Creating Accessible Documents -

Quick Guide

This guide supports the [Creating Accessible Documents](https://www.ucl.ac.uk/hr/UCLTrainingBookingSystem/index/results?searchType=&Model_Page-QUERY=iscad&x=48&y=12) course. For fuller instructions, either attend the course or see further resources on the [Digital Accessibility website](https://www.ucl.ac.uk/digital-accessibility).

**Contents**

[Word 2](#_Toc17099860)

[Styles 2](#_Toc17099861)

[Page Layout 2](#_Toc17099862)

[Paragraph Formatting 2](#_Toc17099863)

[Character formatting 3](#_Toc17099864)

[Tables 3](#_Toc17099865)

[Accessibility Checker 3](#_Toc17099866)

[Word and All 4](#_Toc17099867)

[Images 4](#_Toc17099868)

[Hyperlinks 4](#_Toc17099869)

[Metadata and more information 4](#_Toc17099870)

[Printing 4](#_Toc17099871)

[Templates 5](#_Toc17099872)

[Text Content 5](#_Toc17099873)

[Use of Colour 5](#_Toc17099874)

[Charts 5](#_Toc17099875)

[PowerPoint 6](#_Toc17099876)

[Slide Layout 6](#_Toc17099877)

[Formatting text 6](#_Toc17099878)

[Shapes, SmartArt and other Visuals 6](#_Toc17099879)

[Checking reading order 7](#_Toc17099880)

[Backgrounds 7](#_Toc17099881)

[Excel 7](#_Toc17099882)

[Worksheet tabs and view options 7](#_Toc17099883)

[Formatting 7](#_Toc17099884)

[Lists 8](#_Toc17099885)

[Visuals 8](#_Toc17099886)

[PDF 8](#_Toc17099887)

[Converting to PDF 9](#_Toc17099888)

# Word

| Word Category | What | How |
| --- | --- | --- |
| Styles | * Apply **Heading** styles. * Modify **Heading** styles. * Modify **Normal** style to Arial font. * Use the Navigation Pane. * Create a **Table of Contents**. | * To apply a style to selected text: **Home** tab, **Styles** group, choose one of the inbuilt Heading styles series, e.g. Heading 1, Heading 2. * To modify a style: Right click style name, select **Modify**. * To create a table of contents: **References** tab, **Table of Contents** command. |
| Page Layout | * Use wide **margins**. * Apply **page numbering**. * Insert **page breaks** rather than using paragraph returns. * Use **Show/Hide** to identify unnecessary returns. * **Avoid footnotes and endnotes** if possible. | * To insert page numbering: **Insert** tab, Page Number. * To insert a page break: **Ctrl+Enter** on keyboard. * To identify repeated blank characters: * Use **Accessibility Checker**. * Use the **Show/Hide** command located on the **Home** tab. |
| Paragraph Formatting | * Use **1.5 line spacing**. (TIP: apply to Normal style) * Apply the spacing after paragraph (or before paragraph) where necessary. * Use **bullets** and **numbering** to make your document more readable. * Use full stops or semi colons at the end of bullet or numbered items. * Use **left alignment** and avoid justification. * **Keep with next** option so titles are not left separated from rest of text. | * To apply spacing after a paragraph: **Layout** tab, **Paragraph** group, **Spacing After**.   TIPS:   * Modify the Normal style to have 12 points spacing after each paragraph. * Modify the Heading styles to have a larger amount of spacing before the paragraph than spacing after the paragraph. * To apply Keep with next: Right click on the paragraph, select **Paragraph**, **Line and Page breaks** tab, **Keep with next**. |
| Character formatting | * Use a **sans serif font** e.g. Arial, Calibri, Helvetica. (Not Times Roman). * Use font size **minimum of 12 points**. * Use **bold** but avoid italics, underline and all caps. |  |
| Tables | * Apply formatting to the table via **Table Styles**. Use one of the banding styles when appropriate. * Format the column and row **headings** using the Table style options checkboxes. * Specify the row headings for screen readers. (i.e. Set the **header row** **to repeat** on every page.) * Add **Alt Text**. Describe or summarize the whole table. Highlight the most important thing about the table and mention the most significant value(s). * Don’t use **colour alone** to convey meaning. You could use an extra column to add the data. * Don’t use **merged cells** or table within a table. * Avoid blank rows and cells | * To apply a Table Style: Click in the table, click the **Table Design** ribbon tab, select the **Table Style**. Also, click in the **Header Row** and **First Column** checkboxes to switch on special formatting for those areas. * To specify the row headings, (for screen readers): Select the header row in the table, click the **Table Layout** ribbon tab, click the **Repeat Header Rows** button.  - This needs to be redone every time you select a style. * To add Alt Text: Right click the table, select **Table Properties**, **Alt Text** tab and enter text into the **Description** area. (Note: the most recent version of Word does not have the title option). * To test how a screen reader will navigate your table: Click in the first cell, then press **Tab** key on keyboard to navigate cell by cell. |
| Accessibility Checker | * Use the **Accessibility Checker** to identify anything you may have missed. | * To start the Accessibility Checker:  **File** tab, **Check for issues** button, **Check Accessibility**. |

# Word and All

| All Category | What | How |
| --- | --- | --- |
| Images | * Format all images and other content to be **Inline with text** so you can avoid floating objects. (Word only). TIP: If you click on an image and see an anchor icon this indicates that it is not inline. * Apply **Alt Text** to each image.  If the image is decorative add the word ‘decorative’ as the Alt Text. * Choose images for **relevance**. * Avoid **text** within images. If text is used in an image include the text in the Alt Text. Also, use a **plain background** behind the text so it is easily seen. | * To make an image inline: Right click image, **Text wrap**, **Inline** **with text** * To apply Alt Text: Right click image, **Format Picture**, **Layout** and **Properties** tab (third icon), Alt Text. * Use the [Poet tool](https://poet.diagramcenter.org/about.html) for writing alternative descriptions of images. * To check an image for good colour contrast: **Print in black and white** or set image to **greyscale**. * Use the **Accessibility Checker** to help you identify additional images that are not accessible. |
| Hyperlinks | * Use **descriptive, unique and meaningful** text for the hyperlink instead of the URL. * Never use ‘Click Here’ or similar for the hyperlink text. | * To add a hyperlink: Select text, right click, **Hyperlink**. |
| Metadata and more information | * Add **metadata** (document properties) to the file so it’s easier to find. For example, add descriptive title, more authors, tags, comments. * Depending on audience, add **contact details** into the document to enquire about alternative resources or request an alternative format. * If the file you have shared is in hard copy or PDF, make it available in **editable electronic format**, e.g. Word, PowerPoint or Excel, so people can adapt it to their needs. | * To add metadata: **File** tab, look in the main **Info** pane and edit items in the **Properties** area on the right. |
| Printing | * Avoid using shiny white paper, use pastel if possible. |  |
| Templates | * Consider setting up templates or modifying the Normal template to ensure consistency and save time. For example, set the font, font size, margins and styles. * Use **prebuilt accessible templates**. E.g. in Excel they have lots of white space, larger font and descriptive headings. | * To create a template: **File** tab, **Save As**, from **Save as type** select **Template** option. * To find accessible templates: **File** tab, **New**, type ‘accessible’ in the search box at the top. |
| Text Content | * Use **clear and simple** language. * Use the **active voice**. (For example, ‘he arranged the chairs’ rather than ‘you will be given…’ or ‘the chairs were arranged’.) * **Explain jargon** and acronyms. Know your audience. | * The [Hemingwayapp.com](http://www.hemingwayapp.com/) can be used to check content. |
| Use of Colour | * Use colours that **contrast**. * Avoid red/green (the most common form of colour blindness). Also avoid pinks and oranges. Avoid using a range of shades of the same colour. * Don’t use colour as the only way to convey meaning. Use a **Colour**   **Contrast Analyser** to check suitability of colours. | * Accessing the [Colour Contrast Analyser](https://developer.paciellogroup.com/resources/contrastanalyser/) (CCA). |
| Charts | * Use words carefully in headings, series/category labels, axes. * Adjust spacing in Labels if needed. * Format axes, increase units. * Add data labels. * Consider adding a data table. * Avoid font sizes less than 12pt. * Add Alt Text. Summarise what the chart is about, what it is displaying against what, what has the most impact, the biggest values, i.e. summarize the conclusion. * Avoid 3-D charts unless data is 3-D * Don’t use colour alone to distinguish data series. Use stippling or dashing or label the chart with values. |  |

# PowerPoint

| PowerPoint Category | What | How |
| --- | --- | --- |
| Slide Layout | * Use slide layouts for your slides instead of starting with blank slides. * Avoiding adding extra text boxes. * Don’t put too much text into one slide. * Give each slide a unique title. * Apply slide numbers. * Use the Notes pane to add extra notes as screen readers can read these. | * To apply or change a slide layout: **Home** tab, **Slides** group, **Layout** command. * To apply slide numbers: **Insert** tab, **Slide number** button, tick the **Slide number** checkbox and Apply. |
| Formatting text | * Use sans serif font. * Don’t use text shadow. * Use font size minimum of 24 and 45 for titles. * Check that the line spacing and spacing after a paragraph is sufficient. | * To apply paragraph spacing: **Home** tab, **Line spacing** button, Line spacing options, see spacing section. |
| Shapes, SmartArt and other Visuals | * As in Word, use **Alt Text** for shapes, charts, flowcharts, images etc. * Use visuals to help break up the text and make the presentation easier to follow. * Add images that appear on every slide (e.g. logos) to the **Slide Master**. Then Alt Text can be applied just once. * Consider grouping objects in a diagram and then add Alt Text to the group. * Consider **saving a group as a picture**. Then insert the image with Alt Text applied. (Useful when items in a group include pictures) * Check an image or whole slide for good colour contrast by **viewing in Greyscale**. * Avoid lots of animations. | * To get to the Slide Master: **View** tab, **Slide Master** command. * To view the slides in greyscale: **View** tab, **Grayscale** button. * To save a group as a picture: Right click the group, select **Save as Picture**, delete the group from your slide, insert the saved picture, add Alt Text to the picture. |
| Checking reading order | * Check the reading order and change if necessary. (Usual reading order is in Z order). | * To check and change the reading order: **Home** tab, **Select**, **Selection pane** option. (N.B. first item to be read is at the bottom of the list). Click and drag items to new positions in the list. * To test the reading order: Select your slide, click on the bottom item in the selection pane, press the **Tab key** repeatedly to see where the selection jumps to. |
| Backgrounds | * Avoid bright white backgrounds ad can create glare and blur text. Choose **off-white or cream** colour for background with dark text and lots of space around the letters. * Use white text if using a dark background. | * To change the background colour: **Design** tab, **Format Background** command**.** |

# Excel

| Excel Category | What | How |
| --- | --- | --- |
| Worksheet tabs and view options | * Provide **meaningful and unique** names for worksheet tabs. * Avoid empty worksheets. * Avoid using **Freeze Panes** or **Hide Columns** and other viewing options that obscure data or make page navigation difficult. |  |
| Formatting | * Increase **font** size, add **row height** and use **wider columns** when necessary. * If using multiple headings inside a spreadsheet apply **heading styles**. * Avoid merged or split cells and nested tables. * Avoid empty rows or columns and blank cells. | * Applying styles in Excel: **Home** tab, **Cell Styles** command. |
| Lists | * Use **descriptive headings** and labels. * Specify header row. * Select a table style to add **banding**. Selecting colours to give **high contrast**. * Highlight **header row** and **first column**. * Convert table into a **List**. | * To convert a table to a list: Click in the table, press **Control + L** on the keyboard: * Make sure you click the checkbox for **My table has headers**. * Give the table a **Name** via the contextual tab (helps to navigate or use in formulas). |
| Visuals | * As in Word and PowerPoint, use **Alt Text** for visuals, tables and charts. | * Right-click on the chart and click on **Format Chart Area** |

# PDF

**Note:**It is recommended that you share documents/files in their original file format instead of or in addition to PDF format. If supplying only in PDF format do provide a contact name where requests for the file to be provided in an alternative format can be sent to. (The original file format allows users to format and customise the file to their requirements).

| PDF Category | What | How |
| --- | --- | --- |
| Converting to PDF | * First make your document or presentation accessible and then convert to PDF. * Provide a title in the Word document in Document Properties. * Don't use the print to PDF option from the print dialogue box to convert to PDF. Use one of the methods listed opposite. * Check that **tags for accessibility** will be added for the converted file. | * Converting to PDF: **Method 1**: File tab, Save As, from the File type choices select PDF. **Method 2**: File tab, Export, Create as PDF/XPS. * To check for tagging for accessibility: When you are in **Save As** dialogue box click the **Options** button and make sure the following three checkboxes are ticked: * Document structure tags for accessibility. * ISO 19005-1 compliant (PDF/A) * Document Properties * If you do have an image, use [Sensus](https://www.ucl.ac.uk/students/convert-files-accessible-formats-sensus-access) to convert it. |