Accessible Information Management Version 5: Screen Reader Quick Start Guide

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Accessible Information Management Version 5: Screen Reader Quick Start Guide

# Introduction

This quick start guide is designed to help disability services staff who use screen readers and are new to AIM get a jump start in navigating and using the system. Written by an experienced screen reader user for over twenty-five years, and a daily AIM staff user since 2017, this guide was created with the specific training needs of screen reader users in mind. Whether you are a veteran screen reader user or relatively new to this method of computer access, you will find this a helpful resource in unlocking the power of the AIM data management platform. The guide does presume basic skills in using your screen reader, such as launching a web browser, reading commands, and ability to open a webpage.

This guide serves as a companion to the online AIM manual. The online manual is much more comprehensive and reviews all of the AIM modules and customization options. Readers of this guide are strongly encouraged to consult the online manual once they are comfortable navigating the AIM site and completing the tasks described in this guide. This guide also assumes that your school has already customized at least some of the AIM parameters and that there is live data in the system to interact with.

As of this writing, the two most popular screen readers are JAWS and NVDA. The Screen Reader Quick Start Guide is written for users of these two software packages. If you use a different screen reader and are new to it, you may want to review the training materials associated with that screen reader before consulting this guide.

## Section 1: Overview of Web Browsing Using JAWS and NVDA

This introductory module provides a brief overview of navigating the web. Since AIM is a web-based platform, solid website navigation skills will be essential in having a smooth AIM user experience. If you are already very comfortable navigating websites with a screen reader, you may opt to skip this section. Note that this is not a detailed tutorial on how to customize your web browser or specific web browsing settings in your screen reader. You may wish to consult your screen reader’s help documentation for more information on this.

Most of the commands outlined below apply to both NVDA and JAWS. If a command applies to one screen reader but not the other, this will be noted. A key we will use frequently in this guide is the insert key. Both JAWS and NVDA make heavy use of this key to perform specialized commands that relate only to the screen reader. If you are using a laptop, your screen reader may be configured such that the caps lock is used in place of the insert key. If you are unsure whether your screen reader is customized in this way, try some of the commands as outlined below, first with insert and then with caps lock, to see which key combination works.

### Exploring a Webpage

When you navigate to a website, such as [www.google.com](http://www.google.com), your screen reader will transition to a mode which allows you to browse webpages. In NVDA, this is called Browse Mode. In JAWS, this mode is called Virtual Cursor Mode. When you first land on a page, the screen reader will either place its cursor at the top of the page or at the start of a form field where you could input information, such as a search field. We are using Google’s webpage in this introductory example instead of the AIM webpage because it is a much simpler page with fewer elements to navigate.

You can explore a page’s content on a basic level by using the up and down arrow keys to read the text, as well as explore various page elements such as links, headings, tables, and form fields. You can also use the tab key to navigate down, or forward, through the page elements. To navigate up, or backwards through the page elements, hold down shift and press the tab key. Continuing to press tab or shift tab will cycle you through the elements on the page once you have reached the top or bottom of the page. As you proceed through this guide, you will notice that when browsing the web, pressing the shift key along with another navigation key generally moves your screen reader’s cursor to the previous element instead of the next element. This will be demonstrated later. Pressing control plus the home key takes you to the top of the page, while control plus the end key takes you to the bottom. Pressing insert plus t will tell you the title of the webpage.

### Page Elements

Page elements are features of a webpage which make it easier to navigate. We will review the most common elements found on the AIM website. Links take you to another webpage or another part of the same webpage. Regions are major areas on a webpage that may represent main or secondary content. Headings organize information and are often tiered at different levels. A heading at level 2 will have more specific information related to the information at heading level 1 above it. There are often several headings in each region. Lists group pieces of related information together. Later in this section, we will review how to easily jump to a link, heading, list, and other elements.

#### Grouping Page Elements

In NVDA, an easy way to organize all of the links and headings on a page is to hit the insert key plus F7. You can then arrow up or down through the list. You can jump to a specific link or heading by pressing its first letter. For example, on the Google homepage, after pressing insert plus F7, you can press g to go to the Gmail link, and then press enter to activate it.

In JAWS, pressing insert plus F7 will create a list of links only. Pressing insert plus F6 generates a list of headings, while insert plus F5 generates a list of form fields, such as edit boxes, combo boxes, radio buttons, and checkboxes. Just as with NVDA, pressing an element’s first letter after hitting insert plus F5, F6, or F7 will take you to the element that starts with that letter.

### Form Controls

Form controls are elements on a webpage which allow you to enter information. These include edit boxes, buttons, combo boxes, checkboxes, and radio buttons. There are additional types of form controls which are more advanced. These will not be covered here because they are not used by AIM.

#### Edit Boxes

An edit box allows you to type text. For example, the edit box on Google’s homepage is a search field. Depending on how your screen reader is configured, you may need to hit the enter key on an edit box in order for the screen reader to allow you to enter information in that box. Both JAWS and NVDA refer to the mode where you can enter data as Forms Mode. Once you move away from a form, your screen reader will automatically toggle out of Forms Mode and back to Virtual cursor mode for JAWS or Browse mode for NVDA.

#### Buttons

Buttons are just what they sound like – Form controls which cause the website to perform a particular function when you press enter on them. There is a Search button on Google’s homepage. Unlike with edit boxes, you do not need to be in Forms Mode to activate a button.

#### Exercise 1.1: Performing a Google Search Using an Edit Box and Button

Navigate to Google’s search page by pressing control plus l and then typing in [www.google.com](http://www.google.com). Locate the edit box, which is the search field on the page by using the up and down arrow keys or the tab and shift tab keys. If your screen reader makes a noise such as a click or pop, it is set to automatically enter Forms Mode when you move your screen reader’s cursor over a form field. If you do not hear a click or a pop, your screen reader may be set to enter Forms Mode manually. To enter Forms Mode manually, hit enter on a form field, such as the edit box on Google’s homepage. Then type in a search string and hit the tab key until you hear “Google Search Button.” Press enter on that button to have Google perform the search. Then use the arrow keys or hit insert plus F7 to explore the search results’ links. You can of course hit enter on any link, and your browser will open that link’s corresponding page.

#### Combo Boxes

Combo boxes are lists of options to choose from. For example, when ordering a product online, the product’s webpage will often use a combo box of choices ranging from 1 on up for you to indicate the quantity of that item you would like to order. You will need to be in Forms Mode to activate a combo box. Once in Forms Mode, use the up and down arrow keys to make your choice in the combo box.

#### Exercise 1.2: Searching on Amazon Using a Combo box

Navigate to [www.amazon.com](http://www.amazon.com). Explore the webpage using the arrow keys until you find the combo box which gives you a choice of which department to search in. If your screen reader does not automatically place you in Forms Mode, press enter on the combo box and then use the down arrow key to choose any department. Then press tab until you hear your screen reader announce that you are in a search field. Type something to search for and then press tab until the screen reader says “go button.” Note that since Amazon frequently updates their website, you may hear slightly different wording when your screen reader announces the various form fields. When your browser pulls up the page of search results, use the arrow or tab keys or, better yet, press insert plus F7 to take you through the search results.

#### Checkboxes

Checkboxes are form elements which allow you to choose one or more options at a time. You can think of them as lists of choices where you are able to place a checkmark by as many items on the list as you would like. To check or uncheck a checkbox, press the spacebar on it. Your screen reader will indicate that the box is checked or unchecked. Just like with buttons, you can activate a checkbox even when not in Forms Mode

#### Radio Buttons

Unlike checkboxes, radio buttons only allow you to choose one item from a list of choices. Sometimes radio buttons are used instead of combo boxes. You can think of radio buttons as choosing a station on a radio. You can only listen to one station at a time. When in Forms Mode, use your up or down arrow key to choose which radio button you would like.

#### Exercise 1.3: Filling out a Sample Survey Using Radio Buttons, Comboboxes, Edit Boxes, and Checkboxes

Navigate to https://formsmarts.com/form/yu?mode=h5. You may find it easiest to copy and paste this web address into your browser’s address bar.

This page gives an example of a survey form, showing how radio buttons, comboboxes, edit boxes, and checkboxes work. Explore the page using the arrow keys. Then practice using the various form elements to pretend to fill out the survey. You can hit the escape key to get out of Forms Mode, and you will still be able to toggle the checkboxes as checked or unchecked using the spacebar.

### Tables

A very common way that websites organize information is using tables. While tables are not always built in a way that works well with screen readers, the tables in AIM are carefully designed to be accessible and are a frequent method for displaying data. Once in a table, you will need to hold down the control and alt keys together to navigate the table. With control and alt held down, press down arrow to move down within the current column, up arrow to move up in that same column, right arrow to move right to a different column within the current row, and left arrow to move left within the current row. You will get a chance to practice navigating a table in the section below.

### Navigation quick keys

Now that you are familiar with various types of page and form elements, there is a very easy, one-key way to jump to the next occurrence of a specific type of element on a page. Pressing shift, plus that same key, moves to the previous occurrence of that type of element. This is a very efficient way to navigate the AIM site. Navigation quick keys will be referred to frequently in the remaining sections of this guide.

The list of navigation quick keys below is organized in a table. Use your table navigation skills that you just learned to navigate this table.

|  |  |
| --- | --- |
| Element | Quick Key |
| Next radio button | a |
| Next button | b |
| Next combo box | c |
| Next edit box | e |
| Next form field of any type | f |
| Next region | r (JAWS), d (NVDA) |
| Next heading at any level | H |
| Next heading at level 1 | 1 |
| Next heading at level 2 | 2 |
| Next heading at level 3 | 3 |
| Next list item | I |
| Next list | l |
| Next table | t |
| Next checkbox | x |

### Quickly finding text

Sometimes, you may be looking for something on a webpage, but you don’t know what type of page element it is. Or perhaps what you’re looking for is simply a piece of text. For example, suppose you do a Google search for the phrase “best screen reader,” and you want to find out if the screen reader you use comes up in the search results. You can use the Find command to locate a particular piece of text, like NVDA or JAWS, and the screen reader will then place its cursor on that text if it can be found anywhere on the current webpage.

Using JAWS, this command is probably familiar, control plus f. In NVDA, you will need to use insert plus control plus f. Then type in the search string you’re looking for and press enter. You may find that this saves you a bundle of time once you get to know a website well and know what you are looking for. Your sighted peers may be spending a lot of time scrolling down the page to look for the text. Meanwhile, you are able to find it in only the amount of time it takes you to type in a search string and press enter.

### Conclusion

This concludes the basic webpage navigation part of the tutorial. Your screen reader’s help documentation has much more detailed information, which you are encouraged to review if you are new to web browsing and want to learn more. But the basic skills covered above will get you started in using AIM. Once you are comfortable with the exercises in this section, you are ready to move on to the next section, Navigating AIM.

# Navigating AIM

Now that you are familiar with web browsing basics, let’s apply what you’ve learned to navigating AIM’s site specifically. This section gives an overview of how the site is laid out, some common elements on each page, and some tips and tricks that will help you navigate the site with ease, no matter what page you are on.

## Section 2: Organization of AIM Site and Important Terms

AIM is built around a set of modules which allow schools to manage different types of accommodations and services. You can think of it like a large toolbox with various drawers that have different types of tools. Examples of some of the most popular modules include Accommodations, Alternative Formats, Alternative Testing, Notetaking Services, Housing, and many others.

The Dashboard page is where staff land when they log into AIM, and you will use the apps menu, discussed below, to access all the modules that pertain to your position. Note that the AIM administrator at your school can customize the site so that each staff member will only see the modules that pertain to their particular job responsibilities. This is handy for screen reader users because the menu will only contain the things you need and will not have excess clutter.

In addition to the apps menu, the dashboard page also contains a search field called “Search database” that you can use to search for a user’s profile. In addition, the dashboard can be customized to contain key features or data that you need to access on a regular basis. More information is below on customizing your dashboard to suit your particular workflow.

Now that you understand AIM’s basic architecture, let’s log in.

### Logging In

To get started, open the login URL given to you by AIM staff. This will be different for each school. Complete the login process so that you are signed in. This will take you to My Dashboard, which is your jumping-off point for all AIM tasks.

#### Session Extender

For security reasons, AIM will log you out after fifteen minutes of inactivity. Since we will be on the AIM site for a while as you proceed through this section, you may want to turn on the Session Extender. This is a feature in AIM that prevents it from logging you out after inactivity. This is highly recommended whenever you will be working in AIM for a while. For example, suppose you are writing a case note after a long meeting with a student. If it might take you more than a few minutes to write the note, turning on the Session Extender will ensure that the system does not log you out in the middle of writing it. Though note that AIM will automatically save drafts of case notes, so even if you get logged out, a draft of your case note will be saved.

#### Exercise 2.1: Turning on Session Extender

The fastest way to locate the session extender is to bring up your links list by hitting insert+f7 and then press e for Enable. Depending on how your particular AIM site is customized, you may have to press “e” a couple of times to locate the Enable link. Hit enter on the Enable link to activate the session extender.

### Apps Menu

Near the top of each page is a button for the Apps Menu. This menu contains all of the AIM modules that your school uses. There are two ways to interact with the menu – Either by searching for specific modules or tools within modules, or by clicking on one of the links to menu items below the search. To search for a module or tool, press enter on the button labeled “Module search button” and then begin typing. JAWS users may need to press enter here one additional time to get into forms mode before beginning to type. After you type a few characters, the results that match your search will start populating. You can then press escape to get out of forms mode and use your down arrow key to see the results that match your search. For example, once you’re in forms mode, if you begin typing the key word "accommodations," after you type the third character, AIM will begin populating results that match that search criteria without you needing to press enter on your search term. The more letters you type, the narrower the search results will become. Once you locate the result you’re looking for, press enter on it to be taken to that page.

Alternatively, if you prefer, you can skip the search and simply press down arrow a few times to see links to all the main modules. Then once you bring up the module you want, you can locate the tools or tasks you need from within that module.

Note: The search function is a great way to get to submodule pages quickly. For example, let us say you frequently pull reports in AIM on appointments, accommodations, or other items. Typing the word "report" into the search field in the Apps Menu will show you all the different types of reports you can generate. No need to go to a specific module and then pull the report from there, though of course you can still do that as well.

### Navigation Tips:

AIM makes extensive use of both regions and headings on all its pages, to enhance navigability for screen reader users. It is recommended that screen reader users use the hotkey for region to get to the main part of a page you're looking for, and then the hotkey for heading to find something specific within that region. For JAWS users, press r to go to the next region, shift r to go to the previous region, h to go to the next heading, and shift h to go to the previous heading. NVDA users, press d to go to the next region, shift d to go to the previous region, h to go to the next heading, and shift h to go to the previous heading. NVDA users, please note that the hotkey d has two functions, both next region and next landmark.

### Navigation Region

AIM has a standard layout When you navigate to a module or submodule page. The first region you will encounter is the Modules Menu Navigation Region. This is the list of all the modules in the apps menu. Once you’ve chosen a module or submodule from the Apps Menu, you can generally ignore this area until you’re ready to switch to a different module.

The next important region is the Section Navigation region. This is where you will find most of the tools you need for the particular module you selected from the Apps Menu. All tools will be under headings at level 2. First you will see the option to toggle the session extender on. Next you will see the option to choose the campus if your university has multiple campuses using AIM. Then the next heading at level 2 will contain the links relevant to that module, such as Overview, List Requests, Reports, and any other links relevant to that module. Also in the Navigation Region are two sections called Controls and Email Controls. The Controls and Email Controls sections will only be visible to the staff at your school responsible for configuring and customizing your school's AIM site. They will be discussed briefly later in this quick start guide.

### Main Region

The other important region on all module pages and subpages is called the Main Region. Content in this region will vary by module, but it will contain common data that you might need to access regularly in a given module. For example, in the Appointments module, the Main Region contains scheduled appointments and follow-up appointments for that week, which you can view at a glance. Again, you can navigate through items in this region by pressing h for heading, and all headings are at level 2. One item you will see in the Navigation Region of most modules is the ability to pin tasks to the dashboard. This feature will be discussed later in this guide.

### Searching the Database

Searching the AIM database to pull up a student, employee, or even instructor is very easy. You will find an edit box on almost every AIM page labeled Search Database. And similar to the search field in the Apps Menu, search results will populate as soon as you have typed just a few characters. In the Search Database screen however, the way to access the results is a little bit different than in the Apps Menu. As soon as your screen reader announces that search results are available, press the tab key, and you will be presented with a button to access all search results. If you press tab again, the system will offer you search results in various categories, such as active users, archived or inactive users, student applications, or any other category of results that match your search criteria. Pressing enter on any of those buttons will then show you all the available search results in that category. After pressing enter on the category of results you want, press escape to get out of forms mode, and then press down arrow a few times to access the list of results. Press enter on the result you're looking for to pull up the page for that user.

### Pinning Tasks to the Dashboard:

As mentioned above, you can customize your dashboard to contain the tools and data you need to access most frequently. You can add tools and data points to your dashboard by “pinning them.” In the Main Region of each module’s page, you will see a number of items with a button to pin that item to your dashboard. Once you have pinned a task, you can find it in the Main Region of the My Dashboard screen, and all pinned tasks will be listed as headings at level 2. Note: pinned tasks will appear in the order in which you pin them. Once pinned, you will see an Unpin button, and you can unpin that task from the dashboard at any time. You will still be able to access it if you unpin it. You just won’t be able to access it from the dashboard page. You can get to the My Dashboard screen using the Apps Menu, by typing Dashboard.

### Customizing Modules

This section applies to staff with Administrator privileges in AIM. It is very quick and easy for administrators to customize AIM modules. You can customize each module right from that module's main page. In that module's Navigation Region, you will find a heading at level 2 listing the name of that module and then the word "controls." For example, in the Accommodations module, the heading at level 2 to customize the module is called Accommodation Controls. Below that heading, you will always see Main Control, followed by a list of other things you can customize in that module. Immediately below this, also at heading level 2, is a section for Email Controls. This section allows you to customize the email templates associated with that particular module. This makes it easier to see all the email templates associated with each module so you can customize or update them as needed.

# Conclusion and Additional Resources:

This guide was designed to give screen reader users the basics on how to navigate the AIM site. It is not intended as a how-to on using individual modules. So before diving too deeply into AIM as a screen reader user, it is highly recommended that you consult the main [AIM manual](https://dsaim.org/) for a how-to on using the modules that pertain to your position. **Additionally, if you would like more information on navigating the web with a screen reader or other basic screen reader tips and tricks, we highly recommend you consult the training resources available for your software. Both JAWS and NVDA have robust training resources on their websites.**

Of course, if you don't find an answer to a question in our available documentation, or if you run into any accessibility challenges, we welcome your questions and feedback. Send us an email to: support@accessiblelearning.com.