



OFFICE OF THE CHIEF INFORMATION OFFICER

USE GUIDED ACTION TOOL OR ACTION WIZARD

INTRODUCTION

In Adobe Acrobat, the Action Wizard can be specifically used for enhancing the accessibility of PDF documents. Users can automatically add tag elements to ensure they are readable by screen readers, can set the reading order for text and images, improving navigation for assistive technologies, insert alternative text descriptions for images, making content understandable for visually impaired users, run accessibility checks to identify and fix issues, ensuring compliance with standards WCAG or Section 508, and automate the process of making interactive forms accessible, including setting tab orders and labeling fields properly. Using the Action Wizard for these tasks helps streamline the process of making documents more accessible, ensuring that they can be used by a wider audience.

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SETTING UP THE DOCUMENT PROPERTIES

There are three parts to setting the basic document properties:

1. Setting the Document Title
2. Setting PDF Metadata to Use the Document Title
3. Setting the Language in PDF

Performing these steps first when opening any PDF document will help resolve the most common errors before you start the remediation process.

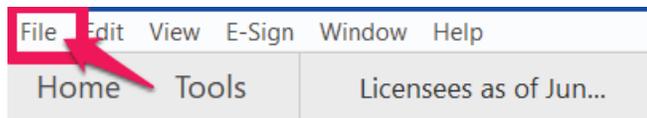
DOCUMENT TITLE

SETTING THE DOCUMENT TITLE

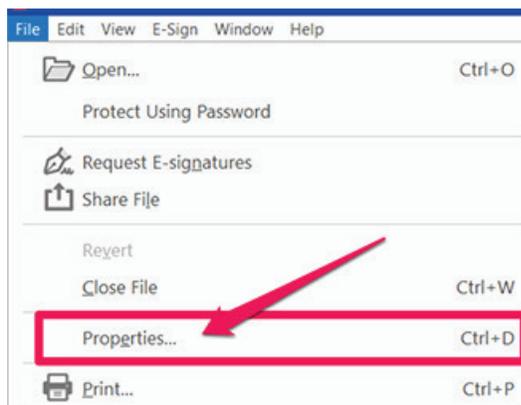
First check if the document has a document title. If it doesn't add the title. If the source document (such as Word, Excel, or PowerPoint) includes a title, the PDF will typically carry it over. Otherwise, you will need to add a title to the PDF. Follow the steps below to determine if the document title has been set properly.

Older Versions of Adobe Acrobat

1. Click on "File" at the top of the menu bar.



4. Select "Properties" to open the Document Properties window.

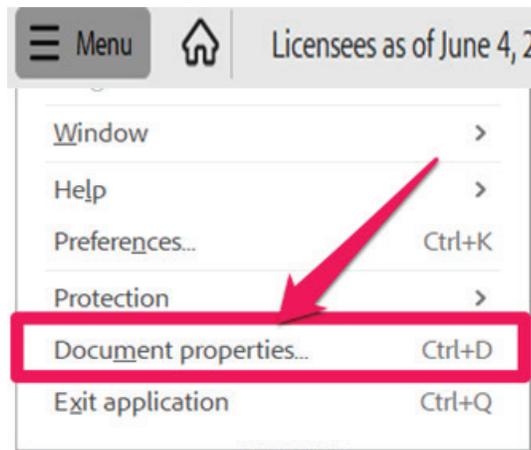


Newer Versions of Adobe Acrobat

1. Click on "Menu" at the top left of the window.

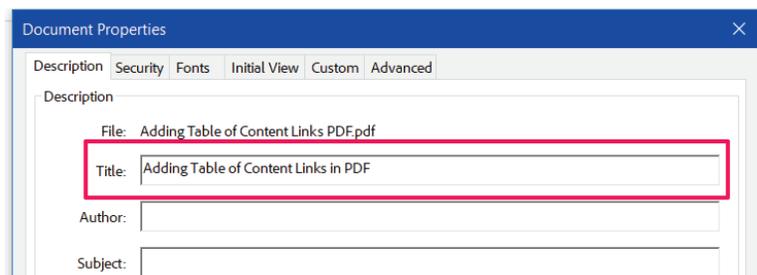


5. Select "Document Properties" to open the Document Properties window.



6. View the Description tab to determine if the document has a title and/or if the title is an appropriate description of the document. If the title is accurate, proceed to next section. If the title is not there or is not accurate, proceed to step 4.

Note: Steps 3 and 4 are the same in both older and newer versions of Adobe Acrobat



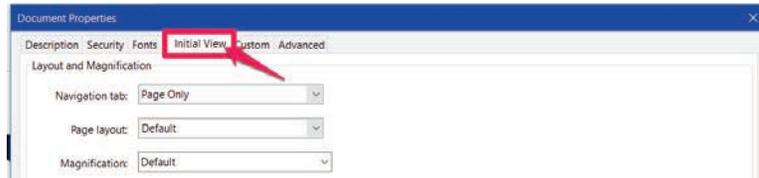
7. If there is no title, or if the title does not provide an accurate description of the document click in the Title field and select any text in it. Type in the new accurate document title.

SETTING PDF METADATA TO USE THE DOCUMENT TITLE

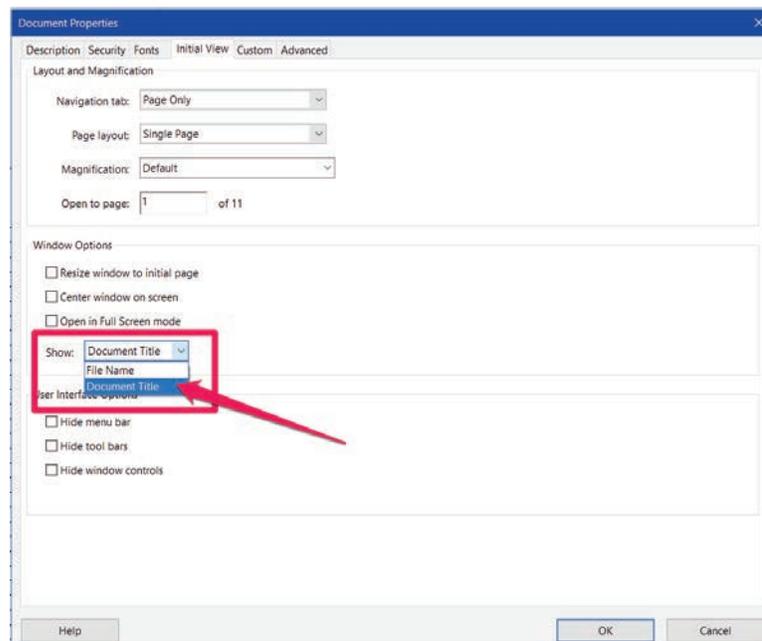
When adding a title to the document, the metadata must be updated to reflect the new document title instead of the file name.

Note: These steps are the same in both older and newer versions of Adobe Acrobat.

1. Make sure you are still in the Document Properties. See last section for guidance.
2. Click on the "Initial View" tab.



8. If the "Show" dropdown menu is set to "File Name" change this to "Document Title"



SETTING THE LANGUAGE IN PDF

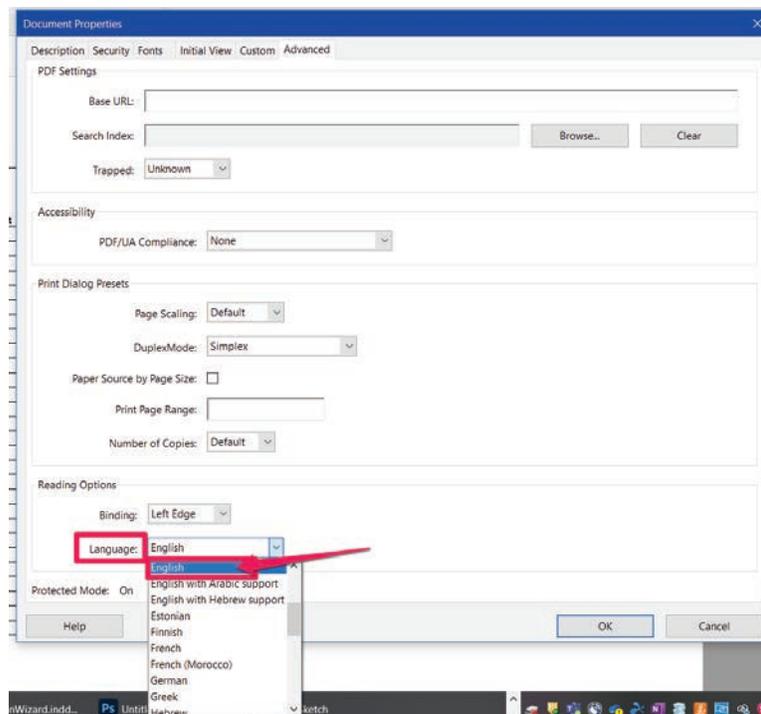
Screen reader technology will read the document to the user in the language set for the document. A document can only have one language setting. The steps to set the correct language in a PDF are:

Note: These steps are the same in both older and newer versions of Adobe Acrobat.

1. Click on the "Advanced" tab in the Document Properties window.



9. Choose the "Language dropdown" and change it to the correct language. In this case "English."



10. Click the "OK" button to save any changes to the PDF title or language.

DIFFERENCE BETWEEN PREPARE FOR ACCESSIBILITY OR ACCESSIBILITY CHECK AND THE ACTION WIZARD

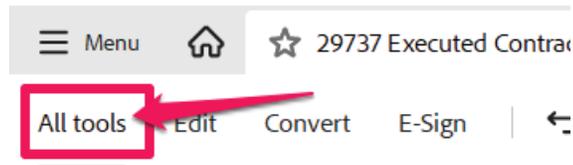
“Prepare for Accessibility” focuses on making a single document accessible, while the Action Wizard or Use Guided Action is about automating processes, including those for accessibility, across multiple documents. They can be used together to ensure that both individual and batch accessibility improvements are efficient and effective.

GUIDED ACTIONS TOOL IN NEW VERSIONS OF ADOBE

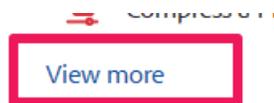
After running the full accessibility check, run the Action Wizard to automate tasks. If the Action Wizard does not appear on the tool bar on the right side of the screen, follow the steps below to add the Action Wizard.

LOCATE GUIDED ACTIONS TOOL IN NEW VERSIONS OF ADOBE

1. To locate the Use Guided Actions tool, click on the All-Tools tab at the top left of the screen, or



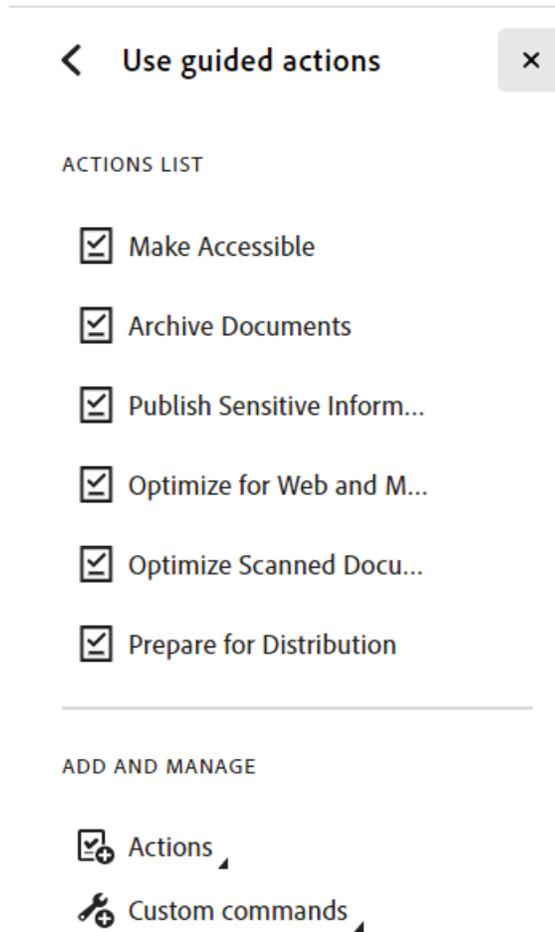
2. Scroll down and click the View More link at the bottom of the list of tools.



3. Click on Use guided actions button. You can skip the next section as it doesn't apply. If you don't see the Use guided actions button in the list, proceed to step 4-5.



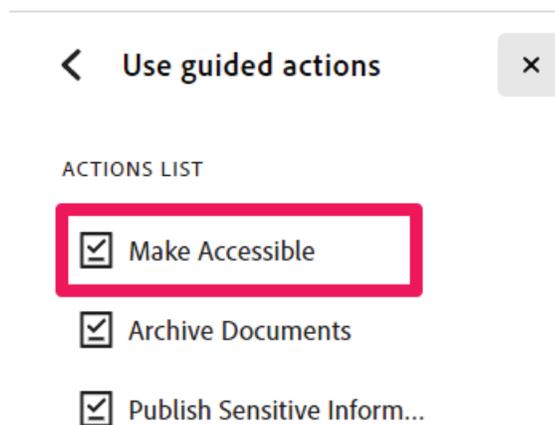
4. The Use Guided Actions tool will appear on the left side of the screen.



USING THE USE GUIDED ACTIONS TOOL IN NEWER VERSIONS OF ADOBE

This tool is used to give all images and tables the option to add Alt text as the scan runs.

1. Click on the Make Accessible button.



2. Click the Start button to automate the Setting up the Document Properties, Language tags, recognizing text from OCR, detecting form fields in scanned documents, and setting the tab order of fields.

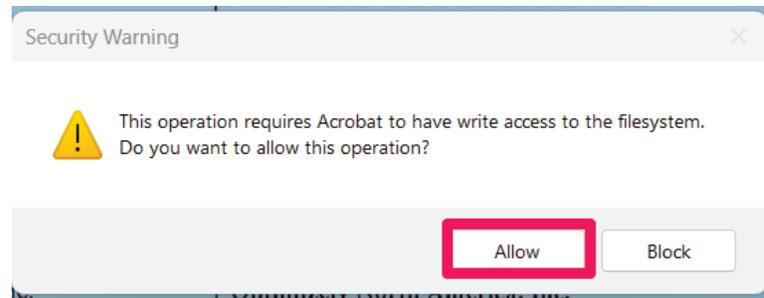
2. SET LANGUAGE & TAGS

 Set Reading Language

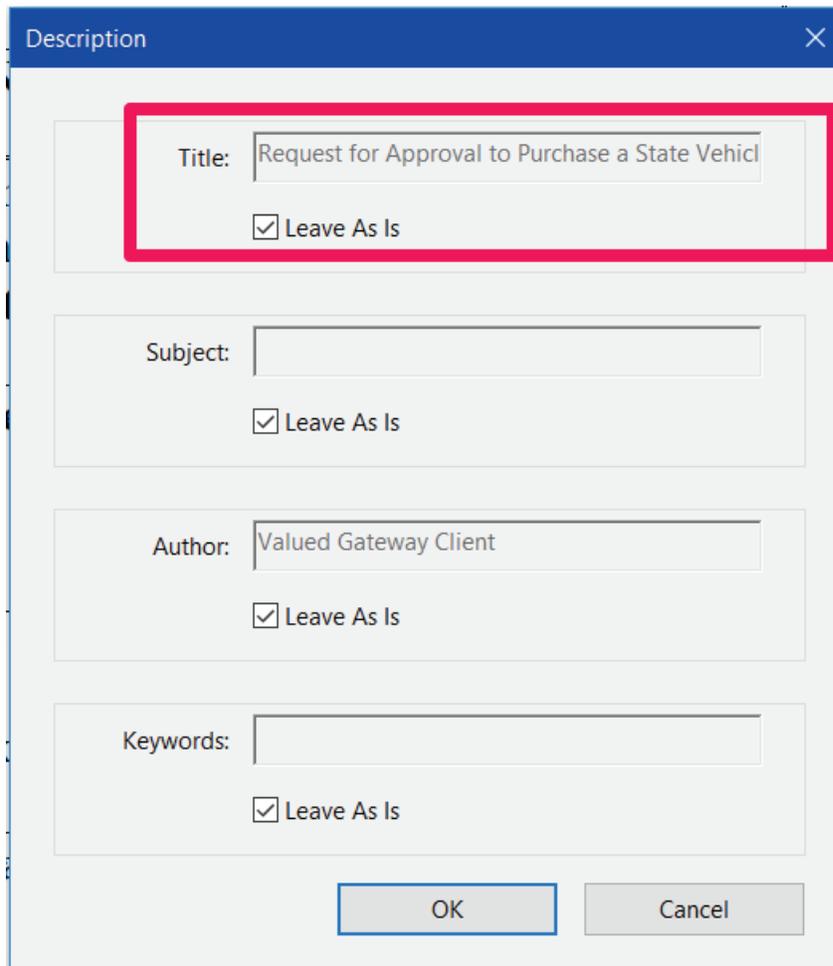
 Autotag document



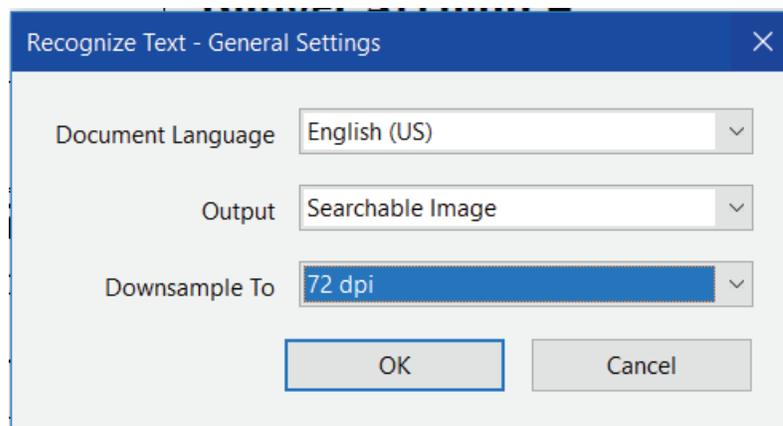
3. A security warning will appear, click the Allow button.



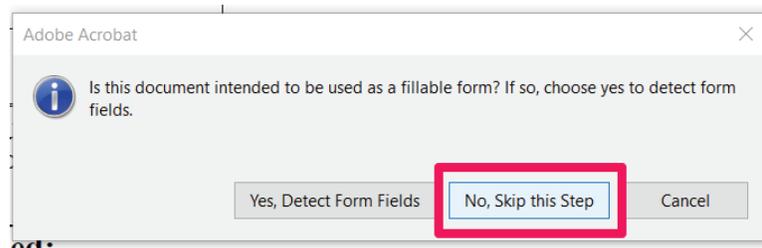
- The Description dialog box will appear. Verify the title is an accurate description of the document. If the title is there and is appropriate, then click OK. If not, uncheck the Leave as Is button and add a title in the Title field.



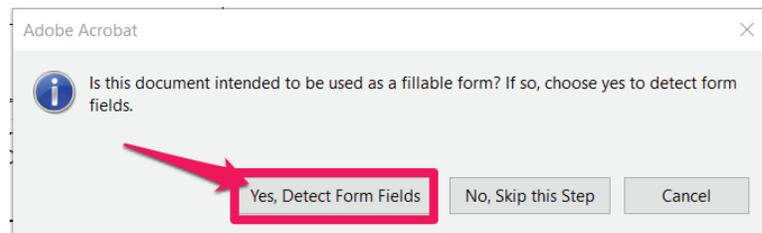
- The Recognize Text – General Settings dialog box will appear, choose the appropriate language for the document. Leave the Output set to Searchable Image and Downsample should be changed to 72 DPI for posting on the web. For printed material a minimum of 300 dpi is recommended. Click Ok to save your changes.



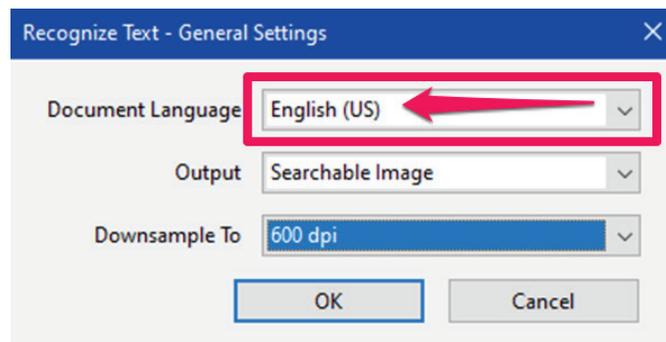
6. The Recognize Text Using OCR dialog box will appear asking if the document is scanned, if so, choose Yes, Recognize Text button. If the document is not a scanned document, click No, Skip this Step.



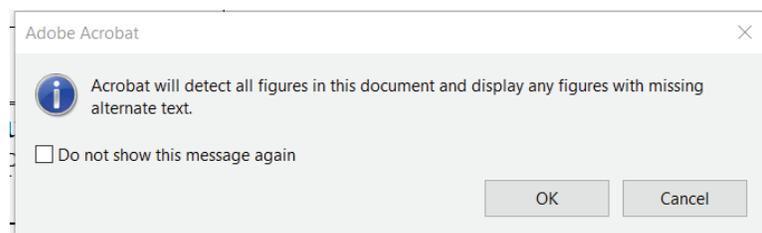
7. A dialog box will appear asking "Is this document intended to be used as a fillable form? If so, choose yes to detect form fields. Click **No, Skip this Step** even if the document is intended to be a fillable form. Use the [Create a Fillable PDF Guide](#) procedure to create a fillable form as this tool is not as efficient as the Prepare Form tool.



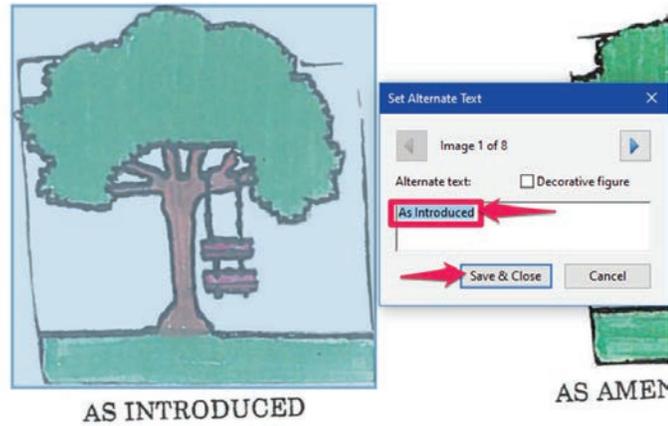
8. The Set Reading Language dialog box will appear, make sure the Document Language is set to the appropriate document language. In this case it is English. If you are posting the document on the web but not printing it, set the Downsample To 72dpi. For print materials use at least 300 dpi. Then click OK.



9. An alert box will appear on the screen indicating "Acrobat will detect all figures in this document and display any figures missing alternate text. Click Ok.



10.If the document has images, make sure to give each image an alternative text. Once done click on Save & Close.

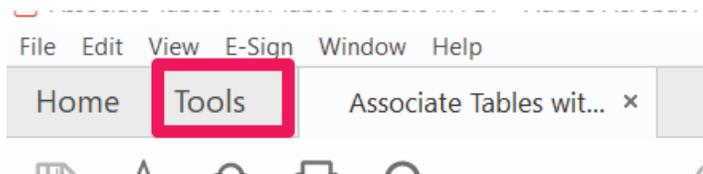


11.The Accessibility Checker Options dialog box will appear. Click Start Checking.

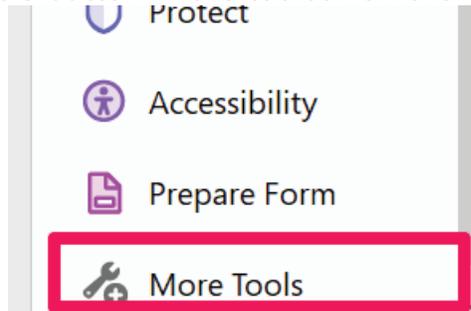
ADD THE ACTION WIZARD IN OLDER VERSIONS OF ADOBE

After running the full accessibility check, run the Action Wizard to automate tasks. If the Action Wizard does not appear on the tool bar on the right side of the screen, follow the steps below to add the Action Wizard.

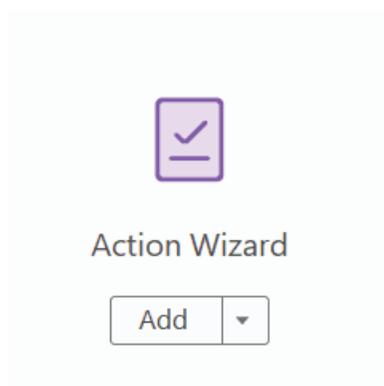
5. To locate the Action Wizard, click on the Tools tab at the top left of the screen, or



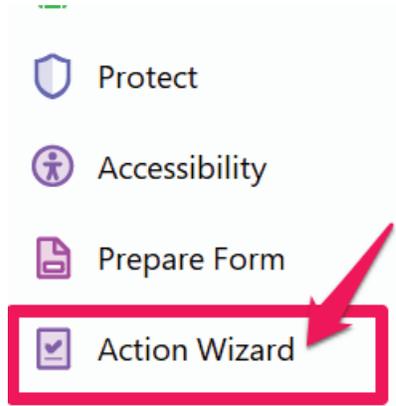
or click on the More Tools button in the toolbar on the right side of the screen.



6. Scroll down to the Customize Section and under Action Wizard click the Add button.



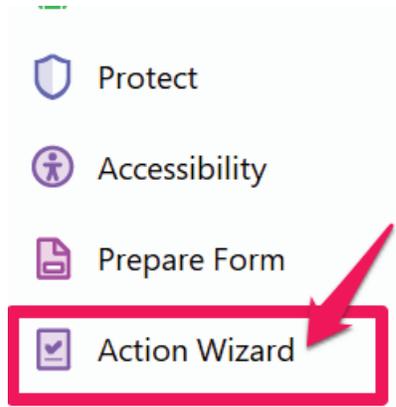
7. This will add the Action Wizard to the toolbar on the right side of the screen.



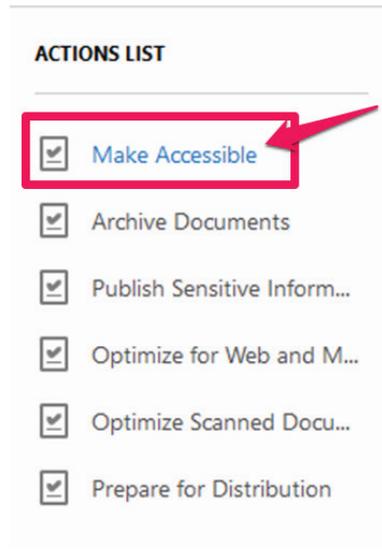
USING THE ACTION WIZARD IN OLDER VERSIONS OF ADOBE

This tool is used to give all images and tables the option to add Alt text as the scan runs.

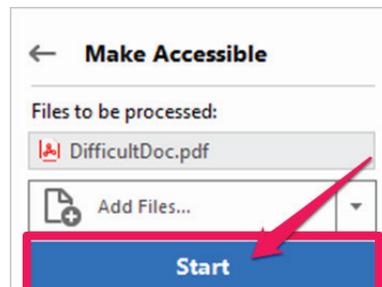
12. Click on the Action Wizard button.



13. Then click on Make Accessible.



14. Click the Start button to automate the Setting up the Document Properties, Language tags, recognizing text from OCR, detecting form fields in scanned documents, and setting the tab order of fields.



15. The Description dialog box will appear. Verify the title is an accurate description of the document, then click OK.

Description

Title: Request for Approval to Purchase a State Vehicle

Leave As Is

Subject:

Leave As Is

Author: Valued Gateway Client

Leave As Is

Keywords:

Leave As Is

OK Cancel

16. The Recognize Text – General Settings dialog box will appear, choose the appropriate language for the document. Leave the Output set to Searchable Image and Downsample should be changed to 72 DPI for posting on the web. For printed material a minimum of 300 dpi is recommended. Click Ok to save your changes.

Recognize Text - General Settings

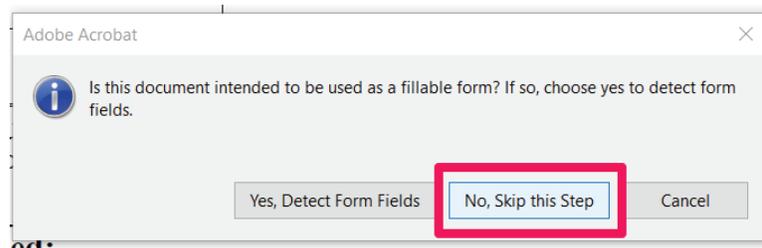
Document Language English (US)

Output Searchable Image

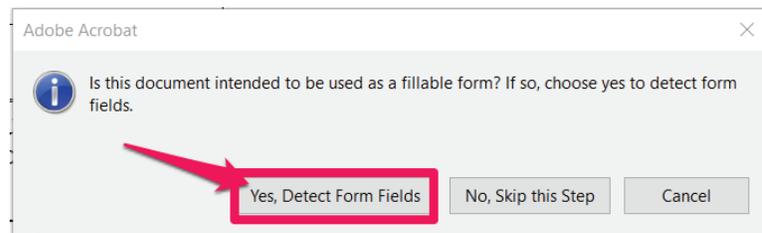
Downsample To 72 dpi

OK Cancel

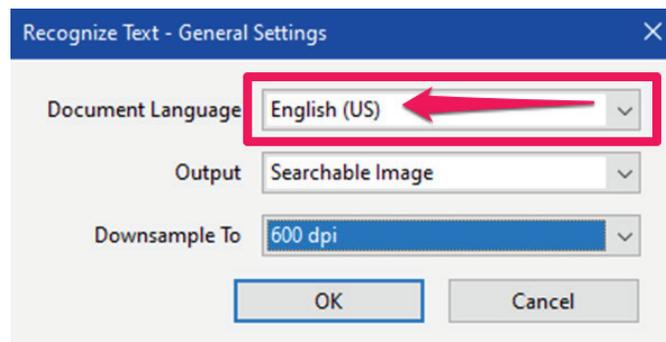
17. The Recognize Text Using OCR dialog box will appear asking if the document is scanned, if so, choose Yes, Recognize Text button. If the document is not a scanned document, click No, Skip this Step.



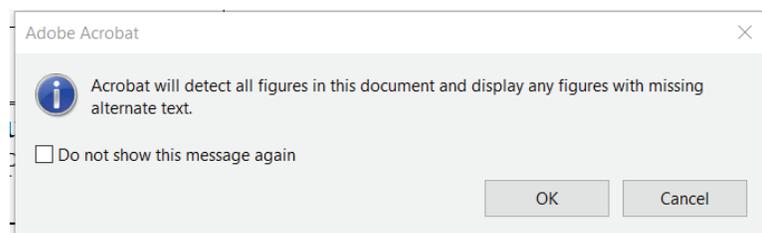
18. A dialog box will appear asking "Is this document intended to be used as a fillable form? If so, choose yes to detect form fields. Click **No, Skip this Step** even if the document is intended to be a fillable form. Use the [Create a Fillable PDF Guide](#) procedure to create a fillable form as this tool is not as efficient as the Prepare Form tool.



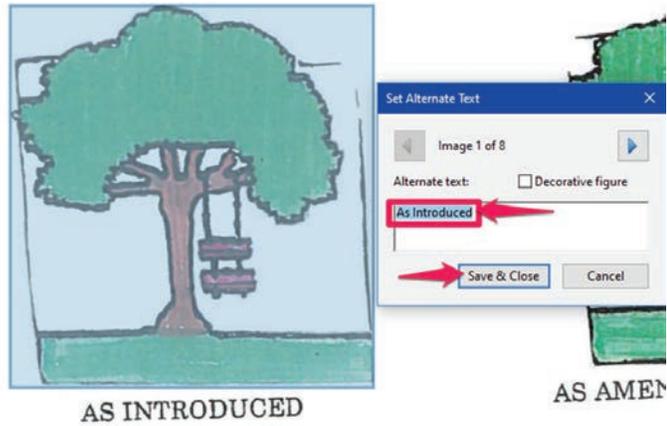
19. The Set Reading Language dialog box will appear, make sure the Document Language is set to the appropriate document language. In this case it is English. If you are posting the document on the web but not printing it, set the Downsample To 72dpi. For print materials use at least 300 dpi. Then click OK.



20. An alert box will appear on the screen indicating "Acrobat will detect all figures in this document and display any figures missing alternate text. Click Ok.



21.If the document has images, make sure to give each image an alternative text. Once done click on Save & Close.



22.The Accessibility Checker Options dialog box will appear. Click Start Checking.