

Accessible Documents Tutorial

Miami-Dade County strives to make all its content accessible to every member of the public, regardless of ability. Following a few basic guidelines will help ensure that your documents meet compliance standards and are available to all our residents and colleagues.

- [Indiana University: Create accessible electronic documents, no matter what format](#)
- [University of Washington: Creating Accessible Documents](#)

Microsoft Word

With proper structure and a few tweaks, you can easily make your Word Documents accessible. Once these documents are authored accessibly, they'll produce PDFs that can be more easily read by users of assistive technologies.

Accessibility Checker

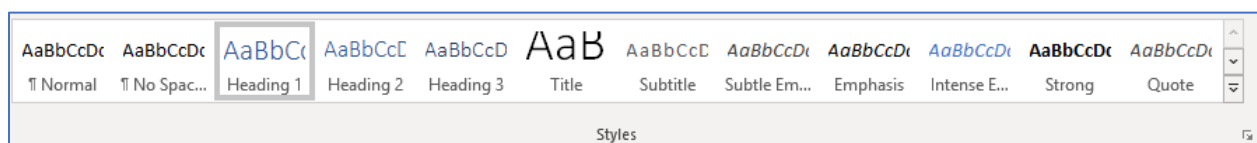
Microsoft Word has a built-in accessibility checker that helps you test the overall accessibility of your document. To test your document, select the "Review" option from the Microsoft Word Menu. Next, select "Check Accessibility." The "Accessibility Checker" pane will open on the right side of your screen, highlighting potential issues and providing guidance on common issues.

You can check your document when you're done working or open the Accessibility Checker from the outset to continually provide you with accessibility guidance.

Use Real Headings

Good structure makes it easier for people with limited eyesight to "scan" through headings, enabling users to quickly find the things they need. It's important to use real headings and not larger fonts because real headings are used by screen-reading technology to create an outline of the document.

To create headers in Word, select a heading from the Styles menu in the Home ribbon.



Make sure to tag your headings in order. "Heading 1" should be used for the main heading of your document. Use as many "Heading 2" sections as your document needs, reserving "Heading 3" only for subheadings within an existing "Heading 2." Do not skip headings or use headings out of order. By keeping these headings in order, your document will have an outline that facilitates easy browsing.

Use Descriptive Links

Users of screen-readers can tab through the links in a document. As they tab through, screen-reading technology will read the link text to the user. Because of this, it's important to make sure that your link text is a descriptive phrase that describes to the user what will happen when they click the link. Don't use gibberish links or "click here" constructions.

Examples:

Do: [Email Animal Services](#)

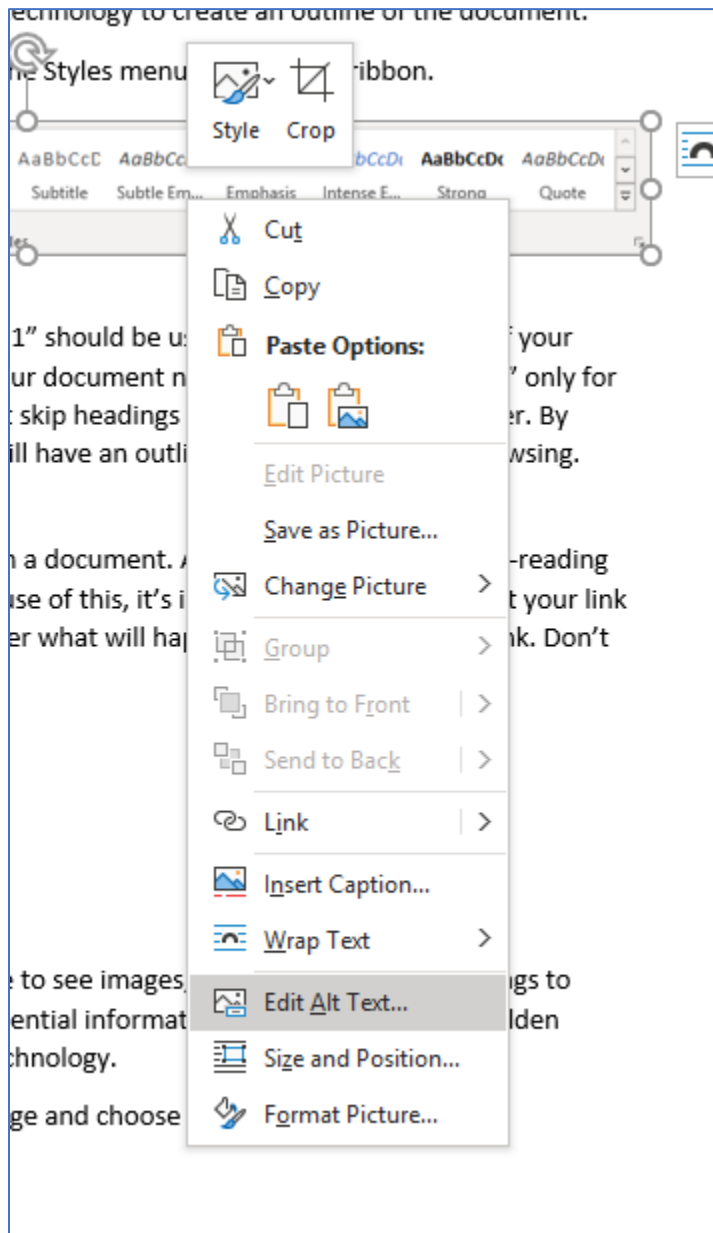
Don't: pets@miamidadegov

Don't: [Click here](#) to email Animal Services

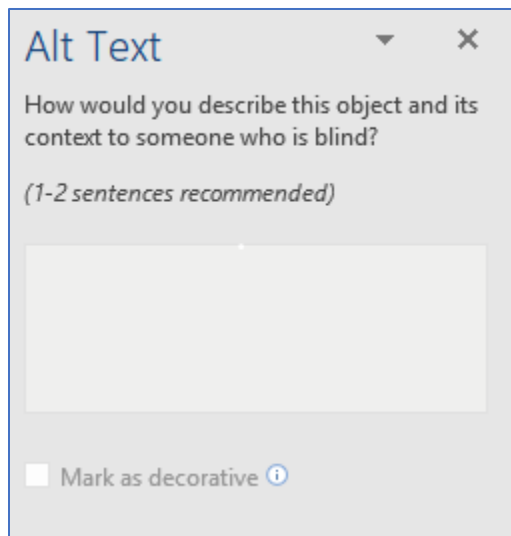
Add Alternate Text for Images or Graphs

Because users with vision impairments will struggle to see images, it's important to add alt-tags to images or graphs, especially when images carry essential information. Alt-tags function as hidden captions that are read to user of screen-reading technology.

To add alt text to an image, right-click over the image and choose "Edit Alt Text":



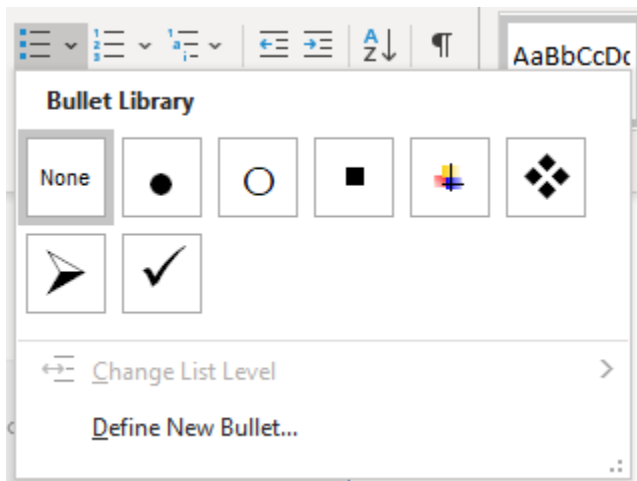
Then, add a short description (one or two sentences) in the Alt Text dialogue box:



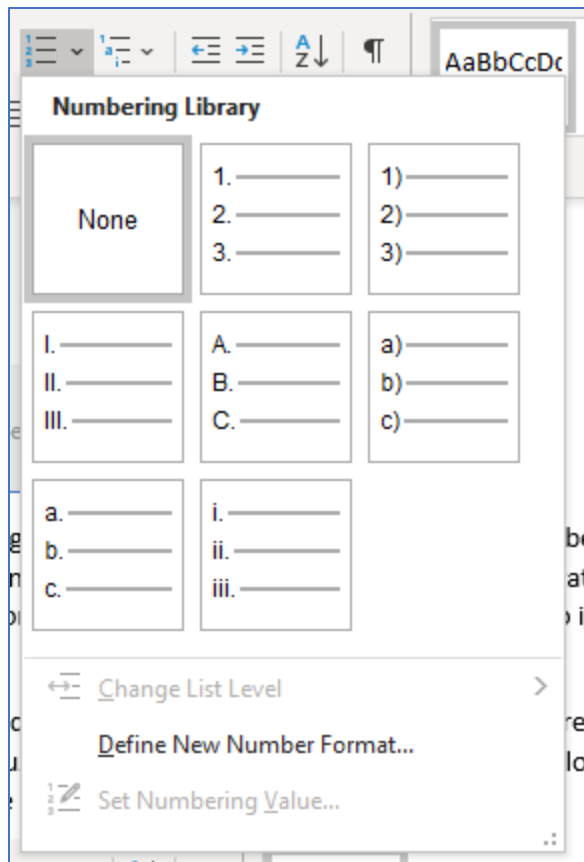
On occasion, an image may not transmit any information. This can be the case for clip art or a decorative image that conveys no real information. If an image is purely decorative, activate the checkbox that reads “Mark as Decorative.” This tells screen-reading technology to ignore the image altogether.

Use Bullet Lists

Bullet lists are a good way to emphasize key content in an easy-to-read way. It’s important to use Word’s bullets menus rather than using fonts to create things that look like bullets. To mark content as bullet items, use the bullet menu from Word’s Home ribbon:



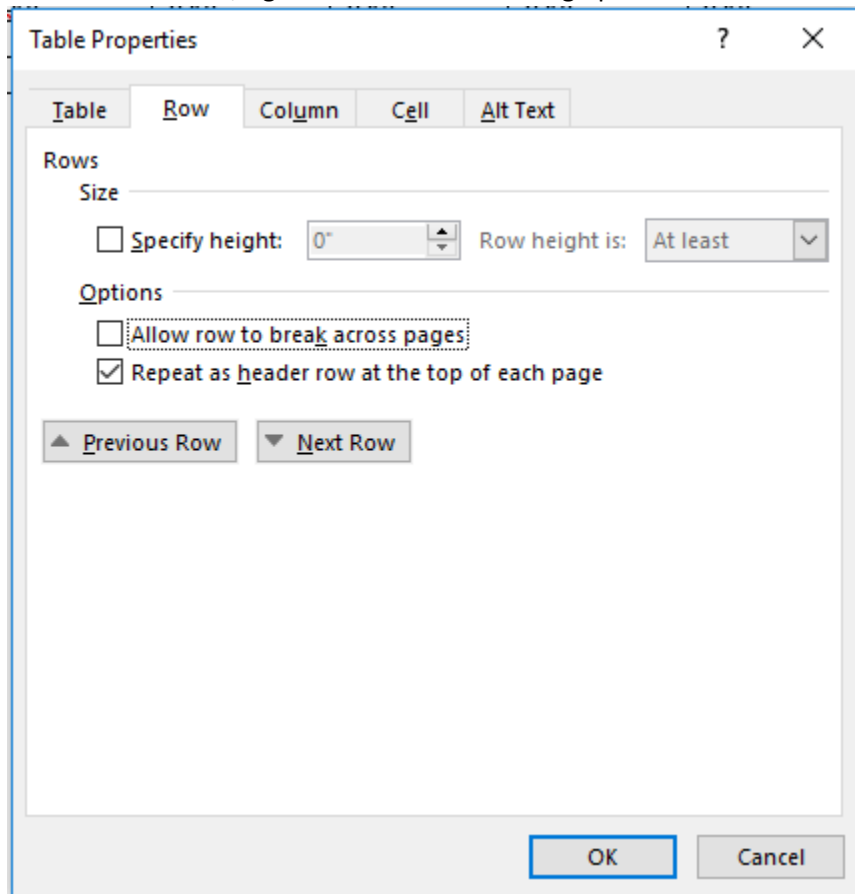
For lists that detail sequential steps, use the “ordered list” option to automatically number your steps:



Tables

Use tables judiciously. They can be difficult to understand. Also, because of Microsoft Word's limitation, complex tables are especially difficult to portray. If complex tables are needed, consider breaking them into multiple simple tables or using an alternative, such as a bullet list.

To make a simple table accessible in Microsoft Word, create a table using the Insert option on the Word menu ribbon. Next, right-click the table to bring up the context menu and select “Table Properties.”

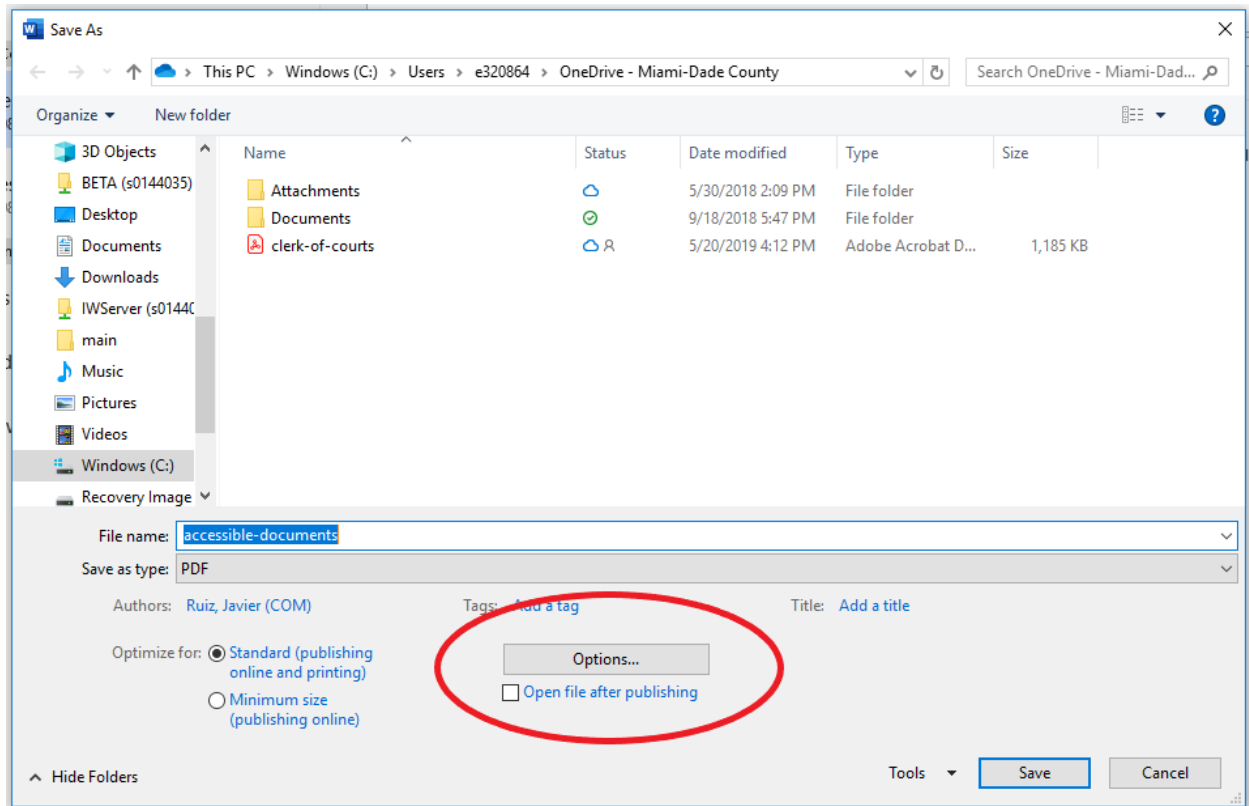


Use the “Previous Row” button to select the first row of your table and check the “Repeat as header row at the top of each page” checkbox. Screen-reading technology will now correctly identify this row as a heading.

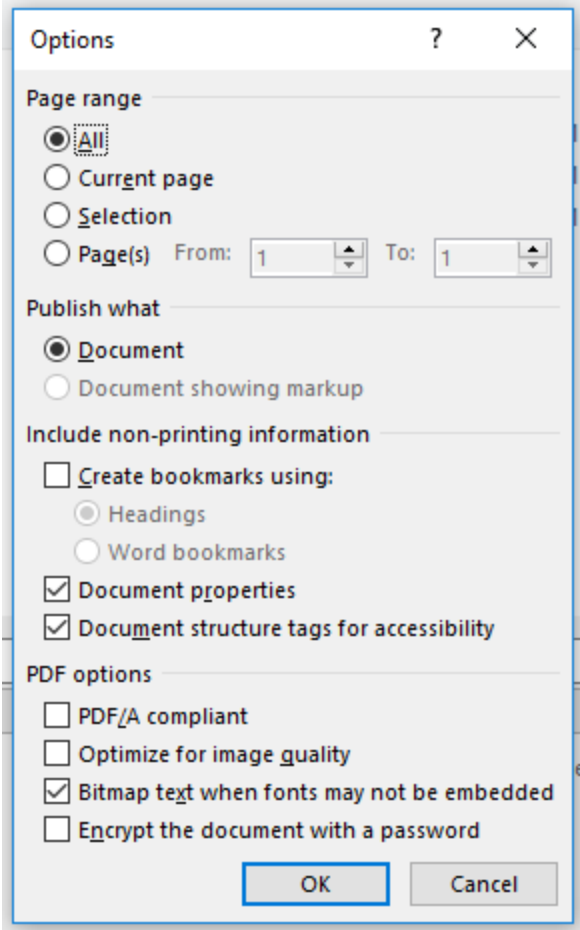
Note: While Word generally does a good job of supporting accessibility options, tables are an exception. For complex tables, more complex solutions – like HTML and PDF – provide more options.

Exporting Word Docs to PDF

Once you’ve created an accessible Word document, exporting the document is easy. From the “File” menu, select “Save a Copy.” Name your file and change the format to “PDF.” Next, select “More Options” from the “Save a Copy” dialogue box. This will open the “Save As” dialogue box. Then, select the “Options...” button:



On the “Options...” dialogue box, ensure that “Document structure tags for accessibility” checkbox is checked. Click “OK” and save your PDF.



Note: While Word exports reasonably accessible documents, some touch up with Adobe Acrobat may still be required, especially for complex or lengthy documents.

Additional Resources

- [Microsoft: Make Your Word Documents Accessible to People with Disabilities](#)
- [University of Washington: Creating Accessible Documents in Microsoft Word](#)
- [WebAIM: Converting Documents to PDFs](#)

Microsoft Excel

Excel is the application of choice for creating tables, charts and financial reports. By following these guidelines, we can provide these documents to the widest audience possible.

Accessibility Checker

Microsoft Excel has a built-in Accessibility Checker that helps you test the overall accessibility of your document. To test your document, select the “Review” option from the Excel Ribbon. Next, select “Check Accessibility.” The “Accessibility Checker” pane will open on the right side of your screen, highlighting potential issues and providing guidance on common issues.

You can check your document when you're done working or open the Accessibility Checker from the outset to continually provide you with accessibility guidance.

Accessible Templates

Starting with an accessible template can be a great time saver. From the "File" menu, select "New" and search for "accessible sampler" to see a curated assortment of Microsoft templates that might fit your needs. If no out-of-the-box template fits your needs, no worries. Following the a few basic guidelines will help.

Provide Context and Instructions

It's helpful to reserve the A1 cell, at a minimum, to provide a brief description and instructions for that particular sheet. On more complex worksheets, other cells in the A column can be used to describe information contained in the adjacent rows.

Sheet names

Your workbook consists of many worksheets, and each sheet in your workbook starts out with a generic name, such as "Sheet1." Providing a descriptive, unique name for each worksheet helps users identify the content in that worksheet.

To rename the worksheet, right click the worksheet name and select "Rename." Use a sheet name that is descriptive of the content on that particular sheet, for example, "2019 Revenues." Use a separate sheet for every main subject in your workbook, giving each sheet a unique name – even if you only have one sheet in your workbook.

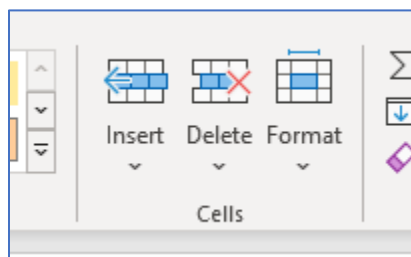
Remove empty sheets by right clicking them and then clicking "delete."

Table Headers

Headings give meaningful context to the data in your tables. It's important to create proper headings in Excel, rather than using typefaces or colors to imply headers. To create proper headers, click on the "Design" option in the Excel ribbon. Next, check the "Header Row" checkbox to create the header row for your table. Lastly, use descriptive text to name your headers.

Avoid Empty Cells

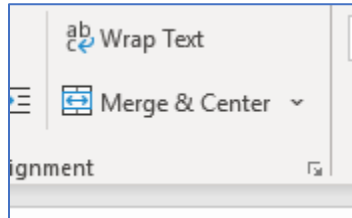
Empty cells will be read as blank and may give the impression that the document as ended. If used for formatting (to create space, for example), it's best to use the "Format" menu in the "Home" ribbon to adjust the size of rows and columns as needed instead of leaving blank cells between areas of content.



Sometimes, cells are left blank because their value represents something like "zero." When this is the case, it's better to fill the cell with appropriate text: "0," "N/A," "not applicable," etc. This way, users of

screen-reading technology receive clear, accurate information. If left blank, users won't know that cell has a value because it won't be read by the screen reader.

When cells are left blank for design purposes, they can be merged together with another cell that does contain data. Use Merge & Center on the Home Ribbon to merge cells:



Otherwise, delete any rows that that are left blank for formatting purposes.

Provide Alternate Text for Charts and Graphics

Whenever a chart or graphic is used, it's a good idea to use alt-text to briefly summarize the content on that object. To add alt text to objects, right click on the object and select the "Edit Alt Text" option. In the "Alt Text" dialogue box, enter a couple of sentences describing the type of chart (pie, bar, etc.) and a summary of the information found in the chart.

Hiding Unused Columns and Rows

Once you've placed all your data and made your charts, you'll notice that there may still be an infinite number of empty columns to the left of your content and an infinite number of rows below your content. To keep things neat and orderly, you can hide these columns.

To do so, highlight the first blank column immediately right of your data by clicking the column letter. Then, while holding the "Shift" and "Control" keys, press the right arrow key. This will highlight all the columns to the right. Next, right click in the selected area and click "hide."

You can use the same technique to hide rows below your data.

Don't Use Color or Font Size to Imply Meaning

On occasion, you may want to visually accent information in a cell to impart greater importance, for example. When doing this, it is important to not rely simply on color or font size to convey meaning. Instead, use Excel's built-in styles to add meaning to data cells:

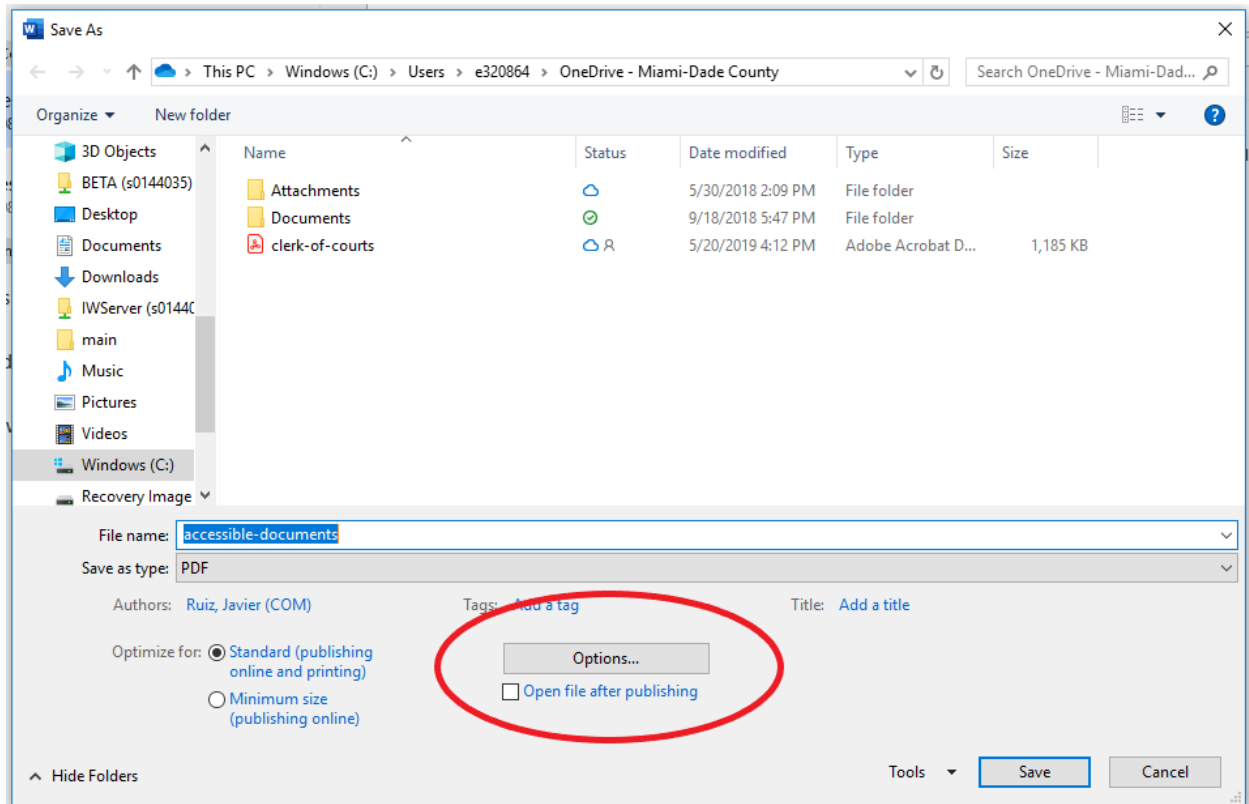


You can modify styles to suit your needs by right-clicking a style. These styles are built to provide additional context to screen reader technologies.

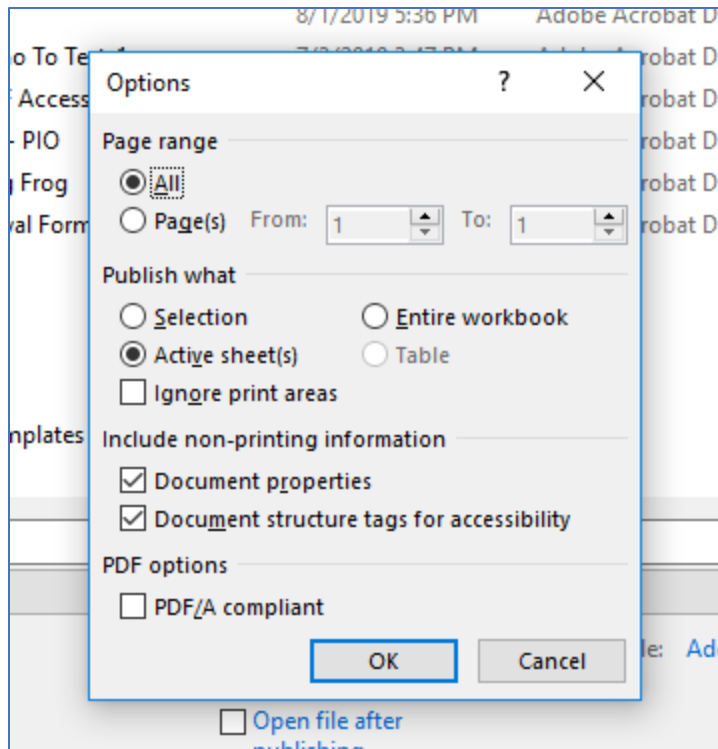
Exporting Excel Workbooks to PDF

Once you've created an accessible Excel workbook, exporting the document is easy. From the "File" menu, select "Save a Copy." Name your file and change the format to "PDF." Next, select "More

Options” from the “Save a Copy” dialogue box. This will open the “Save As” dialogue box. Then, select the “Options...” button:



On the “Options...” dialogue box, ensure that “Document structure tags for accessibility” checkbox is checked. Click “OK” and save your PDF.



Additional Resources

- [University of Alabama: Creating Accessible Excel Spreadsheets](#)
- [Indiana University: Create Accessible Spreadsheets Using Microsoft Excel](#)
- [Penn State: Excel Tips](#)
- [Microsoft: Make Your Excel Documents Accessible to People with Disabilities](#)