Accessible Word Documents

Karen McCall, Med., and University of Arkansas Copyright 2017



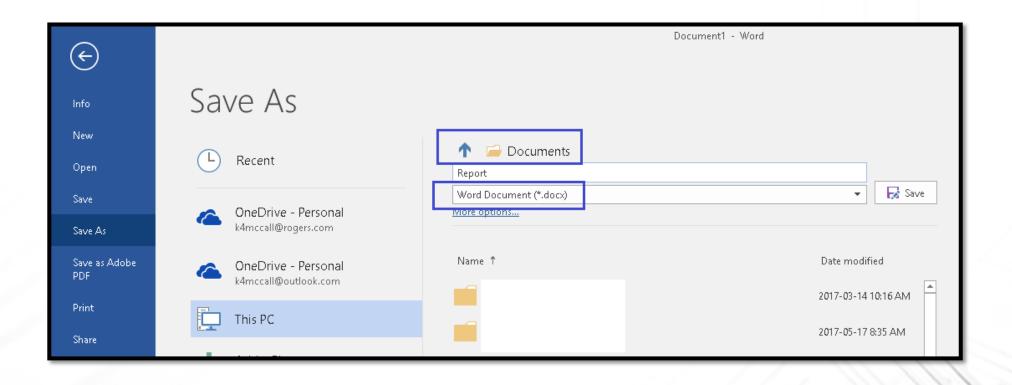
The Goal of This Webinar

- For those of you who are new to accessible document design, the goal of the webinar is to show you the tools you have in Word to make more accessible documents.
- We are learning more about accessible document design and are constantly updating our tools and our capability to improve the accessibility of digital content.
- These are the basic tools in your toolkit!
- You don't have to do everything "by midnight tonight."
- Create a learning plan and add the accessibility as you incorporate the techniques available to you.

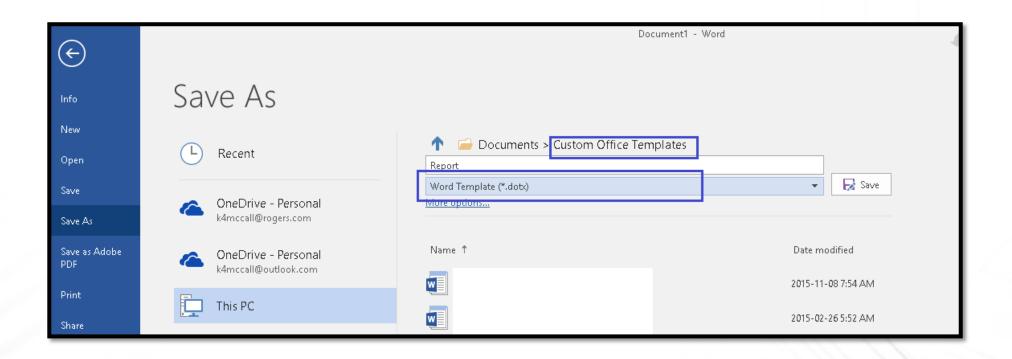
Document Templates

- If you create more than one type of document, create a document template.
 - For example, newsletter, letterhead, report, flyer and so forth.
- File/Backstage area, Save As, Word Template.
- Instead of saving your Word document as "Word Document" or DOCX, save it as "Word Template" or DOTX.
- This will place the template in the Custom Office Templates folder on your hard drive.
- Use it by going to the File/Backstage area, New and choosing it from the Personal Templates.

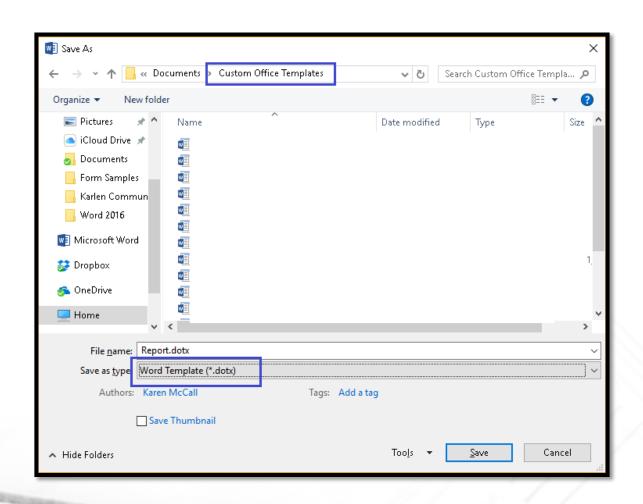
Save As...Document Template



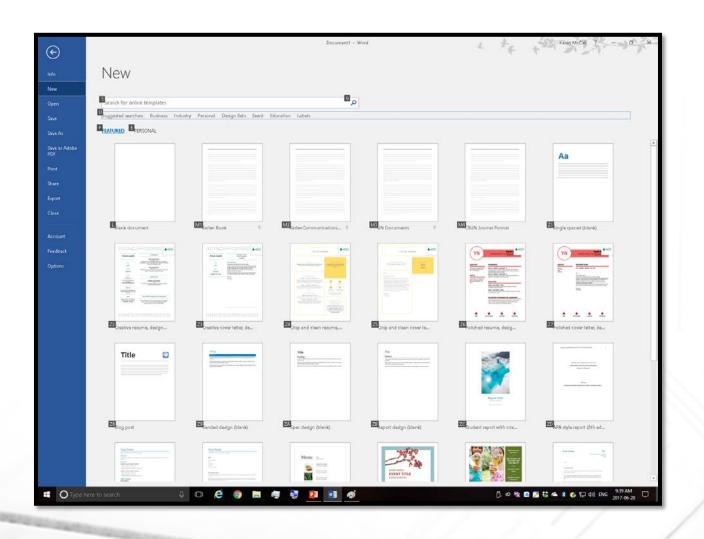
Save As...Document Template - 2



Use F12 to Save As...Word Template



Templates Gallery in Word



Styles are the Foundation of Accessibility

- As much as possible, do not use "direct formatting" such as Bold, Italic or Underline.
 - Use Strong and Emphasis Styles. Create an Underline Style.
- If you want to change the font or font size, modify the Normal Style.
- A lot can be done with Styles including creating a Style that looks like a call out or sidebar but is 100% accessible.
- Avoid using Text Boxes and single cell tables to call out important content.
- Use a standard font like Calibri or Cambria. Verdana is a display font and may not work well if the document is printed.

Direct Formatting is an Accessibility Barrier

Background

For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the elements you want from the different galleries. Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme.

Reading is easier, too, in the new Reading view. You can collapse parts of the document and focus on the text you want. If you need to stop reading before you reach the end, Word remembers where you left off - even on another device. Tideo provides a powerful way to help you prove your point.

Flinging Formatting is an Accessibility Barrier

Introduction

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document.

To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the elements you want from the different galleries.

Background Information

Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme.

Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign.

Chapter One - Style is Everything!

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Styles Allow Scalability/Accessibility

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Historical Context

When you apply styles, your headings chan with new buttons that show up where you your document, click it and a button for lay on a table, click where you want to add a ro

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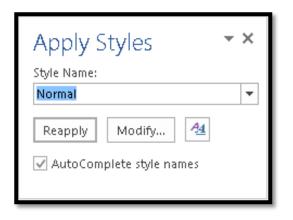
The Basics of Fonts and Font Sizes

- Which font is the best one to use?
 - Pick one as long as it is a standard Unicode font.
 - The fact that you are making your document accessible means that if "I" can't see the font or font size to read it, I can swap out yours for one that works better.
- This is why direct formatting is a barrier to accessibility.
 - Tells Word that no matter what I say, always keep the text this size in this font.
 - Prevents someone from using fonts and font sizes that work best for them.
- Avoid large pieces of bold, italic and underline.
 - Old typewriter formatting.
- Avoid all caps as it is the most difficult font attribute to read by anyone, with or without a disability.

Tools for Working with Styles

- Apply Styles Pane (Ctrl + Shift + S)
- Styles Pane.
- Quick Styles Gallery.
- Quick Access Toolbar (can put the Apply Styles Pane on the Quick Access Toolbar so it is easy to work with)
 - The keyboard command to access it, if it is the first item after the default items is Alt, pause then press 5.

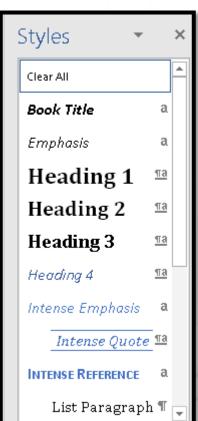
Apply Styles Pane





Quick Styles Gallery and Styles Pane

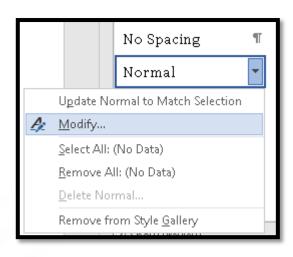


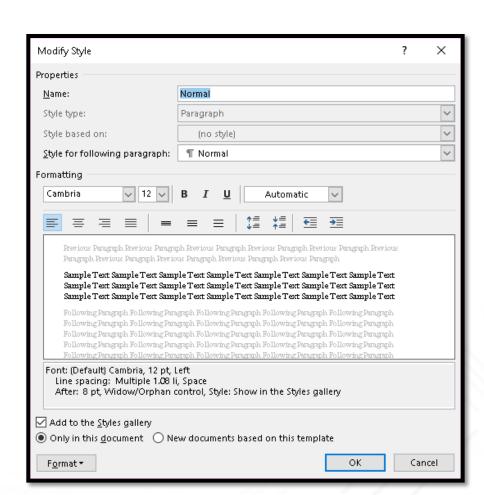


Modify the Normal Paragraph Style

- Locate the Normal Style in the Styles Pane, right click or use the AppKey and choose Modify.
- Change the Font and font size.
- If you are going to change the colour, make sure there is good contrast.

Modify Style Dialog





Headings are Navigational Structures

- We must start designing our Word documents, not just adding content as we think of it.
- The document must have a logical reading order.
- Consistent look and Feel.
- Consistent use of Headings:
 - Must be sequential, Heading 1 leads to Heading 2 which leads to Heading 3.
 - Heading 1 does NOT lead to Heading 3!
- The argument for skipped Headings is one of poor document design.
- Heading Styles will help you ensure that Headings have a consistent look and feel.

Sample of Headings in a Document

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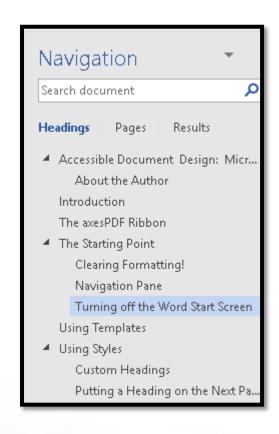
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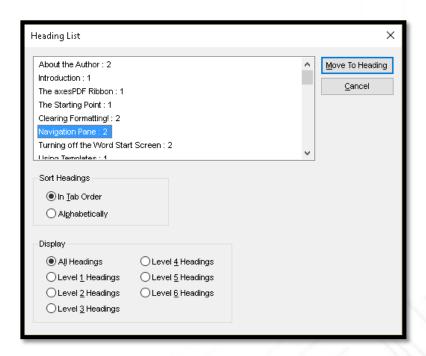
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Navigation Pane - Alt + W, K





Heading Styles

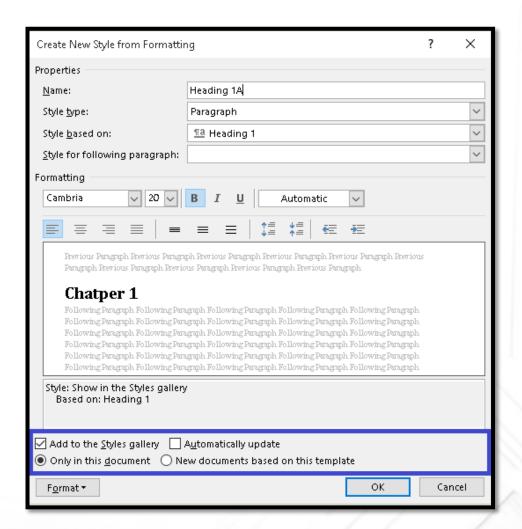
- Ctrl + Alt + number 1 for a heading 1.
- Ctrl + Alt + 2 for a heading 2.
- Ctrl + Alt + 3 for a Heading 3.
- If you use Heading 4-6, you can create a custom keyboard command in your template using "Ctrl + Alt + 4-6" as those keyboard commands are not taken (They are used in OneNote so contact Microsoft if you want them in Word!)
- If you don't like the way a Heading Looks, create a template and modify it!
- Don't choose a Heading level simply because you like the way it looks.
- Headings have navigational meaning for those of us using screen readers or TTS tools!
- If you need more than one H1, create a new Style based on H1 and call it Heading 1A so it will appear alphabetically in the Styles Pane.

Modifying the Formatting of a Heading

- Use the same technique as for modifying the Normal paragraph Style.
 - Locate the Style in the Styles Pane or Quick Styles Gallery.
 - Right click or press the AppKey to get the context menu and choose Modify.
- Select text first so that the Style you want to modify is already highlighted.
- To create a new Heading Style:
 - Select text and apply the Heading Style you want a new one for.
 - Open the Styles Pane if it isn't already open and choose New Style button in lower left of the Styles Pane.
 - Make sure that the new Style is named in a way that puts it in alphabetical order.
 - Make sure that new Heading 1 is based on Heading 1!

Create New Style Dialog





Tables of Content

- Tables of Content use the Heading Styles which in turn adds a second navigational layer to your document.
- Press Alt + S, T, C for References Ribbon, Table of Contents, Custom Table of Contents.
- Do NOT use any of the Tables of Content Gallery items!
 - They use Content Controls which are not accessible!
- Keep the defaults and press Enter to generate a Table of Contents.

Why we don't use Headings to Call Out Text

Introduction

On the Inserttab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to inserttables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look. You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also formattext directly by using the other controls on the Home tab.

Most controls offer a choice of using the look from the current theme or using a format that you specify directly. To change the overall look of your document, choose new Theme elements on the Page Layout tab. To change the looks available in the Quick Style gallery, use the Change Current Quick Style Set command.

Both the Themes gallery and the Quick Styles gallery provide reset commands so that you can always restore the look of your document to the original contained in your current template. On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document.

Chapter One

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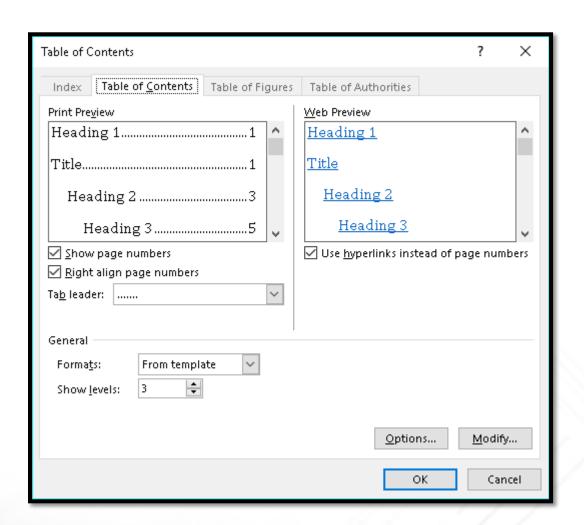
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Table of Contents

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	Background	
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Chapter One......3

Table of Contents Dialog



Sample Table of Contents – 1

Contents Contact Information 4 Introduction 4 Word 5 Clearing Formatting! 5 Navigation Pane 7 Templates and Themes 9 Themes 11 Turning off the Word Start Screen 13 Headings and Custom Headings 14 Custom Headings 16

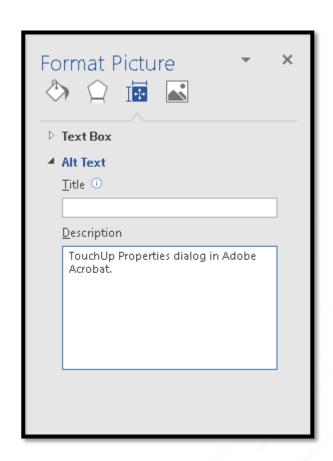
Sample Table of Contents - 2

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	ine	
Turningoffth	ne Word Start Screen	
The Apply Sty	rles Pane	
Put the App	ply Styles Pane on the Quick Access Toolbar	
	lbox" Text to a Document	
Adding "Sand	box" Text to a Document	

Alt Text on Images, Tables and Equations

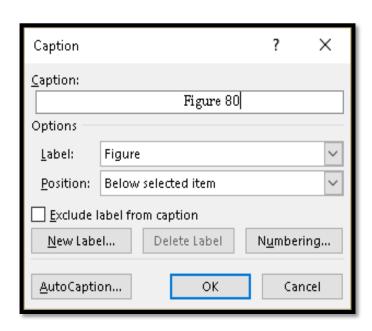
- Select the image, table or equation.
- For images/pictures right click or press the AppKey and choose Format Picture, the go to the Layout icon, expand Alt Text.
- For Tables select the table, right click or press the AppKey and choose Table Properties, then go to the Alt Text tab.
- For equations select the equation, right click or press the AppKey and choose Format Object, then go to the Layout icon and expand Alt Text
- Alt Text should be brief, a sentence or two, not an essay.
- We can't go through Alt Text in the same way we go through regular text in a document...
- Press F6 if focus is not in the Format Picture Pane then press Right Arrow to Layout button, then Tab into Size, use Down Arrow until you land on Alt Text and Right arrow to open Alt Text, then Tab to Description and type the Alt Text.

Alt Text in the Format Picture Pane



Captions for Images, Tables and Equations

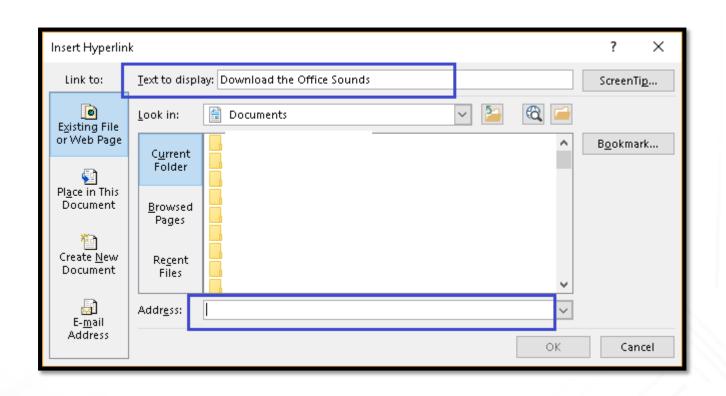
Select the image, table or equation and right click or press the AppKey then choose Insert Caption.



Contextual Links

- Craft the text in the document so that you can select it and make it a link.
 - Yes, this might take a bit of thought, but this improves the accessibility of your documents!
- Select the text and press Ctrl + K to open the Insert Hyperlink dialog.
- Focus is in the edit box where you can add the link.
 - Type or Copy and Paste the web address.
- Tab to and press Enter on the OK button.

Insert Hyperlink Dialog - Ctrl + K



Link Samples

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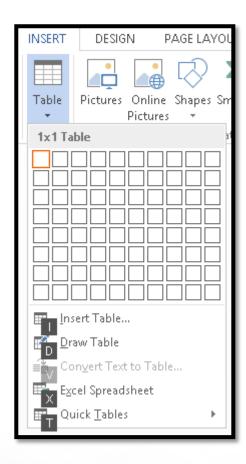
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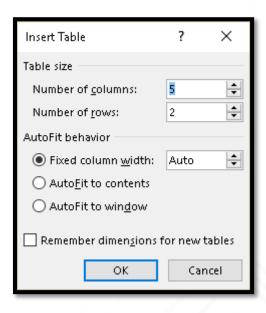
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Optimize the Accessibility of Tables

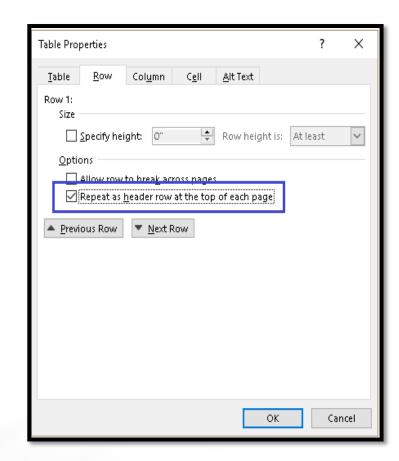
- Insert a table using the Insert Ribbon and either the Table Gallery or the Insert Table dialog (Alt + N, T
 - NEVER draw a table!
- Never use a table for design layout!).
- Repeat the Header Row.
- Do not allow rows to break across pages.
- If you need space adjust the Cell Margins do not use Enter key.
- Add a Cation above the table.
- Alt Text for a table is to provide any information about the oddities of a table. If it is a uniform table, then this is what I usually put.

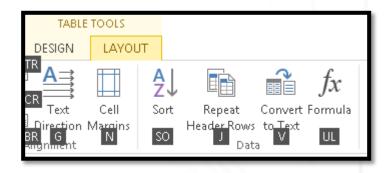
Insert Tables



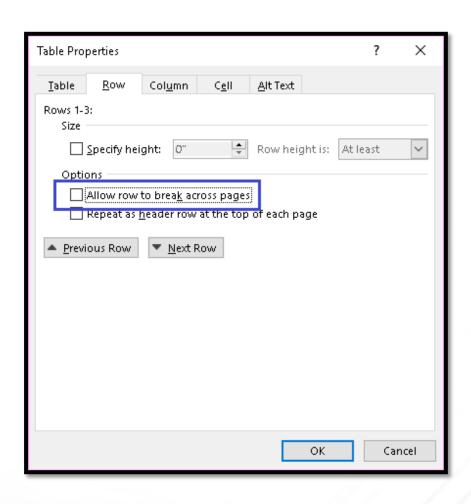


Header Rows Repeat





Do NOT Allow Ros to Break Across Pages



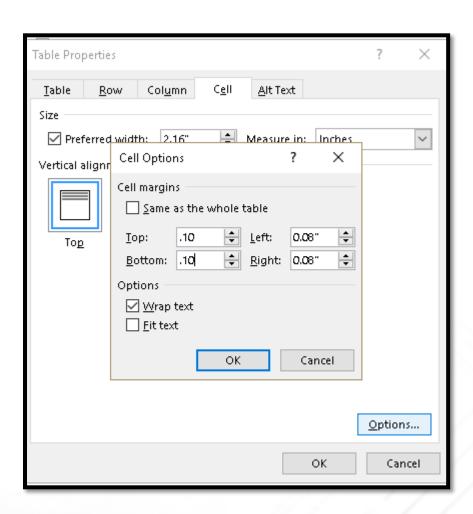
Sample Header Rows Repeat

Table 1 Summary of sales for first two quarters.

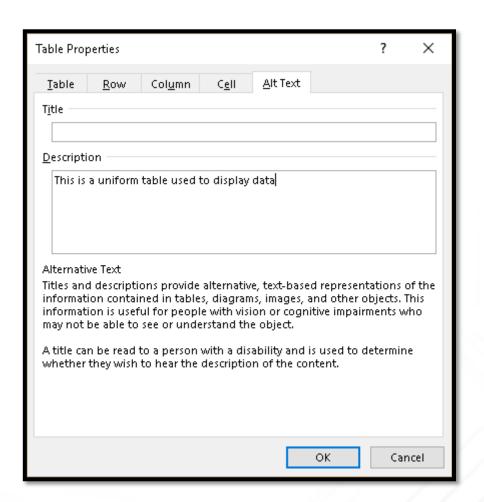
Salesperson	First Half of 2009		Second Half of 2009	
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
Karen	1500	2250	2500	2750
Barnaby	2000	2500	2750	2750
Olivia	2000	2750	2000	2500
Fred	2000	2550	2570	2750

Salesperson	First Half of 2009		erson First Half of 2009 Second Hal		alf of 2009
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	
Oscar	2600	3550	2550	2570	
Aimee	2400	3750	2000	2550	
Lynda	2500	3650	2250	2750	

Cell Tab - Cell Margins



Alt Text for Tables



Changes in Tables - Word 2016

- DO NOT DO THIS!
- Word now uses the Table Tools, Design Ribbon to determine <TH> or Table
 Header Tags in a PDF document.
- By unchecking the Header Row and First Column check boxes, you can now use a table for design layout.
 - This has serious consequences for those of us using adaptive technology and has been a **BAD PRACTICE** for documents and HTML for years!





Free and for purchase resources on accessible document design and how to contact Karen!

Karlen Communications

- Customizing a Table of Contents.
- Accessible Images for Document.
- Alt Text on Images.
- Contextual Links.
- Optimizing Tables for Accessibility.
- http://www.karlencommunications.com/OfficeForWindowsAccessibility.html
- Creating an Index, Citations and Bibliographies, Track Changes, Footnotes and Endnotes.
- Conference handout on the Handouts page has an overview of accessible Word and PowerPoint complete with instructions.

Styles In Word: A Primer

- Styles in Word: A Primer for Accessible Document Design
- A primer for anyone starting in the field of accessible document design or accessible document remediation.
- The book can be purchased using a credit card through the PubCom.com digital bookstore, http://www.pubcom.com/books/ or by invoice/PO directly by e-mailing/calling http://karlencommunications.com/contact.htm.
- It is tagged PDF with option to print entire book or pages, sections, chapters.

Accessible and Usable PDF, Fourth Edition

- The fourth edition of Accessible and Usable PDF Documents: Techniques for Document Authors is available!
- The book can be purchased using a credit card through the PubCom.com digital bookstore, http://www.pubcom.com/books/ or by invoice/PO directly by emailing/calling http://karlencommunications.com/contact.htm.
- It is tagged PDF with option to print entire book or pages, sections, chapters.

Contact Karen!

Karen McCall, M.Ed.
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Consulting and training on accessible document design (Word, PowerPoint, Excel and PDF). Advocate for a Global Inclusive Education Standard.