The Wild West of PDF Remediation Transcript

Glen Schubert
Okay, everybody, I appreciate your time. We all enjoyed the previous session, and in that we learned a lot. We're going to go through a couple of things from Braille Works perspective that we've learned in the dozen years or so that we've been remediating PDF Documents Brief History on Braille Works. We started obviously as a Braille company, but now we have an entire division that does nothing but remediating documents to the week at standard PDF Standard and the HHS standard.

When we talk about document remediation, one of the things that we've learned and we phrase that the Wild West of PDF remediation is that there's not an overwhelming resource out there that guide you through this process. So you're out there kind of on your own. When we talk about finding a PDF remediation vendor and I apologize for, I went into the Wild West, it's much like navigating the Wild West, You know, you're out there looking around.

There's not solid structure everywhere on who's good, who's not, and you need to find a company that will guide you through the process of making your documents accessible and be reasonable. And by and by not, I mean, there are some companies that are, you know, using nothing but overseas resources. You have companies that use nothing but auto timing resources.

Here. It really works. We don't use anything outsourced, but we use a combination of tools, both automated tagging and manual tagging. So why is it so hard to find a vendor? The Web sites all look great. I think you heard me mentioned in the previous session groups that we refer to as aggregators. They just gobble up PDF documents.

They hand them to another company to remediate. They hand them back to you, but on their websites they look great. They use the right buzzwords, They offer a certificate of compliance, but they don't actually make the PDFs accessible. They get close. And in some cases some of the tagging is correct, but it's not 100%. For some reason, when I'm clicking on, there we go.

Well, we went the wrong way. Let's go back up. There we go. The reason for that is there is a lack of regulation in this industry. We don't have a governmental body certifying anything. We have some companies providing some guidance, but we don't have a true resource that says these guys know exactly what they're doing. They know how to properly remediate documents.

There are some private companies that have put up standards and it's it's kind of an area that's evolving in PDF remediation. But again, going back to the fact that these companies can create

beautiful websites and it looks like they know what they're doing, if you don't know the ins and outs of document remediation, it can be very easy to be fooled.

So without a share of policing, the bad guys can be outlaws, roam free. Moving along, I thought, There we go. Let's try again. No, this is running, so I apologize for this. Accessibility checkers are very little help. They do help a little, like I say. But the word little is important here. Why? They don't help. The accessibility checker report isn't enough.

So, for example, I could take a PDF that has some tables. That has lists. I can put everything under a P tag the paragraph tab, and it'll pass the checker. We see this all the time in the industry, companies forcing the document to pass the checker, not doing the work to make the document compliant. And that's a big deal.

It's a huge deal. And the reason I say that, let's see if this slide is going to change for me. There's a lot of technology almost. There we go. The reason this is so important is because you look at the report and you say, Hey, this thing is accessible, but their tags aren't present. The existing image doesn't have all text color.

Contrast ratios aren't checked. It doesn't check to see if your URLs are actually present or they go to live links. So you end up with a report that's essentially useless. You could have a report saying this document is awesome. It passes the checker 100%, but you run it through Jaws or another screen reader and you find out you can't navigate it, you can't read lists, or you don't know how many items are in the lists.

The tables read left to right, top to bottom. So you have no idea what's in each cell. It's just ridiculous. And we you know, we do. Okay. Keep that logo up there. Or the icon says the Wild West of media for mediation. And this is one of the reasons it is so easy to force a document, pass a checker, and you think you've got something reliable when you don't.

There we go. There we go. Accessibility checkers can't check your list. Your bullets are headings. Are they incorrect tags Again, Image Alternate text. Is it correct? Do the links go to the URL? I'm going through a list here hoping. Okay. Now why does all this matter? We've talked a little bit about it, but let's go a little more into detail.

This matters for I guess the biggest reason is that you are responsible for your documents being compliant, not your vendor. And I know we've heard comment that the vendor will stand behind it and yes, we stand behind it and we will. But essentially, your company is on the line. You can have a vendor give you documents that are non-compliant and you post them on your website.

They're not going to come back to the vendor. You may have recourse based on your contractual relationship, but you may not. And if you buy cheap document remediation and you post them on the website, they're going to look to you as the brand and you as the company. It'll affect you sort of in the in the accessibility world.

It'll affect you in terms of your marketing, your ability to reach your customers. It all lands on you. Even though you had a vendor tell you this document was inaccessible, How do we spot the outlaws? Now this is is kind of important because it's it's easy to think I found somebody, but I don't necessarily know. One of the things that we find is they will tell you it's always a flat page rate.

I can tell you from experience, and I'm not a person who remediate, but I've talked extensively with our team and are subject matter experts. If I have a forms page with 100 forms a form fields in it, and I've got to enter tooltips and I've got to put in varying ranges of things that can be put into that form field, I've got to go to every single one of those on a page.

We have forms that have 100 fields on a form that is radically different from tagging something that has three paragraphs of text. It's labor wise, gigantically different. So when you look out there, look very carefully. I mean, if you're providing very simple documents and you're quoted a flat page rate for just this type of content, that's one thing.

But we hear from companies and we've seen companies in bidding opportunities where they throw out a flat page rate for everything regardless. We heard earlier one of the speakers talking about OCR is different because there is another process. There's extra labor involved, so watch out for that. You will get people that will say, We'll do your whole library for X dollars a page if you run into that, run fast, run far.

They don't know what they're doing. If they did, they would understand that remediation of a very complex page can take hours in some cases, and remediation of a simple page could take minutes. So watch for that. They don't correct color. Contrast is the next item. We see this over and over and over again. We get documents and obviously we see the work of other providers because people send documents to us for evaluation and they haven't touched color contrast yet.

They have a certification that this is we can compliant watch for that. They also ignore images of text. The OCR I mentioned earlier, those documents that to a sighted reader look like text. I can read them, you can read them, but when you click on them that text content turns blue. There's no actual text there and a screen reader won't read it, so they'll avoid that.

You won't see anything in terms of OCR being done by these companies. Let's see if this is going to take it will take another way, other ways to spot the outlaws. They don't manually check the PDF for compliance. There are a number of manual steps that has to be done in order to certify this document is compliant and they have no mechanism to do it.

They rely solely on software. And we heard Rob talk about that earlier, that the automated taggers can create an okay document but not a compliant document. And the standard is compliance. A lot of these places will offer an instant turnaround. You can be assured they're not manually checking. They don't have the time to do it in that. And then they're using overseas resources.

Watch for that because a lot of contracts have restrictions in them saying you can't use overseas resources. And one of the latest tricks in the industry is to set up a server in the U.S., have an overseas resource to log in to that server and didn't do the work there, claiming, it's all done right here in the U.S. on a technical level, maybe.

But watch for that. Again, there's nobody regulating this. So you have to be careful. Put your vendors to the test. And this is what we always encourage people to do when you're shopping for a vendor, create a 3 to 5 page document a PDF document with complex components. You want tables, you want lists, you want poor color contrast, you want links in there, you want things that they have to go check.

And if they don't go check them, you're going to know it. You're going to know it pretty quickly. Send that document to your finalists, the people that you say, Hey, okay, I'm down to these few and have them remediated. It's a service that we provide. I know most companies will offer to provide it. Don't send them a 200 page document to be remediated.

You know, that's not fair to the vendors. Make it a small document, but a small document with complex components. And then we're here to help. You know, obviously, we're here presenting some things for you to watch out for. But a lot of this is self-serving. We have a team that is dedicated to PDF document remediation. They train, like I mentioned in the beginning, around on the video from from tier one, level one, remediate or up to a subject matter expert.

It takes years to get there. So on our team, what we'll do is if you're still unsure, send us one of the documents that you have had remediated. And hey, they say it's remediated. Let us take a look at it. We do this all the time and we end up doing a lot of work that was already done by other companies.

But we'll check the document. And I will say there are quite a few times where the document is compliant and we send back good news. This was great, but we want to we want to help you get through this. It's not you said it's partially self-serving, but our mission is to make the world a readable, more readable place.

One of our owners is totally blind, relies on assistive technology, relies on these tools to read the documents. So we do have a passion for this. This is is obviously a company situation, but it's not just purely a it's all profit. It's about getting these things. The documents, into the hands of the people that need them. So for this, we're offering a free PDF for mediation quality check.

There is a QR code on the screen. You can click through to that and upload your document to us or contact us and we can get in touch with you. We'd be happy to talk to you about it and any way that we can help, we are more than happy to. And I think I'm at the end of my.

Yeah, I am. There you go. That's our contact information. So after all of that, I'm going to ask Jess and our team what's next.

Jessica Sanders
Yep. If anybody has any questions, please put them in the chat. We'll be happy to answer them. But aside from that, that is the end of our presentation. All right. Yeah. It doesn't look like there's any questions. maybe there is more than. All right, So that's when we've had or when I've had. gosh. Since moving, when I've had PDFs or media before I received a test report from the PDF Accessibility Checker at WCAG AA.

I know it's free. What are your thoughts on this as far as reports go? And I'm going to turn this over to our subject matter expert Courtney to answer the newest fact checker is a pretty complete product product. If it passes those those checks, you're probably on the right track. Like Glen said earlier, there's going to be a bunch of manual checks that are still going to have to be done, but is probably headed on the right track.

In that case. All right. Next question. You talked about complexity of PDF form remediation. Can you discuss this more often.

Glen Schubert
Or do you have. Yeah, why don't you take that?

Jessica Sanders
Yeah, sure. PDFs can be had a large range of complexity. There can be it can be anything from a basic white background with black text on it, which would be a very low tier level, is what we call them on our end up to. Like Glen mentioned before, hundreds and hundreds of forms on the same page. So, so that tier level page would be a much more complex page and it would take much longer to remediate, much longer to test and so on and so forth.

Glen Schubert
So this is Glen, on that subject of storms and we've talked about it, we've talked about tool tips, we've talked about, you know, setting the range of items that can be entered in a form, feel the things that announce the forms to the individual. Can you talk a little bit about each of those components and how when you're creating that form, you know, they add they just add tying everything we do.

Jessica Sanders
Yeah. So compliance wise, you want to make sure that your tooltip is matching your the label that's on the document. When you auto generate forms, I can guarantee that it's not going to be complete. And in a lot of cases it will actually be incorrect. We go through and we test every single form as far as the tooltip goes and we actually type in every single form field to make sure that the letters are fitting inside the form field, that maybe the font hasn't been selected those too big.

So it can't be seen inside the font field. And then we also go into Jaws and we will listen to every single field to make sure that it's announcing properly to the end user.

Glen Schubert
Excellent. Excellent. There's the next question on forums. What is the best way to making a PDF form billable and is this compliant to use Adobe Pro to make the forms available?

Jessica Sanders
The short answer that is going to be it's going to take a combination of products. You can generate forms in Adobe on the tagging process in Adobe is very tedious, so that's really the big amount of time it's going to come. You know, it's, it's, it's going to be a combination of products, to be honest with you.

Glen Schubert
Okay. Okay. There's a question further down. I think I can take it. Since how do you deal with huge volume requests, Do you always rely on manual processing? We we have a process here that depending on the type of library, so forth, and I see that sort of as a qualified answer. If the documents are consistent things like statements, notices, things that have a fixed structure, those processes can be automated and rely on an automated tool because we do all of the groundwork in advance.

All of the manual work is built into a process for that specific document design. When we're doing a very large library and we've done a number of them, we'll work with the client on determining which of the documents are in priority order. We do have a combination of automated tools and manual checks, but in order to certify the document, some checks have to be manual.

There's not a way around that. So when we check documents, we're looking for things like color contrast, we're looking for you URLs, we're looking for things that to to us as a sighted reader, may not be that difficult. But to somebody who's using assistive technology, it is. So it's again, not just a11 size fits all. Not everything is is tagged on a manual basis.

We look at some health care documents in particular, and we have a document automation team programing team here as well, who can work with those consistently structured documents like provider directories, pharmacy directories, formularies, all of these list type documents have a similar structure from month to month as they release new versions, and those can be automated. So it's a combination, but there is going to be a manual step at some point in the document to confirm certain things.

Jessica Sanders
Great answer, Glen. We have another question. If asking if we can recommend products, we use proprietary in-house software. So we really don't have any products that we can recommend, but we are happy to take a look at your PDFs to let you know where where they need correcting.

Glen Schubert

Yeah, if I could add to that, one of the misnomers out there in the world is there are, you know, I get this software and suddenly I can remediate documents and we deal a lot with companies you know large corporations, municipality is big organizations that send their team to a remediation seminar on a weekend and they come back and they think these people should be able to just start tagging documents.

And as as we mentioned, as Jenny mentioned in her presentation, there's a steep training process for this. It's not something somebody learns and knows the depth of it overnight. It much in similar fashion. It takes months for people who are in our team to get to be a level one or remediation team member. And it takes, like I said, a couple of years to get to that subject matter expert.

So don't rely just on a product. It won't give you the guidance you need necessarily. It is an education that's needed. And then using various tools, like Jessica mentioned, we have tools that have been developed specifically by our programing department that makes things much faster and much easier for our team. But you still need the knowledge.

Jessica Sanders
Thank you for that.

Glen Schubert
Yeah, there's a next question is would it be better then to convert PDF forms to web forms? I really think that's that's more a decision at your IP level. They both have their benefits. You know, the benefit of the PDF form is that somebody can download that form, you can share that form email by email without them needing to go to your website.

They both have their place and it really depends on the application.

Jessica Sanders
That's great. So, well, it looks like that might be all of the questions that we have.

Glen Schubert
Could be.

Jessica Sanders
All right. We want to thank everybody for, there's another one.

Glen Schubert
Yeah. yeah, it does. It does. And it is. There is a whole knowledge base here and really appreciate that input. You know, we CAG is a great standard and following it is, you know, provides a great reading experience, a great user experience and knowing a few things, it's that old adage that a little knowledge is a dangerous thing.

And as a corporation, if you want to have a remediation department, that's great. But I can tell you here, it's very detailed work, it's very tedious work. We are in constant training. What we've got here. Are you hiring? The answer? That is typically yes, because it is something that people do work their way up and we do have a significant number of people working their way toward being a subject matter expert.

But we find that there are people who are attuned to this kind of work and there are people who are not just like everything else in life. And you find those people that are very detail oriented and they really like lining things up and it works great. But if you bring that or try to bring that in-house, where you're not a dedicated department, it's very difficult to maintain very time.

Yeah, I see your thing really that you do remediation in-house and it is hard to get folks to understand why it takes so much time. It's very detailed and that goes back to the watch out for the flat Patriots for everything, because as you know from your experience, paragraph tag's great all day long. You know, complex tables not so much.

So we watch for that and I think that's it. I appreciate all the positive comments, guys. We're here to help and feel free to reach out to us. Our contact information is on the screen or you can go to real work school. There's plenty of places to fill out a form to get in touch with us, as we mentioned before.

And if I scroll back, let's see if this will actually work. And now it's not going to go back to the page I want. There we go. There's the QR code. If you'd like to send a document, we're not going to do thousands and thousands of pages, you know, for the free remediation check. But send us a couple of documents.

Send us some some things that you've had remediated and we'll let you know. And we're happy to let you know if it's remediated properly. This isn't about, you know, telling you something that, you know, nit picking a document, but we'll tell you where it where it fails if it fails and if it's a success and to stay with that vendor.

So thank you very much. We really appreciate this opportunity and look forward to hearing from you.

Jessica Sanders
Thank you, everyone. Have a great day.