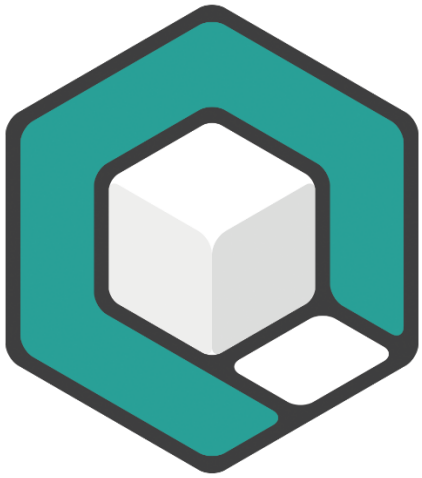

axesPDF®
User Guide

V07.2021

AbleDocs

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Introducing axesPDF®

You can use axesPDF® to check and remediate PDF documents for compliance with the PDF/UA (ISO 14289), WCAG 2.1, and Section 508 standards.

The checking and remediation tools in axesPDF® help you produce fully PDF/UA compliant documents with ease. You can use these tools to check your Microsoft Word, Adobe Acrobat, or Adobe InDesign documents.

Accessibility issues are found quickly, and you can easily fix most of them.

Important: To use AXESPDF ®, your PDF document must contain a tag structure. If it doesn't, you can create a tagged PDF by converting the source document or adding tags using a PDF editor.

PDF/UA, the global standard for PDF accessibility

Originally published in August 2012 and updated in 2014, the global ISO standard 14289-1:2014 – commonly known as PDF/UA (Universal Accessibility) – defines the requirements for accessible PDF documents. Some of the requirements include:

- Content must be tagged in a logical structure or reading order
- Each tag represents the document's semantic structure (headings, tables, lists, etc.)
- Graphics that contribute to the meaning of the content must have associated alternative text. Others must be marked as decorative elements.

PDF/UA also defines the requirements for software, including authoring tools, PDF viewers, assistive technologies, and evaluation tools.

The PDF association sums it up:

"The primary purpose of ISO 14289 (known as PDF/UA) is to define a specific use of the structure and tagged PDF features in PDF 1.7, which provide a mechanism for reuse of PDF page content, especially in the accessibility context."[1]

Want to learn more?

For more information about the PDF/UA and the PDF/A standards, check out the list of resources in the PDF Association website[2].

[1] PDF association. (2014, October 7). ISO 14289 (PDF/UA). Retrieved from https://www.pdfa.org/resource/iso-14289-pdfua/
[2] https://www.pdfa.org/resource/

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A comprehensive set of tools

axesPDF® provides the tools that you need to create PDF/UA-compliant documents:

- Check for PDF/UA compliance

  Checking your document is fast and easy. The structured report shows a summarized result of all the machine-checkable failure conditions.

- See problems immediately

  Select an issue in the Checker pane to see where the error is in the document and in the logical structure view.

- Fix issues with one click

  Fix an issue for the entire document by clicking one button; for example, **Add Note ID** or **Artifact Non-Tagged Content**.

- Edit all in one view

  Context-sensitive editing of properties and attributes of multiple tags at once. For example, adding scope to table header cells.

- Fix Unicode issues

  Unicode issues are no longer show-stoppers. You can easily correct any mapping issues.

- Navigate the logical structure

  Browse the logical structure of the document by jumping from one tag of a particular structure type to the next tag of that same type. You can also search for specific tags.

- Select and view tags with ease

  When you select a tag in the Document Viewer, it is automatically highlighted in the Logical Structure View.

- Screen reader preview

  Simplified structure view for a quick visual evaluation. Check the logical order and the semantics to see what a screen reader would read.

- Detailed expert views

  Views for diagnosis and editing: Checker with report, Properties, Settings, Role Mapping, Destinations, Logical Structure.

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A basic workflow for checking and remediating PDF documents

Here is the typical workflow for checking and remediating PDF documents, with links to corresponding instructions in this User Guide.

1. Open the document in axesPDF®.
2. Look at errors in Checker. See "Checking your PDF document".
3. Fix errors – using the axesPDF® tools. See "Fixing PDF/UA problems".
4. Fix other errors manually, in the PDF file
5. Open the updated document in axesPDF® to check again and ensure that you've corrected all the errors.
6. Visually check your PDF document. See "Visually inspect your PDF document".

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Working with accessible PDF documents

To use axesPDF® to check and remediate your PDF documents, you must begin with an accessible PDF document; this means that it must contain a tag structure.

Good basic tagging structure has the following characteristics:

- One top-level container tag. All other tags are nested within the container tag.
- All relevant content elements are tagged.
- The tag order is the same as the preferred reading order.
- Tags are nested correctly.
- All elements or content that belongs together are kept together. For example, paragraphs, tables, or lists that are span page breaks or column breaks are not divided into several tags.
- All links to external destinations, like websites or other documents, are correctly tagged and are clickable.

What if the PDF document doesn't have good basic tagging structure?

If your document doesn't have tags or a good basic tagging structure, you can create a tagged PDF by converting the source document or adding tags using a PDF editor.

- Convert the source document
- You can create accessible PDF document with authoring tools like Microsoft Word or InDesign, or you can convert information in a structured format like HTML or XML. If the conversion is successful, the tag structure is created.
- Edit the PDF file

If the source file is not available, or if the authoring software doesn't successfully convert the content, you can open the PDF file in a PDF editor and manually add or correct the tags. You must tag each relevant content element and add the required accessibility features, like alternative text to figures.

Once the conversion is finished, you can use axesPDF® to evaluate the PDF, check the PDF/UA compliancy, and fix any outstanding issues.

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Installing axesPDF®

System requirements

axesPDF® works with the following operating systems:

- Microsoft® Windows 8.1 Service Pack (SP) 1
- Microsoft® Windows 10

Downloading and installing axesPDF®

To install axesPDF®, go to the product download page[3], and click **Download axesPDF®**.

Note: If you have a previous version installed, you must uninstall it first.

Start the setup program by navigating to the where you saved the downloaded file and double-click **axesPDF.Setup.exe**.

The installation wizard guides you through the rest of the process.

[3] https://www.abledocs.com/en/products-services/axespdf/download

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Activating axesPDF®

You can use axesPDF® in Trial Mode or activate a license to use all the available features. You set up licenses for a individuals or organizations.

If you choose to run the add-in in Trial Mode, when you create a PDF, each page will have a watermark, and some characters will be randomly colored.

Setting up a personal license

To activate axesPDF® for one person to use, you can set a personal license. For detailed instructions, go to the Activate Personal License article[4] in the axes4 Help Center. The article also includes a link to download a PDF version of the instructions.

Setting up licenses for several people in an organization

To activate axesPDF® for several people in an organization, you can set of access via axes4 IDs or via a domain. For detailed instructions, go to the corresponding articles in the axes4 Help Center. Each article also includes a link to download a PDF version of the instructions.

- Set up access via axes4 IDs[5]
- Set up access via a domain[6]

[4] https://support.axes4.com/hc/en-us/articles/360013781220
[5] https://support.axes4.com/hc/en-us/articles/360013781020
[6] https://support.axes4.com/hc/en-us/articles/360013849319

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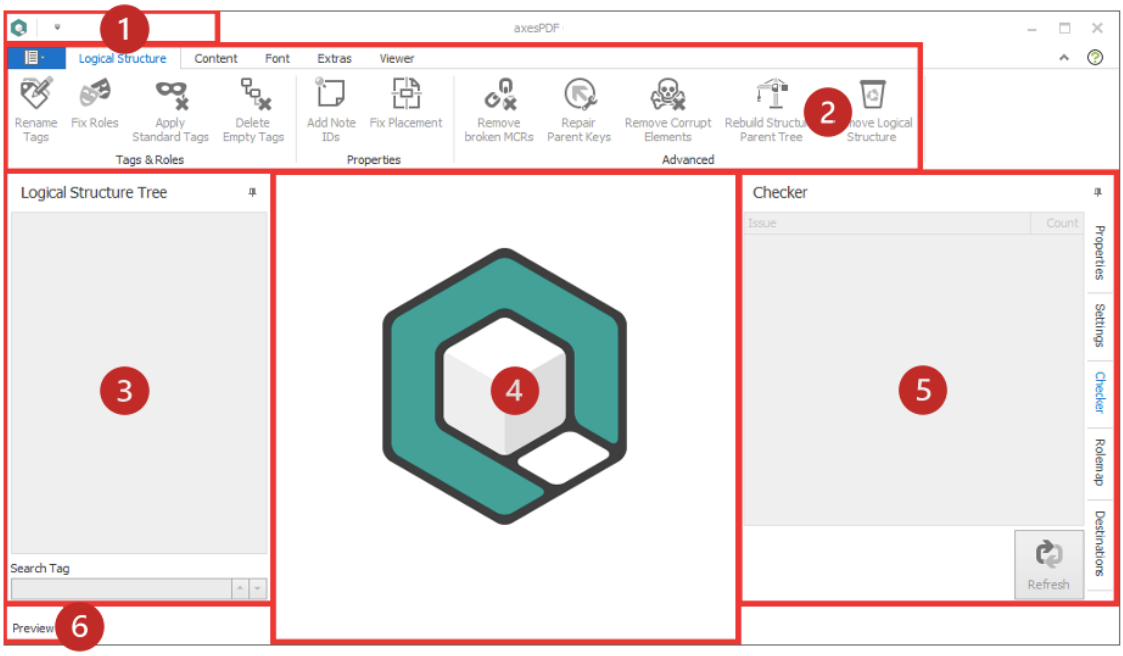
Getting familiar with the axesPDF® user interface

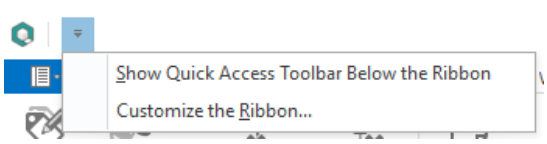
The following screenshot shows the layout of the user interface as it appears when you first start axesPDF®.



1. Quick access toolbar
2. Toolbar ribbon with tabs for each group of controls
3. Logical Structure Tree task pane on the left side
4. Document view in the center pane
5. Task pane on the right side, with tabs for Properties, Settings, Checker, Role map, and Destinations
6. Preview

Quick access toolbar

The Quick Access toolbar is like the Microsoft Quick Access toolbar. You can use it to control the program window or customize the ribbon.



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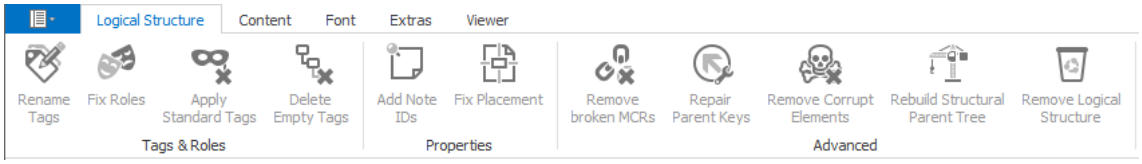
Toolbar ribbon tabs

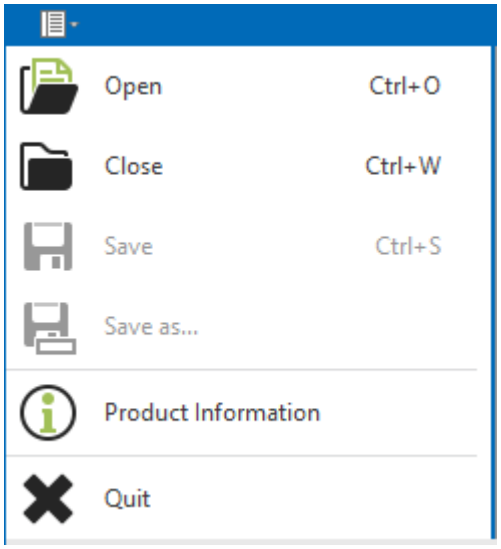
The axesPDF® toolbar ribbon includes several tabs that contain the tools you need to check and remediate PDF documents.



Main menu

Use the main menu to open, close or save files, to read the product information, or to quit axesPDF®.

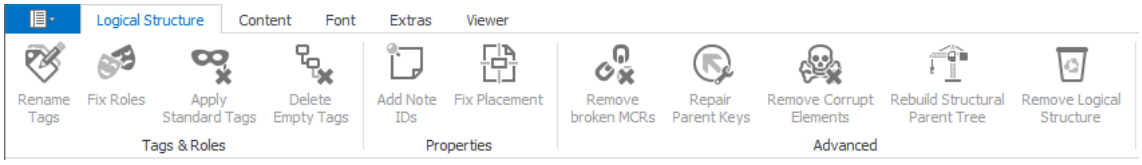
To open the main menu, click .



Logical Structure ribbon tab

The Logical Structure ribbon tab is organized into three groups of controls that you can use to fix structure-related issues in your PDF documents.

- Tags & Roles
- Properties
- Advanced



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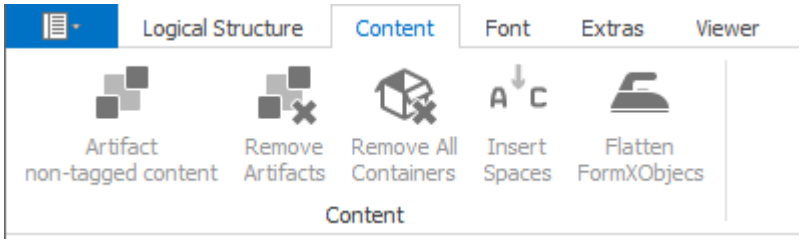
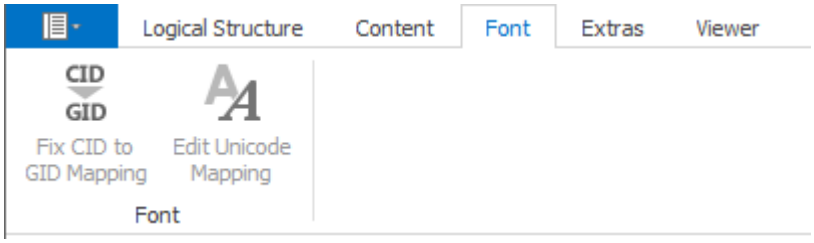
Content ribbon tab

Use the controls in the Content ribbon tab to solve problems with the PDF content.



Font ribbon tab

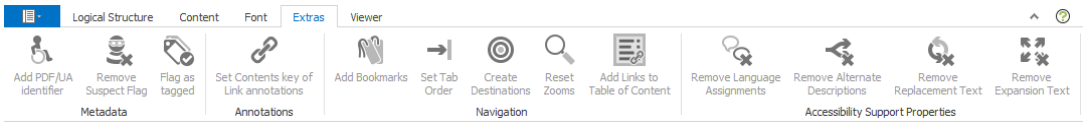
Use the controls in the Font ribbon tab to solve font-related issues; for example, to correct Unicode mapping issues.



Extras ribbon tab

The Extras ribbon tab is organized into four groups of controls that you can use to fix issues in your PDF documents that are not related to the structure or content.

- Metadata
- Annotations
- Navigation
- Accessibility Support Properties



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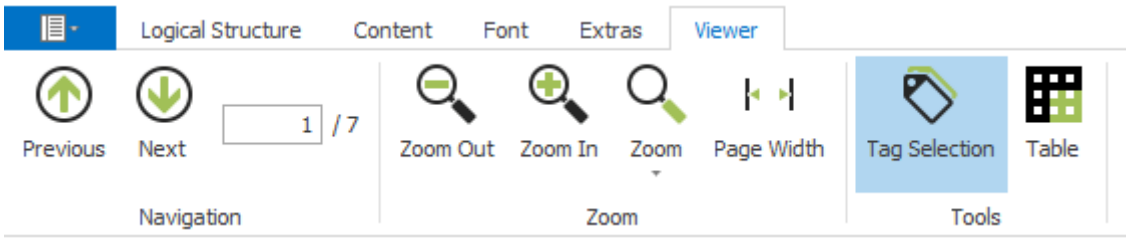
Viewer ribbon tab

Use the controls on the Viewer ribbon tab to navigate your PDF document or zoom in and out. You can also switch between the Tag Selection tool and the Table tool.



Document view

The **Document** view is the default view of the PDF document that you are working on.

If you select a structure element in the **Logical Structure Tree** pane, or select an error in the **Checker** task pane, the corresponding element is highlighted in the **Document** view.

Use this view to:

- Review the presentation of your document
- Navigate the document
- Evaluate the logical order - using the **Logical Structure Tree** pane
- Analyze accessibility issues – using the **Checker** task pane

Logical Structure Tree pane

The logical structure of your PDF document is displayed in the form of a structure tree. You can review the structure from the highest to the deepest level by expanding and collapsing each level of the tree.

When you click a tag in the structure tree, the corresponding area is highlighted in the Document view.

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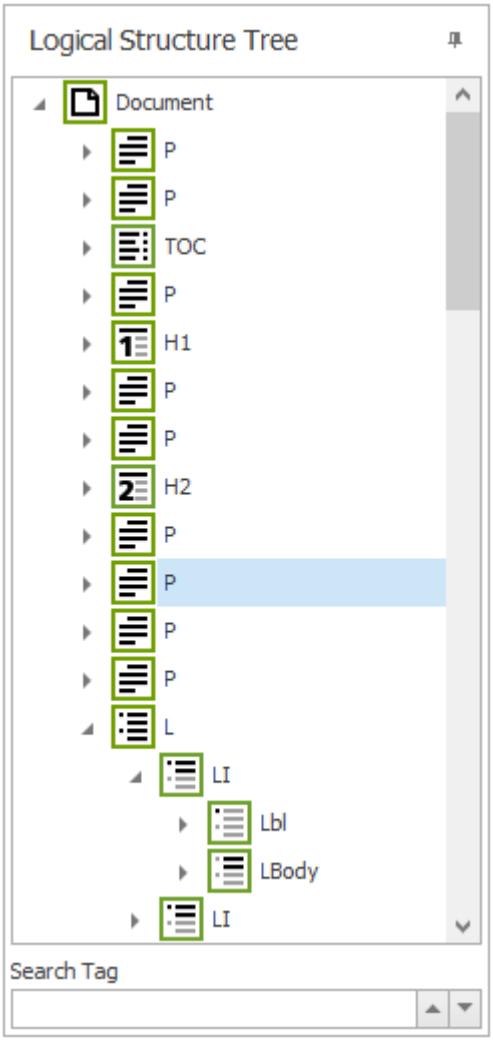

You can also edit tag names by double-clicking the tags and use the Search Tag field to search for specific tags in the structure tree.

Task panes

There are several task panes that you can use to view the results of a PDF/UA check, and to edit the properties, settings, and tags in your PDF document.

Properties task pane

The Properties task pane shows all the properties and attributes for the tag that you select in the Logical Structure Tree pane. You can change all properties of the selected tag, including the structure type.

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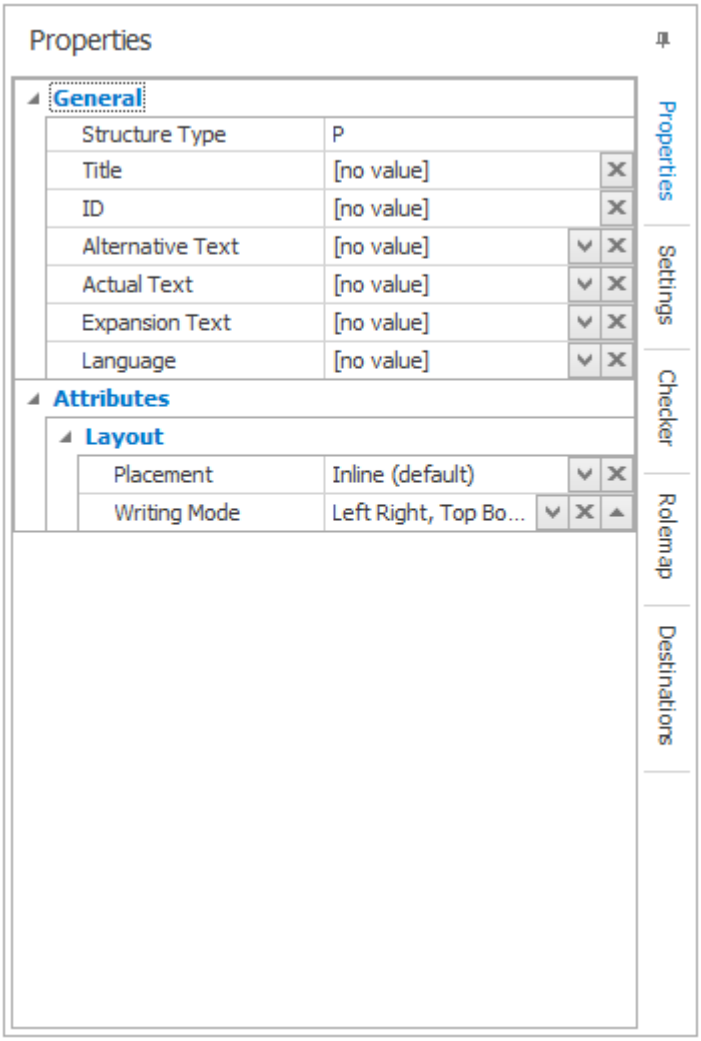

Settings task pane

Use the Settings task pane to specify several general settings for your PDF document that are relevant to the starting view or the assistive technology used to access the document.

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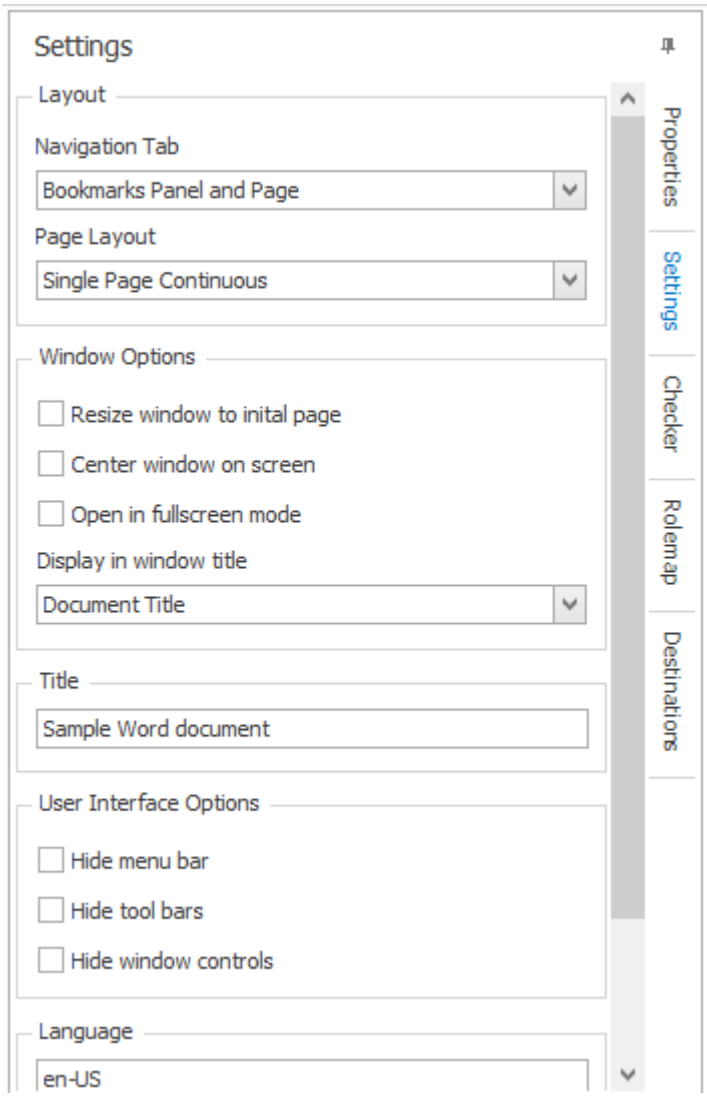

You can click **Default** to set standard values for layout, window options and user interface, which are preferable for accessibility. The default settings include:

Layout

- Options for navigation tab: Bookmarks Panel and Page
- Options for page layout: Single Page Continuous

Window Options

- Resize window to initial page: Not activated
- Center window on screen: Not activated
- Open in full screen mode: Not activated
- Options for window title: Document Title

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User Interface Options

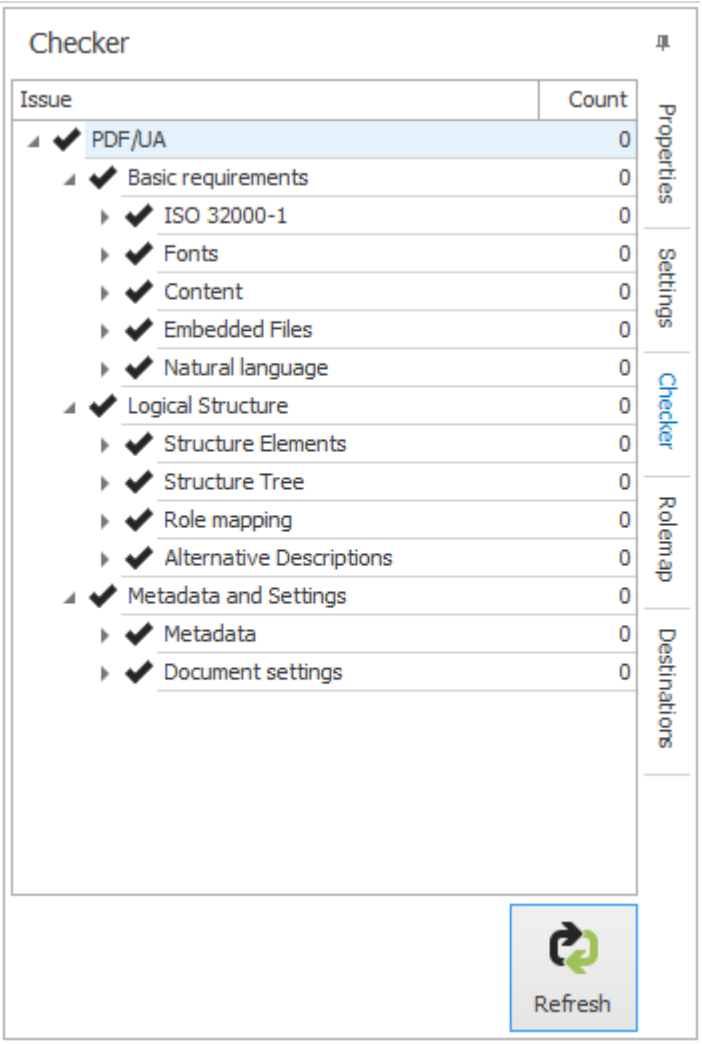
- Hide menu bar: Not activated
- Hide tool bars: Not activated
- Hide window controls: Not activated

You must also specify an individual title and the language for the document. The title will also be the Window title, and the language will be used if no other language is defined at the tag or content level.

Checker task pane

Use the Checker task pane to check your document for PDF/UA issues. When you first open the document, click **Refresh** to perform the analysis and view the list of issues.

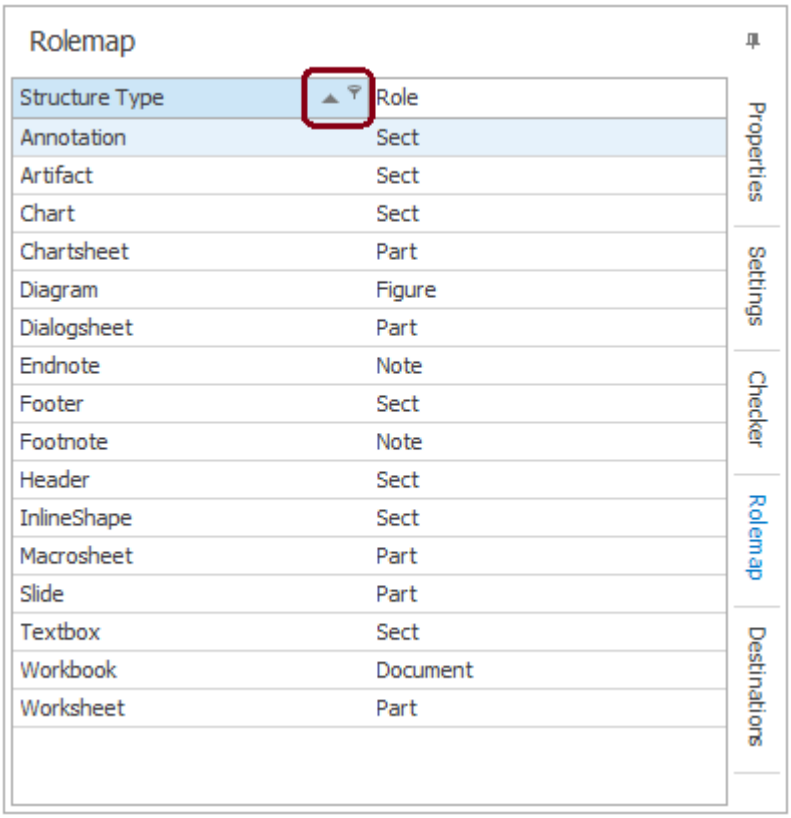
The error messages are organized in categories. You can expand each category to see the specific issues.



Double click on an error message to see the corresponding issue highlighted in the **Document** view and in the **Logical Structure Tree** pane.

Role map task pane

Use the Role map task pane to review role mappings in your PDF document.



You can also sort and filter the items in the Structure Type and Role lists.

Destinations task pane

Use the Destination task pane to review the targets of the internal links and the associated structure elements in your PDF document.

Preview panel

Use the Preview panel to see the content of your PDF document as it is presented to a screen reader or assistive technology. You can use the Preview panel to visually check the logical order and the presentation of the content.

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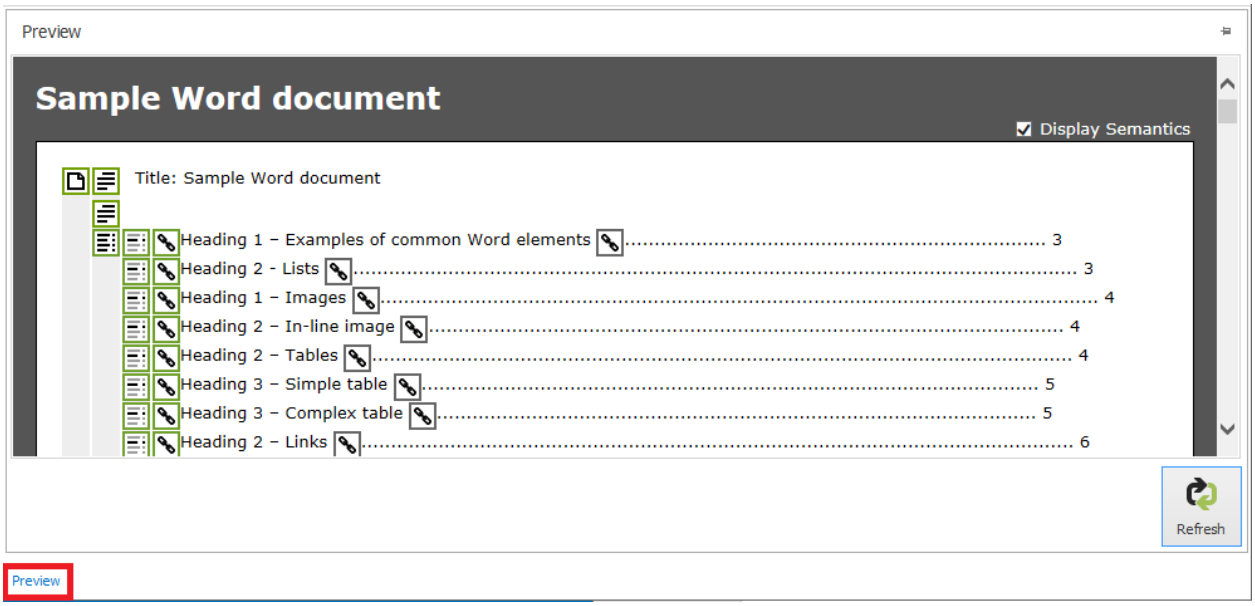

In the Preview panel, the different structure elements are represented by symbols. For more information, go to this article in the Help Center[7].

Checking your PDF document

As the document author, you must evaluate the PDF document for compliance with the PDF/UA standards. Although the PDF/UA standards clearly define the requirements for accessible PDF documents, there are no authoring software applications that fully support PDF/UA. This means that, when you check your document, you often find hard-to-fix errors, which you must manually fix in the PDF document.

Usually you start with the PDF/UA check. Then you examine the errors, choose the corresponding commands, and make the corrections.

To check your PDF document:

1. Open the file in axesPDF®.
2. In the task pane, on the Checker tab, click **Refresh**.

   The results are displayed, and they are organized in a hierarchy.

[7] https://support.axes4.com/hc/en-us/articles/360008791960-Overview-of-the-symbols-in-the-screenreader-preview

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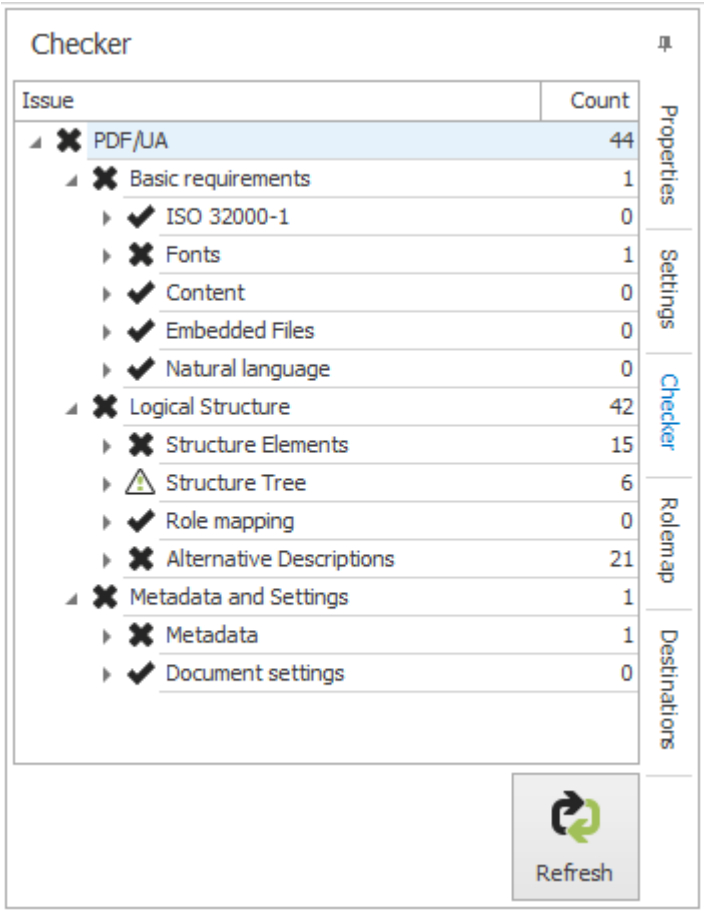

Visually inspect your PDF document

Tools like axesPDF® evaluate your PDF documents for compliance with PDF/UA, but they cannot check for all the requirements. For some requirements, you must visually inspect the document.

You visually check:

When you review the document, check for the following:

- Logical reading order
- Appropriate use of semantics and tags
- Possible accessibility issues like the use of hyphenation, or that words and passages in other languages are marked

You can use the Checker task pane and the Preview panel in axesPDF®, or the Screen reader Preview in PDF Accessibility Checker (PAC). These tools offer a simplified structure view so that you can do a visual check very easily and without deep knowledge of PDF structure elements.

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Fixing PDF/UA problems

Basic requirements problems

Content

Problem: “Artifact present inside tagged content”

A marked content element that is referenced by the logical structure contains a nested artifact.

To fix this issue:

1. Remove all the artifacts by opening the **Content** ribbon tab and clicking **Remove Artifacts**.
2. Mark the content elements again by clicking **Artifact non-tagged content**.

Problem: “Tagged content present inside an Artifact”

There is a marked content container with a MCID that is nested inside an Artifact.

There is no standard method for fixing this error; you must examine the affected content.

If the related element is marked content that is not referenced by the logical structure:

1. Move the content out of the container.
2. Remove the empty marked content container by opening the **Content** ribbon tab and clicking **Remove Artifacts**.

Problem: “<Type> object not tagged”

The following types of objects can trigger issues if they are not tagged:

- Image objects
- Path objects
- Text objects

To fix these issues:

1. Determine if the object that is not tagged is relevant content.
2. If the object is relevant to the content, then add the required tag.
3. If the object is not relevant to the content, then make it an artifact by opening the Content ribbon tab and clicking **Artifact non-tagged content**.

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Natural language

Language assignments can be set on three different levels in a PDF document:

- Document level
- Structure level
- Content level

If the natural language for a document cannot be identified during a PDF/UA check, the then it cannot be determined for the following type of content in the document:

- Outline items
- Text objects
- Actual text
- Alternative text
- Alternate name of a form field
- Contents entries

To fix this issue:

1. In the **Settings** task pane, in the **Language** field, enter the required language code. For example, use "en-GB" for British English, "en-US" for US English or "de-DE" for German.

Logical Structure problems

Alternative Descriptions

Problem: “Alternative description missing for an annotation”

An alternative description about the destination of a link is missing.

To fix this issue:

1. Add an alternative description by opening the **Extras** ribbon tab and clicking **Set Contents key of Link annotations**.

An alternative description is added to every link tag.

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Notes

Problem: “ID missing in Note structure element”

There are Note-Tags without ID.

To fix this issue:

1. On the **Logical Structure** ribbon tab, click **Add Note IDs**.

Role Mapping

Problem: “Non-standard structure type “Story” is neither mapped to a standard structure type nor to another non-standard structure type”

Every non-standard structure type must be mapped to a standard structure type. This mapping is missing from the document.

To fix this issue:

1. On the **Logical Structure** ribbon tab, click **Fix Roles**.
2. In the **Fix Role mapping** dialog box, map every non-standard structure type **Story** to the standard structure type **Sect**.

Problem: “Standard structure type ‘(0)’ is remapped to ‘(1)’”

There is a Standard structure type that is remapped to another structure type. According to the PDF/UA standard, this is not allowed.

To fix this issue:

1. On the **Logical Structure** ribbon tab, click **Fix Roles**.
2. In the **Fix Role mapping** dialog box, delete the mapping of the standard structure type by clicking the corresponding “X”.

Problem: “Structure type 0 is mapped in a circular fashion”

Why is this an issue?

There is a Standard structure type that is remapped to the same structure type. According to the PDF/UA standard, this is not allowed.

To fix this issue:

1. On the **Logical Structure** ribbon tab, click **Fix Roles**.
2. In the **Fix Role mapping** dialog box, delete the mapping of the standard structure type by clicking the corresponding “X”.

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Structure Elements

Problem: “First heading is not on the first level”

In every document, the first heading must be an H1. Heading levels must not be skipped; for example, an H3 must not follow an H1.

To fix this issue:

1. In the **Logical Structure Tree** pane, double-click the first tag heading and change it to “H1”.

Problem: “Table header cell has no associated subcells”

In a table, there are header cells (<TH>) that do not have associated data cells (<TD>).

Programs like screen readers cannot recognize the relationship between the header and the data cells.

To fix this issue:

1. In the **Checker** task pane, double click the error message to move to the corresponding header cell. The header cell is also highlighted in **the Logical Structure Tree** pane.
2. For a simple table, in the Properties task pane, set the correct scope of the selected header cell.
3. If table header cells do not apply for a whole column or row, you have a complex table. In that case, you must set the reference between header cells and data cells by using header IDs. In the Viewer ribbon tab, click **Table**.

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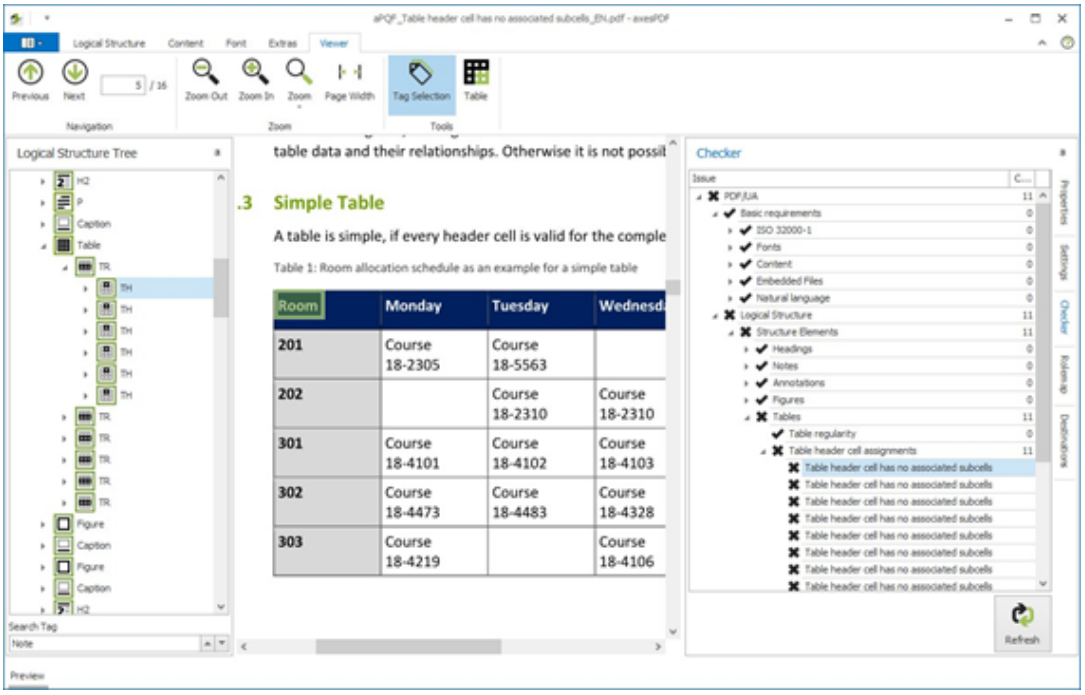

Problem: “Figure element on a single page with no bounding box”

The bounding box of a figure is missing, so the figure cannot be rendered correctly in alternate presentations.

To fix this issue:

1. In the **Checker** task pane, double-click on error so that the related figure and figure tag is highlighted.
2. In the **Properties** task pane, add a bounding box by clicking the "+" for one of the empty attribute fields; for example, the attribute "Left". The correct bounding box is automatically created.

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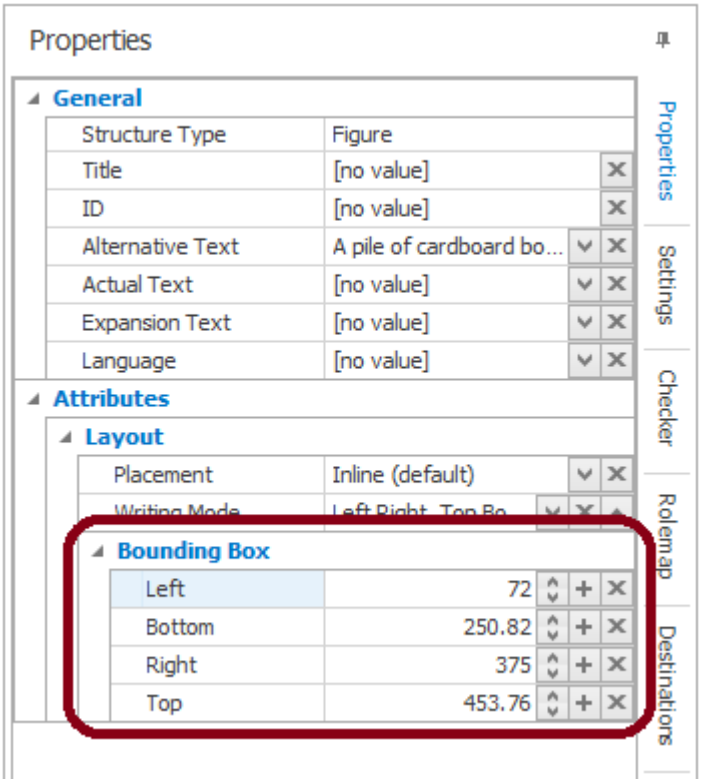

Problem: "Link annotation is not nested inside a Link structure element"

There is a link annotation that is not part of a link tag. In the logical structure, it is the OBJR element.

To fix this issue, add the required tag using a PDF tag editor.

Problem: "Numbered heading skips one or more heading levels"

The heading hierarchy in a document is not structurally correct. One or more heading levels is missing.

To fix this issue:

1. In the **Checker** task pane, double-click on the error so that the related heading and heading tag are highlighted.
2. To change the name of the heading tag, on the **Logical Structure** ribbon tab, click **Rename Tags**, and in the **Rename Tags** dialog box, type a new name for the selected tag.

You can also manually edit the tag name in the Logical Structure Tree pane.

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Structure Tree

Problem: “Art structure element used as root element”

The document contains an Article structure element that, semantically, is not used correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. Click the tag and enter a semantically correct root tag name; for example, "Document".

You can also create a new root tag "Document" in a PDF tag editor and then nest all other tags under it.

Problem: “Div structure element used as root element”

The document contains Div structure elements that, semantically, are not used correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. Click the tag and enter a semantically correct root tag name; for example, "Document".

You can also create a new root tag "Document" in a PDF tag editor and then nest all other tags under it.

Problem: “Document structure element found which is not a root element”

There are Document structure elements in the document that are not used correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. Click the tag and enter a semantically correct root tag name; for example, "Part".

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Problem: “Part structure element used as root element”

There are Part structure elements in the document that are not semantically correct.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. Click the tag and enter a semantically correct root tag name; for example, "Document".

You can also create a new root tag "Document" in a PDF tag editor and then nest all other tags under it.

Problem: “Possibly inappropriate use of a Figure structure element”

Some figure tags in the document are not used correctly. In most cases, it is due to the placement attribute.

The figure tag is an inline level element. If it is used as a block level element, the attribute “Placement: Block” is required. Otherwise, some assistive technologies are not able to present it correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. On the **Logical Structure** ribbon tab, click **Fix Placement**.

Problem: “Possibly inappropriate use of a Form structure element”

Some form tags in the document are not used correctly. In most cases, it is due to the placement attribute.

The form tag is an inline level element. If it is used as a block level element, the attribute “Placement: Block” is required. Otherwise, some assistive technologies are not able to present it correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. On the **Logical Structure** ribbon tab, click **Fix Placement**.

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Problem: “Possibly inappropriate use of a Formula structure element”

Some formula tags in the document are not used correctly. In most cases, it is due to the placement attribute.

The formula tag is an inline level element. If it is used as a block level element, the attribute “Placement: Block” is required. Otherwise, some assistive technologies are not able to present it correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. On the **Logical Structure** ribbon tab, click **Fix Placement**.

Problem: “Possibly inappropriate use of a Note structure element”

Some note tags in the document are not used correctly. In most cases, it is due to the placement attribute.

The note tag is an inline level element. If it is used as a block level element, the attribute “Placement: Block” is required. Otherwise, some assistive technologies are not able to present it correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. On the **Logical Structure** ribbon tab, click **Fix Placement**.

Problem: “Sect structure element used as root element”

There are Section structure elements in the document that are not used correctly.

To fix this issue:

1. In the **Checker** task pane, double-click the error. The corresponding tag is highlighted in the **Logical Structure Tree** pane.
2. Click the tag and enter a semantically correct root tag name; for example, "Document".

You can also create a new root tag "Document" in a PDF tag editor and then nest all other tags under it.

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Metadata and Settings problems

Document Settings

Problem: “DisplayDocTitle entry is not set”

The file name is set as the window title; it should be the title of the document.

To fix this issue:

1. In the **Settings** task pane, click **Default**.

The standard settings for accessibility are applied to your document and the document title is set as the window title.

Problem: “Tab order entry in page with annotations not set to S”

The setting that specifies that the tab order should orientate on the logical structure is missing for one page, for several pages, or for the whole document.

To fix this issue:

1. On the **Extras** ribbon tab, click **Set Tab Order**.

Metadata

Problem: “Title missing in document’s XMP metadata”

The document is missing a title.

To fix this issue:

1. In the **Settings** task pane, in the **Title** field, enter the title of the document.

   You can also add a document title using a PDF editor.

Problem: “PDF/UA identifier missing”

The document is not marked as compliant with PDF/UA by the required XMP file.

To fix this issue:

1. On the **Extras** ribbon tab, click **Add PDF/UA identifier**.

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Glossary

Here is a list of terms used in the tools that you use to create and test PDF documents.

Anchor	Assignment of a figure or a text box (which are not used inline) to a paragraph in the main content. The anchoring defines the position of the element in the logical structure tree.
Artifacts	All elements in a document that are decorative and/or are not relevant content. Artifacts are not part of the logical structure tree and are not processed by assistive technologies. Examples include background images, page numbers or text in headers and footers, and printer's imprints.
Assistive Technologies (AT)	Technical aids that people with disabilities use to consume digital content. Examples include screen readers or Braille displays.
Button	An interactive element that performs a specific function or starts a tool.
Caption	Text that describes a table or a figure. Captions are positioned below or above the corresponding element and are often numbered. In Microsoft Word, you can create tables of contents based on these captions.
Context-sensitive	A representation or a function that is displayed differently, depending on the context.
Data table	A grid or matrix that is used to present data.

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Definition list	A special form of list with individual labels. Each label can be an expression or an abbreviation. The related list entry provides the corresponding explanation.
Destination (new)	A structure element that is the target on an internal link.
Dialog box	An element of the user interface that appears after starting a function. It requires interaction, such as an input or confirmation. An example is the window that you use to edit Unicode mappings in axesPDF®.
Element	Generic term for all possible objects in a document, including paragraphs, figures, formulas, etc.
Figure	Generic term for all pictographic objects in Microsoft Word.
Layout table	A table that is used for layout purposes, rather than for the presentation of data.
Linearized view	A view of contents that are ordered sequentially – one after another.
Link	Connection between a source element (text or figure) and a destination element (footnote, endnote, reference, website, or email address.)
List continue	Further paragraphs within one list item.
Logical document structure	The hierarchical structure of all the tags in a document. This structure does not necessarily correspond with the appearance of the document, but with the division into meaningful units and elements.

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	The logical document structure is the basis for a machine-readable document. It is also a precondition for an accessible document. A PDF document that has a logical structure is called a “tagged PDF”.
Logical order	An unambiguous linearized order of all content elements so that there is a logical information flow. The logical order results from the logical structure tree. It is independent of the position of the object on the respective page, even though logical order and visual positioning should ideally be identical, particularly in documents with a simple layout. You can check the logical order by viewing the structure tree. The logical order corresponds to the reader order, which is important for assistive technologies.
Machine-readable	Structured data that is can be processed by a machine, such as assistive technology. Tags are used to structure the data. See also: Tag
Multilevel list	A list that contains more than one outline level. Also referred to as a nested list.
Table header	Heading of a data cell, column, or row in a table. A data cell has a corresponding column heading or row heading, which helps you understand its purpose and content.
Tag	Tags are invisible labels that mark content elements as a special structure types; also called semantic markup. The tags indicate the role of

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	each content element in the context of the document.
Task pane	A task pane in the user interface shows a specific perspective of a document and provides options for analysis and evaluation, editing, or for changing settings.
Text box	A container for text that can be positioned anywhere in a document.
Tool group	A group of tools that is available in the ribbon tabs. Each group of tools has a common theme; for example, the **Document** tool group.

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