codemantra

accessibilityInsight™

User Guide - Version 2.4.0

NOTICE

Table of Contents

Preface

About this Guide

This guide explains how to use accessibilityInsight (AIN), a secure cloud-based platform that combines machine learning and human intelligence to provide the most efficient solution for document accessibility compliance. AIN performs document validation and remediation to achieve accessibility compliance. This document explains how to complete the document validation and remediation process using the AIN application.

This guide explains the following processes available in AIN:

- Uploading documents

- Searching documents

- Filtering documents

- Validating the uploaded documents

- Remediating accessibility errors in the validated documents

- Assigning documents

- Viewing and downloading the accessibility validation report

- Viewing the document history

- Downloading accessibility error fixed documents and the accessibility validation report

- Deleting error documents (password-protected and corrupted documents).

Intended Audience

This guide is written for professionals who intend to use the AIN application to validate documents (PDF, Word, Excel, EPUB, and PowerPoint documents), fix, and remediate accessibility errors in PDF documents.

Using this Guide

The icons used in this document:

Icon	Description
	Provides additional important information.

Feedback/Assistance

To send us feedback or if you need assistance with AIN, please contact Customer Support at the email address **accessibilityhelpdesk@codemantra.com**.

1 Introduction to accessibilityInsight (AIN)

AIN is a secure, accessible, cloud-based platform combining machine learning and human intelligence to provide the most efficient solution for document accessibility compliance. AIN validates documents (PDF, Word, Excel, EPUB, and PowerPoint documents), fixes, and remediates accessibility errors in PDF documents. It also supports downloading the accessibility validation report and accessibility error-fixed PDF documents (remediated documents).

AIN performs the following two, core functions to achieve accessibility compliance:

Validation - validates PDF, Word, Excel, PowerPoint, and EPUB documents based on PDF/UA and WCAG standards and provides the accessibility percentage (pass percentage and fail percentage) of the validated documents.

Remediation – remediates PDF documents with machine learning suggestions both automatically as well as combined with human oversight and Alt Text writing and ensures accessibility compliance through PDF/UA and WCAG validation reports.

AIN supports the following three modes:

- **accessibilityCheck** – validates/checks uploaded documents (PDF, Word, Excel, EPUB, and PowerPoint documents) for accessibility errors and provides the accessibility validation report. You can also view or download the accessibility validation report.
- **accessibilityFix** - performs artificial intelligence (AI)-based accessibility prediction in the uploaded PDF documents and provides remediated PDF documents.
- **accessibilityReview -** retains all the existing tags, Alt Text, document properties, table summary, and the reading order in the documents. The User can manually add and manage tags, reading orders, Alt Text, and document properties in the Document Editor.

There are two modules in AIN where the major features and functionalities are housed. These are **My Documents** and **Document Editor**.

My Documents - you can upload documents, validate and remediate the documents, view and download the accessibility validation report, and download the remediated document.

Document Editor - you can add and manage zones, tags, Alt Text, view and manage bookmarks, and finally apply changes to documents.

1.1 Accessing accessibilityInsight

You can access AIN after receiving the activation mail on your specified email ID. Only the application administrator (from codemantra) can create user accounts. When the administrator creates an account for a user, the application sends the activation mail to the respective user.

1.1.1 Sign in

After receiving the activation mail, click the link to activate your account and set your password. On clicking, the application displays the Sign in page.
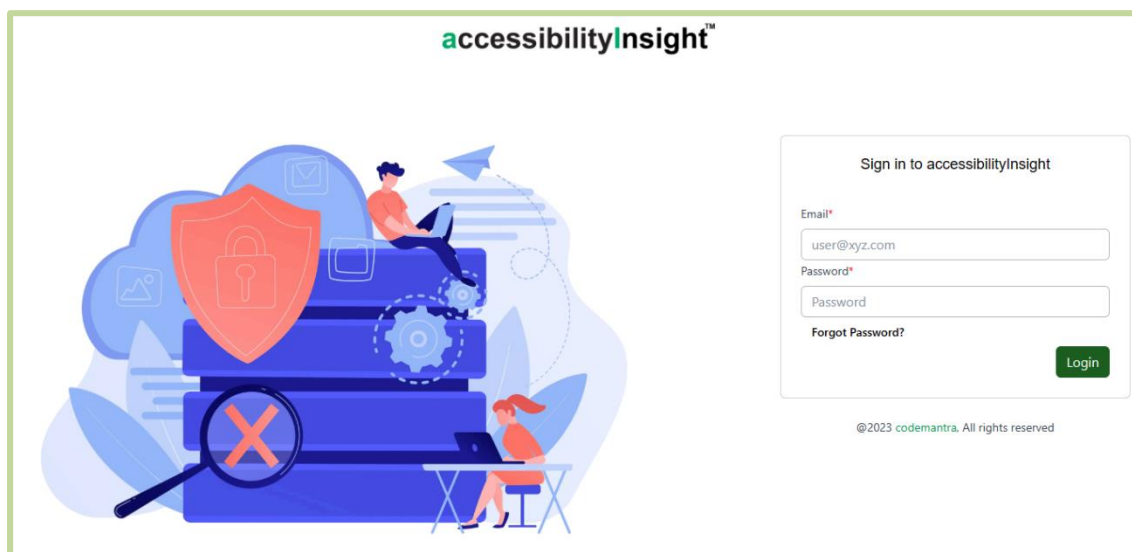

Figure 1 – Sign in Page

On the Sign in page, enter your email ID and password, and click **Login**. On clicking, the application displays the **Dashboard** screen.
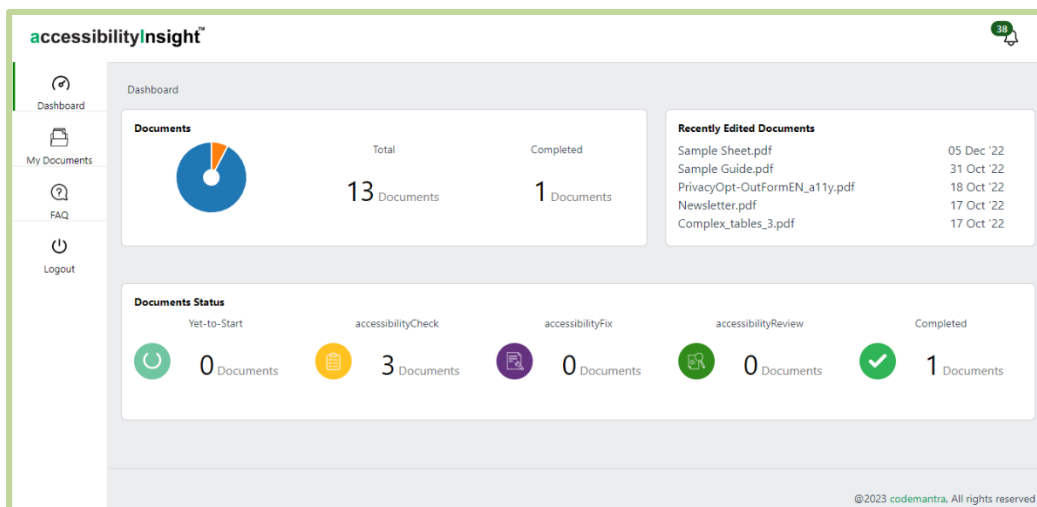
Figure 2 – Dashboard Screen

- After the first Sign in, if the popup blocker is enabled in the browser, the application displays a warning message to disable it.
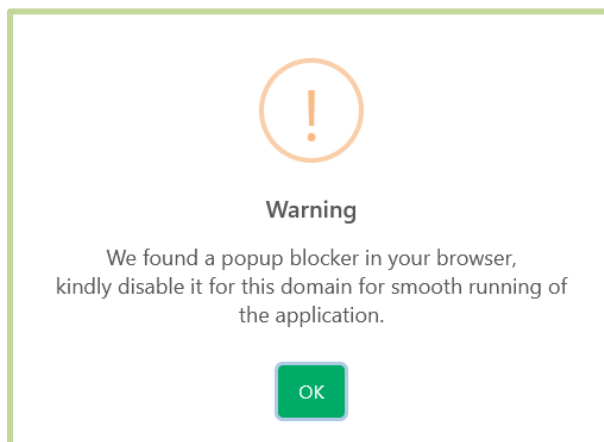

Figure 3 – Popup Blocker Warning Message

- You can access AIN a second time by directly entering your credentials on the Sign in page. To access the Sign in page, enter the provided application URL (**https://accessibilityai.codemantra.com/**) in a browser.

- The session timeout value is set at 30 minutes. When the session timeout value is reached, the application displays the warning message **Session Expired**. Click **OK** in the warning message. On clicking, the application automatically logs off.

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Figure 4 - Session Expired Warning Message
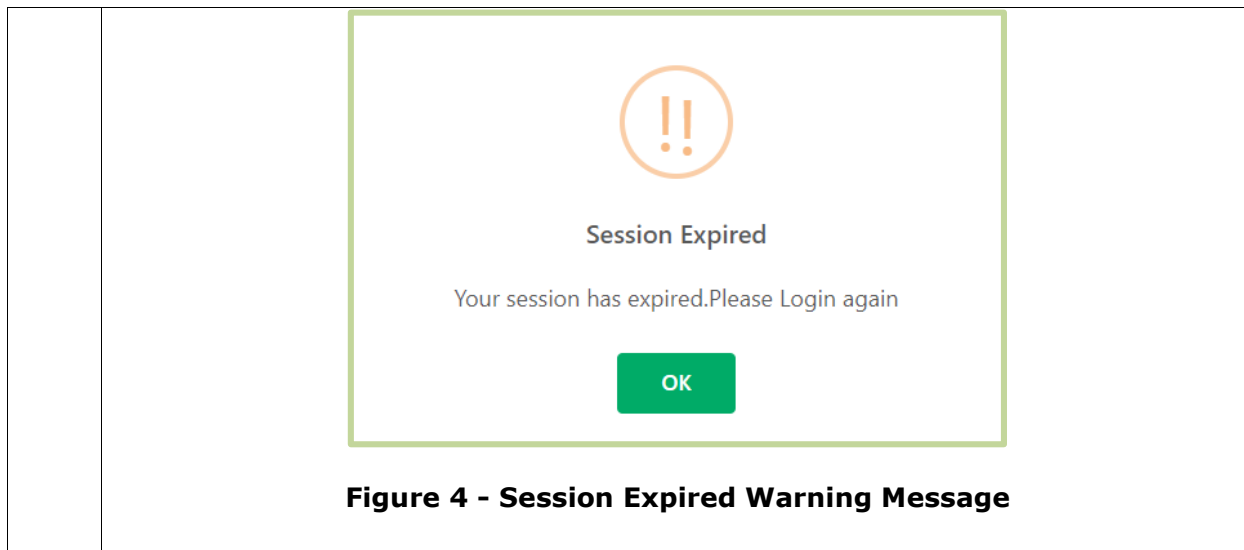
1.1.2 Resetting the Password

If you forget your password, click the **Forgot Password?** link available on the Sign in page. On clicking, the application displays the forgot password page.

Figure 5 - Resetting the Password
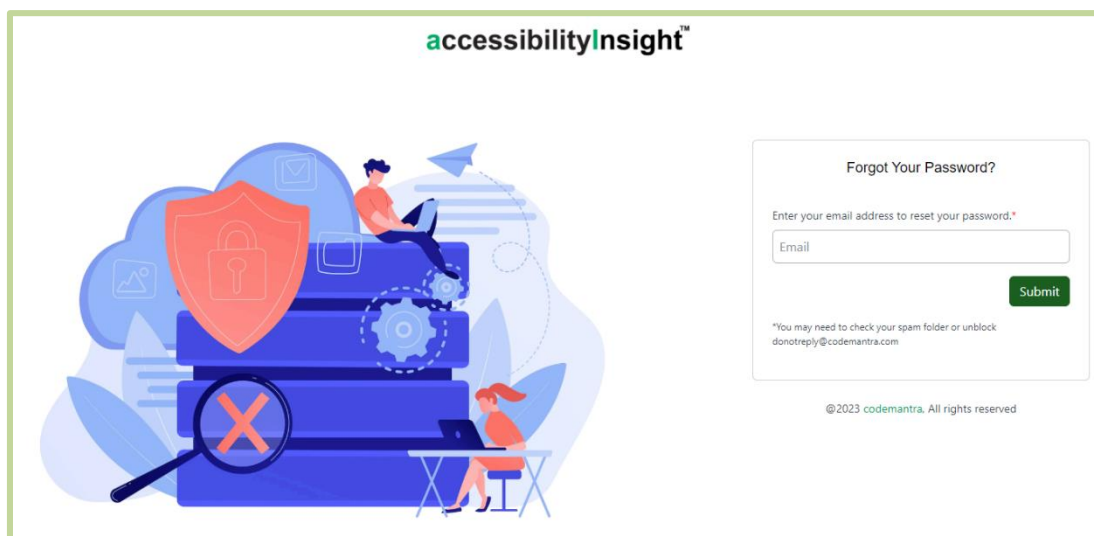
In the forgot password page, enter your email address and click **Submit** to reset your password. On clicking, the application sends a confirmation message with the password reset link to the entered email address.

2 My Documents

The **My Documents** menu allows you to add or upload documents, search and filter the documents, validate the uploaded documents, fix, and remediate the validated documents.

Click the **My Documents** menu. On clicking, the application displays the **My Documents** screen.
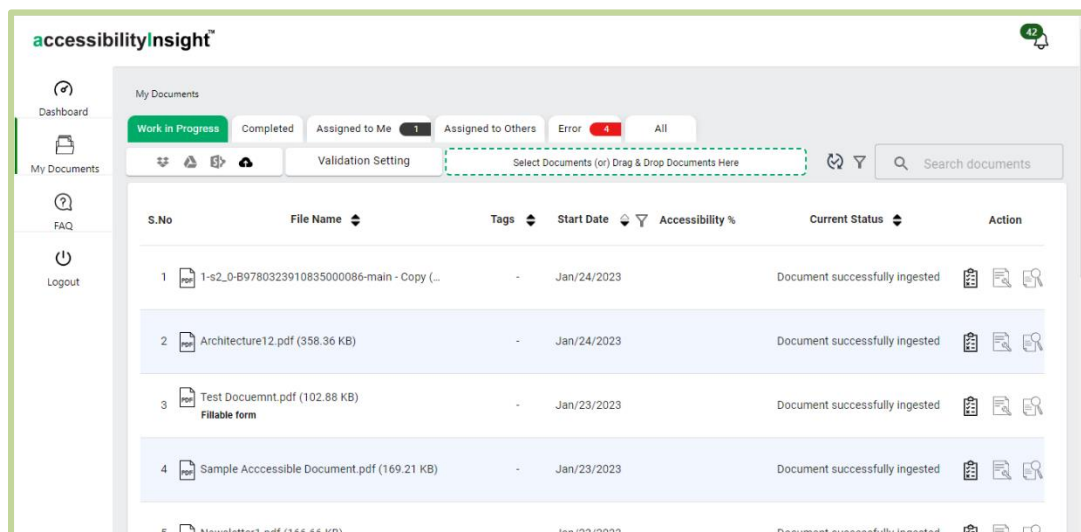

Figure 6 - My Documents Screen

2.1 Primary Tabs

My Documents screen consists of the following six primary tabs:

- Work in Progress
- Completed
- Assigned to Me
- Assigned to Others
- Error
- All

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The six tabs are broken down into their key sectional details in the table below:

	Work in Progress	Completed	Assigned to Me	Assigned to Others	Error	All
S. No Displays the documents in sequential order	✓	✓	✓	✓	✓	✓
File Name Displays the document name	✓	✓	✓	✓	✓	✓
Tags Displays the labels assigned to the document by the user	✓	✓	✓	✓		✓
Start Date Displays the document uploaded date	✓	✓	✓	✓	✓	✓
End Date Displays the document completed date		✓				✓
Accessibility% Displays the accessibility percentage of the document	✓					

Current Status Displays the last performed action on the document	✓					✓
Assigned By Displays the details of the assigned document			✓			
Assigned To Displays the details of the assigned document				✓		✓
Error Displays the document validation error details					✓	
Action Displays the action buttons	✓	✓	✓	✓	✓	✓

2.1.1 Work in Progress

The **Work in Progress** tab displays the list of all the documents the user is currently working on. In this tab, the user can perform accessibilityCheck, accessibilityFix, and accessibilityReview.
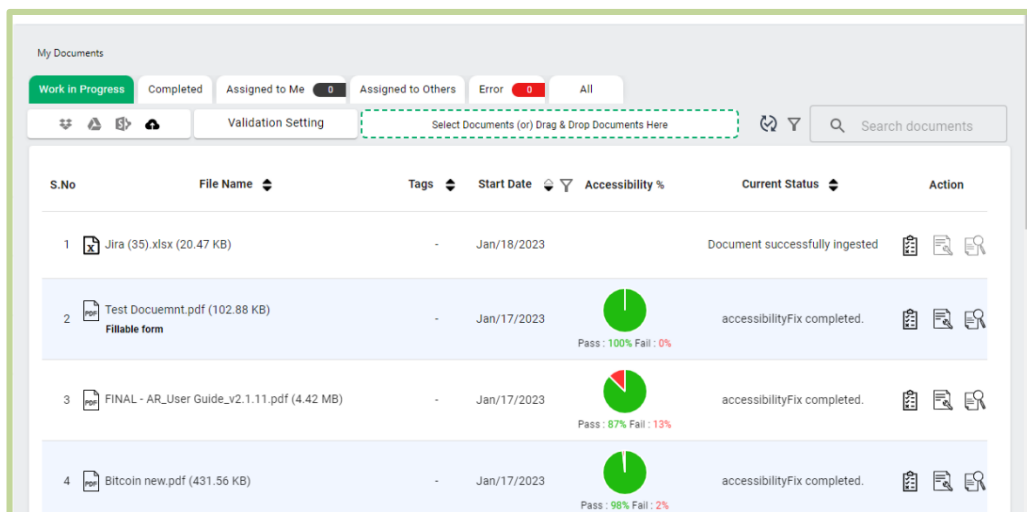
Figure 7 – Work In Progress Tab

In the **Work in Progress** tab, you can perform the following:

➢ Upload documents (PDF, Word, Excel, EPUB, and PowerPoint documents)

➢ Search specific documents

➢ Filter documents

➢ Configure Validation Setting

➢ Check accessibility percentage

➢ Check the current status of the document(s)

➢ Perform accessibilityCheck, accessibilityFix, and accessibilityReview.

2.1.2 Completed

The **Completed** tab displays the completed list of validated and remediated documents.

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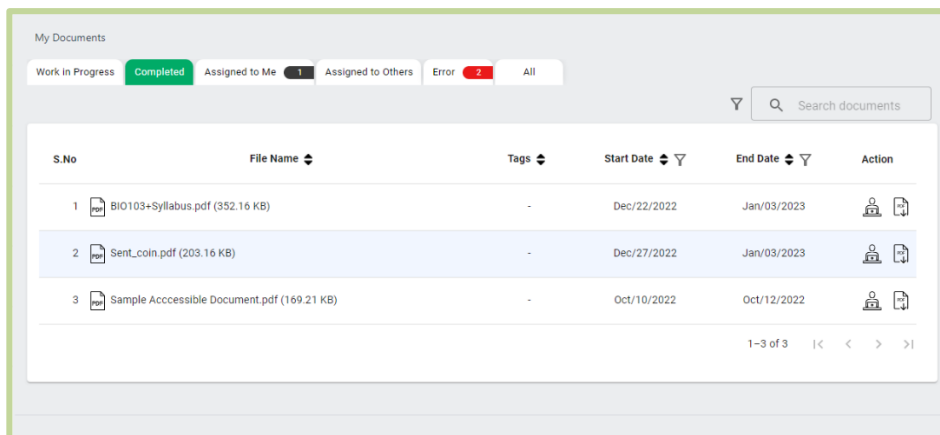
Figure 8 – Completed Tab

In the **Completed** tab, you can perform the following:

- ➢ Check the start date and end date for the respective document

- ➢ Move completed document to the **Work in Progress** tab for rework

- ➢ Download the remediated documents

- ➢ Download the validation report.

2.1.3 Assigned to Me

The **Assigned to Me** tab displays the list of documents assigned to you by other colleagues. The user can either accept or reject the assigned document(s).
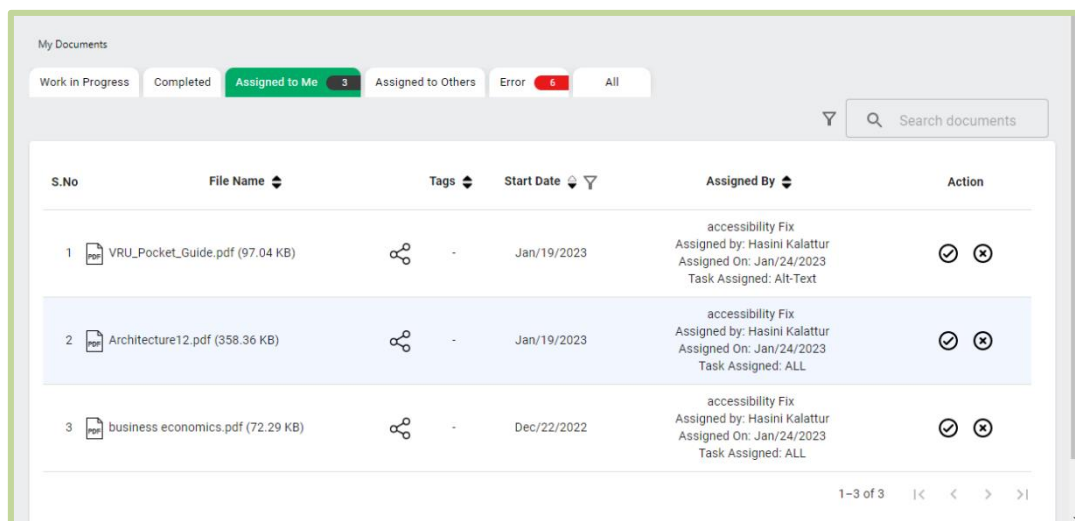

Figure 9 – Assigned To Me Tab

In the **Assigned to Me** tab, you can perform the following:

- ➢ Check the assigned date, assignee name, and task assigned details

- ➢ Accept or Reject the assigned documents.

2.1.4 Assigned to Others

The **Assigned to Others** tab displays the list of documents assigned by you to other colleagues. The user can cancel the permission to the assigned document(s) anytime by clicking on the **Revoke** option in the **Action** column.
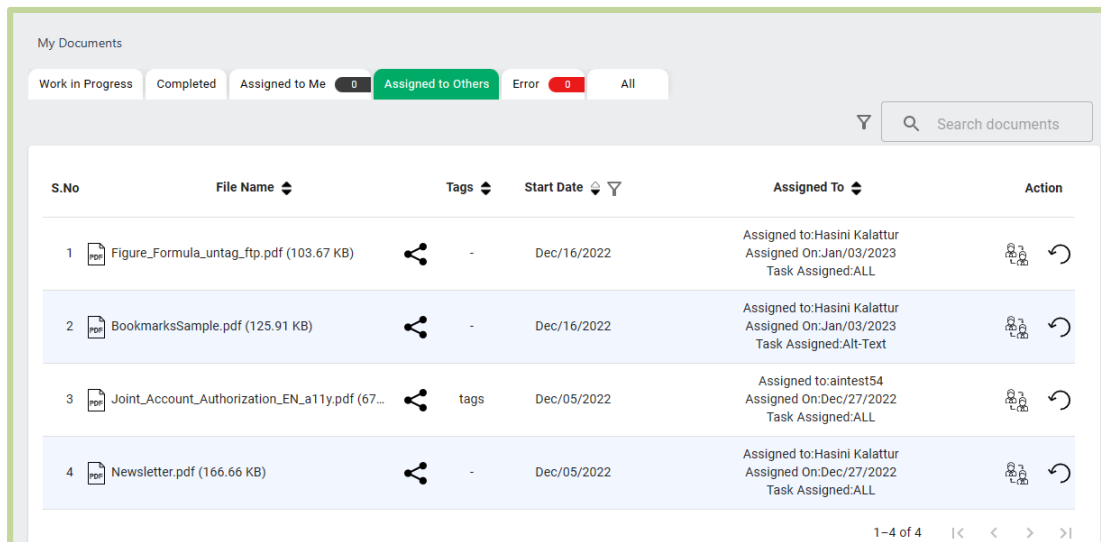
Figure 10 – Assigned To Others Tab

In the **Assigned to Others** tab, you can perform the following:

➢ Check the assigned date, assigned to, and task assigned details

➢ Assign the document to another user

➢ Revoke the assigned document.

2.1.5 Error

The **Error** tab displays the list of either password-protected or corrupted documents.
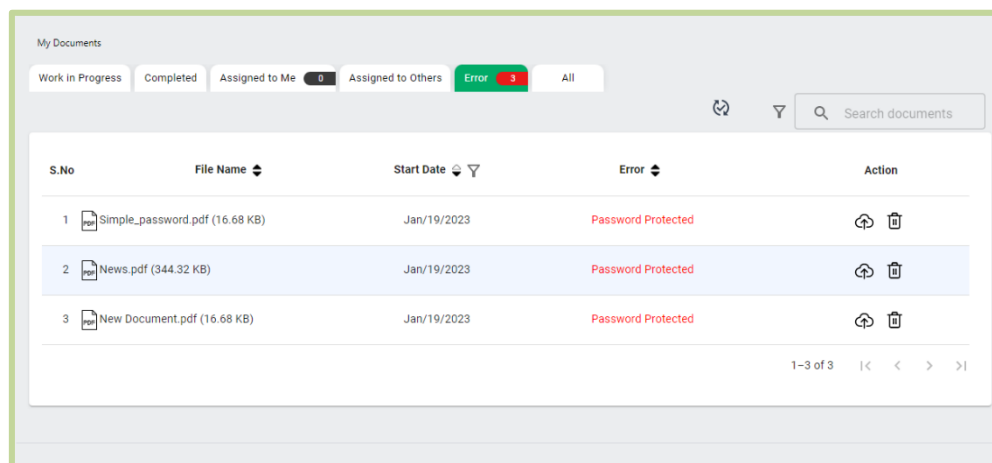

Figure 11 – Error Tab

In the **Error** tab, you can perform the following:

➢ Check error details whether the file is corrupted or password protected

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> ➢ Re-Upload the document

> ➢ Delete the document.

2.1.6 All

The **All** tab displays the list of all the uploaded documents.
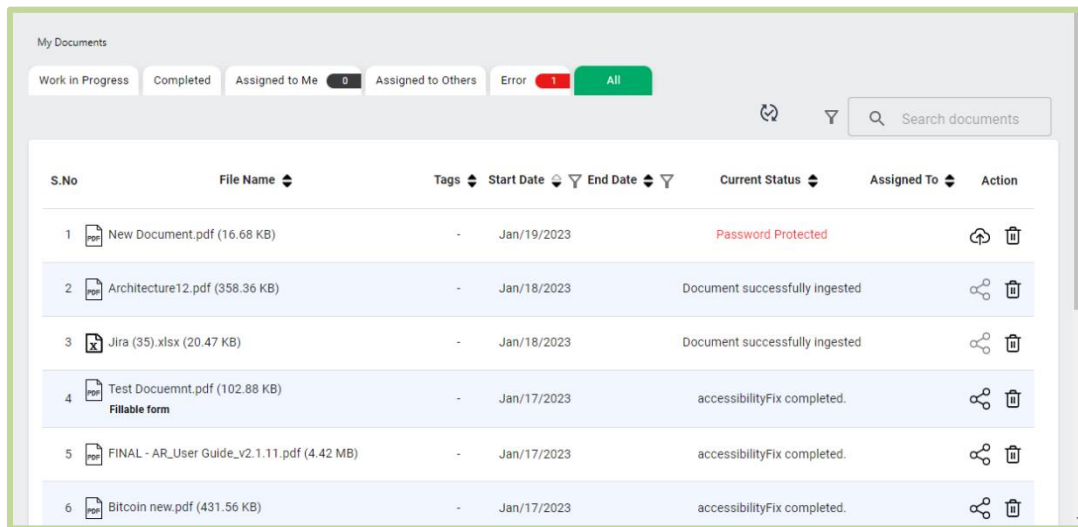
Figure 12 – All Tab

In the **All** tab, you can perform the following:

➢ Check the documents start and end date

➢ Check the current status of the document

➢ Check the task assignee details

➢ Re-Upload the document

➢ Delete the document

➢ Share the document with another user.

📋	• You can use the Sort ⬍ option for File Name, Tags, Current Status, Start Date, End Date, Assigned By, Assigned To, and Error features to categorize the documents alphabetically. • You can use the Filter ▽ option for Start Date and End date to classify the documents within a particular date range.

	• The page numbers and the page navigation buttons are available at the bottom right side of all tabs to easily navigate to the pages.

2.2 Detailed View Popup

Detailed View popup contains document details, accessibility score details, top issues, document history, and validation report details. You can access the popup by clicking on the respective document from the **Work in Progress, Completed,** and **ALL** tabs. On clicking, the application will display the **Detailed View** popup.
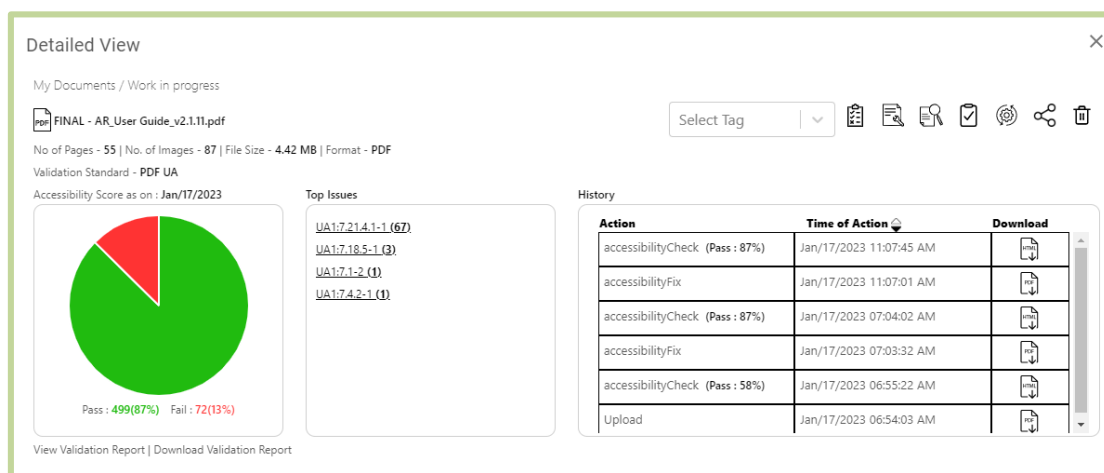
Figure 13 – Detailed View Popup

	• You can access the **Detailed View** popup only after the document completes the **accessibilityCheck** process. • After validation is completed, the user can also click on the pie chart in the **Accessibility%** column to open the **Detailed View** popup.

In the **Detailed View** popup, you can perform the following:

➢ View document details like the number of pages, number of images, document size, and document format

➢ View selected Validation Standard

➢ View accessibility report summary details (pass and fail count)

➢ View the Validation report

➢ Download the Validation Report

- View the Top Issues and count

- Add Tag to the uploaded document

- Perform accessibilityCheck, accessibilityFix, and accessibilityReview

- Mark the document as complete

- Reset the tagging to the source file

- Share the document with other colleagues for All, Alt text writing, and Tagging

- Delete the document from the application

- Check the history of actions performed on the document

- Download the remediated document.

Click on the ✕ icon on the top right side corner to close the **Detailed View** popup.

2.3 Searching Documents

On the **My Documents** screen, you can search specific document(s) by providing the document name either partially or fully.
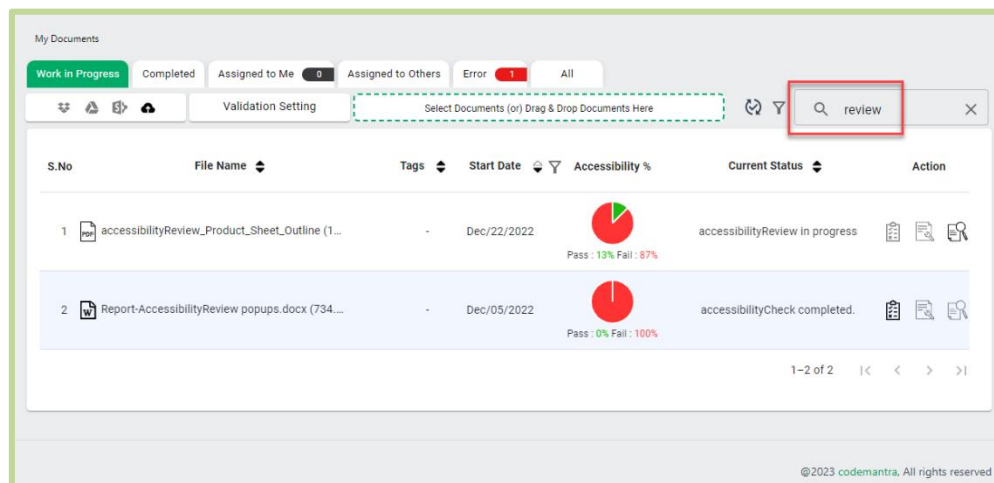
Figure 14 – Searching Specific Document(s)

To search specific document(s), enter the document name in the **Search Documents** field available in the top pane and click Enter. On clicking, the application displays related document(s).

📋	• The application displays the **Search Documents** field on all the tabs. • You should enter at least 3 characters to search the documents.

2.4 Filtering Documents

On the **My Documents** screen, you can filter the list of the document(s) according to different document formats and tags.
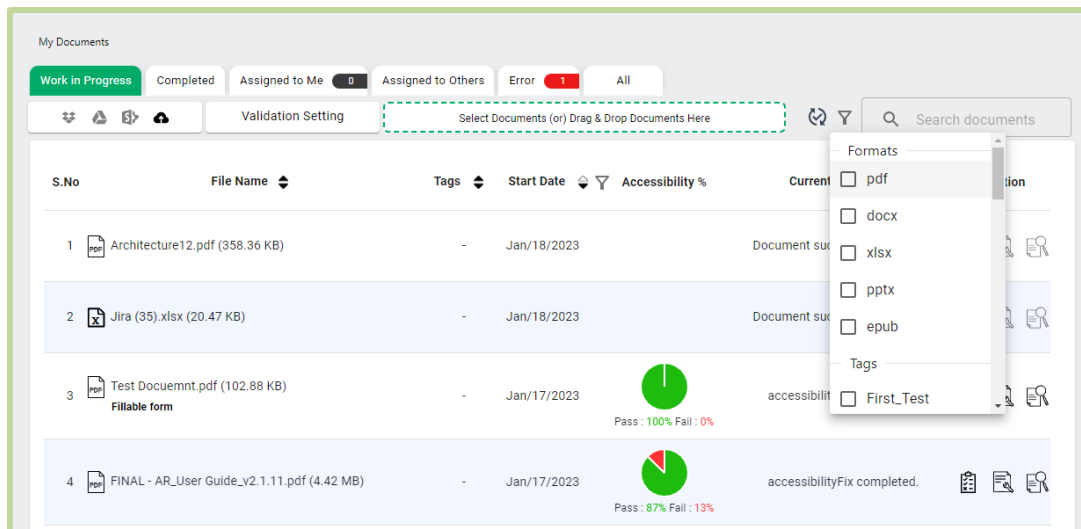
Figure 15 – Filtering Documents

To filter documents with specific formats and tags, do the following:

- Click on the 🔽 filter option available adjacent to the Search Documents field

- On clicking, the application displays the available document formats and tags

- Select the respective filters from the displayed options

- On selecting, the application displays documents based on the selected filters.

📋	The application displays the 🔽 filter option on all the tabs.

2.5 Documents Upload

In the **Work in Progress tab**, you can upload PDF, Word, Excel, EPUB, and PowerPoint documents using the following methods:

1. Manual Upload

- Using file picker
- Drag and drop upload

2. Auto file Ingestion

- SFTP or FTP upload
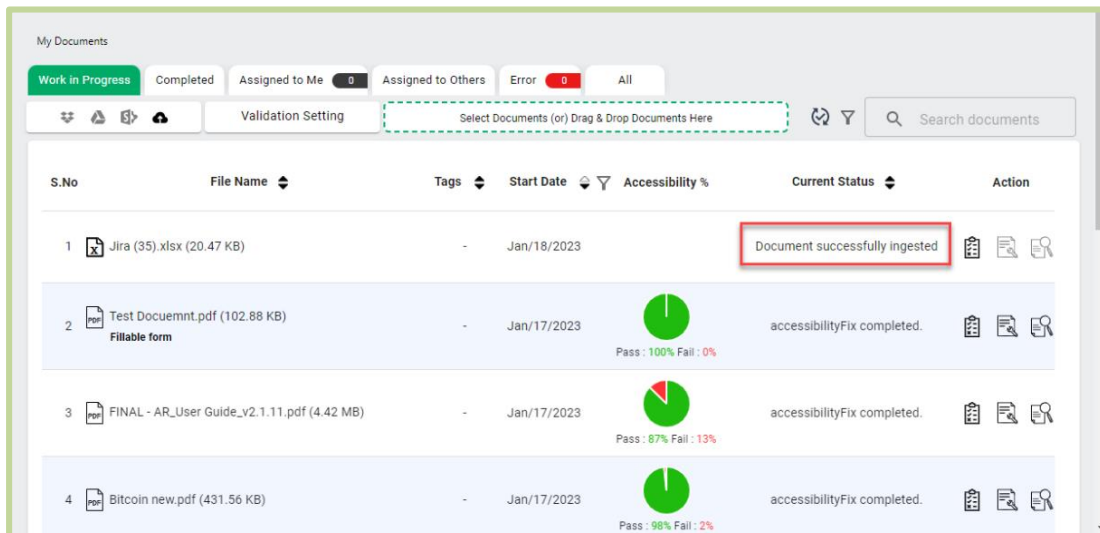
Figure 16 – Work In Progress Tab

	- The documents upload pane will only be displayed on the **Work in Progress** tab. - If you upload a document in a format other than pdf, docx, pptx, xlsx and epub, the application displays the following dialog box. **Figure 17 – File Ingestion Failed Dialog Box**
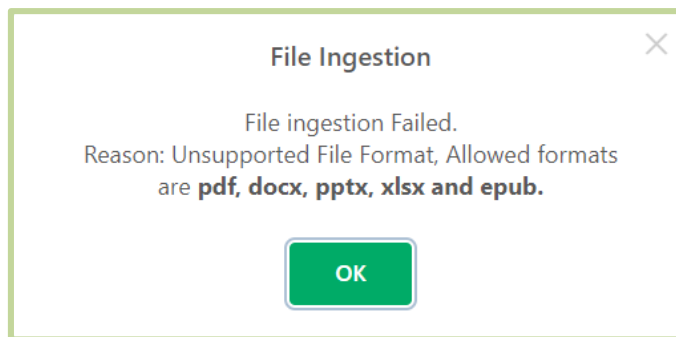
- During document upload the application displays the upload progress in a window on the right side of the **My Documents** screen. Click **Clear** to close the Upload Progress dialog box.
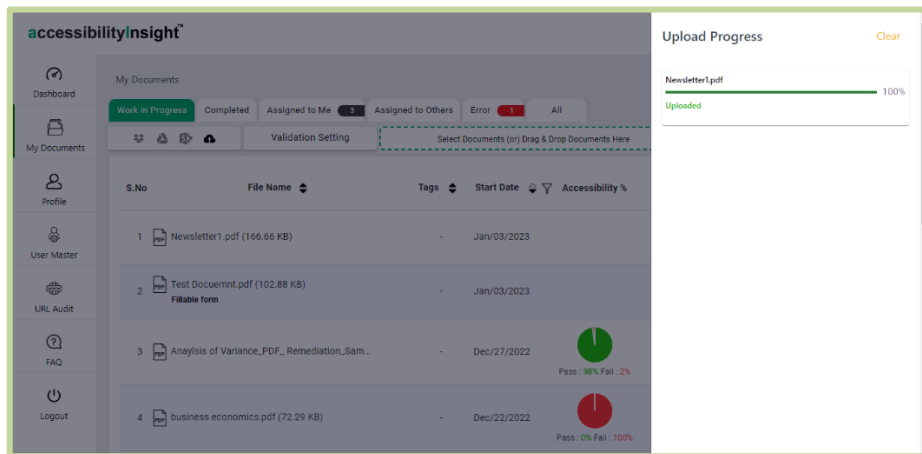
Figure 18 – File Ingestion Failed Dialog Box

> You can open the Upload Progress window anytime by clicking the button on the **Work in Progress, Error,** and **All** tabs.

- Once the document is uploaded, the application displays the following status in the **Current Status** column adjacent to the respective document name..

   1. **Document successfully ingested** – displays when the document upload is completed.

2.5.1 Validation Setting

You should choose the required standard in **Validation Setting** before you upload documents to check accessibility.

Click on **Validation Setting** in the **Work in Progress** tab on the **My Documents** screen. The application will display a dialog box with the following settings:

1. Default Validation for PDF Document (PDF UA and WCAG Standard)
2. Default Validation for non-PDF and Office Document (WCAG Standard)

Select the required standards from the settings and click **Config**. On clicking, the application performs an accessibility check based on the selected standard.
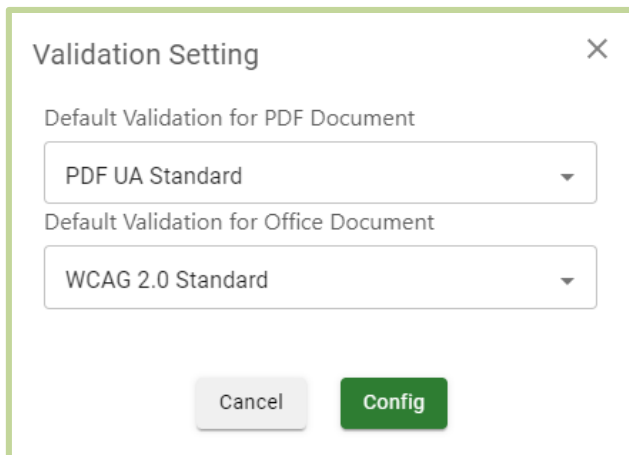
Figure 19 - Validation Setting Dialog Box

📋	The **Validation Setting** option will only be displayed on the **Work in Progress** tab.

2.5.2 Manual Upload

In the **Work in Progress** tab on the **My Documents** screen, you can upload documents manually using the file picker or drag and drop upload.

1. To perform single file or bulk upload using file picker, click on the upload pane in the **Work in Progress** tab. On clicking, the application allows you to browse and upload single or multiple documents.
2. To perform drag and drop upload, drag document(s) and drop it on the upload pane. The application will upload the dropped document(s).
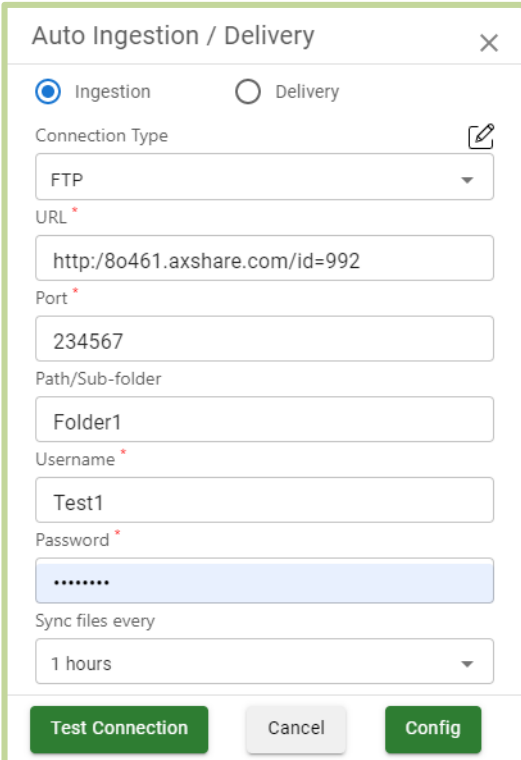
Once you upload a document(s), the application displays the following document details:

file name, start date, current status, and **accessibilityCheck** function in the **Work in Progress** tab.

📋	• All the documents uploaded will be displayed in the **Work in Progress** tab. • The application considers password-protected documents and corrupted documents as error documents and will not check the accessibility level of the error documents. These documents will be displayed in the **Error** tab on the **My Documents** screen.

2.5.3 Auto File Ingestion

The application allows the user to auto ingest the documents from a specified path using FTP/SFTP configuration.

In the **Work in Progress** tab, click on the ☁ (**FTP/SFTP**) icon. On clicking, the application displays the **Auto Ingestion/ Delivery** popup.

Auto Ingestion / Delivery ✕

⦿ Ingestion   ◯ Delivery

Connection Type

FTP ▼

URL *

http:/8o461.axshare.com/id=992

Port *

234567

Path/Sub-folder

Folder1

Username *

Test1

Password *

••••••••

Sync files every

1 hours ▼

[Test Connection]   [Cancel]   [Config]

Figure 20 – FTP/SFTP Configuration

To perform **FTP/SFTP** configuration, do the following steps:

- Select the **Ingestion** option from the popup.
- Select the connection type (FTP/SFTP).
- Enter the details in the URL, port number, path/subfolder, user name, and password fields.
- Select the time duration to sync the documents.
- Click **Test connection**. On clicking, the application will test for connectivity.
- When the testing is completed the application will show a confirmation message. (success or failure).

- Click on **Config** to proceed with the configuration or click on **Cancel** to close the popup.
- Once configured, the application automatically syncs the documents from the specified path in the set time interval.

2.6 Adding Tags

In the **Detailed View** pop screen, you can add tags to the uploaded documents.

To add a tag to the document, perform the following steps:

1. Click on the respective document in the **Work in Progress** tab to open the **Detailed View** popup.
2. To select from the available tags, do the following actions:
   - Click on the Select Tag drop-down in the top right corner on the popup.
   - Select from the available tags from the dropdown list.
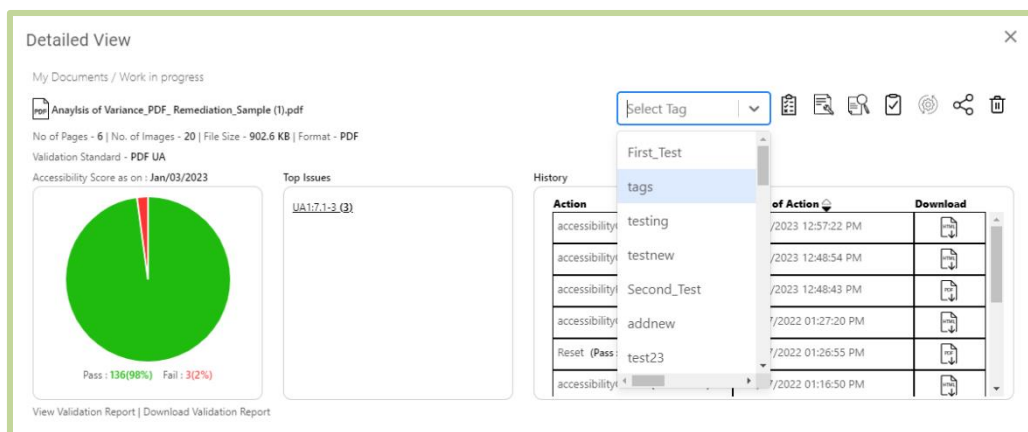
Figure 21 – Detailed View Popup with Tag Option

3. To create a new tag, do the following actions:
   - Type free form text in the displayed **Select Tag** box.
   - Click the displayed **Create** option to add the tag to the list.
   - Click the tags dropdown again and scroll to select the tag you have created.
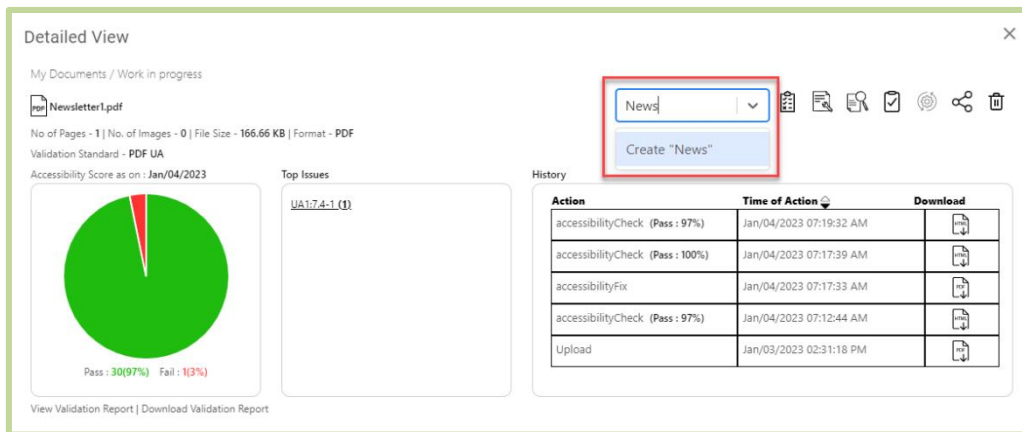
Figure 22 – Detailed View Popup with Tag Option

4. On selecting, the application will close the popup and updates the selected tag to the document.

5. You can view the assigned tag displayed adjacent to the document in the **Tags** column.
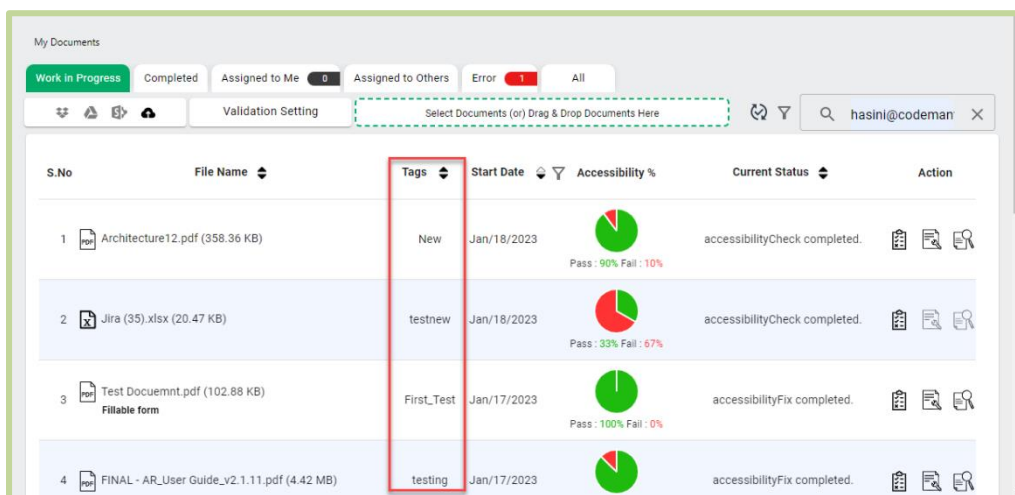
Figure 23 – Tags Column on The Work In Progress Tab

2.7 Validating Documents

accessibilityInsight allows you to perform accessibility validation for PDF, Word (DOCX), Excel (XLSX), PowerPoint (PPTX), and EPUB documents. The application validates the uploaded documents against PDF/UA and WCAG standards.

> Once documents are uploaded, the application enables only **accessibilityCheck** in the **Work in Progress** tab.
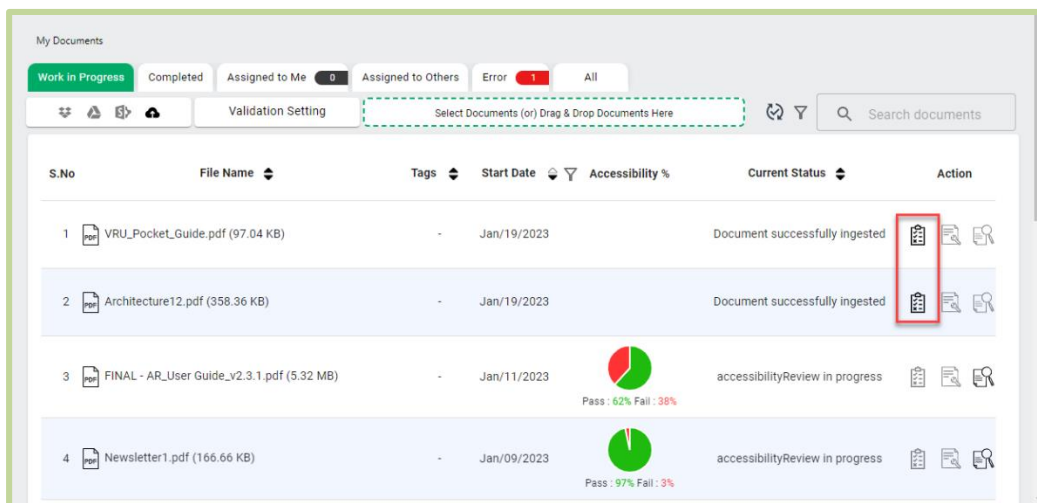
Figure 24 - My Documents Screen with the accessibilityCheck Button

To validate a document, click on the **accessibiltyCheck** button adjacent to the corresponding document. On clicking, the application validates the document against the selected standards and displays the accessibility percentage (pass percentage and fail percentage) in a pie chart in the **Accessibility%** column on the **Work in Progress** tab.
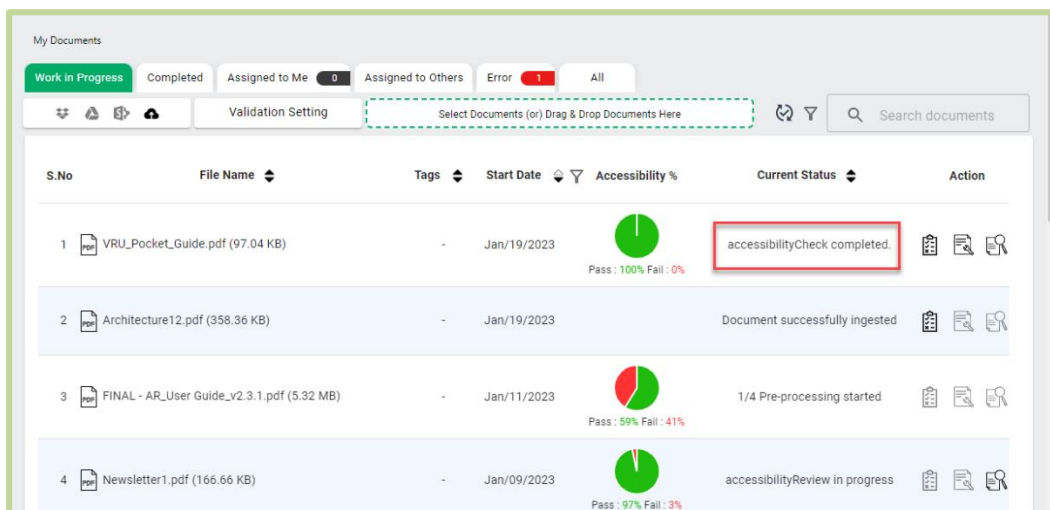
Figure 25 - Viewing the Accessibility Percentage of Documents

	Once the validation is completed, the application displays the message "Accessibility check completed" in the **Current Status** column.

2.8 Viewing and Downloading the Accessibility Validation Report

You can view and download the validation report for documents in the **Detailed View** popup after the accessibility validation is completed.

	The application revalidates documents and updates the validation report each time the user performs remediation. Also, the application updates the accessibility percentage on the **Work in Progress** tab.

2.8.1 View Validation Report

To view the accessibility validation report for a document, click on the respective document. On clicking the application will display the **Detailed View** popup.
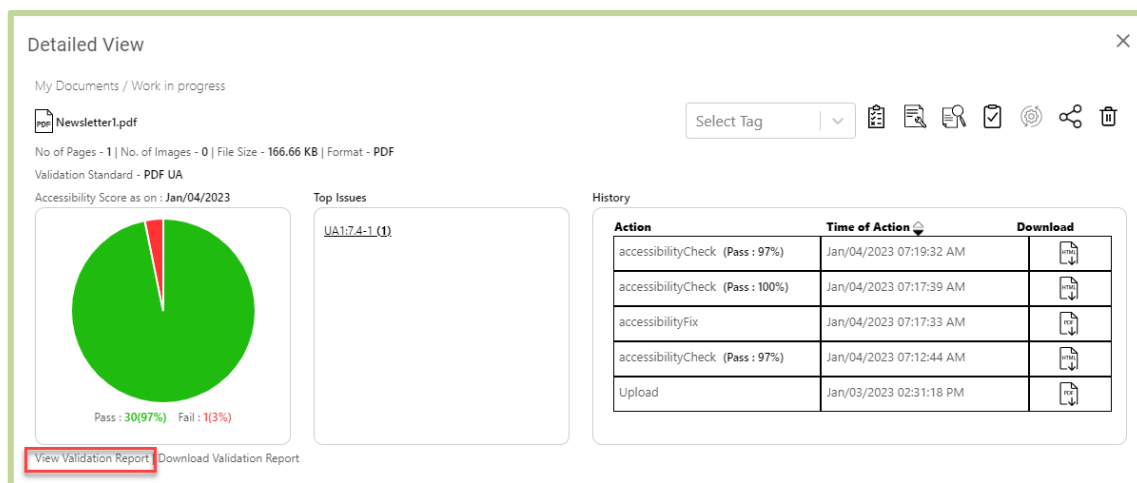
Figure 26 - Viewing the Accessibility Validation Report

Click on **View Validation Report** on the popup. On clicking, the application displays the report summary.
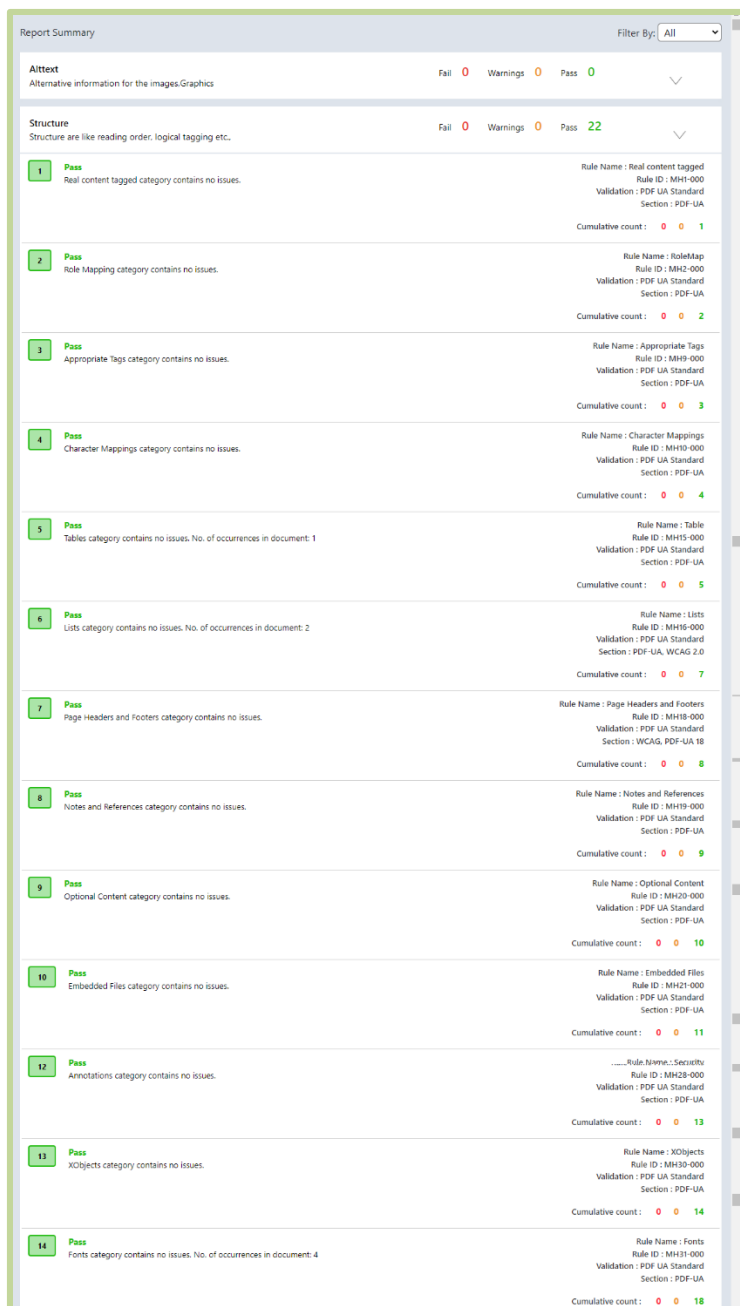
Figure 27 - Accessibility Validation Report

The report summary contains the following details:

- Selected Validation Standard details
- Pass, fail, and warning count
- Rule name and rule ID details

In the validation report, select a filter from the list to filter the report summary details. The available filter options are: **All**, **Fail**, **Pass,** and **Warnings**.

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2.8.2 Download Validation Report

You can download the validation report using the following methods:

1. In the **Detailed View** popup, click on the **Download Validation Report** option.

   On clicking, the accessibility validation report will be downloaded.
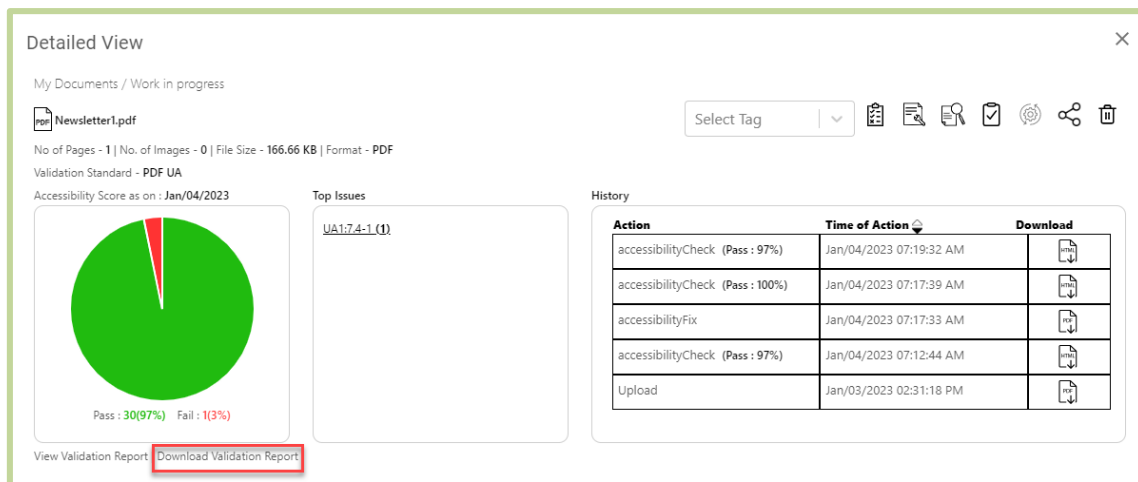
Figure 28 – Download Validation Report

2. Click on the ⬇ button under the **Action** menu in the **Completed** tab. On clicking, the application downloads the accessibility validation report.
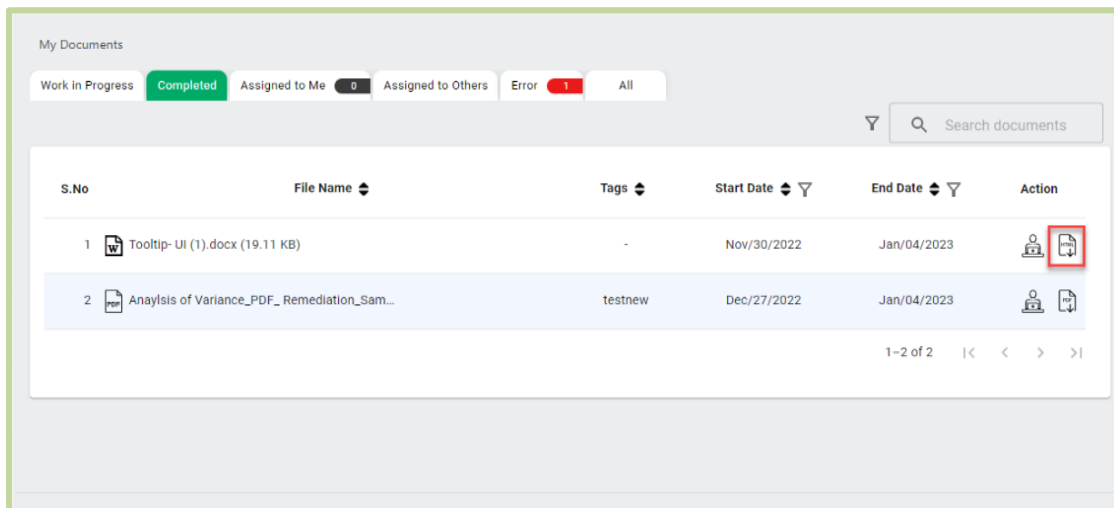
Figure 29 – Completed Tab

	You can download the accessibility validation report for accessibility check completed documents only.

2.9 Remediating Accessibility Errors in Validated Documents

In the **Work in Progress** tab, you can remediate accessibility errors in PDF documents once the accessibility validation is completed.

	• The application only supports remediation for PDF documents. • The remediate feature is not available for Word, Excel, PowerPoint, and EPUB documents.

2.9.1 Remediation Modes

The application supports the following remediation modes:

- **accessibilityFix** – In this mode, the application performs auto-remediation. The application performs AI-based accessibility prediction, applies required tags, reading orders, and bookmarks to documents, and automatically fixes accessibility errors in the uploaded PDF documents.

- **accessibilityReview** – In this mode, the application retains all the existing tags, Alt Text (provided for images and formulae), document properties, table summary, and the reading order in documents. It also retains all the existing bookmarks, if needed. You can manually edit the retained details and add new ones.

Once **accessibilityCheck** is completed for the uploaded document, the application enables the **accessibilityFix** and **accessibilityReview** on the **Work in Progress** tab.
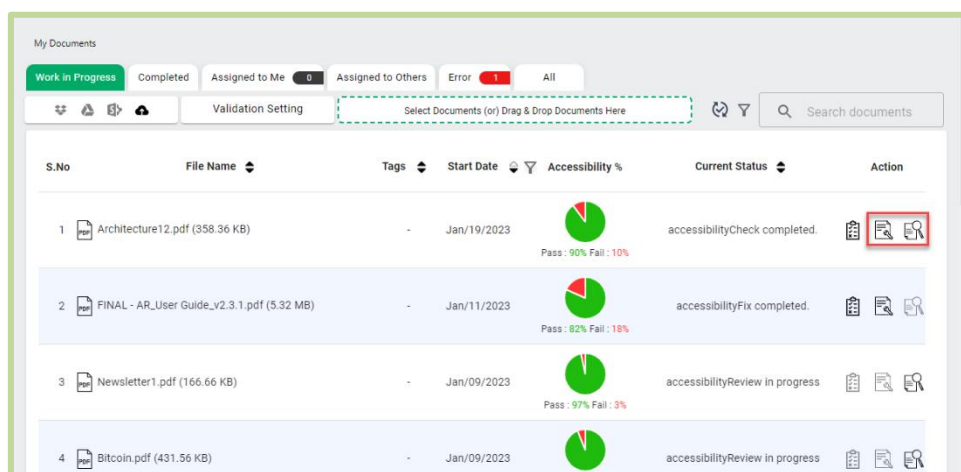
Figure 30 - Remediation Modes on the Work In Progress Tab

The user can choose from the following options (either **accessibilityFix** or **accessibilityReview**) based on the requirement.

1. To fix the accessibility errors automatically, do the following:
   a) Click on the **accessibilityFix** option from the **Action** column.
   b) On clicking, the application will start the prediction process and will auto-remediate the selected document for accessibility errors.
2. To edit the tags manually retaining the existing tags, do the following:
   a) Click on the **accessibilityReview** option from the **Action** column.
   b) On clicking, the application displays the document editor in a separate browser tab. For more information about the document editor, refer to the **Document Editor** section.

	• If you click on **accessibilityReview** after completing **accessibilityFix** , the application retains all the applied changes made in the document while in the fix mode and considers it to be the most recent document.
	• If you click on **accessibilityFix** after completing **accessibilityReview** , the application takes into account the most recently remediated PDF document in the editor and applies automatic prediction to correct accessibility errors.
	• You can select and repeat the remediation modes based on the requirement. The application will consider the most recently selected mode as the latest remediated document.
	• When a selected remediation mode is in-progress (being applied to a document), it cannot be changed.
	• The application will perform **accessibiltyCheck** every time after the document remediation is completed. The document will be validated again and the latest accessibility percentage (pass percentage and fail percentage) will be updated in the pie chart in the **Accessibility%** column on the **Work in Progress** tab.
	• The **accessibilityReview** button is not accessible for a user who assigns a respective document to another user with Alt Text and tagging access. For

	more information about assigning documents, refer to the **Documents Assign** section.

The application displays the current document status adjacent to the respective document in the **Current Status** column. The available statuses are:

- **accessibilityFix completed** – displays when accessibility fix is completed.

- **accessibilityReview completed** – displays when changes are applied in the editor and the document is reviewed for accessibility errors.

2.10 Documents Assign

In **accessibilityInsight,** you can perform the following actions:

- Assign the document(s) to other users
- Revoke the assigned document anytime
- Accept or Reject the documents assigned to you by other users.

The assignee is responsible for performing remediation and completing the assigned documents. Once completed, the documents will be assigned back to the owner to apply the changes done by the assignee to the documents.

2.10.1   Assign Documents to other Users

You can assign documents (PDF documents) to another user to perform remediation. The user can share the document with other users only after completing the validation process.

The application moves the assigned documents to the **Assigned to Others** tab from the **Work in Progress** tab.
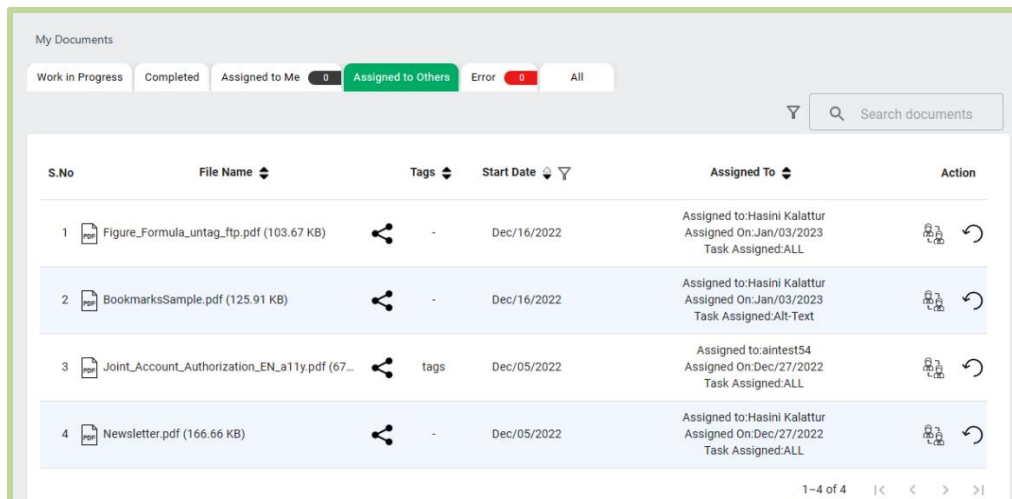
Figure 31 – Assigned to Others Tab

To share a PDF document, do the following steps:

1. Click on the respective document or click on the pie chart in the **Accessibility%** column to open the **Detailed View** popup.

Figure 32 – Detailed View Popup

2. Click on the **Share** icon on the top right side of the pop-up. On clicking, the application displays the **Task Assign** dialog box.
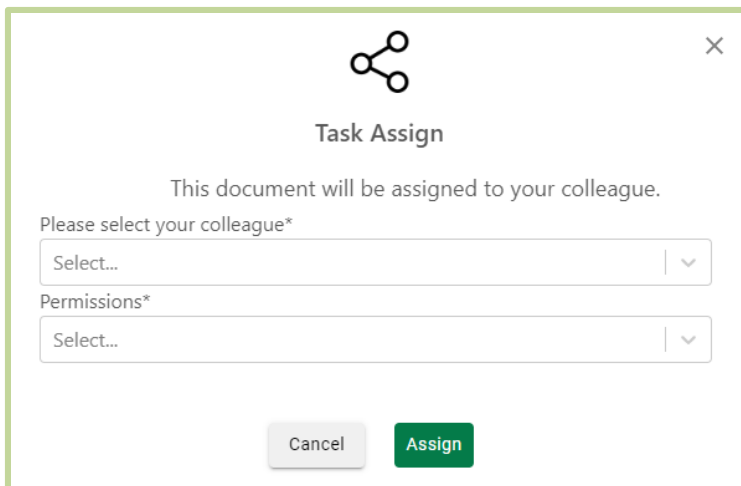
Figure 33 – Assigning a PDF Document

3. In the **Task Assign** dialog box, select an assignee from the **Please select your colleague** list.

4. Select permission from the following options:

- **All** – select it to provide Alt Text and tagging access to the selected assignee. So, the assignee can add Alt Text for figures and formulae, and perform content tagging.

- **Alt text** – select it to provide Alt Text access alone. This will restrict the selected assignee to access the content tagging feature.

- **Tagging** – select it to provide tagging access alone. This will restrict the selected assignee to access the Alt Text (figure and formula).

On providing details in the **Task Assign** dialog box, click **Assign**. On clicking, the application displays a confirmation message about successful assignment. Also, the application moves the document from the **Work in Progress** tab to the **Assigned to Others** tab.

	The user can also share the document with other users by clicking on the ⌘ button under the **Action** column in the **All** tab.

2.10.2 Reassign Assigned Documents

The document owner can reassign the assigned documents any time from the **Action** menu in the **Assigned to Others** tab.
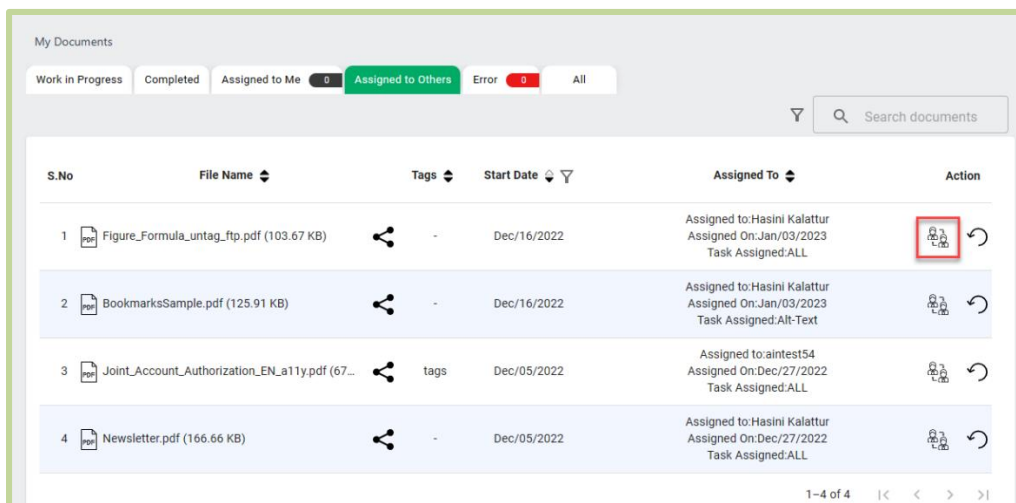
Figure 34 – Assigned to Others Tab with the Reassign Button

To reassign a assigned PDF document, click on the icon under the **Action** column for the respective document in the **Assigned to Others** tab. On clicking, the application displays a dialog box.
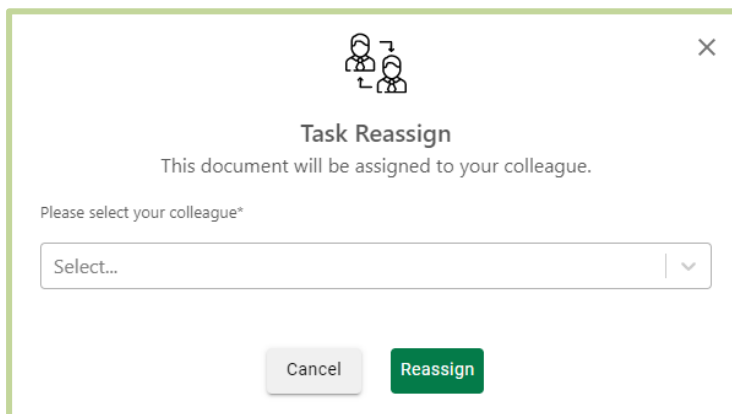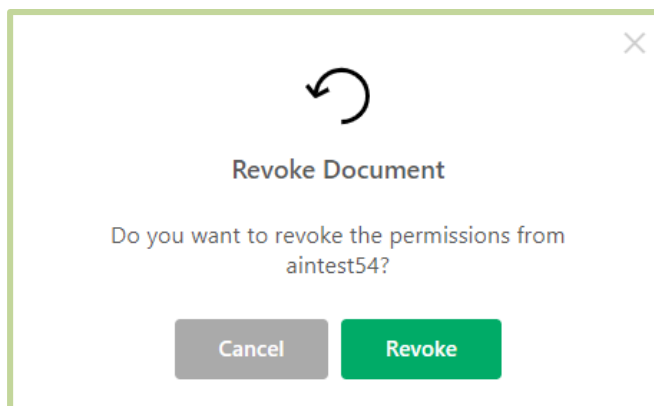

Figure 35 – Reassigning an Assigned Document

In the displayed dialog box, click **Reassign** to confirm. On clicking, the application displays a confirmation message about successful assignment and reassigns the document to the selected assignee.

The application displays a notification message to the assignee about the assigned document. For more information about the notification feature, refer to the **Notifications** section.

2.10.3 Revoking Assigned Documents

The document owner can revoke the assigned documents at any time. The application assigns the documents back to the owner with the changes made by the assignee(s).
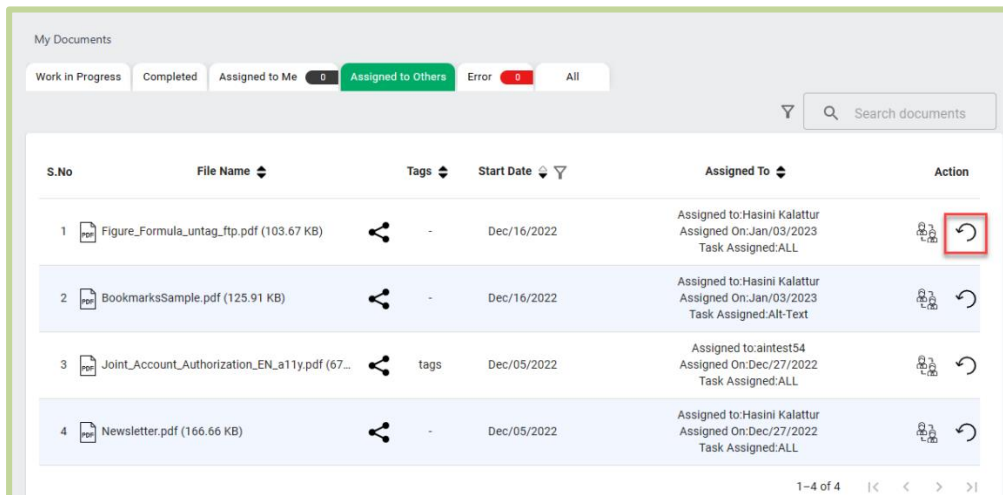
Figure 36 – Assigned to Others Tab with the Revoke Button

To revoke a assigned PDF document, click on the ⟲ icon under the **Action** column for the respective document in the **Assigned to Others** tab. On clicking, the application displays a dialog box.

Figure 37 – Revoking a Assigned Document

In the displayed dialog box, click **Revoke** to confirm. On clicking the application displays a confirmation message and revokes the document.

Also, the application displays a notification message to the assignee about the revoked document. For more information about the notification feature, refer to the **Notifications** section.

2.10.4 Accept or Reject Documents Assigned to you

You can view the document(s) assigned to you in the **Assigned to Me** tab. You can **Accept** or **Reject** the assigned PDF documents.
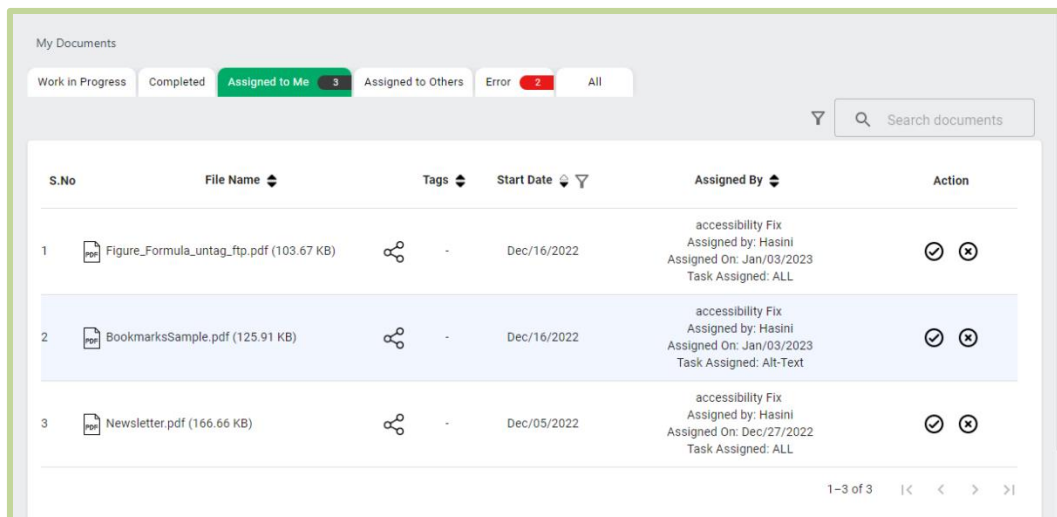
Figure 38 - Assigned To Me Tab

To **Accept** or **Reject** a assigned PDF document, click on the ⊘ or the ⊗ icons from the **Action** menu on the **Assigned to Me** tab adjacent to the respective document. On clicking **Accept**, the application displays the following dialog box.
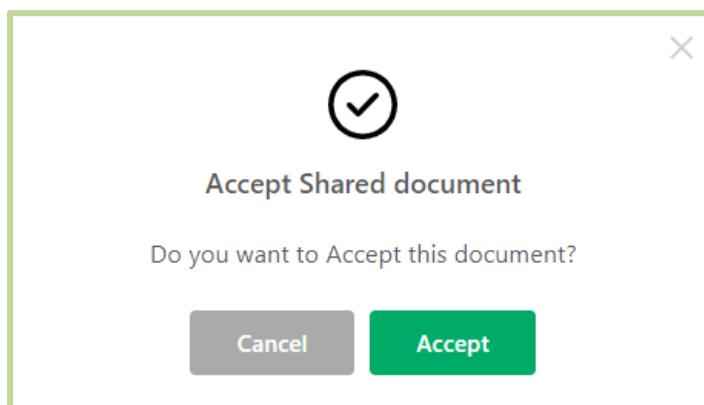
Figure 39 – Accepting a Assigned Document

In the dialog box, click **Accept** to accept the document. On clicking **Accept**, the application displays a confirmation message and moves the document to the **Work in Progress** tab to complete working on the document.

On clicking **Reject**, the application displays the following dialog box.
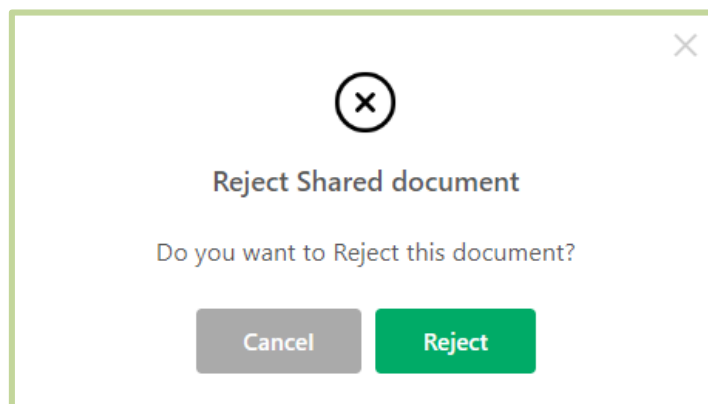
Figure 40 – Rejecting a Assigned Document

In the displayed dialog box, click **Reject** to cancel the document. On clicking, the application displays a confirmation message and cancels the assigned document and assigns it back to the document owner.

Once Accepted or Rejected, the assigned document disappears from the **Assigned to Me** tab for the assignee. The application displays a notification about the accepted or rejected status for the document owner in the notification feature available in the top pane. For more information about the notification feature, refer to the **Notifications** section.

2.11 Mark Documents as Completed

When you complete the validation or remediation process for a document on the **Work in Progress** tab, you can mark the document as completed and move it to the **Completed** tab.

To mark the document as completed, perform the following steps:

- Click on the respective document to open the **Detailed View** popup.
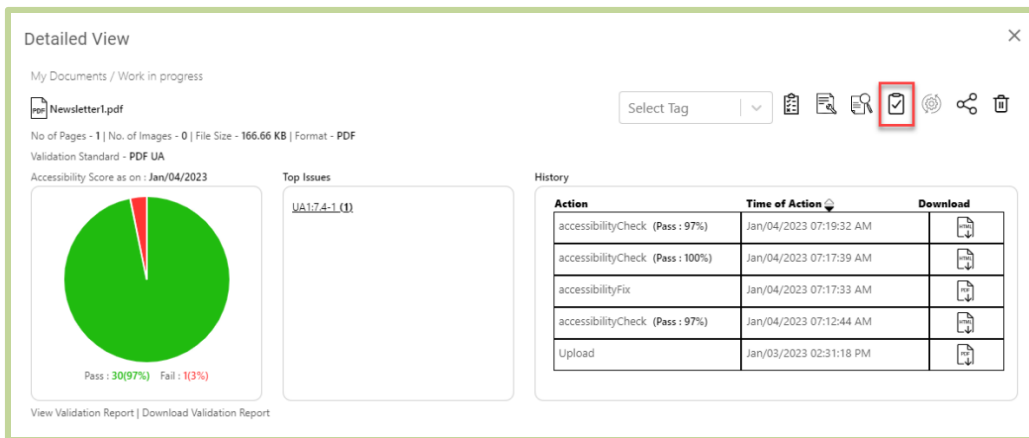
Figure 41 – Detailed View popup with Compete Option

- Click on the ☑ (Mark as completed) button available on the top right side of the popup.

- On clicking, the application will display the following dialog box.
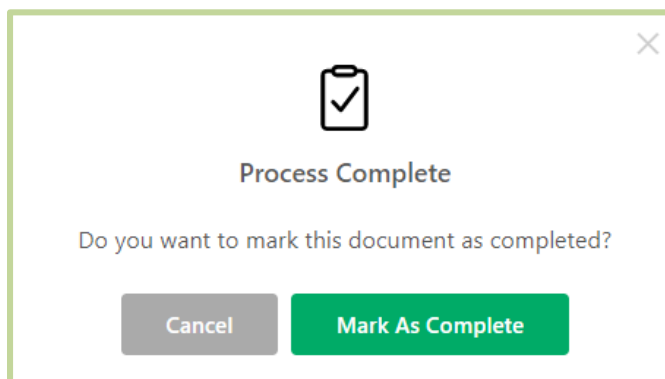
Figure 42 – Alert Message for Remediation Completed Document

- Click **Mark As Complete** in the dialog box to confirm.

- On clicking, the application displays a confirmation message and moves the document to the **Completed** tab.
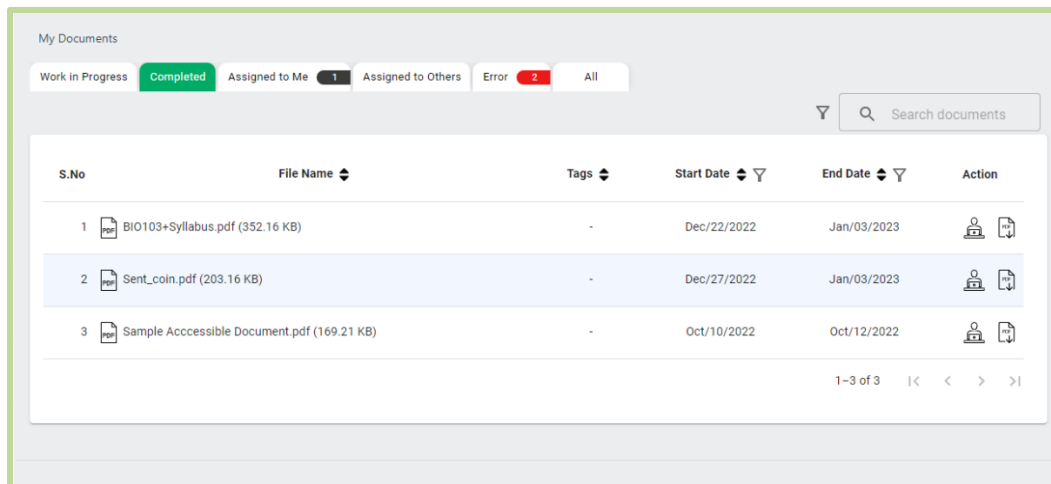
Figure 43 – Completed Tab

2.12 Move Documents to WIP

In the **Completed** tab, users can rework on the document(s) anytime by moving the document back to the **Work in Progress** tab.
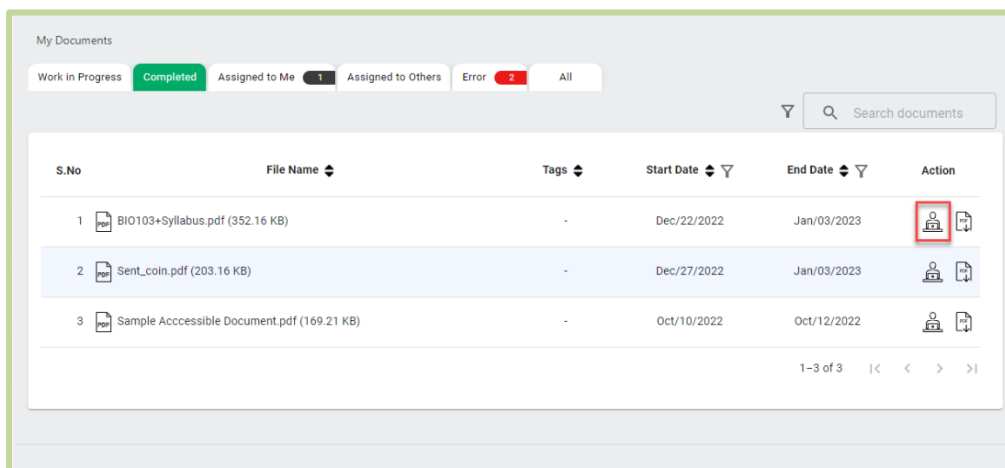
Figure 44 – Move to WIP Option on Completed Tab

To rework on a document, click on the [icon] (**Move to WIP**) icon available adjacent to the respective document under the **Action** menu on the **Completed** tab. On clicking, the application displays the following dialog box.
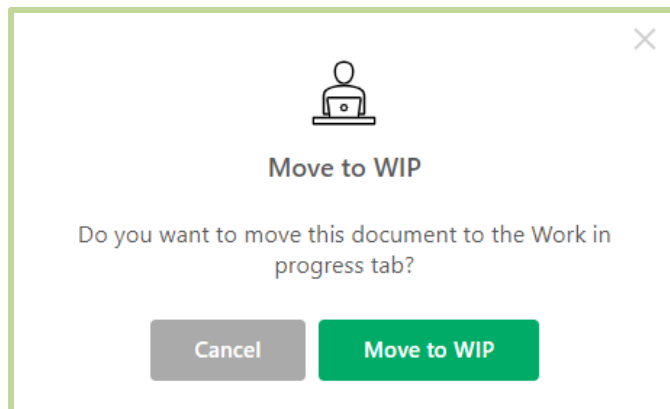
Figure 45 – Alert Message

In the dialog box, click **Move to WIP** to confirm. On clicking, the application displays a confirmation message about the successful movement. Also, the application moves the respective document to the **Work in Progress** tab. You can start reworking on the document from the **Work in Progress** tab.

2.13 Reset Document Tags

The user can anytime reset the tagging of the already remediated documents to the source document. To reset the tagging to the source document, click the ⚙ icon on the **Detailed View** popup for the corresponding document.
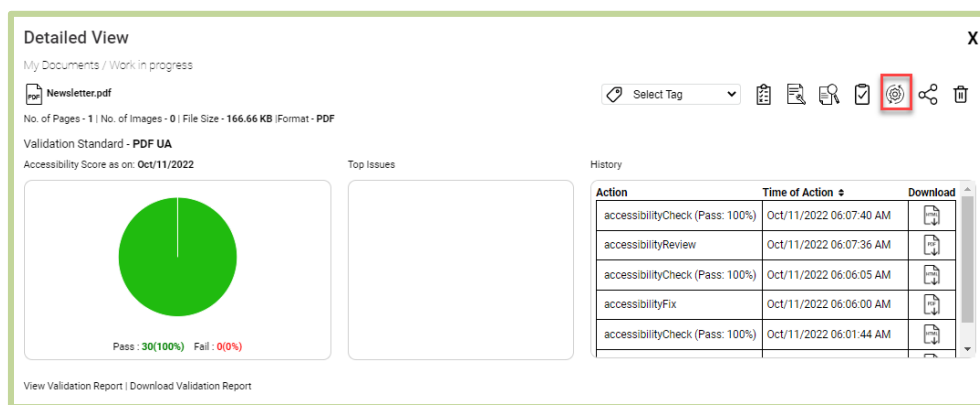
Figure 46 – Reset Icon On The Detailed View Popup

On clicking, the application displays the following dialog box.
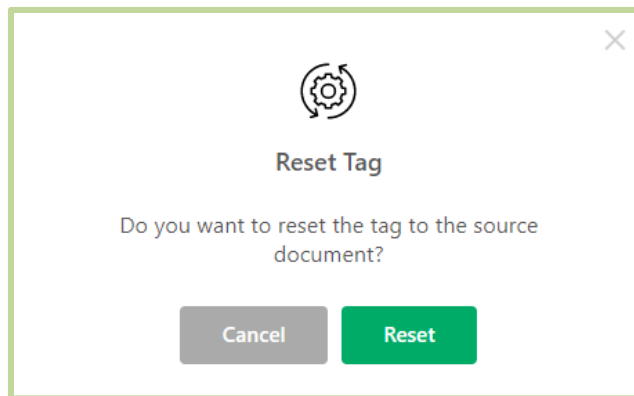
Figure 47 – Alert Message

In the dialog box, click **Reset** to confirm. On clicking, the application will reset the tagging of the selected document to the initial uploaded document.

2.14 Downloading Remediated Documents

You can download the remediated PDF documents using the following methods:

1. In the **Completed** tab, you can download the remediated PDF documents.
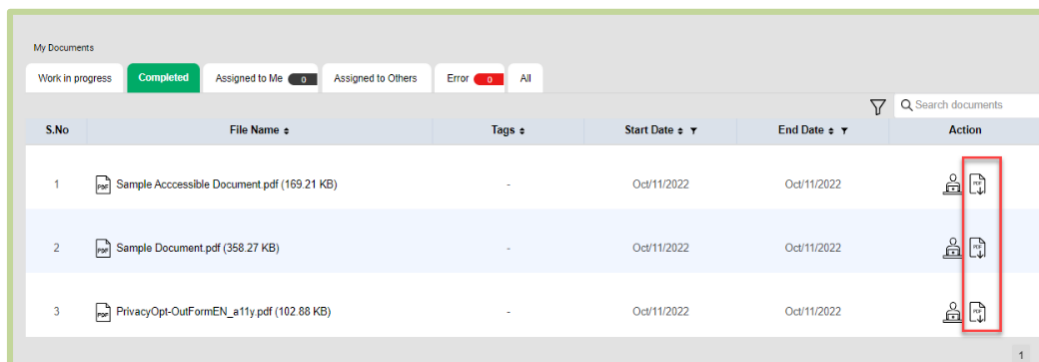
Figure 48 – Completed Tab with Download option

On clicking the (**Download**) icon under the **Action** menu for the respective document, the document will be downloaded.

2. You can download the remediated PDF documents from the **Detailed View** popup. In the **Detailed View** popup, click the icon next to the latest **accessibilityFix** or **accessibilityReview** entry from the **History** section to download the document.
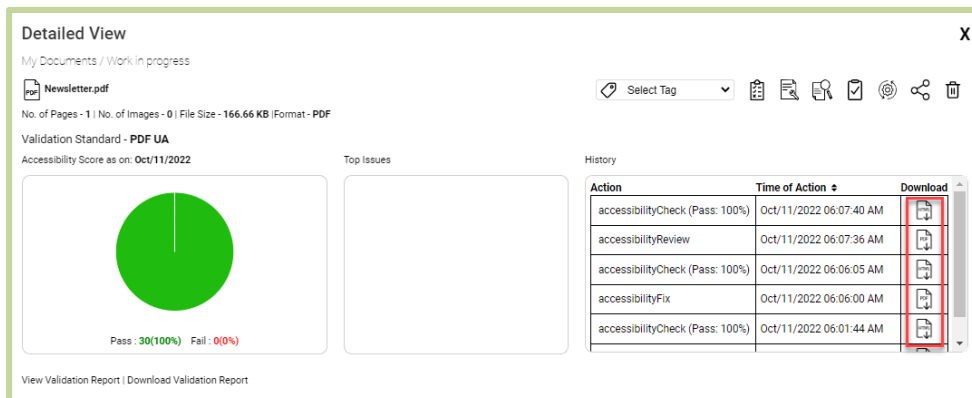
Figure 49 - Detailed View popup with Download Option

2.15 Deleting Documents

You can delete documents in the **My Documents** screen using the following methods:

1. Click on the respective document you want to delete. The application will display the **Detailed View** popup. Click on the 🗑 icon on the popup.
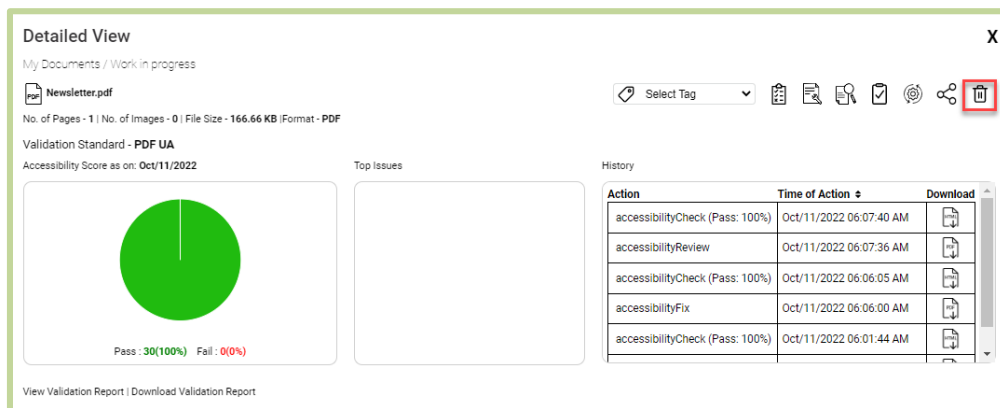
Figure 50 - Deleting a Document

On clicking the 🗑 icon , the application displays the dialog box. Click on **Delete** to permanently delete the document.
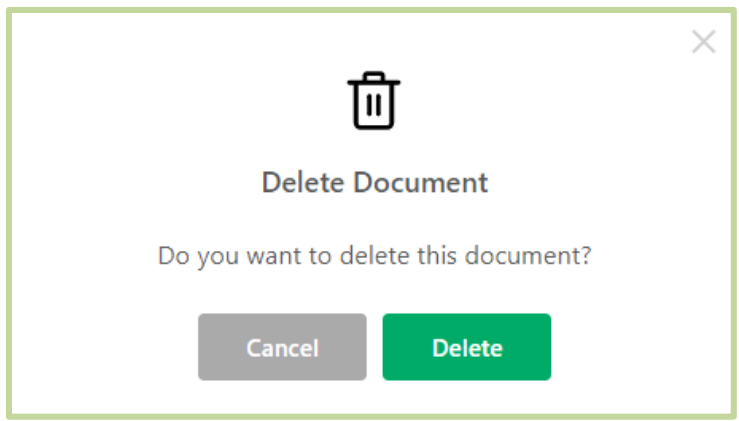
Figure 51 - Alert Message

2. In the **All** tab, click on the 🗑 icon available adjacent to the respective document in the **Action** menu.
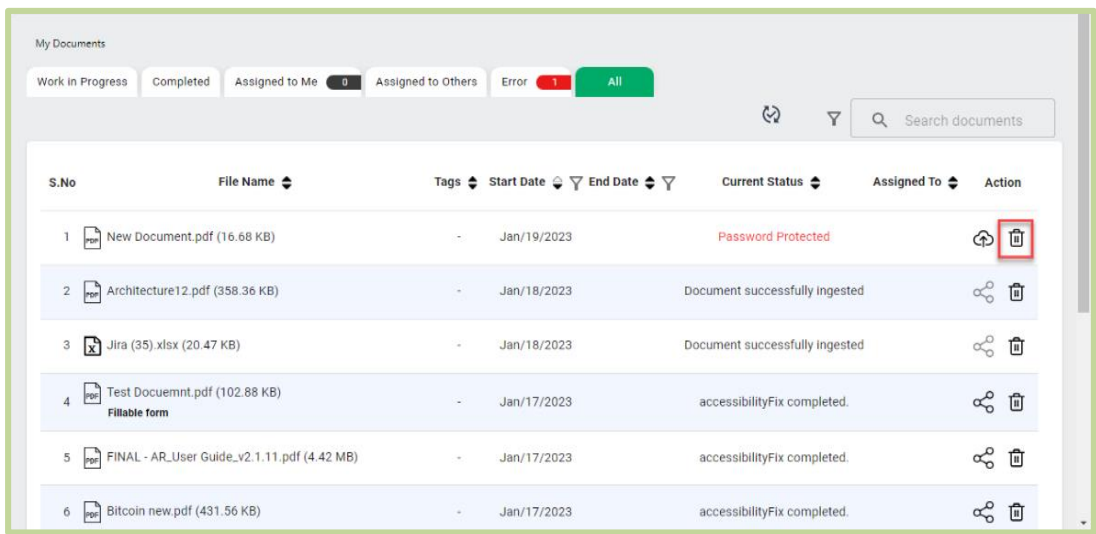
Figure 52 – All Tab

On clicking, the application asks for your confirmation to delete the document.
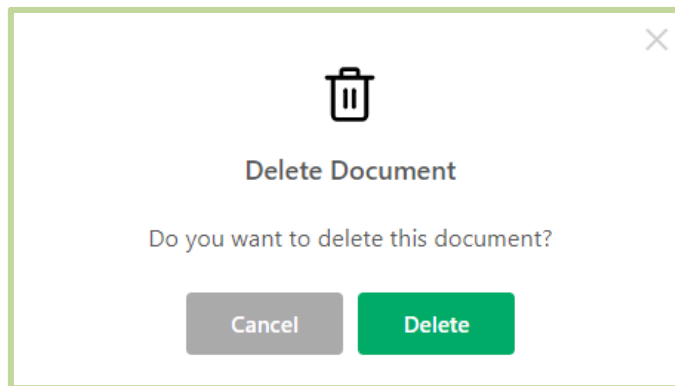
Figure 53 - Alert Message

In the dialog box, click **Delete** to permanently delete the document.

2.16 Documents Re-upload

You can re-upload the documents that the application has identified as error documents in the **Error** and **All** tabs.
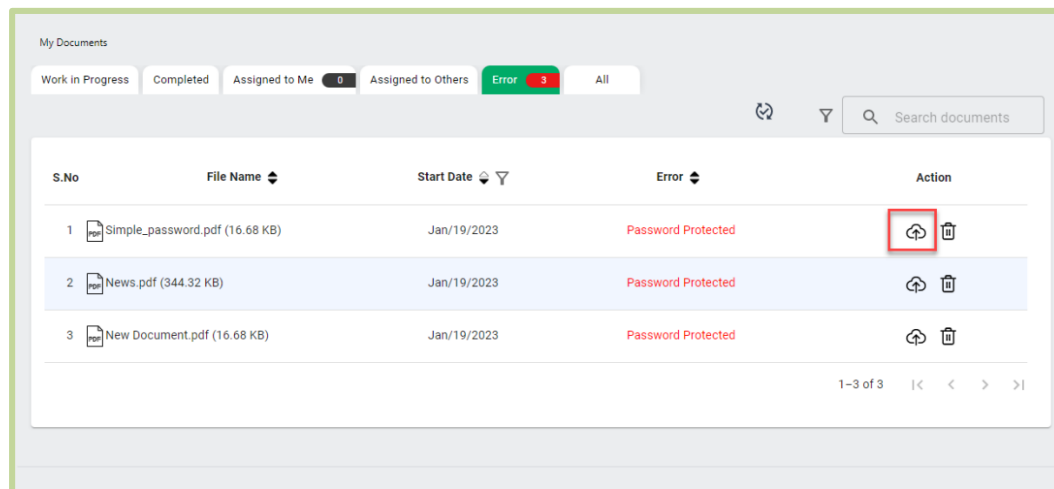
Figure 54 – Error Tab
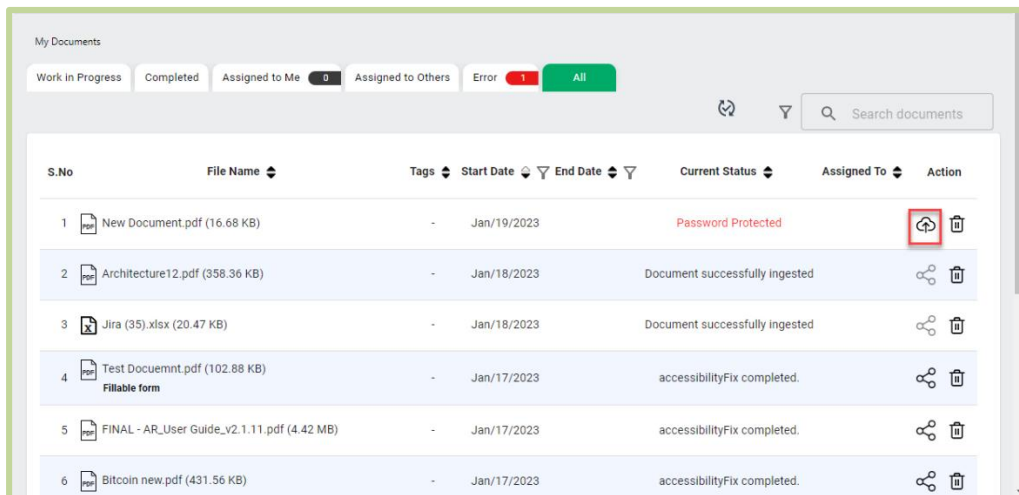
Figure 55 – All Tab

Click on the 🔼 icon available adjacent to the respective document in the **Action** column. On clicking, the application allows the user to re-upload the documents.

2.17 Auto File Delivery

The application allows the user to auto-deliver the completed documents to a specified path using FTP/SFTP configuration.

In the **Work in Progress** tab, click on the ☁ (**FTP/SFTP**) icon. On clicking, the application displays the **Auto Ingestion/ Delivery** popup.

Figure 56 – FTP/SFTP Configuration

To perform **FTP/SFTP** configuration, do the following steps:

- Select the **Delivery** option from the popup.
- Select the connection type (FTP/SFTP).
- Enter the details in the URL, port number, path/subfolder, user name, and password fields.
- Select the time duration to sync the documents.
- Click on **Test connection**. On clicking, the application will test for connectivity.
- When the testing is completed the application will show a confirmation message. (success or failure).
- Click on **Config** to proceed with the configuration or click on **Cancel** close the popup.
- Once configured the application automatically syncs the documents to the specified path from the **Completed** tab in the set time interval.

3 Document Editor

The document editor allows you to add and manage zones, tags, alt text, view and manage bookmarks, and finally apply changes to documents.

Once you click on the 📋 **accessibilityReview** button on the **Work in Progress** tab, the document editor will get opened in a separate browser tab.
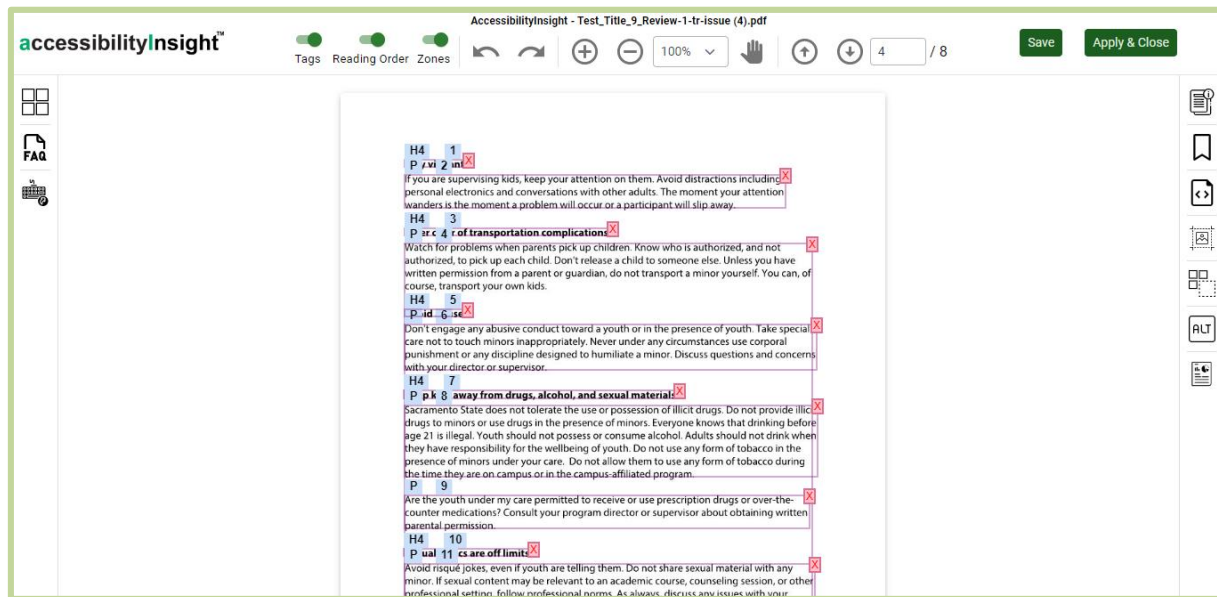
Figure 57 - Document Editor

3.1 Top Ribbon

Figure 58 - Top Ribbon

In the top ribbon of the document editor, you can perform the following functions:

- Enable or disable **Tags** to show or hide the available tags in the document.

- Enable or disable **Reading Order** to show or hide the reading order in the document.

- Enable or disable **Zones** to show or hide the zones in the document. On disabling **Zones**, the application also hides the reading order and tags.

- Click the ↶ (**Undo (Ctrl + z)**) icon or the ↷ (**Redo (Ctrl + y)**) icon to undo or redo the previous action. You can undo or redo up to 10 previous actions.

	You can undo or redo the following actions: tag creation done using the **Zone Creation** and the **Tags Tray**, tag size change, tag position change, tag type change, reading order change, tag deletion, table quick actions (row creation, row deletion, column creation, column deletion, grid to table, table generation, and merge cell), list quick actions (LI split, LBL split, and generate list), and zone action (paragraph creation).

- Click the ⊕ (**Zoom in)** or the ⊖ **(Zoom out)** icons to adjust the size of the current page of the document.

- Click the 100% ⌄ zoom value drop-down to change the page view according to the percentage you choose from the dropdown. You can zoom in up to 800%.

	By default, the application displays the page at 100% magnification.

- Click the ✋ **(Pan)** icon to move the current page on the screen.

- Access the navigation or action icons to perform the corresponding actions. For example, click the ⬆ (**Previous**) or ⬇ (**Next**) icon to navigate to the previous or next page.

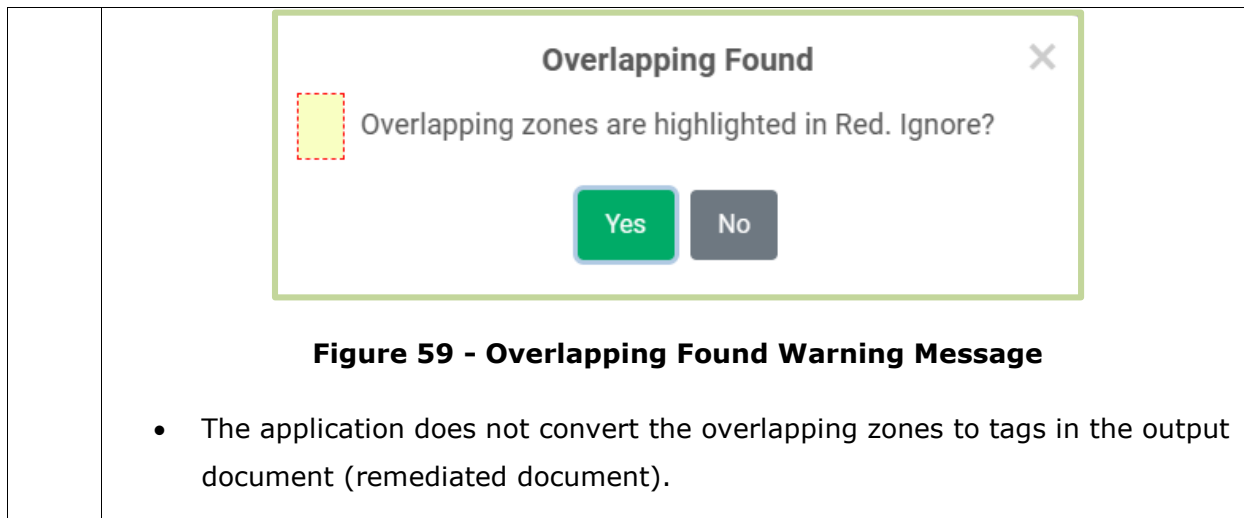|	• When navigating to the previous or next page, if any changes are made in the editor the application will save the document and displays the warning message about the overlapping zones (if available on the current page). In the warning message, click **Yes** to ignore or click **No** to view the overlapping zones and adjust if needed.

Figure 59 - Overlapping Found Warning Message

- The application does not convert the overlapping zones to tags in the output document (remediated document).

- Click **Save** to save the document.

- Click **Apply & Close**. The application displays the following dialog box.
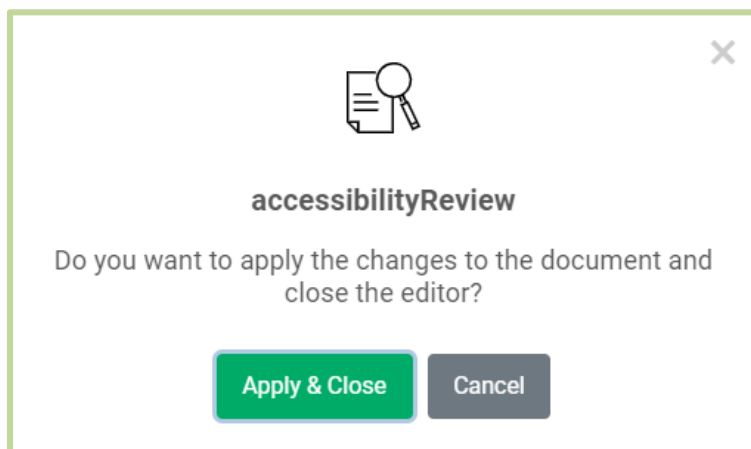

Figure 60 – Apply & Close Dialog Box

In the dialog box, click **Apply & Close** to apply changes to the document. Once the document changes are applied, the application saves the changes done in the document, closes the editor, revalidates the document, and updates the accessibility percentage in the **Work in Progress** tab. You can remediate the document even after the document changes are applied.
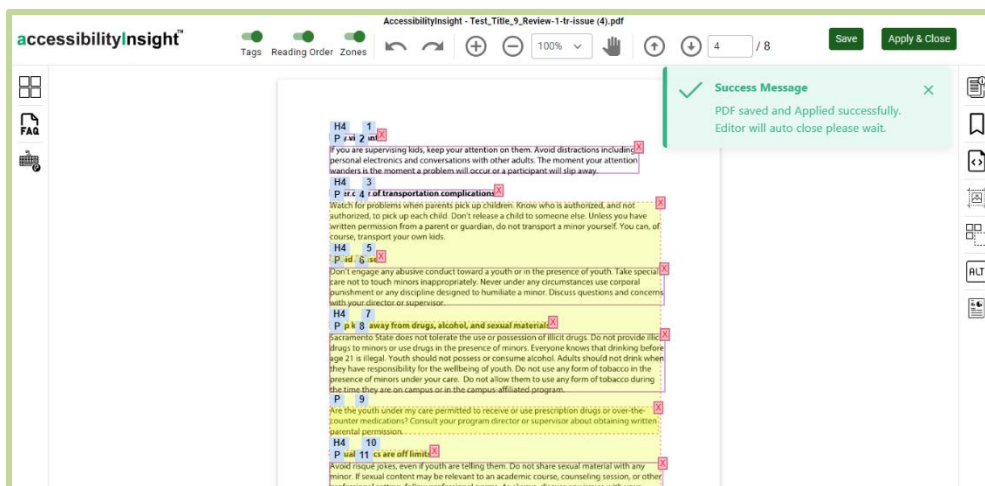
Figure 61 – Closing the Editor

📝	• When you apply changes to a document, the application checks whether Alt Text is available for all figures and formulae in the document. The application displays an alert message if Alt Text is not available for any figure or formula. • When a document is assigned by the original user to an assignee: a) The **Apply & Close** button will not be displayed for the assignee, instead the assignee will have access to **Finish Alttext, Finish Tagging, Tagging, Alttext Finish** buttons based on the given permission. For more information about completing the assigned document, refer to the **Task Finishing for Shared Documents** section. b) The **Apply & Close** button is not accessible for the original user till the assignee completes or cancels the assigned document.

3.2 Object Property Tray

In the document editor, click a zone in the document. On clicking, the application displays the **Object Property** tray.
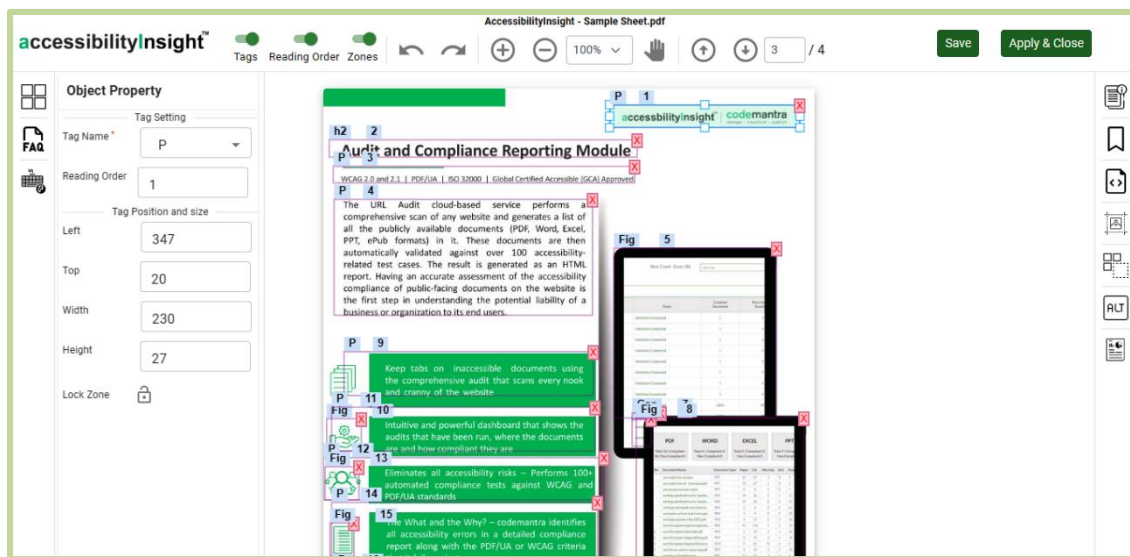
Figure 62 - Document Editor with the Object Property Tray

In the **Object Property** tray, you can perform the following functions:

- Add and modify the required property details: tag name, reading order, actual text, link type, tag position, and tag size.

> You can manually drag to move a zone if required. Once moved, the application automatically updates the position and size details in the **Object Property** tray.

- Click the ⬚ (**Lock Zone – Restrict From Movement or Deletion**) icon to lock the current zone properties. Once locked, you cannot modify the zone properties, delete, or move the corresponding zone in the document.

3.3 Right-Rail Menu

3.3.1 Document Details Tray

In the document editor, click the ⬚ (**Document Details**) icon available in the right-rail menu to add and manage the document details: title, author name, language, subject, and keywords. On clicking, the application displays the **Document Details** tray.
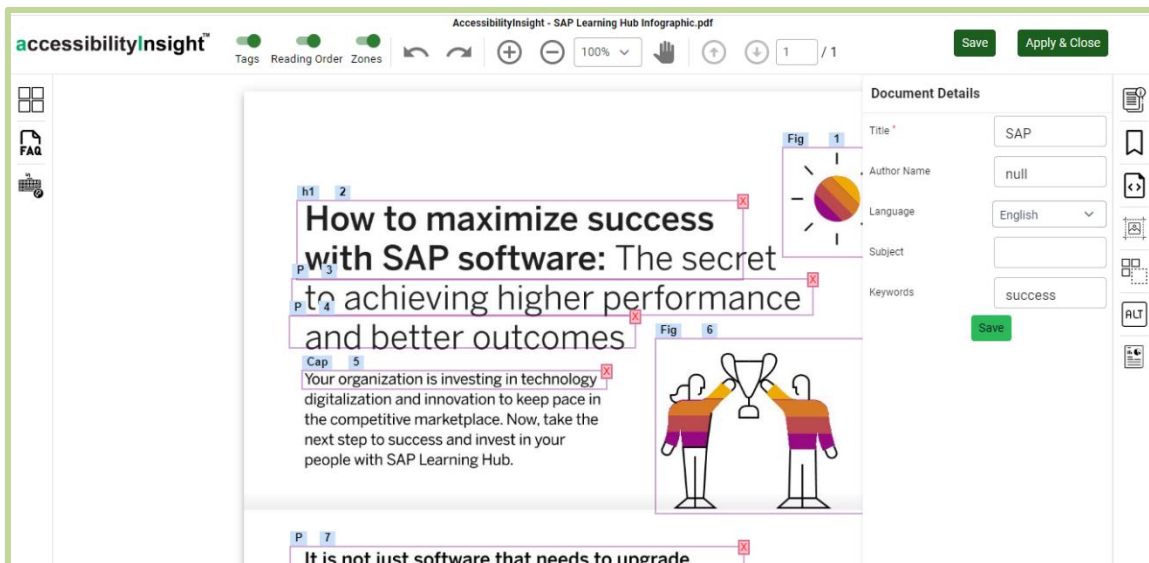
Figure 63 - Document Editor with the Document Details Tray

In the **Document Details** tray, provide or modify the title, author name, language, subject, and keywords. On providing the details, click **Save** to save the provided details.

	Click the icon again to close the **Document Details** tray.

3.3.2 Bookmarks Tray

In the document editor, click the (**Bookmarks Tray**) icon available in the right-rail menu to manage the available bookmarks. On clicking, the application displays the **Bookmarks** tray.
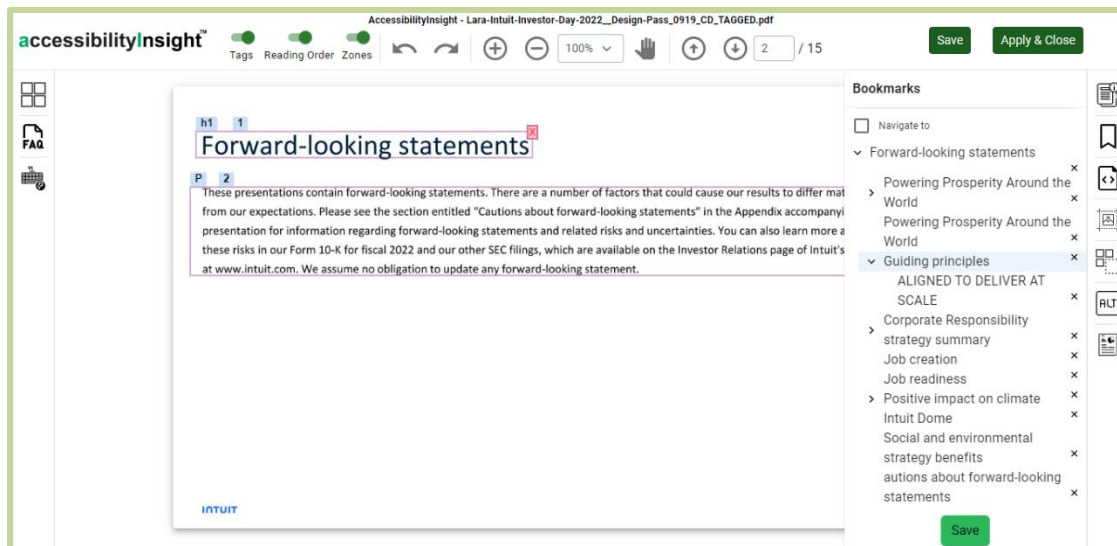
Figure 64 - Document Editor with the Bookmarks Tray

- The application automatically captures heading levels (up to 3 levels) on all pages of a document as bookmarks and displays the captured bookmarks in hierarchy levels in the document.

- You cannot apply changes to documents if bookmarks are not available. The application displays a warning message to update the bookmarks in order to apply changes to the documents.

- If headings are not available in documents, you cannot apply changes to the documents.

- You cannot apply changes to documents if empty bookmarks are available. The application displays a warning message to remove the empty bookmarks and proceed to apply the changes.

Figure 65 – Empty Bookmark Warning Message

In the **Bookmarks** tray, you can perform the following:

- Click the ✕ (**Delete**) icon to delete the corresponding bookmark.

📝	The application displays a warning message if the selected bookmark (parent) has any child-level bookmark. Click **OK** to continue with deletion or click **Cancel** to cancel. **Figure 66 – Child Bookmark Found Warning Message**

- Double-click a required bookmark to modify the bookmark name.

- Click **Save** to save the modified details.

3.3.3 Document Tags Tray

In the document editor, click the (**Document Tags Tray**) icon available in the right-rail menu to add and manage the document tags. On clicking, the application displays the **Document Tags** tray with the available tags for the current page.
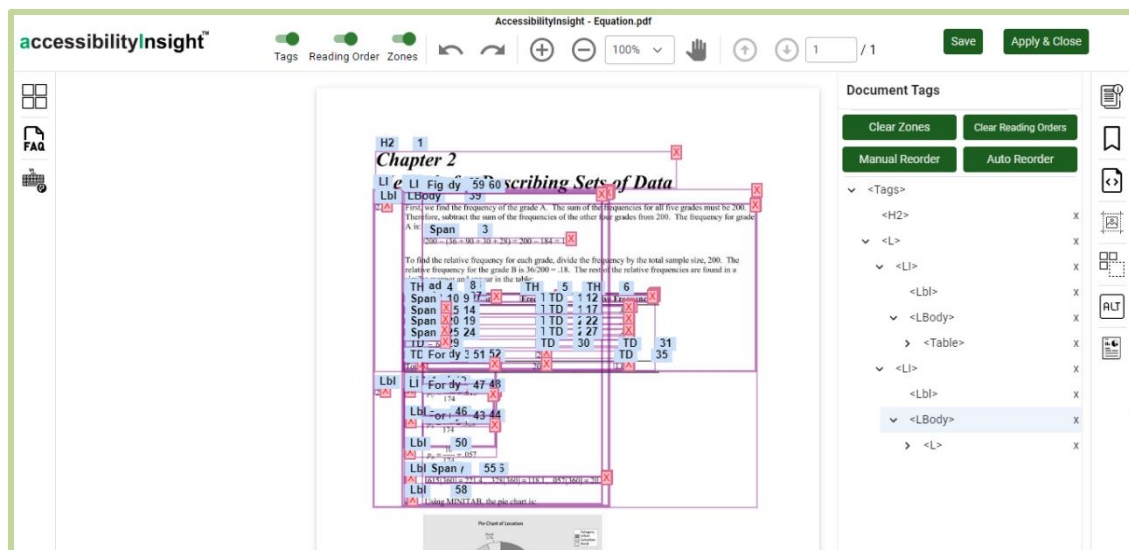
Figure 67 - Document Editor with the Document Tags Tray

	• The **Document Tags** tray displays the tags in a collapsible Tag tree structure with nested tags. • The **Document Tags** tray is not accessible for the user to whom the respective document is assigned without the tagging access. For more information about assigning documents, refer to the **Documents Assign** section.

In the **Document Tags** tray, you can perform the following:

• Click the ⟩ icon to expand the first displayed root tag. On clicking, the application displays the child tags in sequential hierarchical order.

• Click the ⌄ icon to close the hierarchical Tag tree structure.

• Click a required tag. On clicking, the application highlights and navigates to the corresponding zone in the document.

• Click the ✕ (**Remove tag**) icon to delete the corresponding tag.

• Click **Clear Zones** to clear all the zones and Alt Text in the current page of the document. On clicking, the application asks for confirmation. Click **OK** to confirm the zones deletion.
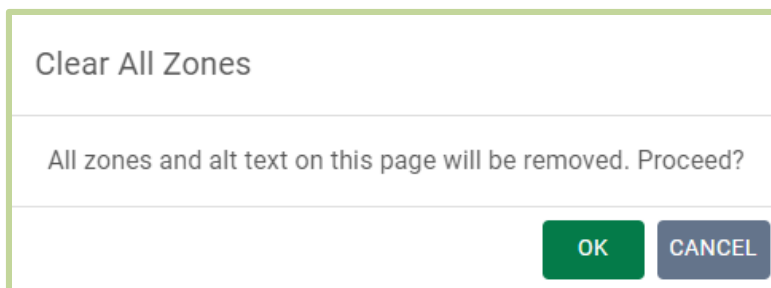
Figure 68 - Deleting All Zones and Alt Text in the Current Page

- Click **Clear Reading Orders** to clear the reading order in the current page of the document. On clicking, the application asks for confirmation. Click **Yes** to confirm the reading order deletion.
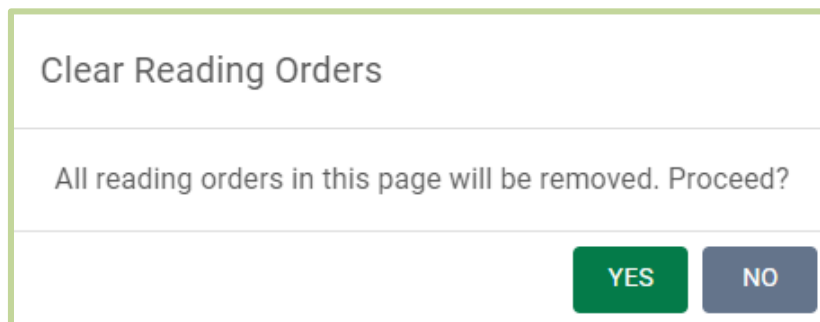
Figure 69 - Deleting the Reading Order in the Current Page

- Click **Manual Reorder** and then click a zone to apply the reading order to the zone. Once applied, the application displays the next reading order to be applied as shown in the below image. You can continue this process till you complete the reading order assignment. Once you have completed, click **End Order**.
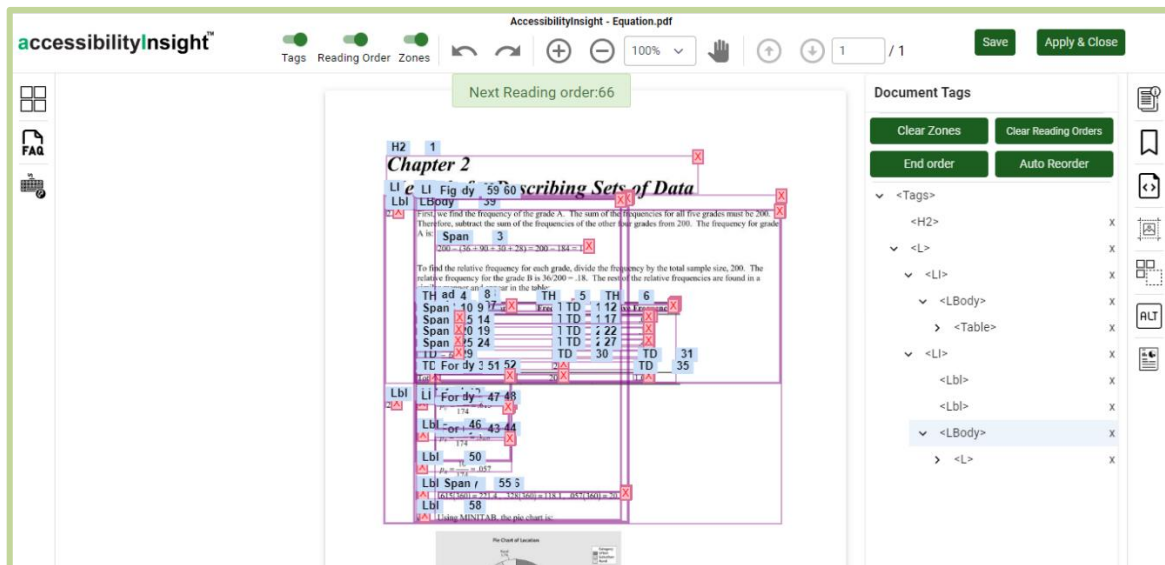
Figure 70 - Applying the Reading Order

- Click **Auto Reorder** to automatically reorder the zones in the current page of the document. Once applied, the application will remove the existing reading order and reorders from the first zone.

3.3.4 Zone Creation Tags Tray

Click the ⊡ (**Zone Creation**) icon to create a new zone. On clicking, the application allows you to draw either single zone or continuous zones by clicking and dragging in the document. After drawing a zone, you can select or modify the required tag type and the reading order by clicking on it.

	The application applies **Paragraph** tag as the default tag when you draw a zone. However, you can modify the applied tag type.
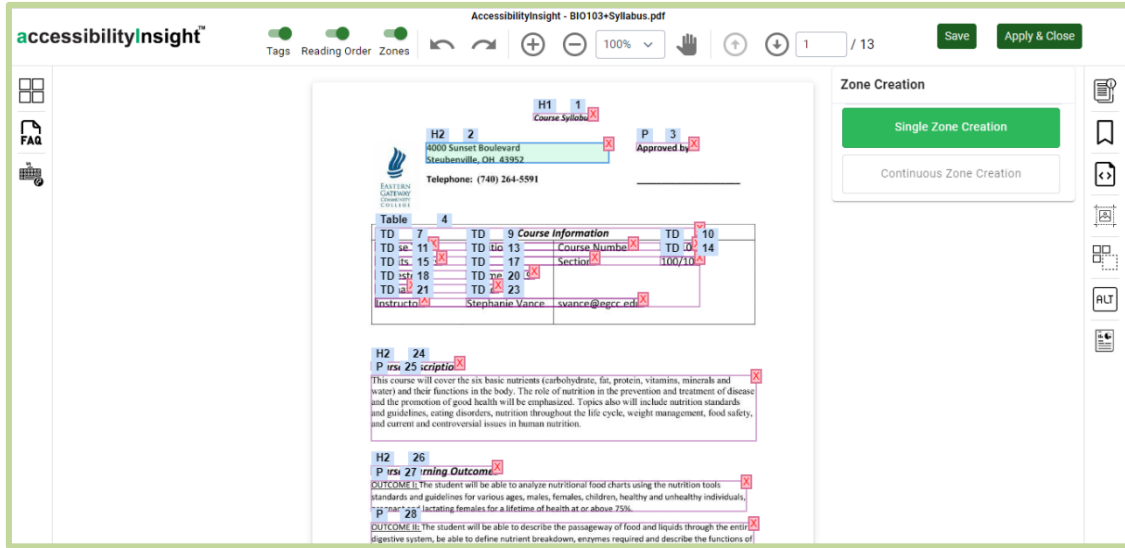
Figure 71 - Creating a Zone in a Document

	Click the ☒ icon available at the top right corner of the tagged zone to delete the zone.

3.3.5 Tags Tray

Click the ⊞ icon to select a favorite tag type. On clicking, the application displays the **Tags** tray. You can select a favorite tag type from the **Tags** tray. When you create a zone in the document, the application automatically applies the selected favorite tag to the zone.
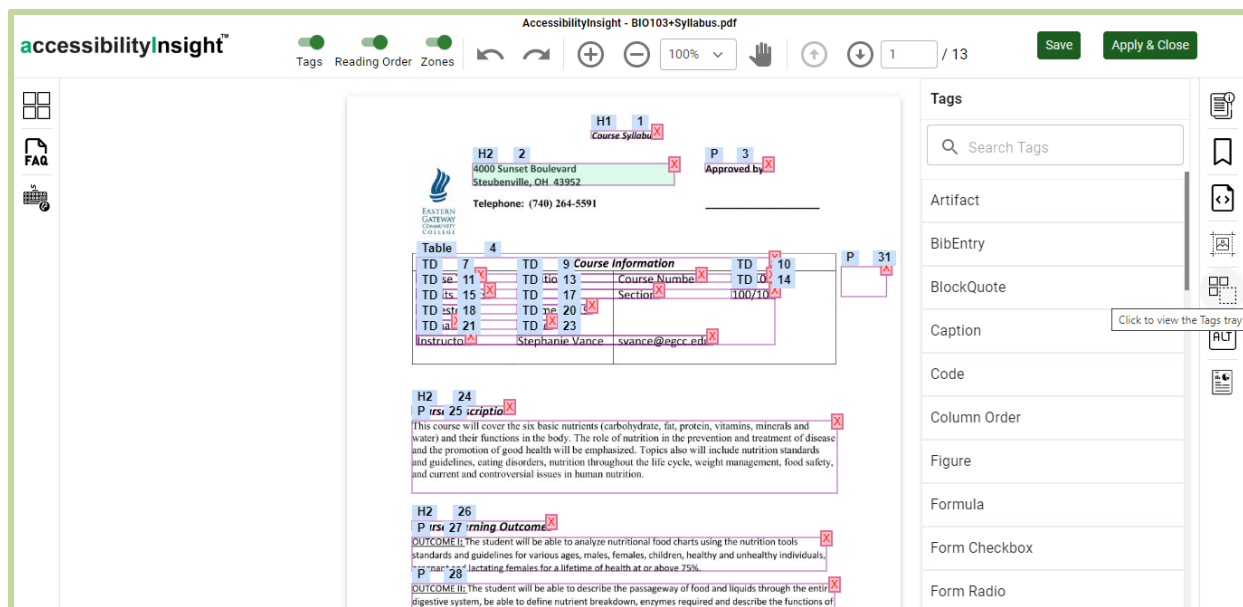
Figure 72 - Document Editor with the Favorite Tags Tray

3.3.6 Alt Text Tray

In the document editor, click the [ALT] (**Alt Text Tray**) icon available in the right-rail menu to add and manage Alt Text.

On clicking the [ALT] icon, the application displays the Alt Text tray with the available Alt Text for the entire document. The application displays Alt Text for the images, formulae, and tables available in the document.

In the Alt Text tray, you can perform the following:

- Click the [image icon] icon to view Alt Text available for the images in the document.
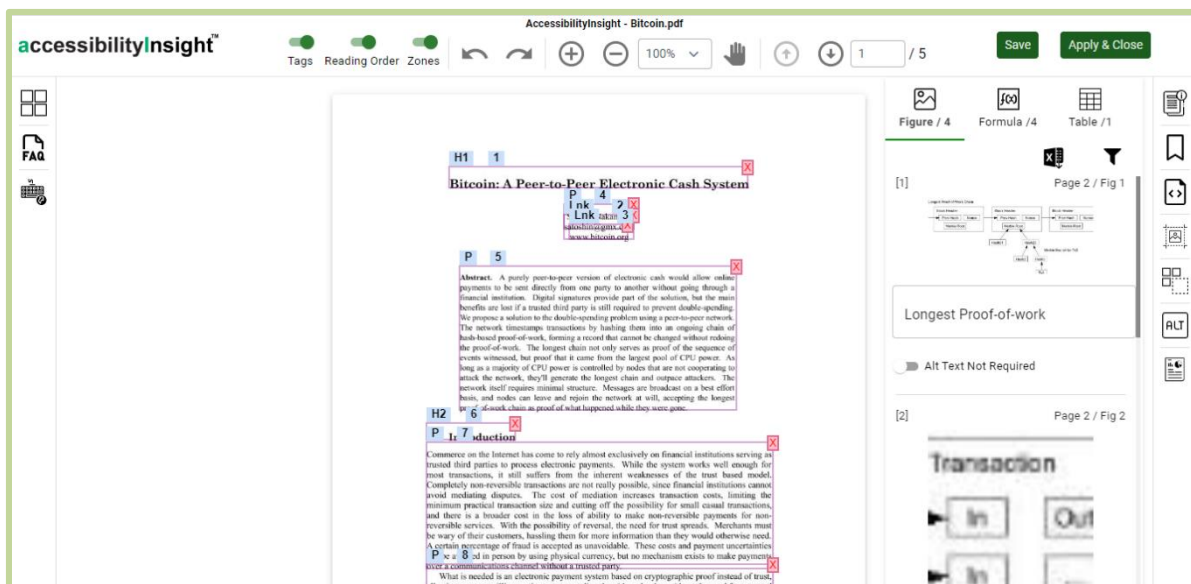
Figure 73 - Document Editor with the Alt Text Tray for Figures

- Click the ![f(x)] icon to view Alt Text available for the formulae in the document.
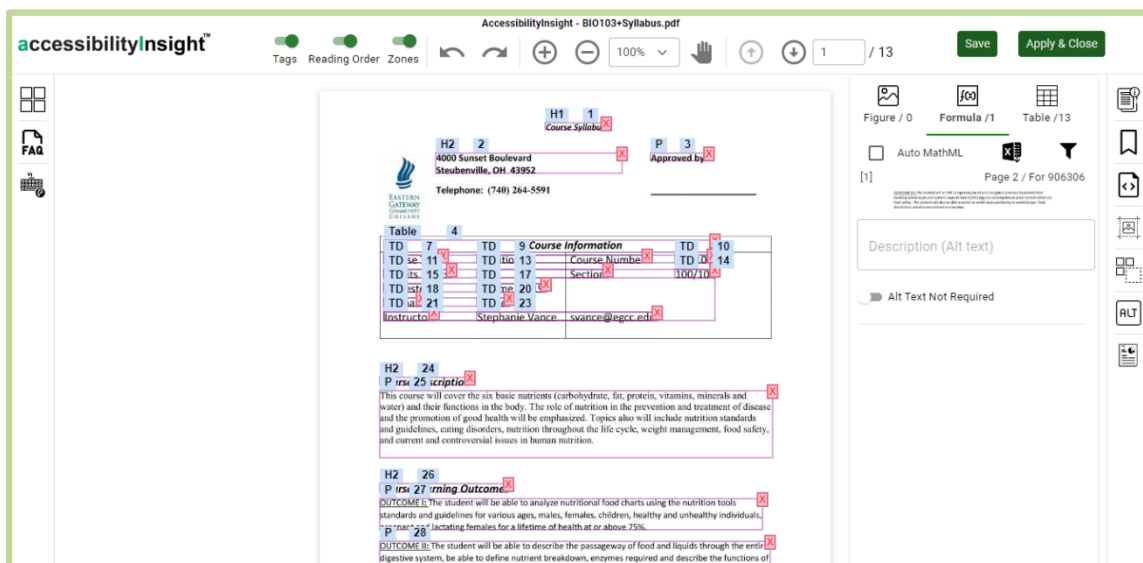
Figure 74 - Document Editor with the Alt Text Tray for Formulae

- Click the ![table] icon to view Alt Text available for the tables in the document.
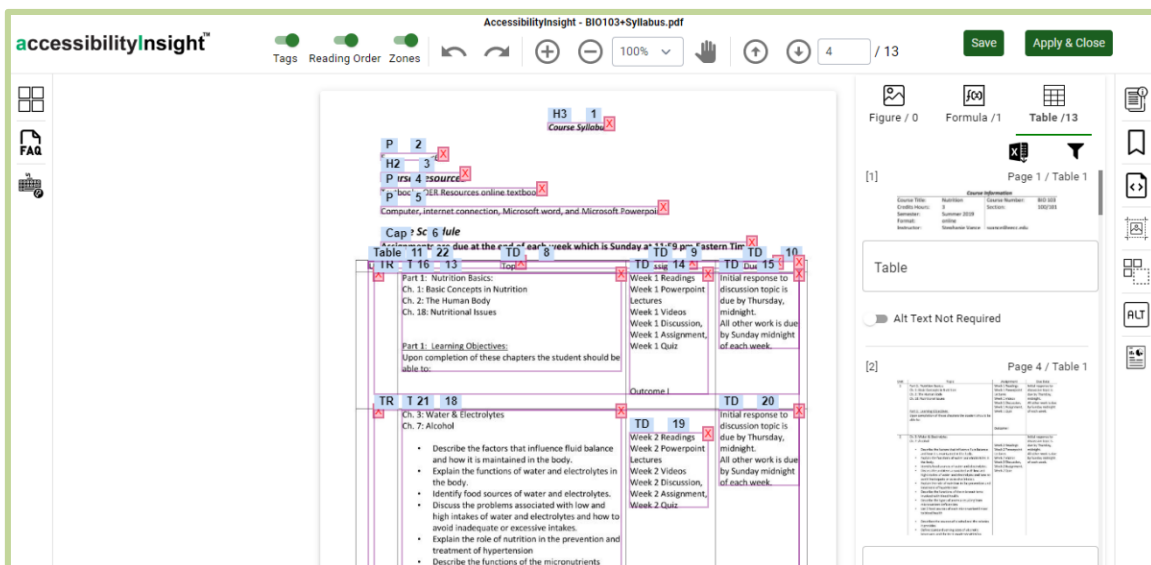
Figure 75 - Document Editor with the Table summaries for Tables

	• The application displays the number of available Alt Text below the , , and icons.
	• The Alt Text tray is not accessible for the user to whom the respective document is assigned without Alt Text access. For more information about assigning documents, refer to the **Documents Assign** section.

• You can export Alt Text for figures, formulae, and table summaries for tables into a spreadsheet. Click on the icon on the Alt Text tray. On clicking, an email will be sent to the user's registered email id with the download link.
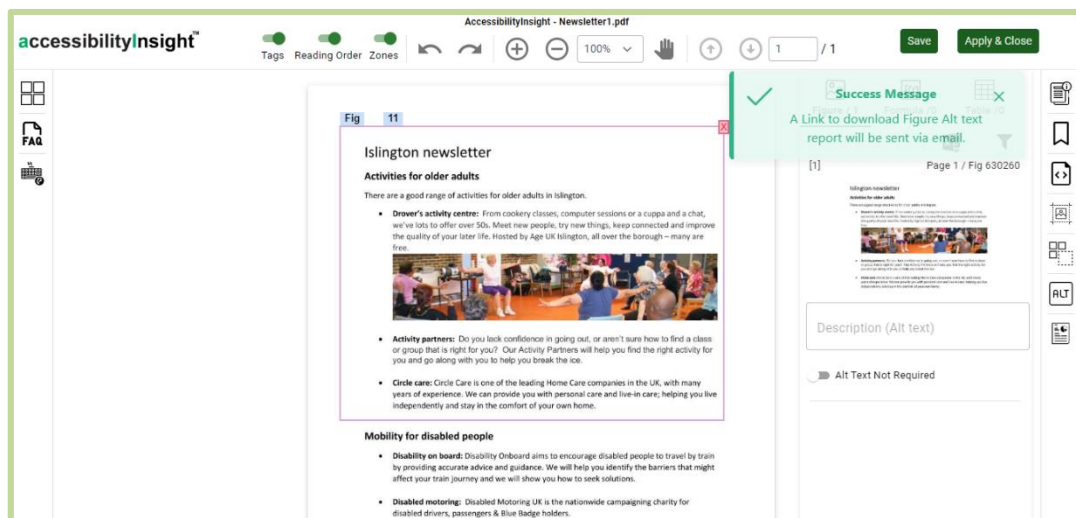
Figure 76 - Alt Text Tray With Spreadsheet Option

- Click the ![filter] icon to filter Alt Text for the images, formulae and tables. The available filter options are **Alt text missing** and **Alt text not required**.

- Select the **Auto MathML** option to auto-generate Alt Text for formulae. This option is available only for formulae.

- Click on any image available in the Alt Text tray to navigate to the corresponding image in the document.

- Edit Alt Text available in the **Description (Alt text)** field. After editing Alt Text, the application automatically saves the modified Alt Text.

- Select the **Alt Text Not Required** toggle button if Alt Text is not required for the corresponding image (decorative image).

3.3.7 Validation Report

Click the ![icon] icon to view and download the accessibility validation report. On clicking, the application displays the **Validation Report** tray. In the tray, click the ![HTML icon] icon to download the report.
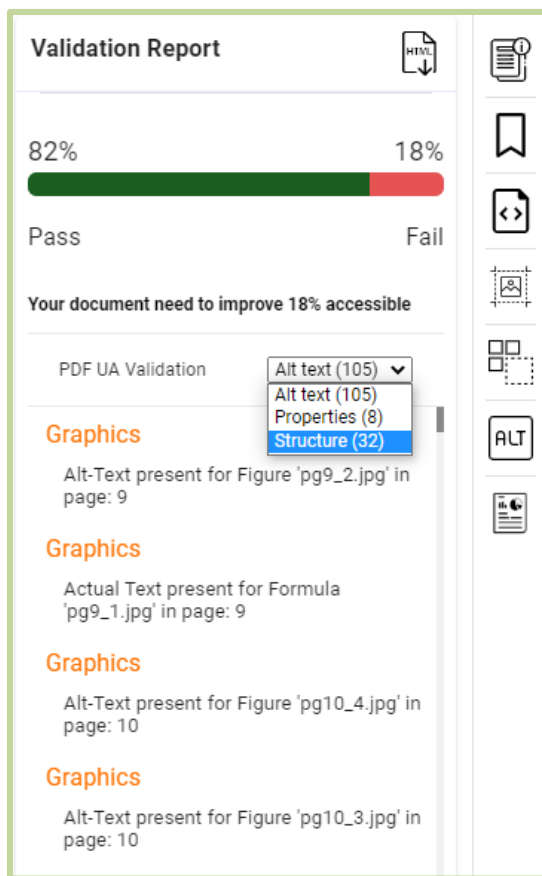
Figure 77 – Accessibility Report Tray

	• In the **Validation Report** tray, select the required criteria from the filter dropdown to view related details. • The application updates the validation report whenever you apply changes to the document.

3.4 Left-Rail Menu

3.4.1 Thumbnails Tray

In the document editor, click the ⊞ (**Thumbnails Tray**) icon available in the left-rail menu to access the thumbnails of the document pages. On clicking, the application displays the **Thumbnails** tray.
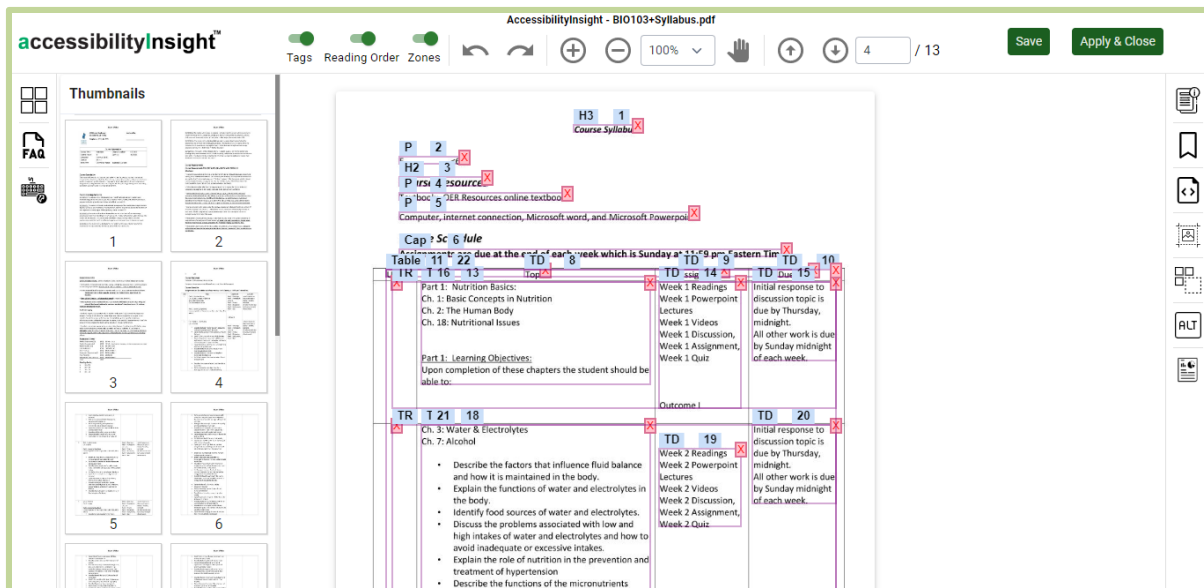
Figure 78 - Document Editor with the Thumbnails Tray

In the **Thumbnails** tray, click a thumbnail to navigate to the corresponding page.

3.4.2 FAQ Page

Click the (FAQ) icon to view the Help Center screen. For more information about the Help Center screen, refer to the **FAQs** section.

3.4.3 Keyboard Shortcuts

Click the (**Keyboard Shortcuts**) icon to view the keyboard shortcuts applicable in the application. On clicking, the application displays the **Keyboard Shortcuts** dialog box with the list of keyboard shortcuts.
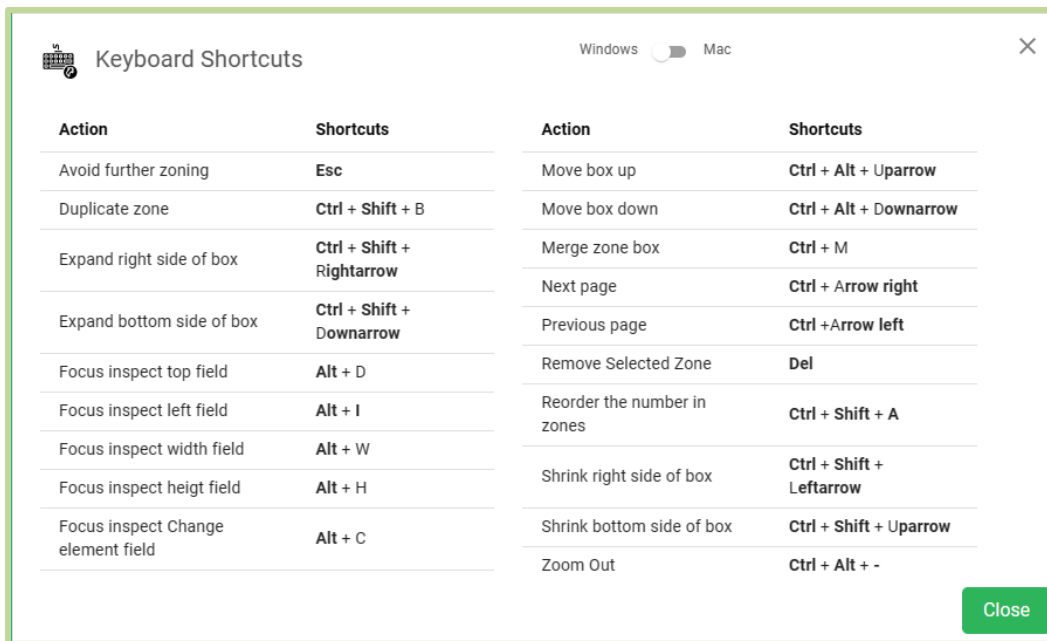
Figure 79 - Keyboard Shortcuts

Click on the toggle button on the top to choose between either Windows or Mac operating systems. Click **Close** to close the dialog box.

3.5 Quick Action Menu

In the document editor, click a zone that has a table, list, or zone tag. On clicking, the application displays the quick action menus: **LI split**, **LBL split**, **Grid to List**, **Clear LI/LBL** menu icons for the list tag, **Row Split**, **Remove Row**, **Column Split**, **Column Remove**, **Merge Cell**, **Generate Table**, **Clear Cell** menu icons for the table tag, and **Split Para**, **Remove Para**, **Generate Para** menu icons for the zone tag.
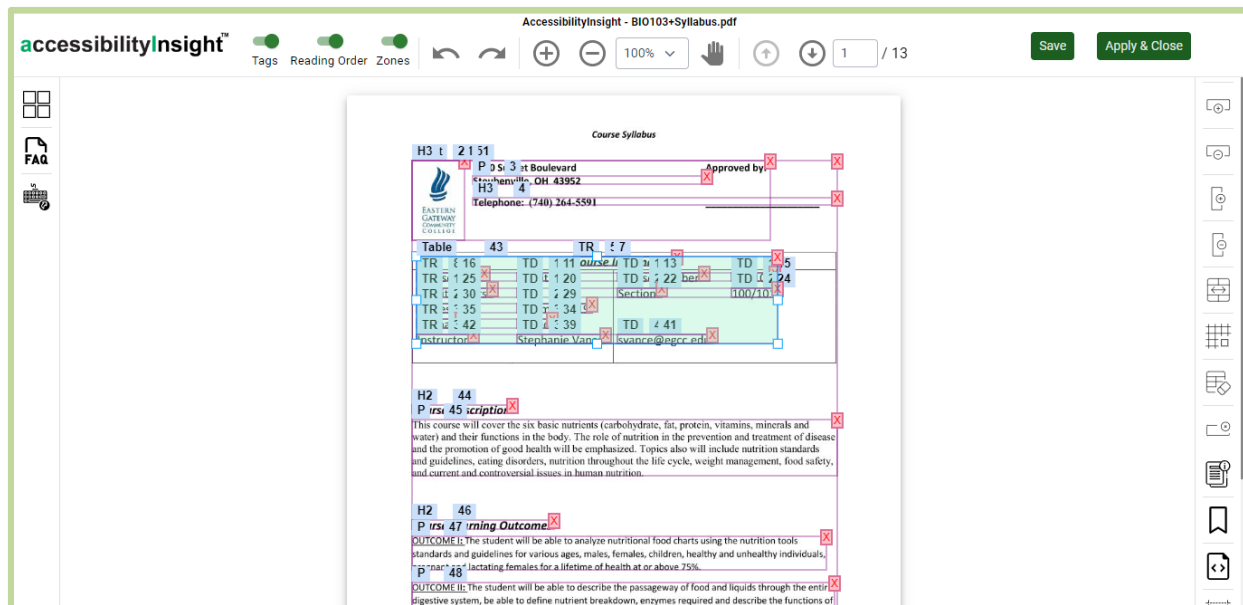
Figure 80 - Document Editor with the Quick Action Menus

In the quick action menu, you can perform the following for the table tag:

- Click the ⌐⊕⌐ (**Row Split**) icon to split a table row. On clicking, the application allows you to split a row in the document editor. Similarly, you can use the ⊕ (**Column Split**) icon to split a column.

- Click the ⌐⊖⌐ (**Remove Row**) icon to remove the split row. Similarly, you can use the ⊖ (**Column Remove**) menu to remove the split column.

- Click the ⇔ (**Merge Cell**) icon to merge table cells.

- Click the ⊞ (**Generate Table**) icon to assign proper table tags for the zones that have split rows and columns.

- Click the ⊟ (**Clear Cell**) icon to clear table cells.

- Click the ⌐⊗ (**Delete Zone**) to delete the selected zone.

	• Click the ⊞ (**Generate Table**) icon to generate a required table with the split rows and columns. • The output or remediated document contains all the table tags: TD and TH.

In the quick action menu, you can perform the following for the list type tag:

- Click the ⊡ (**LI split**) icon to split a list item.

- Click the ⬚ (**LBL split)** icon to split the list label.

- Click the ⊟ (**Clear LI/LBL**) icon to clear a split list item or the split list label.

- Click the ⊞ (**Grid to List**) icon to assign proper list tags for the zones that have split items and split labels.

- Click the ⊟ (**Delete Zone**) to delete the selected zone.

	Click the ⊞ (**Grid to List**) icon to generate a required list with the split items and label.

In the quick action menu, you can perform the following for the zone tag:

- Click the ⊡ (**Split Para**) icon to split the corresponding zone into paras. On clicking, the application allows you to split the zone.

- Click the ⊡ (**Remove Para**) icon to remove a split zone.

- Click the ⊞ (**Generate Para**) icon to generate para tags for split zones.

- Click the ⊟ (**Delete Zone**) to delete the selected zone.

3.6 Useful Features

Refer to the sections below for these useful features:

- List or TOC tag bulk change

- Renumbering the reading order of multiple zones at a time in the document editor

- Generating table tags

- Generating list tags

3.6.1 Link and TOC Tag Bulk Change

You can apply link and TOC tags to multiple zones at a time by drawing a new zone (parent zone) around required zones (child zones) that need to be changed.

To perform link or TOC tag bulk change:

1. Click the icon to access the **Tags** tray.
2. In the **Tags** tray, click the link or TOC tag.
3. Draw a new zone (parent zone) around required zones (child zones) that need to be changed. After drawing a parent zone, the application automatically applies the link or TOC tags to the child zones. For example, when you draw a TOC zone, the application applies TOCI tags to child zones.
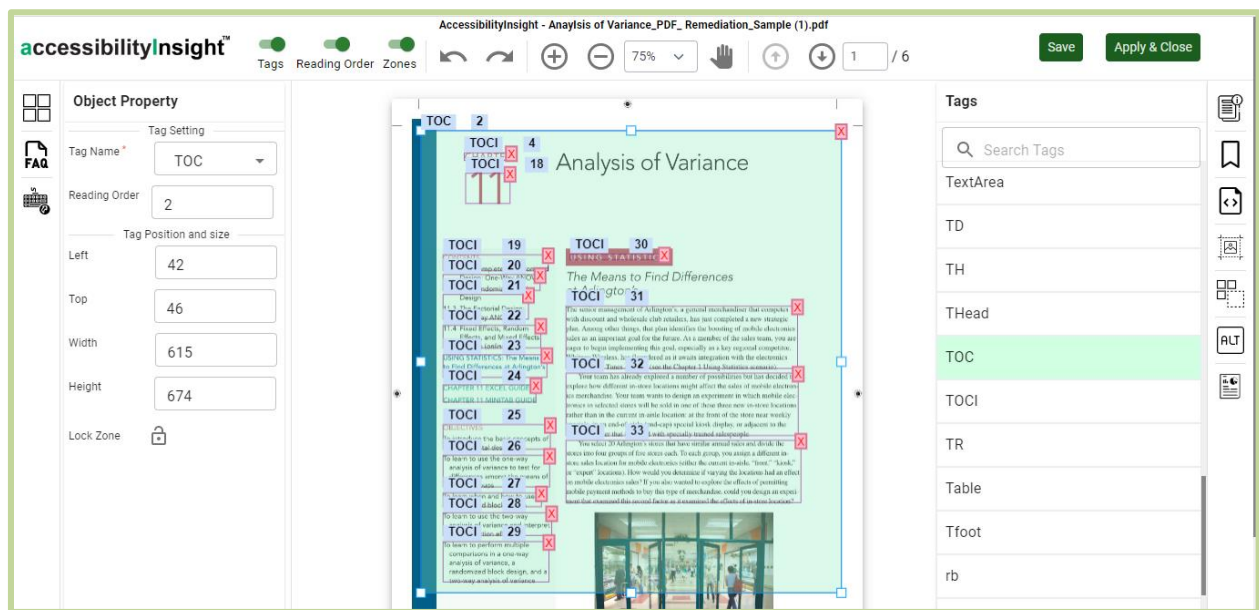
Figure 81 - Applying a TOC Tag to Multiple Zones

	If you draw a TOC zone around link zones, the application will change the link zones to TOCI zones. In the remediated or output document, the link tags will be available inside the TOCI tags under the TOC parent tag.

3.6.2 Renumbering the Reading Order of Multiple Zones

You can renumber the reading order of multiple zones of a particular area (for example, columnar area) by drawing a new zone (parent zone) around required zones (child zones) that need to be renumbered.

To renumber the reading order of multiple zones, perform the following:

1. Click the [icon] icon to access the **Tags** tray.
2. In the **Tags** tray, click the **Column Order** tag.
3. Draw a new zone (parent zone) around required zones (child zones) that need to be renumbered.
4. After drawing a parent zone, enter the required reading order in the drawn zone and press Enter. The application automatically applies the sequential reading order for all the child zones based on the entered reading order.
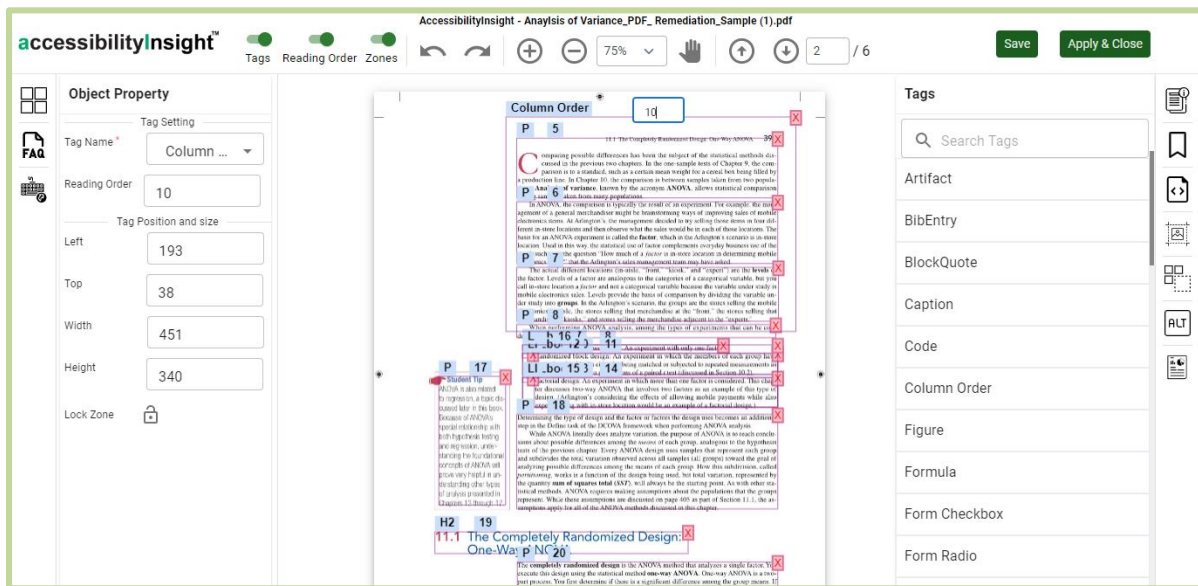

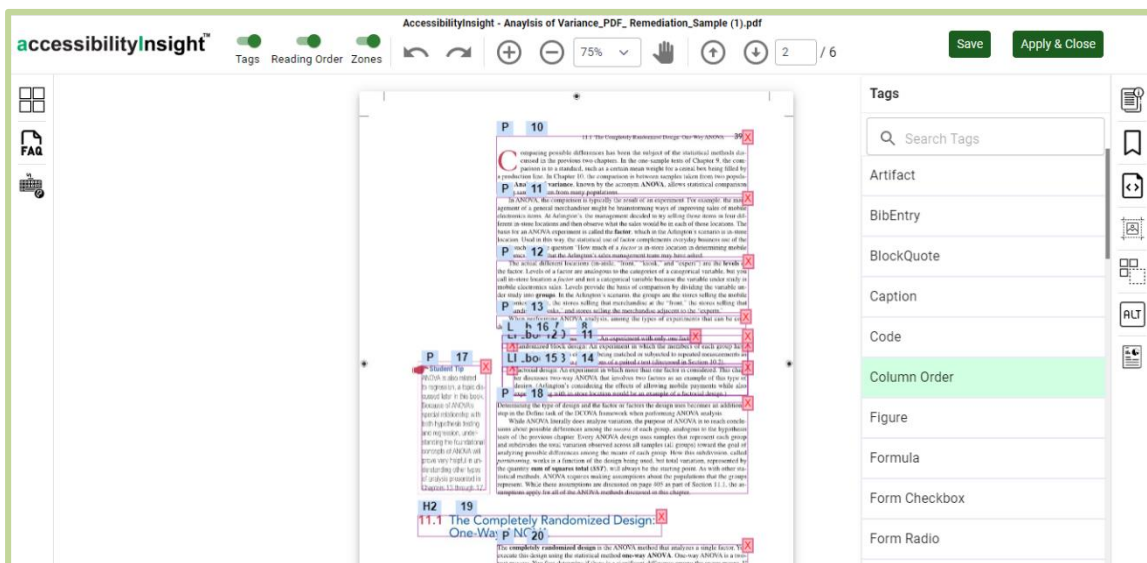**Figure 82 - Renumbering the Reading Order of Multiple Zones**

Figure 83 - Modified Reading Order

3.6.3 Generating Table Tags

You can generate table tags (TD and TH) automatically for tables (if not predicted).

To automatically generate table tags:

1. In the document editor, draw a table zone around the table content, if the table is not predicted. The application displays the quick action menus: **Row Split**, **Remove Row**, **Column Split**, **Column Remove**, **Merge Cell**, **Generate Table**, and **Clear Cell**.

2. Perform table actions such as row split, column split, merge cells, and so on, using the quick action menus, if required. For more information about using the quick action menus, refer to the **Quick Action Menu** section.

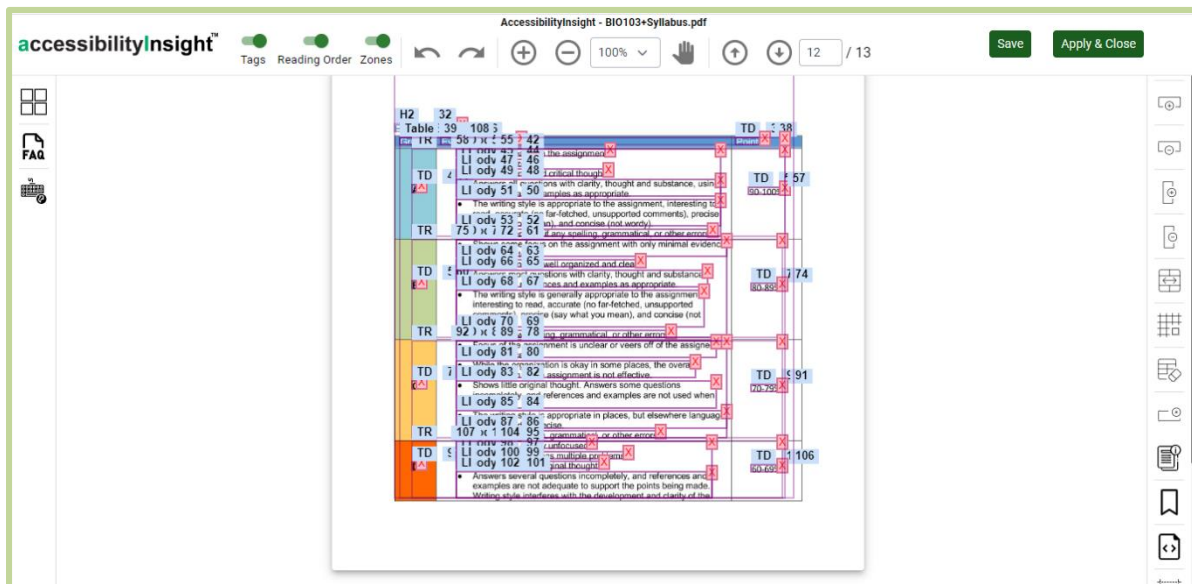3. Click the (**Generate Table**) icon to assign proper table tags for the zone that has split rows and columns.

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Figure 84 – Generating Table Tags

3.6.4 Generating List Tags

You can generate list tags (LI and Lbl) automatically for lists.

To generate list tags:

1. Draw a list (L) zone around the list content, if the list is not predicted. The application displays the quick action menus: **LI split**, **LBL split**, **Grid to List**, and **Clear LI/LBL**.

2. Perform the list actions such as list item split, list label split, clear list item, and so on, using the quick action menus, if required. For more information about using the quick action menus, refer to the **Quick Action Menu** section.

3. Click the ⊞ (**Grid to List**) icon to assign proper list tags for the zone that has the split items and split label.
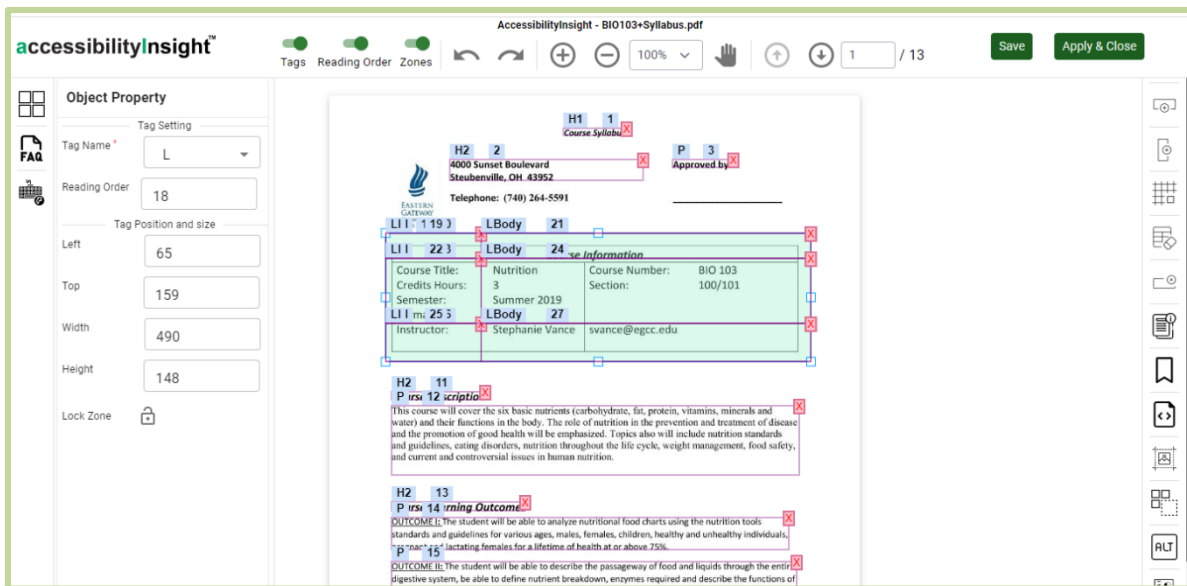
Figure 85 – Generating List Tags

3.7 Task Finishing for Shared Documents

For the documents shared with you by other users, the application displays the following buttons instead of **Apply & Close** on the top ribbon of the document editor.

- **Finish Alttext**, when only Alttext permission is given
- **Finish Tagging**, when only Tagging permission is given
- **Tagging, Alttext Finish**, when both Alttext and Tagging permissions are given
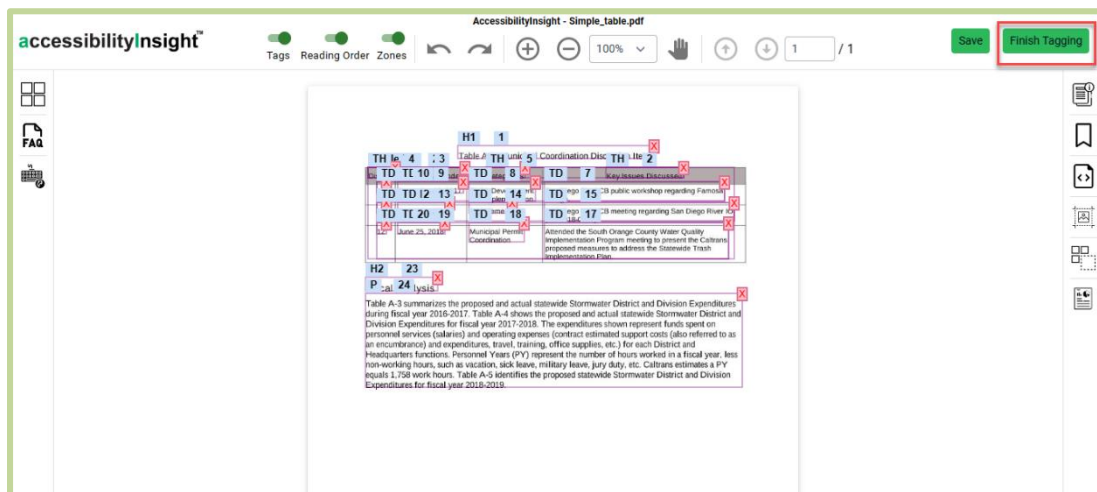

Figure 86 – Document Editor Screen For Shared Documents

Once you complete the assigned work in the documents editor, do the following actions:

- Click **Save** to save the document.

- Click on **Finish Tagging** (based on the given permission) button to apply changes to the document. On clicking, the application displays the confirmation dialog box.
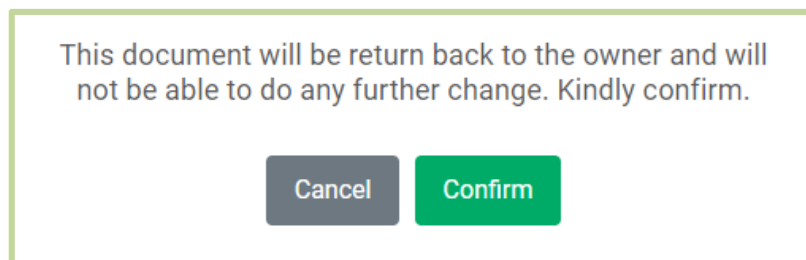

This document will be return back to the owner and will not be able to do any further change. Kindly confirm.

Cancel   Confirm

Figure 87 – Task Finishing Confirmation

- Click on **Confirm** button. On clicking, the application closes the editor and returns the document to the document owner.

- Click on **Cancel** to close the popup.

	• Alttext tray will not be visible to the user working with only **Tagging** permission.
	• Similarly, for users working with only **Alt text** permission, Document Tags Tray, Zone Creation, and Favourite Tags tray will not be visible.
	• Users assigned with **ALL** permission will have access all the features of the Document Editor.
	• The assigned user cannot access the document once it is returned to the document owner.

4 Notifications

The notification feature available in the top pane notifies about assigned documents and Alt Text export details for figures, formulae, and tables.

When assignees accept or reject the assigned documents, the application displays notifications. Also, when you assign documents to assignees and revoke the assigned documents, the application notifies the assignees. Refer to the **Documents Assign** section for more information on assigning documents.

To access the notification feature, click the ⌾ icon in the top pane. On clicking, the application displays the **Notifications** dialog box with the list of notifications.
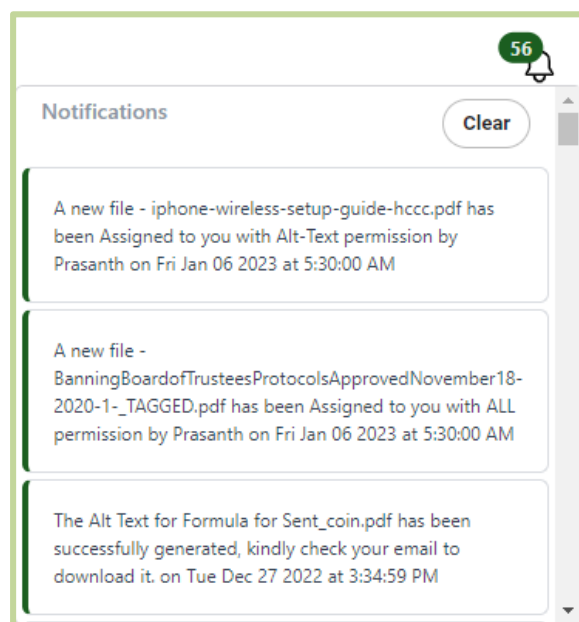
Figure 88 – Accessing Notifications

In the **Notifications** dialog box, click **Clear** to delete all the notifications.

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5 FAQ

You can access the FAQs, version details, company (codemantra) information, and the User Manual from the FAQs menu. Click the **FAQ** menu. On clicking, the application displays the Help Center screen.
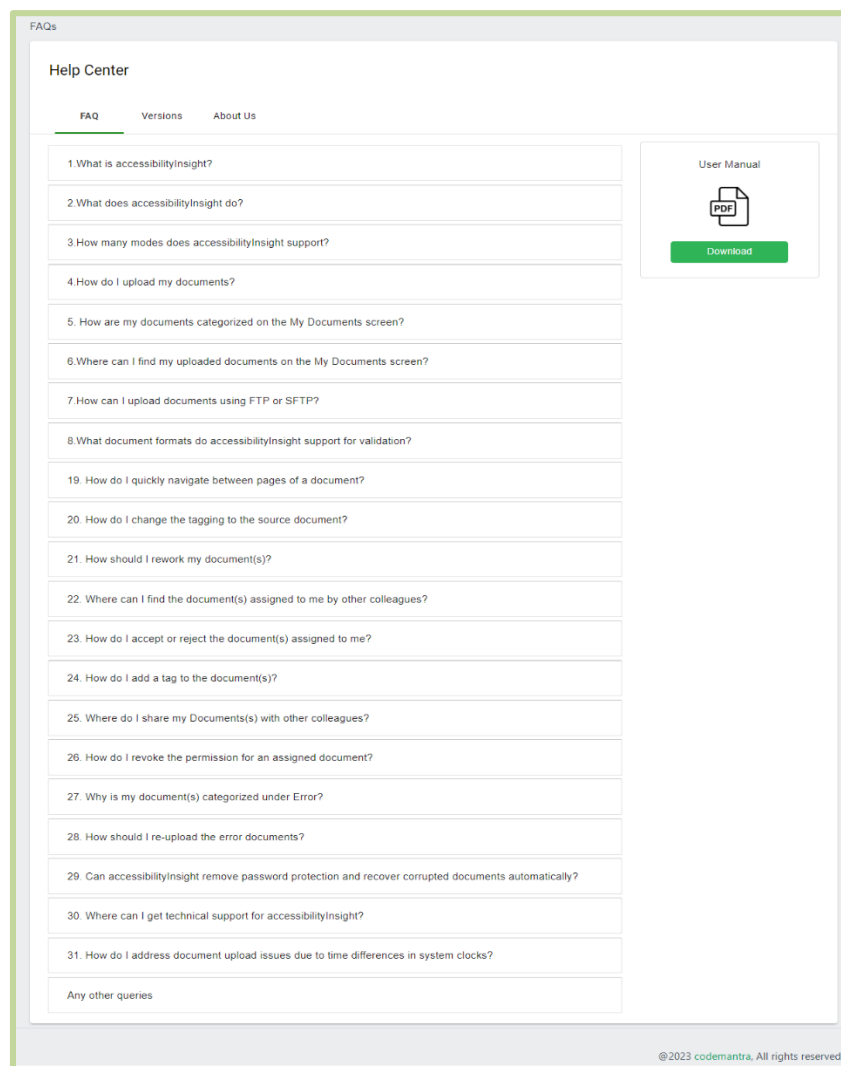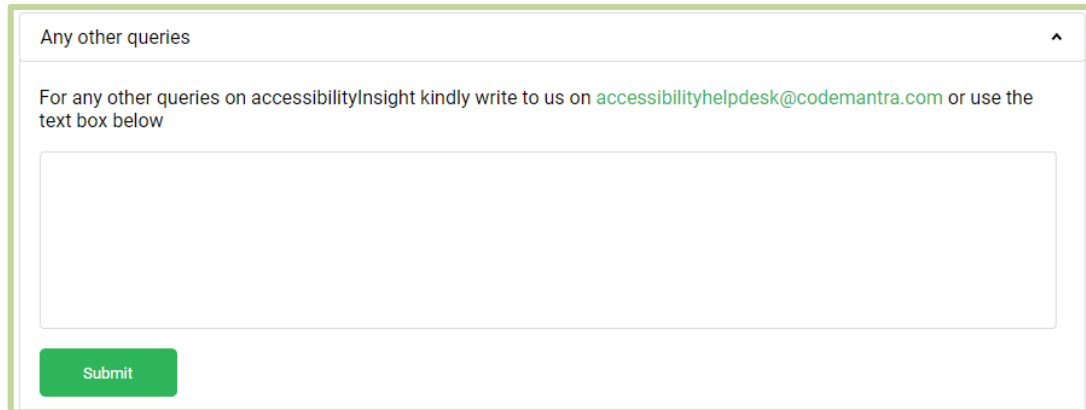

Figure 89 - Help Center Screen

In the help center screen, you can perform the following:

- Click on a FAQ question to view its answer.

- Click on any other queries at the bottom to submit your questions in the text box provided or write to **accessibilityhelpdesk@codemantra.com** for further assistance.

Figure 90 - Help Center Screen

- Click on the Versions tab to view summary details of Release Notes and their versions.

- Click on the About Us tab to view details about the company(codemantra).

- Click the Download button on the right side of the screen to download the User Manual.

6 Logout

The **Logout** menu allows you to log out from the application. Click the **Logout** option on the left side menu. On clicking, the application displays a popup for confirmation. On clicking **Yes, Logout** the application logs out and redirects to the login screen.
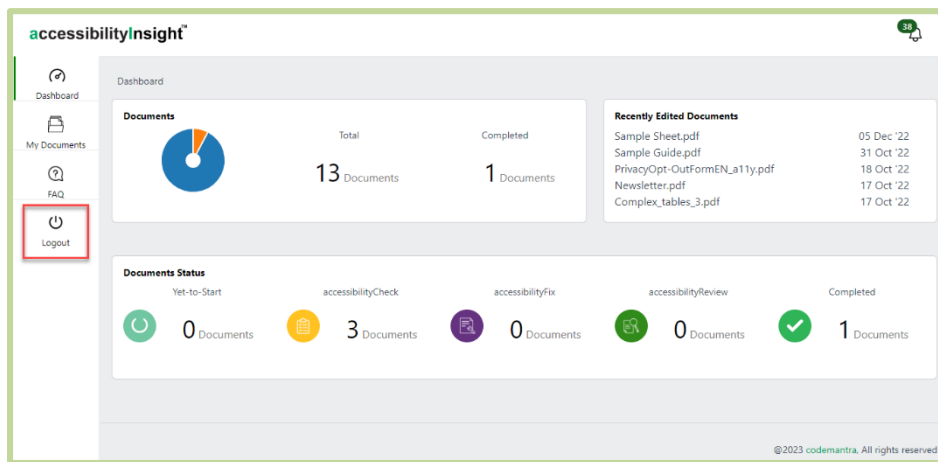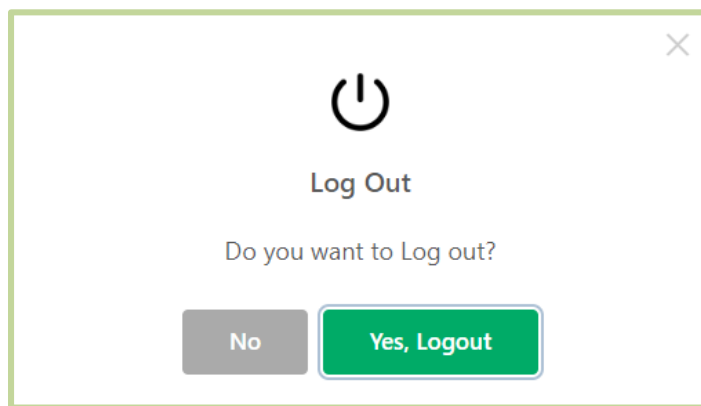

Figure 91 – Logout Menu

Figure 92 – Logout Confirmation Message

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