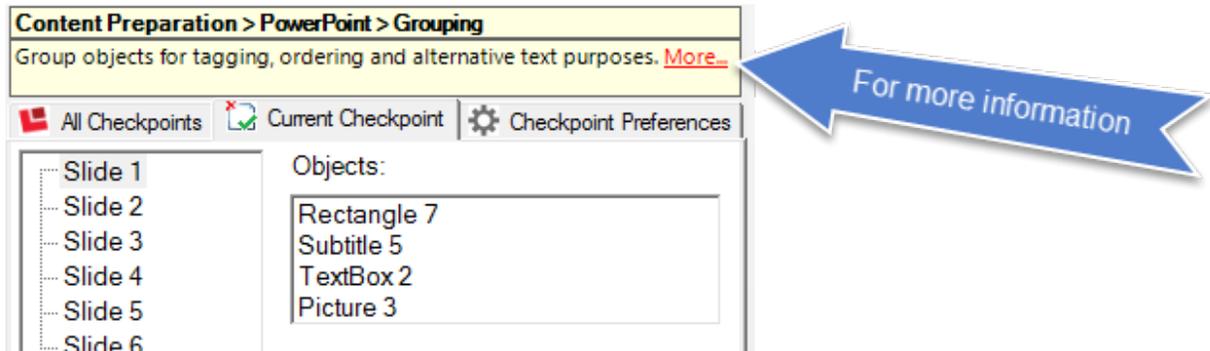
The default view in CommonLook Office is on the Current Checkpoint tab, and CommonLook Office stops on the first checkpoint that has issues in the presentation.



Clicking on the “All Checkpoints” tab will show all of the checkpoints (PowerPoint, Section 508, Additional Checks, and Metadata) that are tested and whether or not they are applicable in the current presentation. The checkpoints that are bold are the ones that need to be addressed. Either CommonLook Office has found a problem with that checkpoint or the presentation needs to be manually verified in order to pass a particular checkpoint (such as the appropriateness of alternative text on images).



At the top of the CommonLook Office wizard is a yellow box that explains what each checkpoint is looking for when CommonLook tests the presentation. In addition, there is a link, labeled “More” to provide further information about the checkpoint including its purpose, instructions on how to handle it, conformance criteria for Section 508, WCAG, and PDF U/A, and links to supplemental information.



Grouping (Objects)

In the Quick Start Presentation, the first item to check is whether or not content on any of the slides needs to be grouped together for proper tagging, reading order, and/or alternative text.

To check for proper grouping, follow these steps:

1. When CommonLook Office opens, click on “Rectangle 7” in the Objects panel,
2. Check and see whether or not it should be grouped together with any other content on that slide. (It shouldn't – it's the yellowish-gold box with the title of the presentation inside.)



3. Click “Next Task” to advance down the Objects panel to “Subtitle 5” (the next item in the Objects panel).



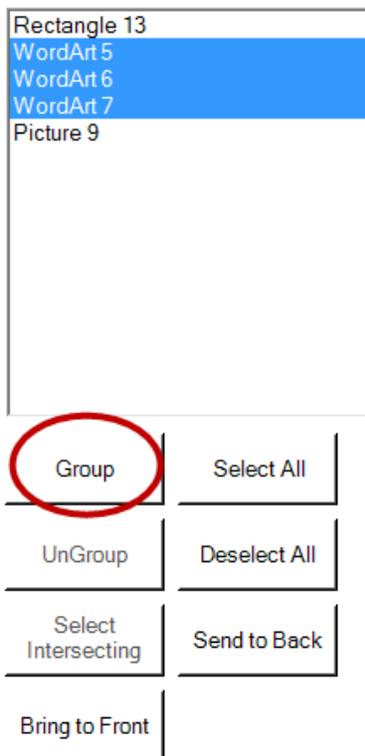
None of the objects on the first slide need to be grouped. So, continue clicking “Next Task” to proceed to Slide 2. In fact, none of the items on any of the slides need to be grouped until we reach Slide 6. (Verify this by clicking “Next Task” to work through the slides.)

Grouping the Objects on Slide 8

The Word Art (question marks) on Slide 8 should be grouped so that they are seen as one image.

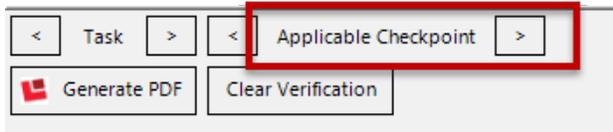
To group objects:

1. Click “Next Task” in Slide 8 until “WordArt5” is selected,
2. Click on WordArt6 and WordArt7 in the Objects panel so that the three WordArt objects are selected,
3. In the button options below, click “Group.”



After the individual pieces are grouped together, in the Objects panel, they will simply be listed as “Group(Figure)”.

Since we have now checked all of the slides for proper object grouping, click “Next Applicable Checkpoint” (to the right of “Next Task”) to advance to the next checkpoint in CommonLook Office.



Overlapping Objects

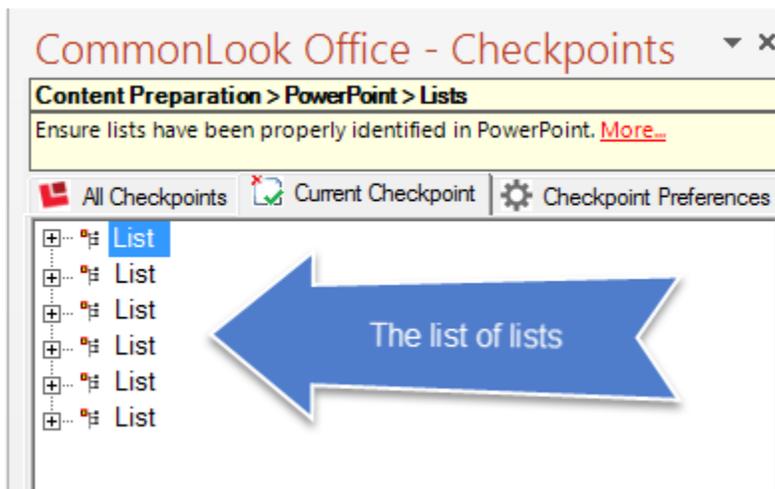
While this checkpoint may seem similar to the Grouping checkpoint, and, in fact, if items overlap then perhaps they should be grouped, in actuality this checkpoint is for the user to verify that content is not being hidden by objects that overlap each other.

Click “Next Task” to scroll down the list of objects in the presentation to verify that content is not being obstructed. If content is being covered up, then the slide should be reformatted so that relevant information is visible. This is, in fact, another excellent reason why the presentation author should be using CommonLook Office – so that if design changes need to be made, someone with the authority to make the changes can do so quickly and easily!

In this example, although items do in fact overlap each other, information is not lost. Continuing to click “Next Task” will take the user through all of the slides and then will proceed automatically to the next checkpoint – Lists.

Lists

When we land on the List checkpoint, there will be a list in the CommonLook Office panel of all of the lists used on the various slides in the presentation.



Click on the first “List” and make sure that, in the physical view of the slide, the entire list is selected.

Ensure lists have been properly id

All Checkpoints Current C

Outline

- Brief history
- Drafting a web accessibility policy
- Gaining buy-in
- Implementation
- Training and support
- Ensuring compliance
- Current status
- Future steps

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The first list in the wizard and the corresponding list in the presentation.

In this first instance, everything is correct so click “Next Task.”

In the second list, there are a number of problems. First, the entire list (on the PowerPoint slide) is not selected. Second, when we click the plus (+) sign next to the list (in the CommonLook panel), we see that it is a list of three items. Clicking on the second list item will reveal (in the PowerPoint slide) that this list item is simply an empty space between the list items that do contain text.

Implementation: Lessons Learned

- Making sure the office responsible for the implementation of the Policy was equipped to do so
- Didn't fully identify the challenges individuals would face and the tools they would need to comply with the policy
- Should have spoken with more departments about the policy, the expectations, and addressed their concerns

List

List

List Item

List Item

List Item

List

List

List

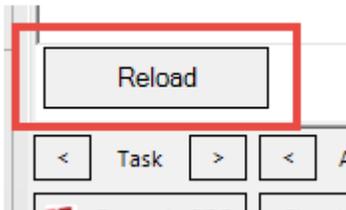
List

List

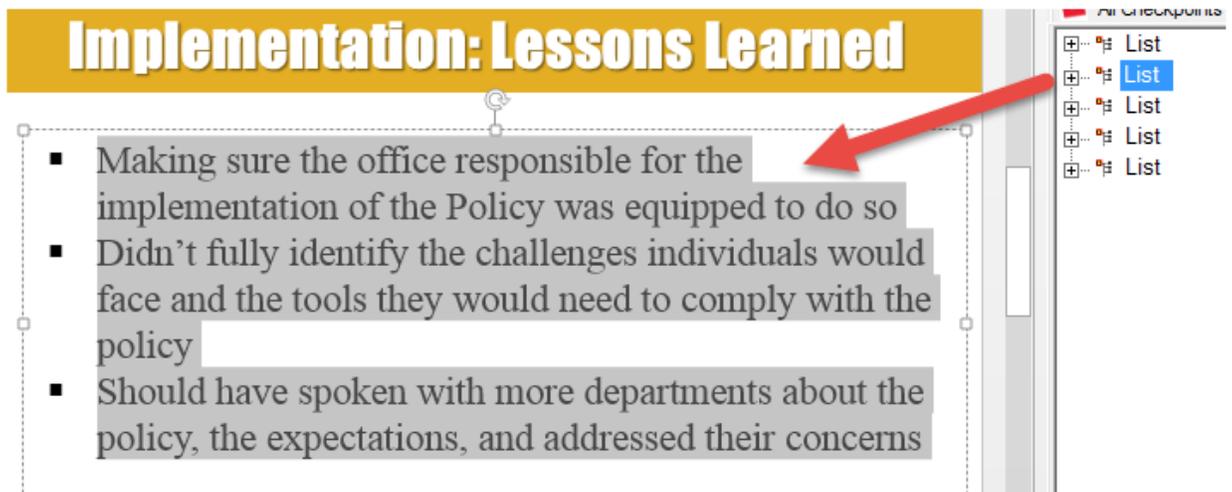
In fact, clicking on the third list in the CommonLook panel will show that the third list item on the current PowerPoint slide is actually being identified as a separate list of one item.

To Solve the Issue:

1. In the PowerPoint slide, click in the empty space between the first and second list items,
2. Delete the empty space,
3. Repeat the process with the empty space between the second and third list items on the slide,
4. Click the “Reload” button located just above the “Next Task” button in the CommonLook Office wizard.



5. Click again on the second list in the CommonLook Panel and verify that the second list now corresponds with the entire list on that slide in PowerPoint.
Note: When the list was fixed, formatting was changed. To fix the formatting so that the list appears as it originally did, use the Paragraph formatting tools in PowerPoint.



6. Click “Next Task” to check the next list in the presentation.

The third list in the CommonLook Office panel is structured correctly. To see how nested lists should be constructed, click the plus (+) sign next to the list to reveal the list

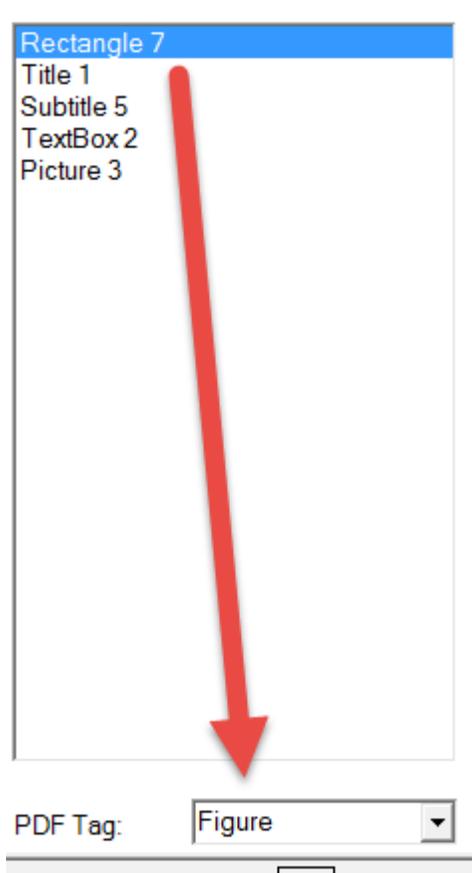
items. Click the plus (+) sign next to the third list item to open it. This will show the text for that list item and the nested list inside.

The fourth and fifth lists in the CommonLook panel present the same problems that we encountered with the second list and they can be fixed the same way. Place the cursor in the empty spaces and delete them. Then, click the “Reload” button. Click on the last list in the CommonLook Office panel to verify that the list is now assembled correctly. Then, click “Next Applicable Checkpoint.”

Style Mapping

As mentioned at the beginning of this guide, the proper use of heading levels is very important so that users can understand the structure of the PDF document and so they can easily navigate through it. The style mapping checkpoint is to make sure that the proper heading levels are being assigned.

When the Style Mapping checkpoint opens, the first rectangle (Rectangle 7) will be selected and it will also be highlighted in the slide. In the lower right corner of the CommonLook Office wizard, the PDF tag that will be associated with that rectangle will be displayed in a dropdown menu. In this case, it will be tagged as a Figure.



Click “Next Task.”

The second item in the list, “Title 1,” will be tagged as an H1 (heading level 1). This is correct because the title of the presentation will become the title of the PDF document and titles of documents should be tagged as heading level 1. Click “Next Task.”

Subtitle 5 is shown as “Autodetect” in the PDF tag menu. This is correct and we’ll see in the resulting PDF that the textbox will be tagged correctly!

Continue clicking “Next Task” to work through the first slide (everything else is going to be correctly tagged). Continue on to slide 2.

On the second slide, the text of “Outline” (shown as Title 1 in the CommonLook Panel) will be tagged as an H2 (heading level 2). This is correct. Since the title of the document is an H1, the subsections under the title (like chapters in a book) should be tagged as heading level 2. Click “Next Task.”

Rectangle 13 is shown as “Autodetect” (again, correctly so). Click “Next Task.”

The next item, “Slide Number Placeholder 4” is set to be tagged as an artifact. In actuality, “artifact” is not a tag and it will not appear in the tag tree. This is indeed correct, however, because we do not want a screen reader to read slide numbers (or page numbers) while reading through the content of a document. Click “Next Task.”

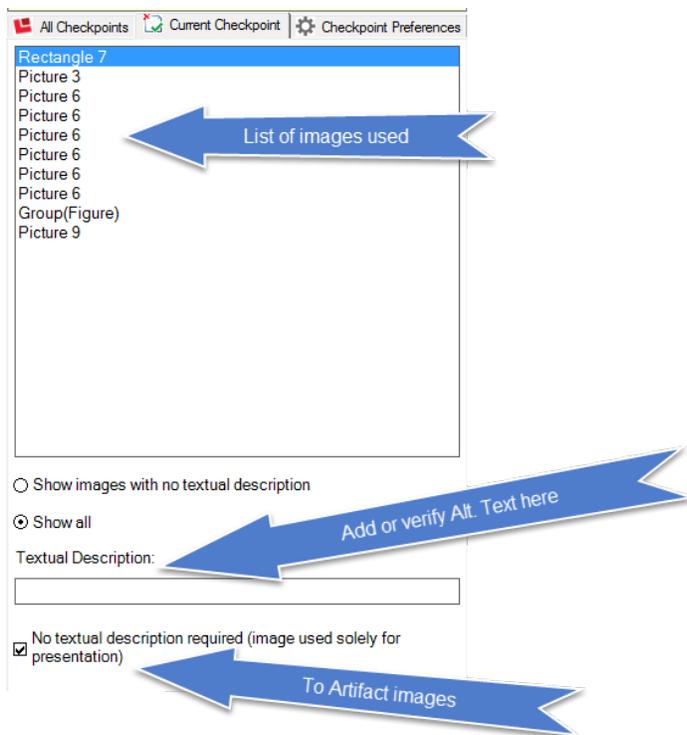
The final object on this slide is the image at the lower right corner. It will be correctly tagged as a Figure. Click “Next Task” to move to the next slide.

Continue clicking “Next Task” through the rest of the slides to make sure that the items on the slides will be tagged correctly. If there is an error, use the dropdown menu to assign a different tag to the selected object.

At the end of slide 8, click “Next Applicable Checkpoint.”

Text Tags (Alternative Text)

When the text tags checkpoint opens, the CommonLook Panel will list all of the images used in the PowerPoint. Below the panel are options to artifact (untag) images so that a screen reader will not try to read them and to add alternative text to the image as needed. If an image already has alternative text, the alt. text will be displayed to verify that it is appropriate for the image. Again, this is a great example of why presentation authors should be using CommonLook Office – because they really know what would be appropriate alt. text for the images that are included in the presentation.



The first image (Rectangle 7) is the gold box behind the title on the first slide. Since it is just there for decoration, it does not require Alternative text. So, leaving the checkbox for “No textual description required” is correct. Click “Next Task.”

The second item, Picture 3, could (for this example) be considered relevant and so it needs to have Alternative Text associated with it. Click in the text box to add a “Textual Description.” For this example, we can use alt. text such as “Famous college picture.” Notice, also, that when Alternative Text is typed into the text box, it appears next to the image listed in the CommonLook Panel. Click “Next Task.”

Continue through the slide presentation either assigning alt. text to the images or artifacting them so that they are not read. **Hint:** For this example, all of the “Picture 6” items will be artifacted, the “Group(Figure)” will be given the alt text of “Are there any questions?”, and Picture 9 will be artifacted as well.

After all of the images have been verified for alt text, click “Next Applicable Checkpoint.”

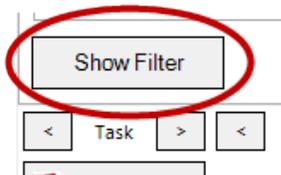
Color

After addressing the images in the document, the next checkpoint that CommonLook Office stops on is for color. While color certainly can be used in a document, and often helps to make a document more visually interesting, problems arise when color is the only way that information is conveyed. For example, if there are negative numbers in a table, and the only way to know that those numbers are negative is by the fact that they are shown in red, this information will be lost to people who are using screen readers as

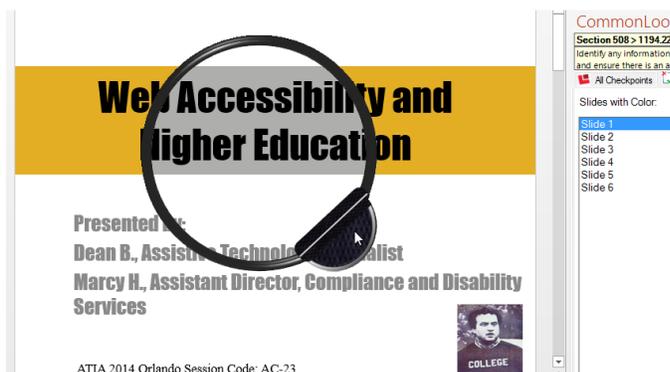
well as to those who have colorblindness for which they cannot see red. For this reason, the color checkpoint is one of those checkpoints that require manual verification.

As with the other checkpoints, the CommonLook wizard will list the possible problems – in this instance, the slides that use color and need to be checked to make sure that information is not lost due to this color use.

In the CommonLook wizard, under the window listing the page numbers that contain color, there is a button labeled “Show Filter.”



Click this button to reveal a tool that can be dragged over the presentation. When used, this tool removes all color from the document, to simulate colorblindness. (Click off of the filter or hit “Esc” to close it.)



Use the filter on each slide to make sure that there aren't any instances in which color is used to convey pertinent information. Click “Next Task” to move through the slides.

After checking slide 8, click “Next Applicable Checkpoint.”

Readability

After the color checkpoint, we stop on the reading order checkpoint.

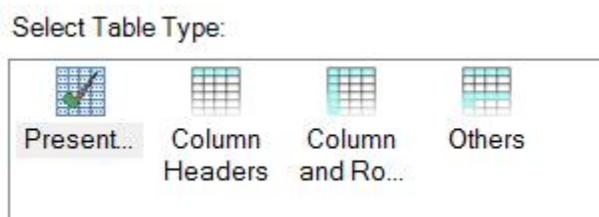
In the CommonLook Office panel, all of the slides will be listed on the left, and on the right all of the text boxes, images, etc. will be listed in the order in which they will be read. Click “Next Task” to scroll through the list of objects on each slide to make sure that they will be read in the correct order. If not, use the “Up” or “Down” buttons below the list of objects on each slide to change the reading order of those objects.

After checking slide 8, click “Next Applicable Checkpoint.”

Tables

After checking the reading order of the slides, CommonLook Office stops on the Data Table checkpoint.

In the CommonLook Office wizard, when the table checkpoint opens, a list of the tables used in the PowerPoint will appear. Under the list of tables, there is a section to select the table type.



Presentation Tables

The first table used in this PowerPoint is a presentation table, used to achieve a column format. While tables are often used for formatting purposes, this, unfortunately, presents an accessibility problem.

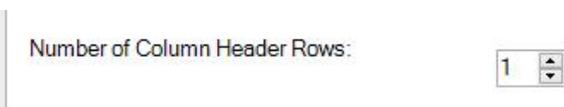
When a table is inserted in a PowerPoint slide, and the presentation is converted to PDF, a table tag will be created in the tag tree. Then, when a screen reader sees the table tag, it will announce to the listener the number of rows and columns that are in the table and will try to associate the data in the table with the headers. However, if the table is being used simply for formatting, and there are not any header cells or data to associate with headers, the information in the table is incorrectly conveyed.

To correct this problem, in the CommonLook Office wizard, choose the first table type “Presentation” and click “Next Task.”

Column Headers

The second table in the sample presentation is a simple table that only has column headers. So, in CommonLook Office, choose the second table type “Column Headers.”

When selected, another panel will open asking the user to input the number of column header rows. In this example, there is one row of column headers (Quantity and Price) so use the default “1” in the dropdown menu and click “Next Task.”



Other Table Types

Although not being used in this sample presentation, there are other Table Types to choose from, based on the complexity of the table. For more information on how to handle complex tables, or other concepts in CommonLook Office, please contact our [training department](#).

Metadata

After finishing checking the tables, the user is brought to the metadata checkpoint. While not a Section 508 requirement, many organizations require metadata information to be included in documents. In addition, metadata is required for WCAG, PDF U/A, and HHS.

Enter in the necessary Metadata information.

- The title should be an easy to understand name for the document.
- The subject is generally the same as the title.
- The Author is the company, department, agency, etc. (not an individual person's name).
- Keywords are used in internet searches. Separate them with semicolons.

When finished filling out the metadata information for your document, click "Next Applicable Checkpoint."

Note: A window will pop up notifying the user that the document has changed since the last verification and asks if verification should be run again. Clicking "Yes" will take the user through all of the applicable checkpoints again. Click "No."

Generating the PDF

Now that we have gone through all of the checkpoints to create an accessible, compliant, properly tagged PDF, CommonLook Office opens the "Save as Accessible PDF" menu.

Enter or change the information as needed in the Save As panel and click Save. CommonLook Office will then generate the PDF and ask the user if he/she would like to open it. Click Yes to view the PDF.

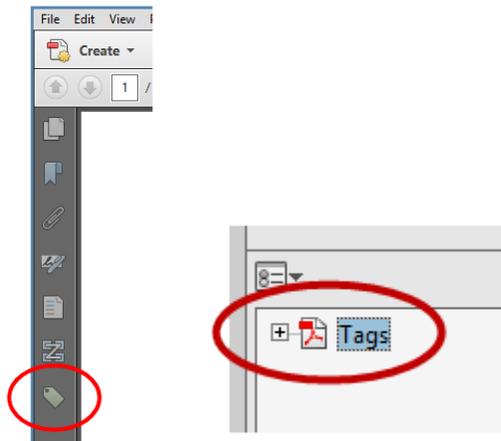
If opening the PDF in Adobe Acrobat Standard or Professional versions, the user can open the tag view and verify the logical structure of the document (see the steps below to [verify correct tagging](#) in the PDF).

Congratulations! You have generated an accessible and Section 508 compliant PDF using CommonLook Office. (As previously mentioned in this guide, by following the

steps here, the document is not only Section 508 compliant, but is also very close to adherence to the WCAG, HHS, and PDF U/A standards as well.)

Verifying Correct Tagging in the PDF Document

After CommonLook Office has created the PDF, open it in Adobe Acrobat to verify that the tagging has been done correctly. To open the tag view in the PDF, click on the Tag icon on the left side of the PDF document. If the Tag icon is not available, right click in the gray area of the left margin in the PDF and choose “Tags” from the context menu. Then, click the plus sign next to the Tag to open the tag tree.



Closing Remarks

We hope that this quick start guide is a helpful resource in getting started using CommonLook Office.

For more tips, help, and information, please feel free to [contact us](#) to discuss additional training options.