

**PDF-Access Meeting
Draft Meeting Minutes
January 11-12, 2005
National Federation of the Blind
Baltimore, Maryland**

Those in attendance included:

Bruce Bailey, U.S. Department of Education
Frederick (Rick) Bowes II, Consultant
Jon Brundage, TecAccess
Caesar Eghtesadi, AccenWorld Solutions
Mark Gavin, APPLIGENT, Inc.
Virginia Gavin, APPLIGENT, Inc.
Brad Hodges, National Federation of the Blind
Karyn Kortan, Criterion 508 Solutions
Ed McCoyd, Association of American Publishers
Mac McCuller, TecAccess
Michele Novak, Social Security Administration
Greg Pisocky, Adobe
Loretta Guarino Reid, Adobe
Paul Rosenfeld, SSB Technologies
Mary Smith, Batimaeus Group
Timothy Springer, SSB Technologies
Ann Taylor, National Federation of the Blind
Mike Taylor, Information Manufacturing Corporation
Paul Topping, Design Science, Inc.
Dariusz Tybor, Social Security Administration
Cari Welch, Houghton Mifflin Co.

Via Phone:

Angie Brook, Criterion 508
Joe Clark
Renee Georges, AIIM
Bank of Montreal
Duff Johnson, Document Solutions
James Jacobs, HP
George Kercher, DAISY Consortium
Bob Montengro, Alt Text Production

Brad Hodges welcomed the meeting participants to the National Federation of the Blind (NFB) Headquarters. The Federation is supportive of the efforts of the committee as they see it as bringing consistency to the technology.

NFB is largest org of blind. It is in the best interest of blind people that PDF format be accessible. The key elements of accessibility are that the technologies are universally accessible and consistent. NFB applauds Adobe's efforts to pioneer in accessibility and PDF. To that end, some items:

1. Universality and consistency of documents. A clearly understandable and definable set of standards for the creation of docs that they be accessible regardless of creation mechanism. Analogous to the HTML effort. One format, many ways to author it. Promulgate, disseminate and hold people to the standard. Cannot hold people to a standard that is not universally applicable
2. Now assess and evaluate the capacity of PDF creation software to create accessible PDF. We can look at a product and objectively measure.
3. Also guides and informs the various user agents, viewing techniques and strategies. Either Adobe reader or a blindness related product for instance such as a hand held note taking device. Particularly in instances when not based on Windows operating system.

PDF documents can be accessible. At the same time must be active and engaged in making the effort directly applicable and germane to individuals. Specifically of conversion of PDF documents to Braille in a way that is simple and an accurate translation. Ensure the PDF document is not a walled off city of its own. Accessed by whatever means the blind person chooses to use. Those are the primary features and objectives as being the desirable outcome in this effort. Why NFB is allocating facilities, staff time, and resources in the effort. Also want to farm the effort out and spread the results. That in a nutshell is our desire with this effort.

Betsy Fanning, AIIM provided an overview of the standards development process and AIIM's most recent projects. The involvement in developing PDF standards was highlighted. AIIM will share some slides about the process. For information regarding the other committees AIIM has, you may visit www.aiim.org/standards. Primarily the meetings will be via conference call with some face-to-face meetings. Once a draft has been developed, the committee may decide if it should be introduced at the ISO level. After the committee has made this decision, if it is to go to the International level, the document will be balloted to the US Technical Advisory Group (TAG) for approval to present as a US submission to ISO.

Several committee positions were discussed that will facilitate the movement of this project and the development of the draft. They include, project leader/editor who will be responsible for assembling and editing the document and facilitator/chair who is responsible for running the meeting. All committee members function as subject matter experts.

When a ballot is issued on a draft, only one vote per organization is permitted.

AIIM utilizes listserver software to facilitate the committee discussions between meetings. All meeting participants will be added to the committee list so that they may receive agendas, draft meeting minutes and document drafts. A web page will also be finalized and documents will be posted there to be used by the committee.

The committee will need to determine on which version of the PDF Reference to base this standard.

Mark Gavin, APPLIGENT, provided an overview of PDF and the work underway with PDF/Archive.

The committee reviewed the scope statement from the project proposal for the PDF/Access and the PDF/Archive Projects. The meeting participants explained what they and their company expect to get out of this standards development effort and why they were attending the meeting.

The following is a brief list from this discussion:

- Tag Set Adequate
- Footnotes, side bars, annotations, references
- Non linear document formats and the National File Format
- Real world use cases need to be taken into account
- View <http://nimas.cast.org>
- Web accessibility
- Tension between electronic and layout - print elements that do not have an easy conversion to alternate accessible formats
- Tags are what they are today – the committee decided that tags will not be part of what we do right now
- XML a syntax
- Workflow – MS Word to Layout, InDesign, Ventura, Quark > Printer PDF files. NIMAS designed to be a source standard. Publishers have their own DTDs. Multiple vocabularies acceptable if you can define the semantics behind them.
- Drive the definition of what the objects are and their use from an accessibility point of view

The work from this committee will need to be harmonized with what is happening in the web accessible community and point to related work rather than redevelop it.

The meeting was reconvened at 9:05 a.m. on January 12, 2005.

Each participant reviewed why the work of this committee was important to them and their company:

- Assist with the development of a process or API that will allow for the continued development of tools.
- Getting textbooks to people in a timely fashion using a common process
- Gain a better understanding of PDF internals
- Relation to areas of accessibility
- Math accessibility (create the equation for Microsoft)(MathML) have math to speech using screen writers(daisy and Nimas efforts involvement)
- NFB be the link between the application developers and guarantee that access to information is available
- Unified and optimal method to provide PDFs to the students
- Make sure standards are realistic for HM products
- Make technology more accessible and help the progress
- 5K documents and forms that are not accessible being converted – feel PDF- Access will be easier to use so that documents and forms are created accessible from the initiation
- Bringing a service bureau to the process
- Better understanding of PDF and working with IMC and fed clients to improve process and automation
- Have more tools to make accessible PDF
- All blind people have access to information when and where they need it
- Produce standards and document that are accessible
- Better connected to the process in the US as the problems are similar
- Influence UK government on accessibility and use of PDF
- (studied eBook spec and worked on that)
- learning about PDF and accessible PDF
- service company implementing accessible PDF and defining best practices for accessible
- producing materials for students that are alternatives to the printed word have over 1K files that are PDF but are not accessible for higher education
- Eliminate the middle man going from the publisher to the student
- 80% of students are learning disabled and use assistive technologies such as provided by Kurzweil products
- Service provider that has been asked to make documents compliant for other agencies (bookmarks are essential for accessibility to allow for skimming and importance of structurally marking the documents up, white text with a dark background for reflow

Some of the technical requirements that have been initially identified include:

- Relationship of technical standards and operational or terms of art – issues of tagging and explicit content rather than description
- International harmonization
- Procedure for authors on how to create an accessible PDF
- For user and creator of the PDF

The topics that should be included in the standard include:

- Annotation
- File Structure
- Tagging
- Fonts
- Multimedia
- Metadata
- Tables and table structure/layout, spreadsheets (interactive cells)
- Forms
- Read Order
- Input/Creation
- Mathematics
- Document Structure – headers, footers, chapters
- Security
- Navigational Constructs
- Harmonization or explanation of bookmark feature
- Searchability
- Granularity

At this time the committee will exclude 3D.

Governmental agencies and commercial entities are inquiring if PDF is accessible. If it is, it must be equivalent to those of normal eyesight to maintain the legitimacy of the document.

The committee discussed the format requirement and determined that it not lose the columns and centering. In essence the document must be an accurate representation of itself. The committee will need to consider document types as it drafts the standard as tagging requirements may differ.

An accessible PDF is a document that can be exported to XML and the national file format. Work is already underway in the area of textbooks. Other document types would take a similar approach as the textbook approach. It is important to be able to export good structure from PDF. This effort should not consider only structure but also rules.

As the project progresses, we need to identify the things that need to be mapped to and the third party accessible standards that we will be following and determine how we will map to them.

Adobe will provide an inventory of tags supported by PDF.

The committee formed four breakout groups:

- 1) Define the characteristics of an accessible PDF. For instance a statement that says in effect: An accessible PDF is
 - a. tagged,
 - b. all text within the file is searchable (not an image),
 - c. has a logical read order,
 - d. contains alternate text description for all graphics embedded within
 - e. is navigable

From each criteria we then describe the mechanism or construct for satisfying that criteria.

Participants in this group:

Jon Brundage

Paul Topping

Ann Taylor

Ed McCoyd

Cari Welch

Caesar Eghtesadi

Michele Novak

Dariusz Tybor

Mike Taylor

Brad Hodges

Bruce Bailey

Rick Bowes

Angie Brook

Duff Johnson

George Kercher

- 2) Define current objects in a PDF file (components at a lower level of granularity)
 - a. Text
 - b. Tables
 - c. Forms
 - d. Graphics

- e. Digital Signatures
- f. Multimedia
- g. Annotations

Participants in this group:

Michele Novak
Dariusz Tybor
Mike Taylor
Karyn Kortan
George Kercher
Rick Bowes
Duff Johnson

- 3) Determine what objects should be added, what might be appropriate for inclusion
 - a. Superscript
 - b. Subscript
 - c. Mathematics
 - d. Endnotes
 - e. Footnotes

Participants in this group:

Paul Topping
Virginia Gavin
Mark Gavin

- 4) Identify and disseminate current related accessibility standards
 - a. Web Content Accessibility Guidelines (WCAG 1.0)
 - b. DAISY
 - c. NIMAS

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Jon Brundage
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Cari Welch
Caesar Eghtesadi

Karyn Kortan
Mark Gavin
Brad Hodges
Bruce Bailey
Duff Johnson
George Kercher

George Kerchner provided an introduction to the Daisy Consortium which was formed in 1996. 12 full members, 50 associates and 15 friends. Example Canadian DAISY consortium has 10 organizations. RFBB, RNIB, etc. The standards are based on W3C existing technology since the web accessibility initiative was one of the four branches of the W3C. For more information on DAISY:

www.DAISY.org

www.loc.gov/nls/z3986

www.cast.org/nsf/nimas

<http://.nimas.cast.org>

It was recommended that the committee work under the framework. AAP fully supports NIMAS for K – 12.

Each of the breakout groups are to discuss their topics using the listserv. Once the group has come to consensus, it should produce a draft that summarizes and pulls together the groups collective thoughts. Each group should appoint a scribe or temporary project editor.

Upcoming meetings

Planned meeting May 18 at AIIM conference, May 17-19, 2005. Register for an exhibits badge at no charge by visiting www.aiimexpo.com. Do this prior to May 17.

Next meeting is to be held on March 8 and 9 beginning on March 8 at 9 and going until 4 then on March 9 running from 9 to noon at the National Federation of the Blind Headquarters in Baltimore.

To make it easier on the committee members, please preface listserv messages with the group number. Listserv address pdf-access@listserv.aiim.org

To subscribe email Renee Georges or Betsy Fanning. Participants have been subscribed.