

CommonLook Office Quick Start Guide –

Microsoft Word

Welcome to CommonLook Office! This guide is designed to take the user step by step through the process of using CommonLook Office to address the typical accessibility issues in a Word document and to create an accessible and compliant PDF. **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 Word documents, it should not be taken as an all-inclusive guide for using Microsoft Word. 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.

An Important Distinction

Accessible and compliant are not interchangeable terms. In fact, a document can be Section 508 compliant and still not be very “user friendly” (accessible). For example, according to Section 508, heading levels in a document are not required. But, 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, like using bookmarks. Consequently, if a document is particularly long, a person using a screen reader can skip over the pages that they do not need to listen to in order to more quickly get to the content that is important to them. However, without heading levels, the user is forced to listen to all of the (irrelevant) information before they get to the content that they want to hear. (Note that in other conformance criteria such as WCAG, PDF U/A, and HHS, heading levels are required.)

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 (or accessible) as possible.

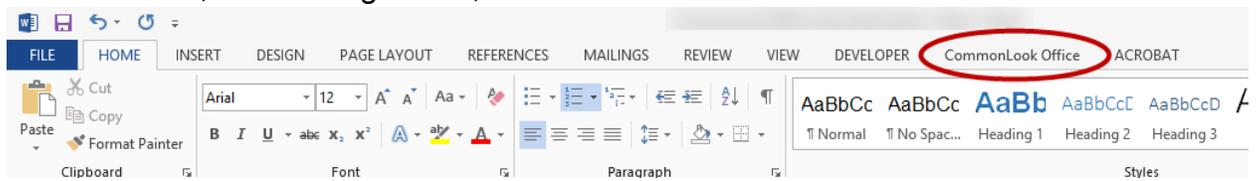
Who Should Use CommonLook Office?

Ideally, content authors should be using CommonLook Office as part of their document creation process. This is because authors have the best knowledge of the content in their document. 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 document and what the most appropriate alternative text is to use with those images. (For more information on alternative text, see that section below.) Furthermore, content authors also know whether or not images are being used just for decoration, in which case the images should be artfacted so that they are not read by screen readers.

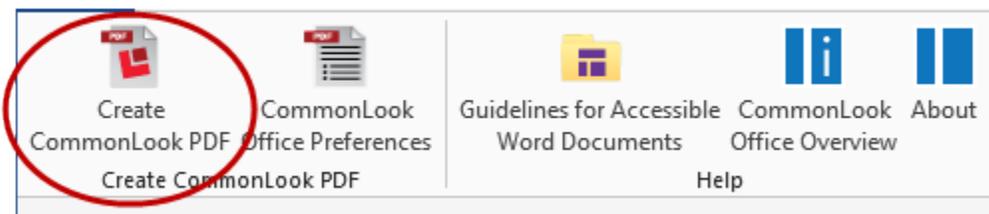
Let's Get Going!

This guide will take the user through the CommonLook Office software using the Quick Start Word Document. Start by opening CommonLook Office using the following steps:

1. Open the Quick Start Document in Microsoft Word.
2. On the ribbon, near the right side, click on the tab for CommonLook Office.

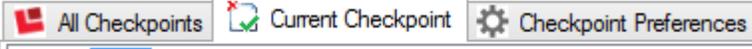


3. In the CommonLook Office tab, there are a number of options for help and preferences. Click the first button, "Create CommonLook PDF" to open the software and begin working to create the accessible PDF document.



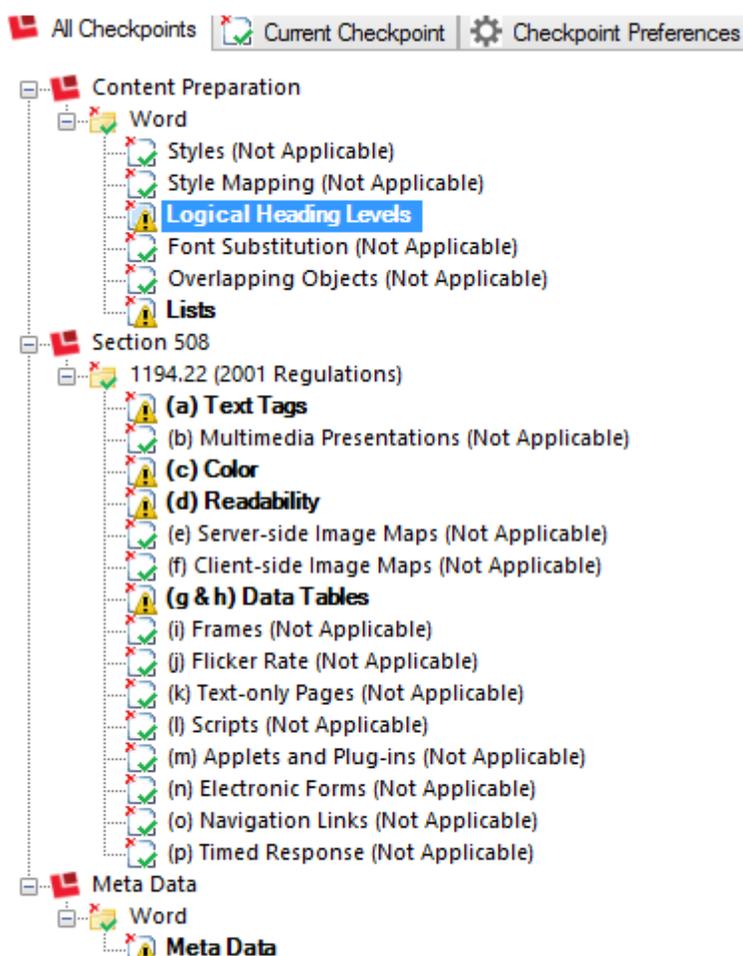
4. CommonLook Office will open and begin checking the document, running through various accessibility criteria and checkpoints.

When CommonLook Office opens, the document will be seen on the left side of the screen and the CommonLook wizard will be on the right. The default view is on the Current Checkpoint tab, and CommonLook Office stops on the first checkpoint that has

issues in the document. 

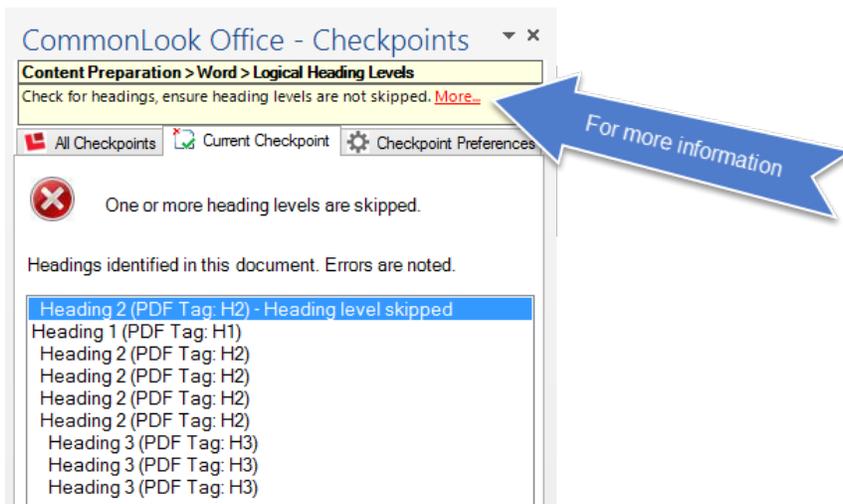
Clicking on the "All Checkpoints" tab will show all of the checkpoints (Content Preparation, Section 508, and Metadata) that are tested and whether or not they are applicable in the current document. The checkpoints that are bold are the ones that

need to be addressed. Either CommonLook Office has found a problem with that checkpoint or the document needs to be manually verified in order to pass a particular checkpoint (such as the use of color).



At the top of the CommonLook Office wizard is a yellow box that explains what each checkpoint is looking for when CommonLook tests the document. In addition, there is a link, labeled “More” to provide information about the checkpoint including the purpose for the checkpoint, instructions on how to handle it, conformance criteria for Section

508, WCAG, and PDF U/A, as well as links for additional information.

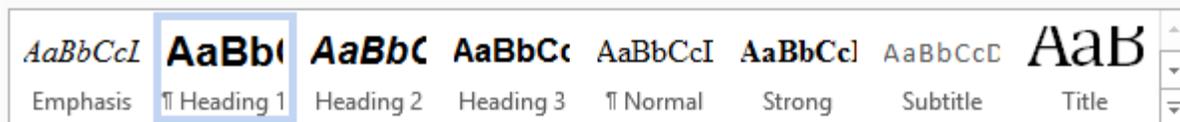


Heading Levels

In the quick start document, the first problem we encounter is that heading levels have been skipped. While many errors can be fixed within CommonLook Office, some require closing the wizard to address. Fixing the problem of skipped heading levels is one of the errors that requires closing CommonLook. Click the button on the left side of the CommonLook Office ribbon to “Close & Return to Word.”



After returning to Word, click on the Home tab in the ribbon and, in the Styles group, assign the proper heading levels to the various sections of the document.



Keep in mind that heading levels may be formatted to change their appearance however, it is important that heading levels are used correctly in a document. (Refer to the section on accessibility vs. compliance - “[An Important Distinction](#)” for more information.) For ease and consistency using this guide, listed here is the heading text and the associated heading level:

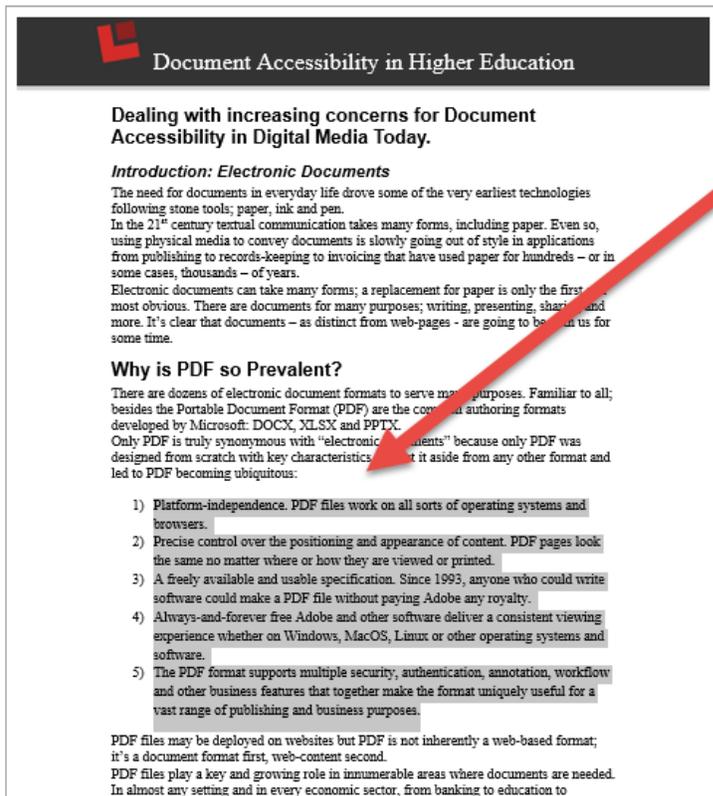
- Dealing with increasing concerns for Document Accessibility... - Heading 1
- Introduction... - Heading 2
- Why is PDF so Prevalent? - Heading 2
- The Use of Color - Heading 2
- Result is Limited... - Heading 2
- Nested (sub) Lists: - Heading 2
- Images: - Heading 2
- Examples of Tables: - Heading 2
- Presentation Table: - Heading 3
- Simple Table: - Heading 3
- Complex Table: - Heading 3

After the heading levels have been properly assigned, click Save and reopen CommonLook Office. Now that the issue with skipped heading levels has been fixed, CommonLook Office will open on the List checkpoint.

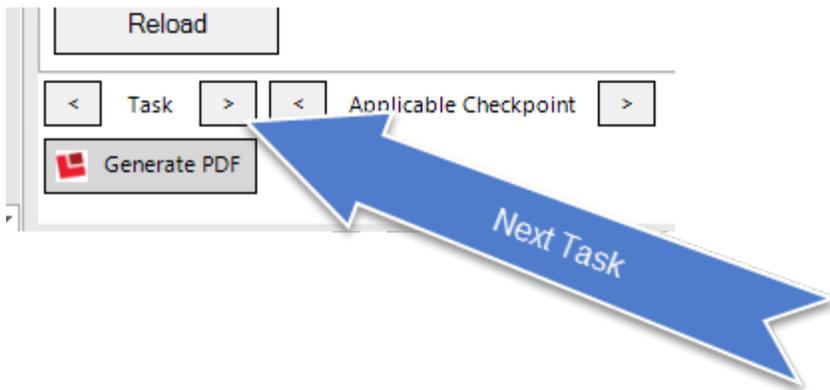
Lists

Keep in mind that Lists are not a Section 508 requirement but this checkpoint is here for the usability of the document. Also, the proper tagging of lists is required in the WCAG, PDF U/A, and HHS conformance criteria.

In the CommonLook wizard, when the list checkpoint opens, there will be a list of the lists in the Word document displayed in the middle panel (where the heading levels were displayed at that checkpoint).



Check the list in the wizard window with the list in the physical view of the document to make sure that the entire list (in the physical view) is selected. In this case, the first list is correct, so click “Next Task” near the bottom of the CommonLook Office window.



The second list (after clicking “Next Task”) is also correct so click “Next Task” again. (Note: This second list will be revisited when we address the color checkpoint.)

With the third list, the third list item is not included in the list the way it was created and, as a result, will not be correctly included in the list tag in the PDF. This is an issue because, when reading lists, screen readers will identify a “List of ‘X (number)’ of items when reading the list. As a result, if content is not correctly included in the list, a screen

reader will convey incorrect structural information to someone listening to the document. In the screen shot below, the third list item is not gray, indicating that it was not included in the list.

Nested (sub) Lists:
The following is an example of a nested list:

1. Item 1
2. Item 2
 - a. Item 2-a
 - b. Item 2-b
3. Item 3



Lists are one of the items that can be fixed without leaving the CommonLook Office interface. To fix the list, follow these steps:

1. Place the cursor in front of the word "Item" in "Item 3"

The following is an example of a nested list:

1. Item 1
2. Item 2
 - a. Item 2-a
 - b. Item 2-b
3. Item 3



2. Press "Backspace" until "Item 3" is immediately after the text "Item 2-b."

The following is an example of a nested list:

1. Item 1
2. Item 2
 - a. ~~Item 2 a~~
 - b. Item 2-bItem 3

3. Press "Enter." (Item 3 will become list item 2c.)
4. Press and hold the Shift key and press the Tab key. This will move "Item 3" to become the third list item. Visually, everything appears as it originally did.

However, the list is now going to be tagged correctly.

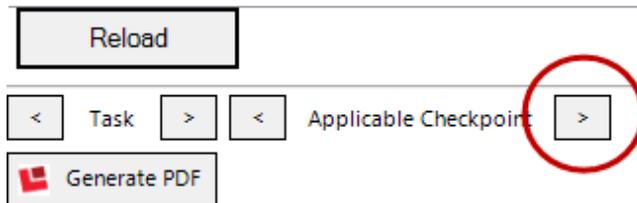
The following is an example of a nested list:

1. Item 1
2. Item 2
 - a. Item 2-a
 - b. Item 2-b
3. Item 3

5. Press the “Reload” button located just above the “Next Task” button.

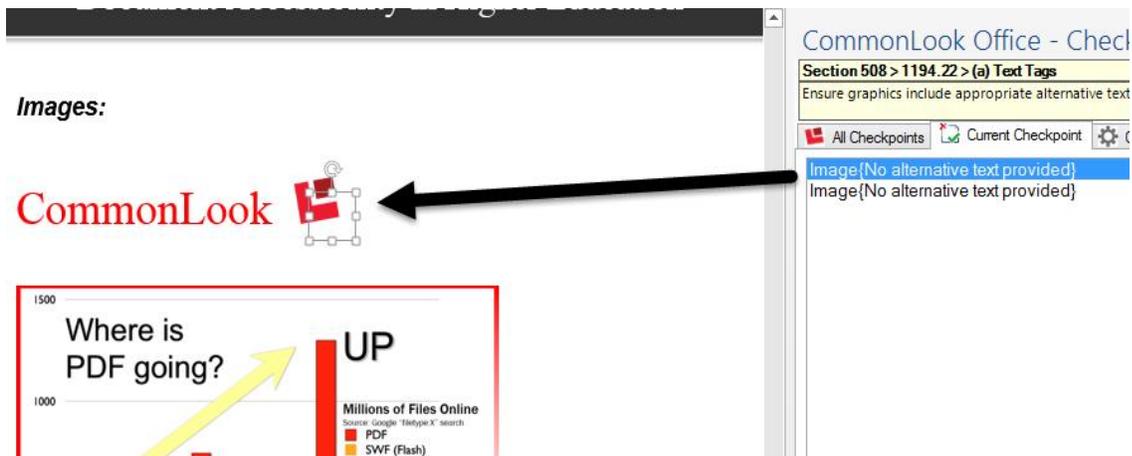


6. Hit “Next Applicable Checkpoint”



Text Tags

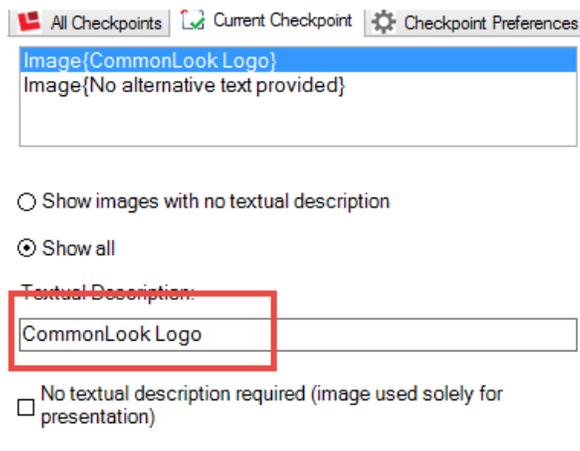
The next checkpoint is for “text tags” – otherwise known as Alternative Text for images. The wizard window shows the first image (in a list of 2) and the corresponding image is shown in the Word document as well.



Follow these steps for handling images:

1. Decide whether or not the image conveys information (in this example, we'll say that it does – it's the CommonLook logo).

2. In the textual description box, type “CommonLook Logo”



All Checkpoints Current Checkpoint Checkpoint Preferences

Image{CommonLook Logo}
Image{No alternative text provided}

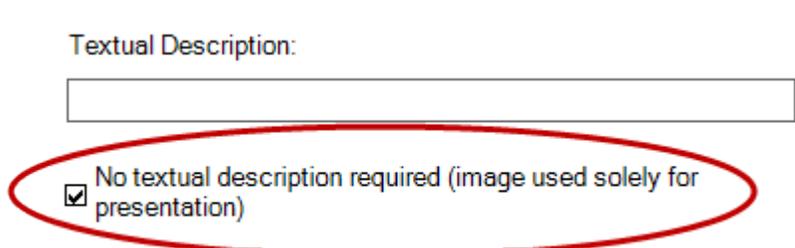
Show images with no textual description
 Show all

Textual Description:
CommonLook Logo

No textual description required (image used solely for presentation)

3. Click “Next Task.” Because the Alt Text is only two words long, a window pops up asking whether or not the Alt Text is appropriate for the image. In this case the Alt Text is sufficiently descriptive so click “Yes.” **Note:** There is a setting in the software in which users can set parameters for the “quality” of Alt Text that is allowed, for example whether or not numbers, letters, and even symbols may be used.
4. The next image, the chart of PDF use on line, also conveys information and so it requires Alt text as well. This is a perfect example of why the author of the document needs to be the person using CommonLook Office. The author knows best whether every single data point in the chart is relevant or whether the basic idea of the chart – that PDF use online is on the rise – is good enough information to convey in the Alt Text. For our purposes, we’ll assume that the basic idea is enough. Type “Chart showing the increased use of PDF documents online” and click “Next Applicable Checkpoint.”

Tip: If an image is used simply for decoration and does not convey relevant information, it does not require Alternative text. In this case, do not type a textual description in the box and, instead, keep the checkbox checked for “No textual description required.”



Textual Description:

No textual description required (image used solely for presentation)

We can see that on page two there is an issue with the list starting with “Red text is bad, green text is good.” It is beyond the scope of this guide to fix the color issue. However, because ideally the authors have the software on their machines, they are in the perfect position to solve color issues. For example, the author could create two lists – one good and one bad. There could be a table with one column for good data and another column for bad. For the sake of this example, we’ll just click next task.

Page three uses color with the CommonLook logo (but no information is lost there) and the chart of increased PDF use online. We’ve already added the appropriate Alt text to the chart. Another way to handle the color problem is to make sure that the relevant information in the chart, lost due to the use of color, is also discussed in the body of the document. That way there is some “redundancy” in the presentation of information. For the sake of this example, click next task.

Page four presents an interesting scenario. The issue on this page is not color, per se, but CommonLook Office sees the font change to bold (on the table headers) and is asking us to verify that information is not being conveyed by the use of bold text. Seeing as the bold font is simply being used for appearance, to visually show table headers, this is not a failure of the color checkpoint and we can click “Next applicable checkpoint.” **Note:** While a screen reader will not announce the bold text as table headers, due to the formatting of the table in the table checkpoint, a screen reader will be able to properly announce the table headers as the table information is read.

Reading Order

After the color checkpoint, we stop on the reading order checkpoint. According to the wizard, there is not anything that needs to be done for this checkpoint and we can simply hit “Next Applicable Checkpoint.” (However, please notice that there is documentation and help provided to assist with avoiding reading order issues.)

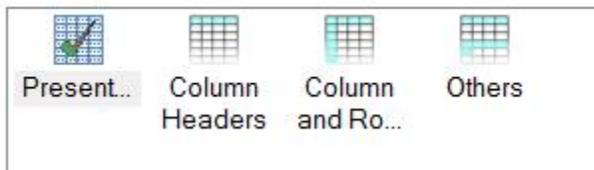
Tables

Presentation Tables

Oftentimes in Word documents, authors will use tables to help in formatting the document. However, from an accessibility standpoint, this is not correct because when a table is used and the document 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 then try to associate the data in the table with the headers. However, if there are not any headers, and there is not any real data, the information in the document is incorrectly conveyed. This is the scenario for the first table in the Quick Start Document. A table was used for formatting to give the appearance of columns.

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

Select Table Type:

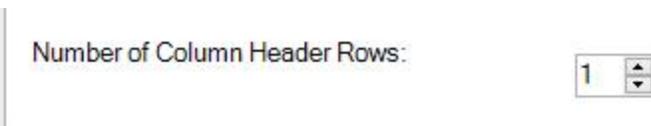


The first table used in this document, as mentioned, is a presentation table used to achieve a column format. So, in CommonLook Office, choose the first table type “Presentation” and click “Next Task.”

Column Headers

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

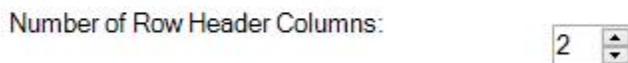
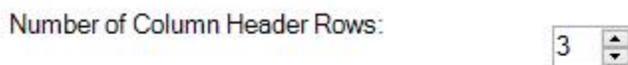
When selected, another panel will open asking the user to input the number of column header rows. In this example, there is one row of column headers (Quantity and Price) so use the default “1” in the dropdown menu and click “Next Task.”



Column and Row Headers

The third table in the sample document is a little bit more complex, having multiple rows of column headers, multiple columns of row headers, and cells that span multiple columns/rows. However, CommonLook Office handles this table quite easily.

Make sure, in the list of tables, that the third table is selected and for the Table Type, choose “Column and Row Headers.” Similar to the “Column Headers” option, another panel will open. This time, the user is asked to specify not only the number of column header rows but also the number of row header columns. In this instance, there are three rows of column headers and two columns of row headers. Use the dropdown menus to set these numbers (see the screen shot below).



Since this is the last table to work with in this document, click “Next Applicable Checkpoint.”

Others

CommonLook Office can properly tag even more complex tables than those found in this sample document. To do so, select the Table Type “Others.” Click the “Edit Cells” button to open the table settings tool. While the functionality of this tool is beyond the scope of this guide, [please contact us for additional training](#) in which handling of very complex tables, and other advanced concepts, are covered.

In addition, it may be helpful for authors to keep in mind that if a table is very complex, perhaps it should be rewritten so that it is easier for everyone to understand.

Metadata

After finishing the work with the tables, and clicking “Next Applicable Checkpoint” 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.

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.)

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.