Accessible Formatting for MS Word

Version 1.0
User Level: Faculty/Staff

Introduction

Bakersfield College promises our students to use accessible documents and materials for all classes in our core values, our catalog and our syllabi. Since we create many of our documents in Word and then deliver them to students electronically via the Web with PDF, it is important to understand how to format documents so that they are accessible with a screen reader and for the vision impairment. This means using Headings from the Styles on the Home Ribbon, using colors that are high contrast, using tables for data only, and including alternative text for images. Documents formatted and saved correctly retain the accessible formatting when saved as a PDF.

Using the Styles does not mean that the document has to appear with the formatting that Microsoft chose. You have the ability to change all of the formatting for those styles, replacing the default Calibri font with your favorite font, changing the colors, sizes, borders, line spacing, etc., to suit your needs. You may choose to match styles to an existing document, or format the styles while you are creating the document. You may also choose to make these styles default and apply to future documents.
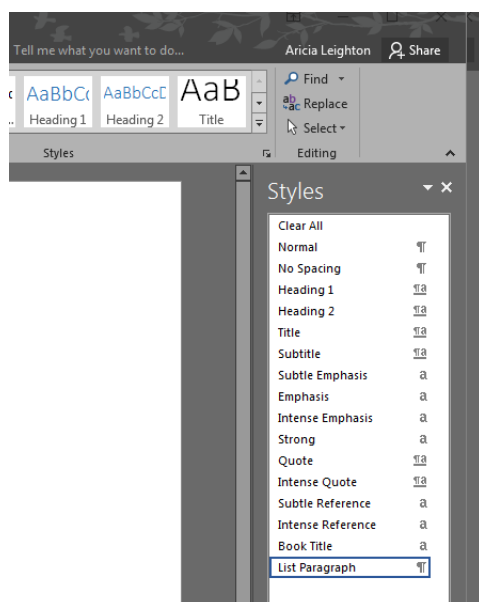
Procedure

Opening the Styles Dock
1. Open the Styles menu on the *Home* tab by clicking the ⬛ button at the lower right corner.
    a. You can drag the box to wherever is most comfortable for you.
    b. If you drag to the right of the Word Window, it will dock itself in the window

2. At the bottom of the *Styles* Dialog box, check "Show Preview." This will allow you to see what the style appearance before applying it.
3. To apply a style:
   a. Highlight the text
   b. Click the style
4. To modify a style:
   a. Hover your cursor over the style in the *Styles* dock until you see an arrow to the right.
   b. Click the arrow for the menu.
   c. Select Modify
   d. Alternate ways to modify the style: Right click on the style in the *Home* tab Ribbon or on the *Styles* dock to get the same menu.

Adding Headers to a Formatted Document

For this scenario, you have a document formatted with the desired appearance, and now you need to add headings for accessibility. See *Opening the Styles Dock* to open the dock.

1. Highlight the Title of the document
2. Right click the *Title* style in the *Styles* dock or in the *Styles* on the Home tab Ribbon (on the ribbon, you will need the down arrow to see it) or use the dropdown menu by the hover method in the *Styles* dock.
3. Select "Update Title to Match Selection"
4. Highlight a paragraph of regular text.
5. Right click the Normal style or hover as you did in step 2 with the Title.
6. Select "Update Normal to Match Selection"
7. Continue throughout the document with each heading, subtitle, list, etc.

Formatting Headers and Styles for a New Document

For this scenario, you are creating a document and deciding on the format appearance as you write. See *Opening the Styles Dock* to open the dock.

1. First, change the Normal style. This is the body text or main style for your page and some other styles, e.g. list items and footer styles, are based on this style.
    a. Open the Menu - On the *Styles* dock, click the down arrow that appears on the right side of Normal while you hover over it. You may also get this menu by right clicking Normal in the dock or on the ribbon.
   b. Choose Modify

Figure 2 - Modify Style Dialog box
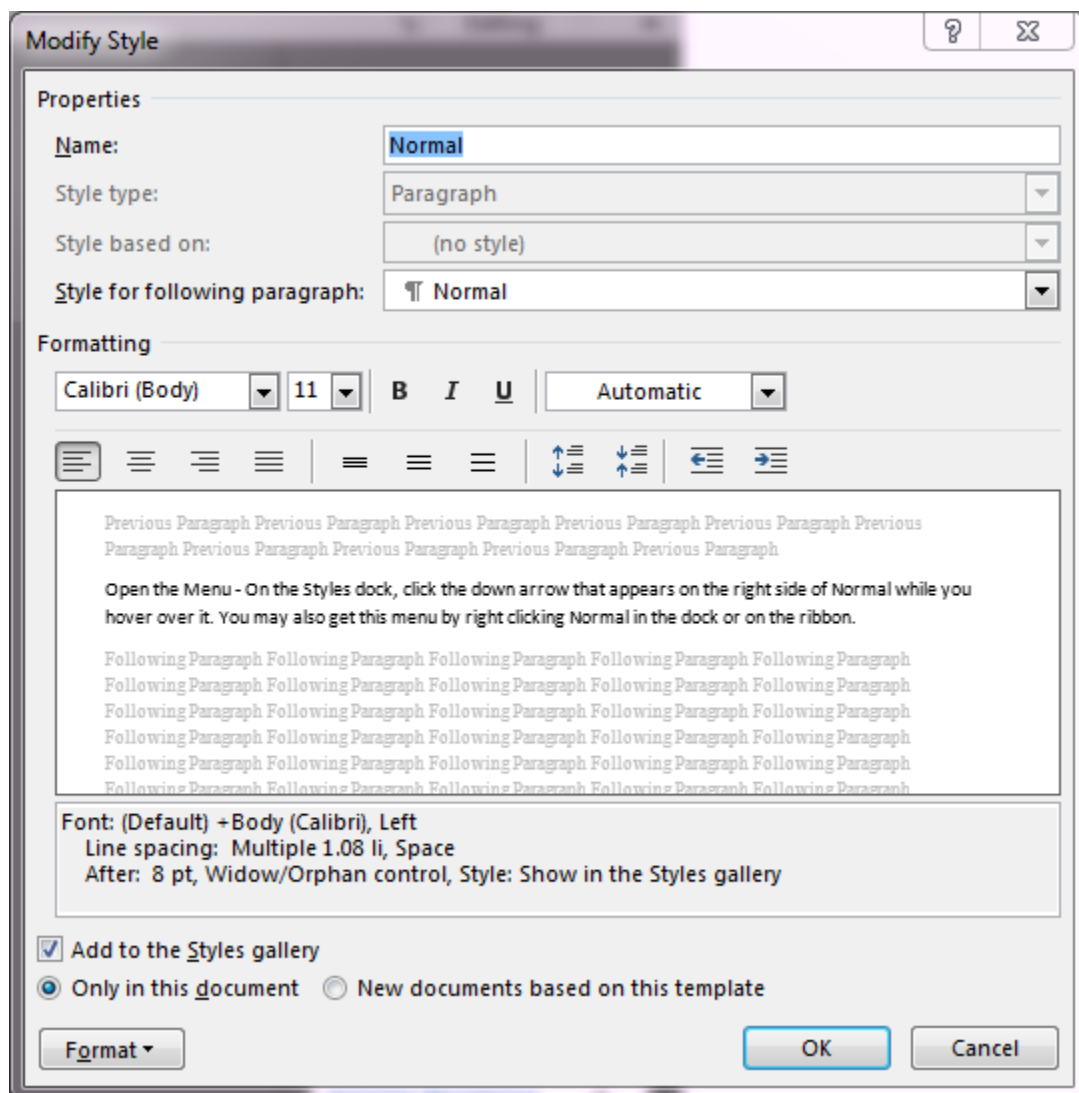
c. The *Modify Styles* dialog box appears. All formatting information appears in the lower quarter of the *Modify Styles* dialog box below the white box.

Figure 2 shows that the font is Calibri, paragraphs align left, and line spacing is 1.08 plus 8 pts after a paragraph.

d. Change the Font by using the dropdown under *Formatting* and select your preferred font.

e. Next, adjust the size of the font to make it legible.

f. Select the "New documents based on this template" radio button at the bottom of the window to make this the default style in future documents.

g. To change the line spacing, click "Format" in the lower left corner of the *Modify Style* dialog box for a menu and choose Paragraph.

Figure 3 Paragraph Dialog Box
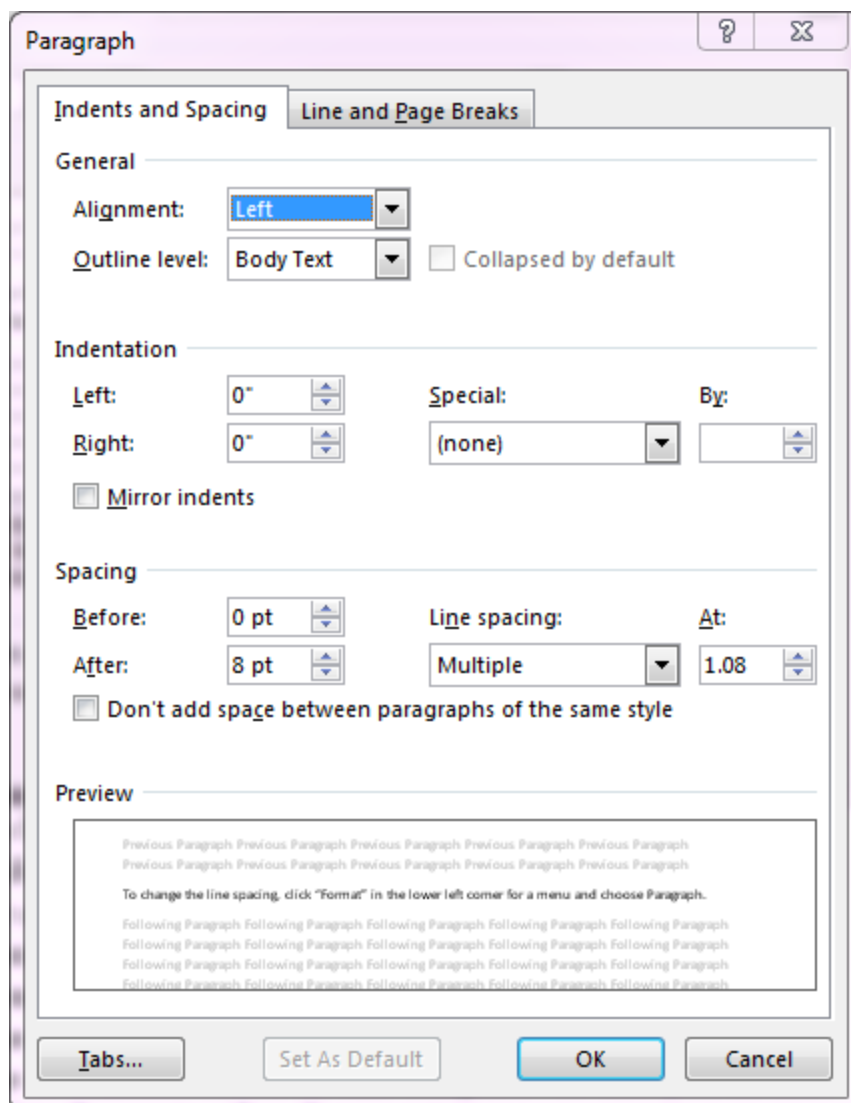
h. Change the settings of your line space and space before and/or after the paragraph.

i. Click OK in the *Paragraph* dialog box.

j. Click OK in the *Modify Style* dialog box.

2. Change the Headings
   a. Start with Heading 1. Hover in the dock on the right side so that you get the dropdown and choose modify.
   b. Change the Font and font size.
   c. Change the font color from light blue to a dark color (automatic for black) using the dropdown to the right of the font size.
   d. There is a 12-point space automatically inserted above Heading 1. To change this:
      i. Click "Format" in the lower left corner of the *Modify Style* dialog box.
      ii. Select "Paragraph…"
      iii. adjust the size of "Before" under "Spacing"
      iv. Click OK at the bottom of the *Paragraph* dialog box
   e. To add a line under the heading:
      i. Click "Format" in the lower left corner
      ii. Select "Border…"

Figure 4 Borders and Shading Dialog Box
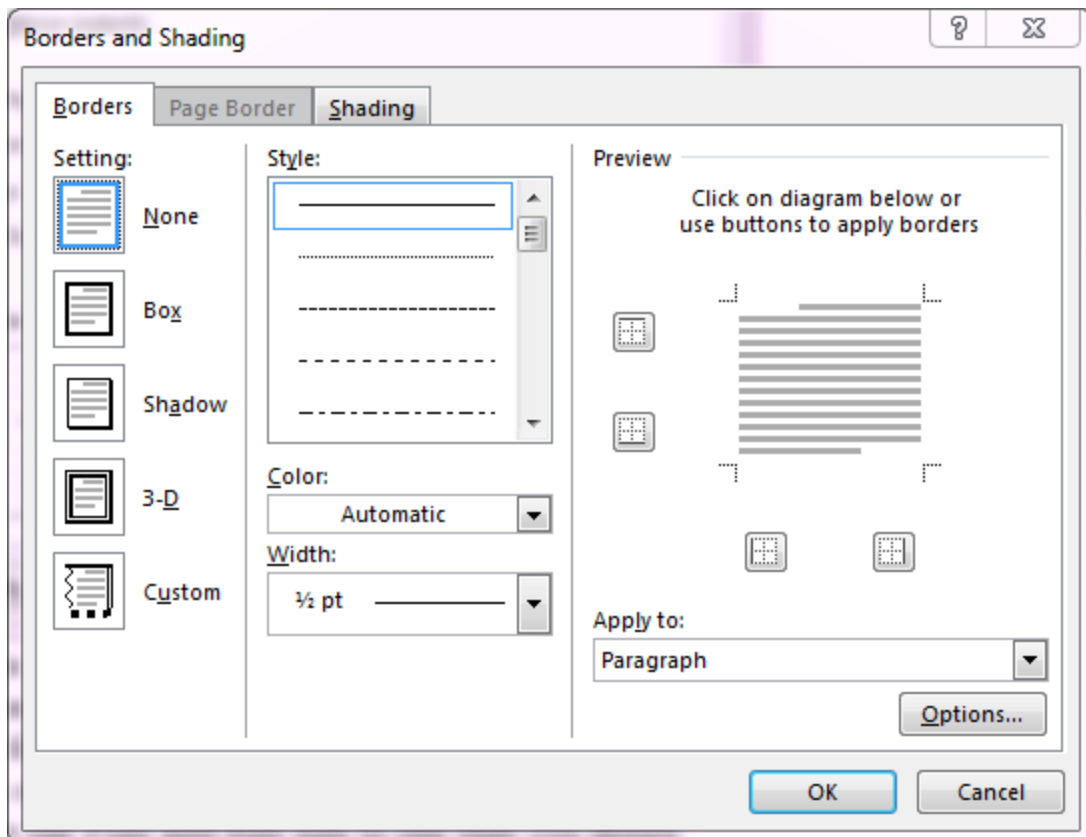
      iii. The solid black ½ point line is the default. Change style, color and width to your desired appearance in the Style portion of the dialog box. For a line across the page under the Heading, select the bottom border button in the preview.

iv. Click OK at the bottom of the *Borders and Shading* Dialog box.
f. Click OK at the bottom of the *Modify Style* dialog box.
3. Modify all other styles that you use where the styling is not what you wish.

Tables

Do not use tables for layout. Screen readers will say that it is a table and will often repeat headers as it reads the data in each cell. If it is not tabular information, it can be very tedious and confusing. When adding a table, use the *Insert → Table* from the Word Insert Ribbon. Only create simple tables with a single header row in Word and do not split or merge the cells. To identify the header row:

1. Select the First Row
2. On the *Table Tools → Layout* tab on the Ribbon, click the "Repeat as header row" button.

Images

Images of substance will need alternative text. This is a good tool to use when deciding if your image needs alternative text: http://4syllables.com.au/articles/text-alternatives-decision-tree/. To give an image alternative text:

1. Right click the image
2. Select "Format Picture"
3. The Dialog box will dock itself to the right of your Word Window.
4. Select the *Layout & Properties* button (next to the pentagon shape)
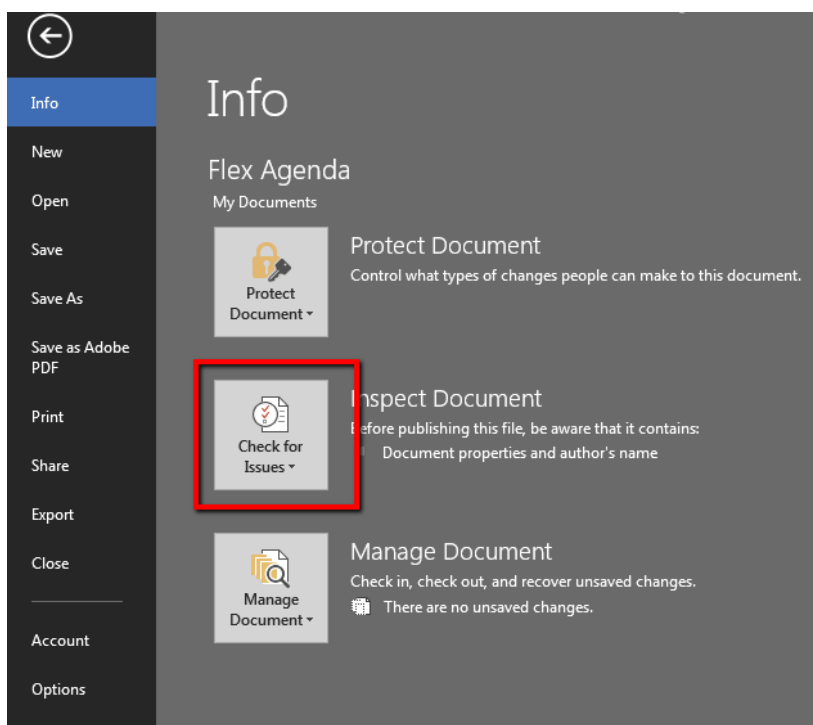
Figure 5 Layout & Properties Button

5. Type the alternative text in the *Title* box.

Check Accessibility

Once you have completed your document, check the document for accessibility.

1. Select *File* tab
2. Click *Inspect Document* for a menu

Figure 6 Check for Issue button

3. Choose *Check Accessibility*
4. The *Accessibility Checker* report will dock itself on the right side of the Word Window. Make any corrections necessary and check again.

Saving as a PDF

The last step for providing documents to students electronically is to convert the document to PDF. It is considered rude and can break trust with visitors to force them to download anything. When a document is in Word, PowerPoint, Excel, and most other formats, the document will automatically download to the person's computer. It also may be the case that the visitor does not have the software needed to read the document. Where various PDF readers are free, Microsoft software is not. Therefore, it is important to convert the document to PDF. After all of the work you did to make sure your document is accessible, you want to make sure that it stays accessible when it is PDF. To keep the accessibility:

1. Ensure preferences are correct (you only need to do this once, it should be defaulted to this setting):
   a. Select the *ACROBAT* tab
   b. Click preferences (second button from the right)
   c. Ensure that "Enable Accessibility and Fileflow with tagged Adobe PDF" is checked.
   d. Click OK.
2. Select the *File* tab
3. Click *Save as Adobe PDF*

4. Choose where to save the document
5. Name the document
   a. Web tip – make sure that you do not use spaces in the filename of your document. If it has multiple words, either use "Camel Case", use a hyphen to separate words or use the underscore to separate words in the document name. Examples:
      - Camel Case: MyLongDocumentName.pdf
      - Hyphenated: my-long-document-name.pdf
      - Underscored: my_long_document_name.pdf
6. Click Save

Resources

Web AIM: http://webaim.org/techniques/word/word2016win
Section 508.gov: https://www.section508.gov/content/build/create-accessible-documents

Document Control

Version	Date	Author	Description
1.0	8/14/2017	A. Leighton	First Draft