Create Inclusive Content in Microsoft Word

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Introduction

This information assumes you have already reviewed *Inclusive and Accessible Content 101* and are familiar with Headings.

Best Practices for Word

A few best practices for creating accessible Word documents are provided below. For additional training, please see "Creating Accessible Word Documents" from Level Access.

- Group and alt-tag Smart Art
- Do not use text boxes
- Do not use tables to structure content; Tab stops may cause the content to be read out of order – use columns instead
- Ensure all images are in-line with text
- Add both figure captions and alt-text to all images and figures (charts, graphs, etc.)
- Ensure all hyperlinks are unique and descriptive
- Ensure headings are used with Styles and in the proper order
- Ensure color is not used as a single identifier and all colors have sufficient foreground and background contrast
- Ensure readable fonts are used (serif for printing; san serif for screens) and nothing is set below 10pts
- Ensure that size, shape, location, sound, orientation, and color are not the sole means of communicating meaning or providing instructions
- Use built-in headers and footers
- Use built-in bullet and list styles
- Do not add video or GIFs that flash or blink more than three times in a second and that the flashing element doesn't occupy more than 3% of the screen space
- Ensure all data tables have the header row set to "Repeat as header row at the top of each page"; that the table does not contain split or merged cells; that columns all have header labels
- See other training for instructions on how to prepare fillable forms using Word

Getting Started with the Styles Pane

The Styles Pane in Word is used to mark text as Headings.

Heading 1 Title
    Heading 2 Major Topic
        Heading 3 Minor Topic
            Heading 4 Subtopic

Styles do two things to text:

- Apply formatting (such as typeface and color)
- Apply tags to make Headings "clickable" and navigable to those using assistive devices

To access the Styles Pane:

1. Go to the Home tab on the ribbon in Word.
2. Click the icon for Styles Pane in the upper right corner.

A best practice is to use the Styles Pane along with the Document Map.

The Document Map makes it simple to see what headings have been applied and whether they are structured in a logical hierarchy. It also allows you to click on each heading and jump between sections of the document quickly. This is especially useful with longer documents.

To access the Document Map:

1. Go to the View tab on the ribbon in Word.
2. Choose Navigation Pane.
3. Click the icon that resembles a bulleted list to access the Document Map.

Short, Text-Only Documents

Plain-text documents under two pages in length require a title marked as Heading 1 and body paragraphs marked as Normal.

To make short, plain-text documents accessible:

1. Set the document title (for the file itself.)
    - Go to File.
    - Choose Properties.
    - Select the Summary tab.
    - Type in the Title field.
2. Apply Heading 1 to the title.
    - Mouse over the title to highlight it.
    - Click on Heading 1 in the Styles Pane to mark as Heading 1.
3. Apply Normal to Body Paragraphs.

- Mouse over the body paragraphs to highlight them.
- Click on Normal in the Styles Pane to mark as Normal.

Longer, Text-Only Documents

Documents longer than two pages require: A title marked as Heading 1; A logical outline structure to mark major topics as Heading 2, minor topics as Heading 3, and subtopics as Heading 4; Body paragraphs marked as Normal.

To make longer documents accessible:

1. Set the document title (for the file itself.)
    - Go to File.
    - Choose Properties.
    - Select the Summary tab.
    - Type in the Title field.
2. Write using a logical outline to define major topics, minor topics, and subtopics.
3. Apply Styles.
    - Title (Heading 1).
        - Mouse over the title to highlight it.
        - Click on Heading 1 in the Styles Pane to mark as Heading 1.
    - Major topic (Heading 2).
        - Mouse over the major topic to highlight it.
        - Click on Heading 2 in the Styles Pane to mark as Heading 2.
    - Minor topic (Heading 3).
        - Mouse over the minor topic to highlight it.
        - Click on Heading 3 in the Styles Pane to mark as Heading 3.

    - Subtopic (Heading 4).
        - Mouse over the subtopic to highlight it.
        - Click on Heading 4 from the Styles Pane to mark as Heading 4.
    - Body Paragraphs (Normal).
        - Mouse over the body paragraphs to highlight them.
        - Click on Normal in the Styles Pane to mark as Normal.
4. Design accessible tables and alt-tag them.
5. Write alt-text for images and other visuals (or mark them as decorative.)

Documents That Contain Visuals

Regardless of length, documents that contain visuals need to include alt-text.

Visuals include photographs, graphics (such as icons, arrows, buttons, illustrations), data visualizations (such as charts, graphs, or infographics).

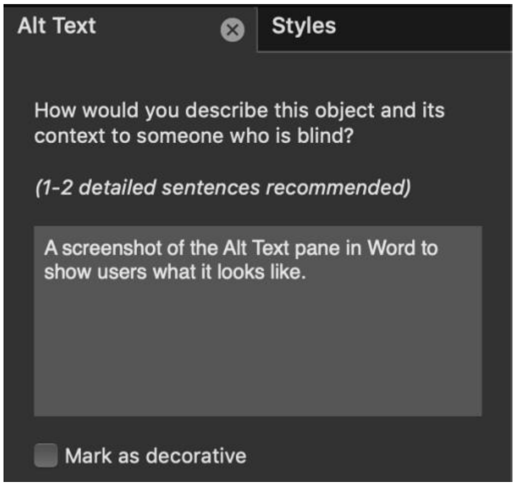
Any visual that conveys meaning needs alt-text. The alt-text must describe everything the visual represents, including any data points, key takeaways, and any important information.

See this article from WebAim to learn how to write descriptive alt-text. (The option in Word to "Generate a description for me" is seldom accurate or useful.)

If the d
If the alt-text will be longer than 120 characters, provide a succinct alt-text and a more descriptive figure caption below the image. The figure caption is visible to all users.

To add an alt-text to a visual:

1. Right click on the visual.
2. Select "Edit Alt Text."
3. Type the alt-text into the Alt Text pane.



How would you describe this object and its context to someone who is blind?

(1-2 detailed sentences recommended)

A screenshot of the Alt Text pane in Word to show users what it looks like.

Visuals that do not convey meaning and are simply decorative (such as solid background blocks, leader dots, lines or borders) should be marked as decorative. This allows the screen reader to ignore the object, rather than voice information about it.

To mark a visual as decorative:

1. Right click on the visual.
2. Select “Edit Alt Text.”
3. Click the checkbox “Mark as decorative.”

Documents That Contain Tables

Documents that contain tables need to include alt-text and a few settings.

Tables are used to organize *data*, not to arrange text. Use columns or tabs to arrange text.

Both document author and the user will benefit from tables that do not contain merged cells. Complex tables require additional remediation that can be quite involved. A best practice is to create simple tables and avoid merged cells.

Tables should not have blank cells as this can imply missing information.

All users benefit from tables that have sufficient contrast between fill colors (shading for columns and rows) and the text. Tables with fill colors that are too close to the color of the text are hard to read and may be may inaccessible to those with color blindness.

To design a simple table:

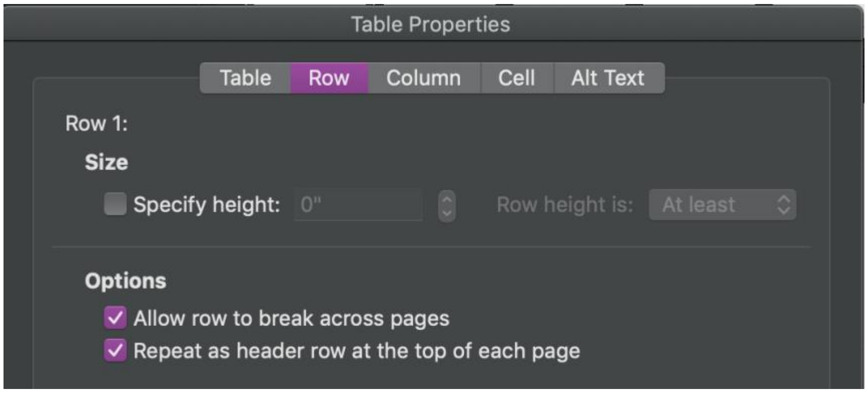
1. Choose Insert from the ribbon.
2. Choose Table.

3. Mouse over to select the desired number of rows and cells or chose Insert Table.
4. Do not merge cells and avoid fill colors that are close to the text color.

Tables must have a setting applied to them to designate header rows and to allow the header rows to repeat across page breaks. This is done so that the user doesn't lose important context when reading the document or hearing the document using a screen reader.

To cause header rows to repeat across page breaks:

1. Click to highlight the top row (header row) ONLY.
   (This does not work properly if you select the entire table.)
2. Right click and choose Table Properties.
3. Click the checkbox to "Repeat as header row across the top of each page."



Row 1:

Size

☐ Specify height: 0" Row height is: At least

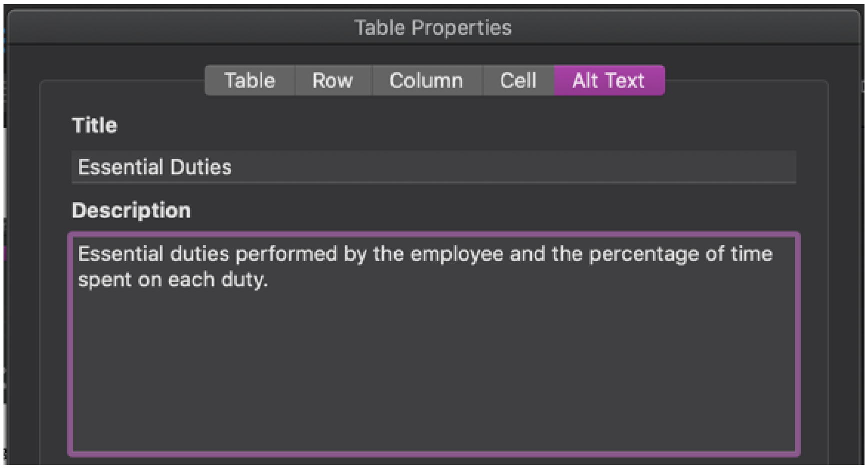
Options

☑ Allow row to break across pages
☑ Repeat as header row at the top of each page

Tables must also be alt-tagged to describe their contents. Write an alt-text that describes the purpose of the table and summarizes the data it contains. Learn more about tables here.

To add an alt-text to a table:

1. Right click on the table.
2. Select Table Properties.
3. Choose Edit Alt Text.
4. Type the alt-text into the Alt Text pane.



Title

Essential Duties

Description

Essential duties performed by the employee and the percentage of time spent on each duty.

Tables should include a label that appears above or below the table and a caption to describe key takeaways. The caption should be distinct from the alt-text.

To insert a figure caption:

1. Right click on the table.
2. Select “Insert Caption”
3. Choose the correct label – figure, equation, or table
4. Type the caption.

Word defaults to automatically resizing the table to fit the table contents. To turn this off:

1. Right click on the table.
2. Choose “Table Properties”
3. Choose “Options”
4. Uncheck “Automatically resize to fit contents.”

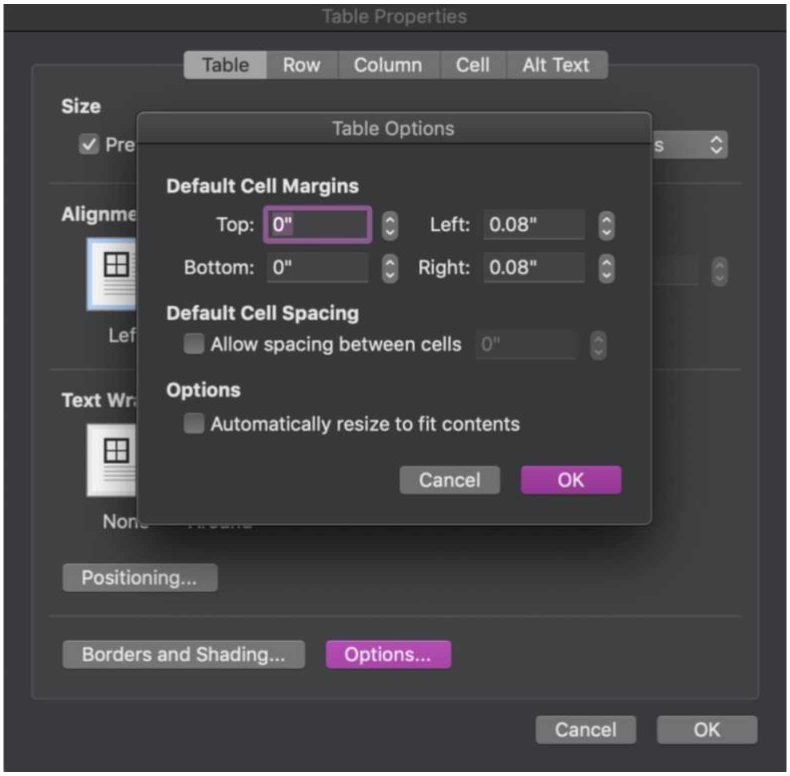


Table Properties
Table
Row
Column
Cell
Alt Text
Size
Pre
Alignme
Lef
Text Wr
Non
Positioning...
Borders and Shading...
Options...
Cancel
OK
Cancel
OK

Table Options

Default Cell Margins

Top: 0"
Left: 0.08"
Bottom: 0"
Right: 0.08"

Default Cell Spacing

☐ Allow spacing between cells 0"

Options

☐ Automatically resize to fit contents

Finalizing Documents

Reviewing with "Check Accessibility" in Word

A best practice is to review your document using the Accessibility Checker in Word. This will alert you to any accessibility issues that need to be addressed such as missing alt-text.

To check for accessibility in Word:

1. Access the Review tab on the ribbon.
2. Click the option Check Accessibility.
3. Address any errors found under Inspection Results.
4. Click Check Accessibility again and verify all errors have been addressed.

Exporting to Accessible PDF

A best practice to finalize your Word document is to convert to PDF.

Always maintain a copy of your original Word file along with your PDF. Return to the Word file to make any updates or edits, then export a new PDF.

Converting to PDF has many benefits including:

- PDF prevents document contents from being edited or changed.
- PDFs ensure that the document's accessibility features are preserved and easy for screen reader users to navigate.
- PDFs ensure compliance with Web Standards Procedure IT-PR04. (Documents hosted on public-facing websites are required to be PDFs.)
- PDF ensures hyperlinks are "clickable."
- PDF ensures the table of contents is "clickable" and automatically generates "clickable" bookmarks found in the Bookmarks Panel in Adobe Acrobat.
- PDFs can be used to create fillable forms in Acrobat or Adobe Sign.

To convert to PDF:

1. Choose File > Save A Copy.
2. Choose PDF under File Format.
3. Choose "Best for electronic distribution and accessibility."
4. Click Export.

Avoid the option "Best for printing" as this transforms the entire document into an image. Screen readers cannot recognize the text or voice it to the user.

Reviewing with the Accessibility Checker in Adobe Acrobat

A best practice is to review your document with the Accessibility Checker in Adobe Acrobat after exporting to PDF.

Use the Accessibility Checker in Adobe Acrobat after using Check Accessibility in Word, addressing any issues, and exporting to PDF.

To use the Accessibility Checker in Adobe Acrobat:

1. Open the document in Acrobat.
2. Choose Tools.
3. Click Accessibility.
4. Click Full Check.
5. Choose all checkboxes on the Accessibility Checker Options dialog.
6. Click Start Checking.
7. Review and address accessibility errors in the Accessibility pane.

If errors are found, return to the Word document and fix them, then re-export to PDF. Accessibility errors corrected in PDF are not carried over to Word. If the error is addressed at the source and corrected in Word, the error will not appear in PDF.

This final step helps you verify that your document is completely accessible.