

Karlen Communications

Accessible Document Design Basics



Karen McCall, Med

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Contact Information

This tutorial provides basic information about accessible document design using a word processor. Most word processors have similar tools. However, Microsoft is making a concerted effort to improve the ability to create accessible content and use its applications using adaptive technology such as a screen reader. I am a person who uses a screen reader, although sometimes I use screen magnification. This tutorial uses keyboard commands to perform tasks rather than mouse clicks.

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Introduction

This tutorial is based on Word from the Office 365 subscription. Stand-alone versions of Office 2013 or 2016 are not updated with the most recent accessibility features. If you work in accessible document design, you will need to use the subscription version of Office. I know...I resisted as long as possible, but the new tools make life easier when using Office applications with adaptive technology or creating more accessible content.

You will notice that I will not guarantee that digital content is fully accessible. The level of accessibility depends on the application the content is being viewed in, the age of the adaptive technology being used, and the user verbosity settings in both the application and the adaptive technology. For example, If you open a PDF document PDF/UA 1 conforming (2014) with Adobe Reader 6 (2008), the adaptive technology will not access all of the features built into the Tags/PDF. Likewise, if someone is using Adobe Reader 6 with JAWS 10, they will not be able to take advantage of new settings and scripts to access information in the document.

Additional documents are attached to this PDF for topics I've developed more specific tutorials for. Older documents are on the Karlen Communications website, while updated versions are housed in an accessible online repository at the [Karen McCall School in Teachable](#)².

Have fun!

¹ Karlen Communications, Online Courses, Publications and Services:
<http://www.karlencommunications.com/products.htm>

² Karen McCall School in Teachable (free updated tutorials: <https://karen-mccall.teachable.com/p/microsoft-office-tutorials-and-resource-documents>)

Accessible Elements to a Document

There are several elements you can use to create more accessible Word documents:

- Create templates for individual documents such as letters, reports and newsletters.
- Use Themes and Style Sets so that if someone can't use the colours, fonts and font sizes you've chosen, they can use their Style Set or a different Theme.
- Use heading styles and custom heading styles.
 - Always make sure that the Headings are sequential! **DO NOT skip Heading levels!**
- Use inherent document structures such as lists.
- Insert, don't draw tables.
- Don't allow table rows to break across pages.
- Use cell margins instead of the Enter key for spacing.
- Identify table header rows [these are NOT headings.]
- Provide Alt Text for images and objects.
- Provide Captions for tables, images and equations.
- Use contextual links supported by footnotes or endnotes.
- Do not use Content Controls to create fillable forms/document parts.
 - You can create a more accessible form by using a Word template with no symbols or underlining to represent form controls, saving the Word document as a tagged PDF and adding the form controls in Adobe Acrobat.
- Check the colour contrast if you are using colours on text.

Always create a template for the various types of documents you'll use. This gives each document a consistent and distinct look and feel more accessible.

Take advantage of Themes and Style Sets in the Office. This will let people swap out a Theme that is not accessible or usable to them and use one that is. When you combine Themes with a personalised Style Set, the level of accessibility can be optimised.

Clearing Formatting!

One of the barriers to accessibility is the formatting that often comes with repurposing content from one document to another or when document authors use direct formatting, both of which bring the source document's formatting into your current document or template. This can create chaos in styles and formatted content in ways you don't want or

need. It is essential to clear the formatting of anything you add to your current document or template. This should be done BEFORE you bring it into the recent document or template.

There are several ways to clear formatting from selected content in Word:

- Select the text in the source document and press Alt + H, E to “erase” the formatting.
- Selecting a paragraph and pressing Ctrl + Q will reset the paragraph to the margin without clearing formatting.
- Selecting a paragraph and pressing Ctrl + Spacebar will clear manual formatting such as Bold or Italic.
- Set the Copy and Paste options in the Word Options dialog to match the destination formatting or Keep Text Only.

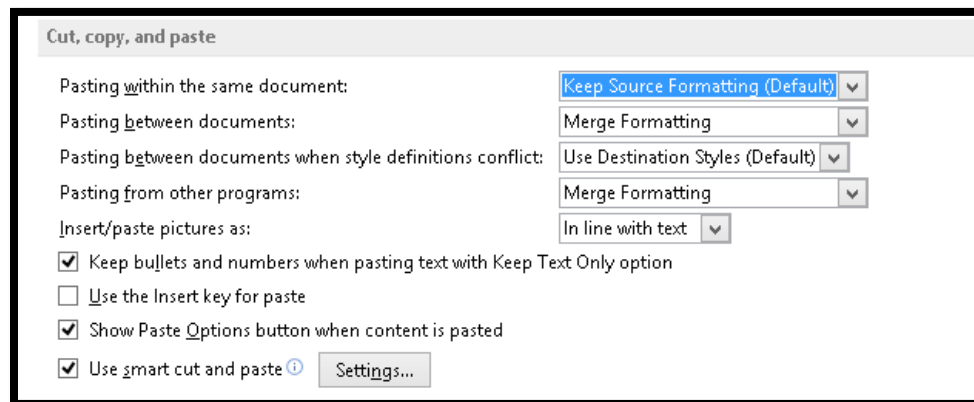


Figure 1 Cut, Copy and Paste settings in Word Options dialog.

There is no Mac equivalent to these settings in Word.

To find the Cut, Copy and Paste settings in the Word Options dialog:

1. Press Alt + F, T for File/Backstage area, Word Options.
2. When the Word Options dialog opens, press A for the Advanced category.
3. Press Alt + W twice to move to the list for copying or moving within the same document.
 - a. For this setting, it is OK to “Keep Source Formatting” because you are copying and pasting within the same document and most likely want to move content around, not get rid of wonky formatting.
4. Press Tab to move to the following setting.
5. The following setting allows copying and pasting content from one document into another. For this setting, choose Keep Text Only, which will remove formatting from the source content as it is being pasted into the current document.

6. Press Tab to move to the following setting.
7. The following setting is for copying and pasting content from other applications into Word documents. For this setting, choose Keep Text Only so that any formatting in the source application will be removed when you paste the content into a Word document.

By default, copying images or pictures into Word will result in Inline objects.

In addition to these main settings for copying and pasting, Smart Copy and Paste options are found under a Settings button in the same area of Advanced settings (not available in the Mac version of Word). If you press Alt +S, you will move to and check the check box for “Use Smart copy and paste options”, which will reveal a Settings button (once the check box is checked, press Tab to move to the Settings button and press Enter.)

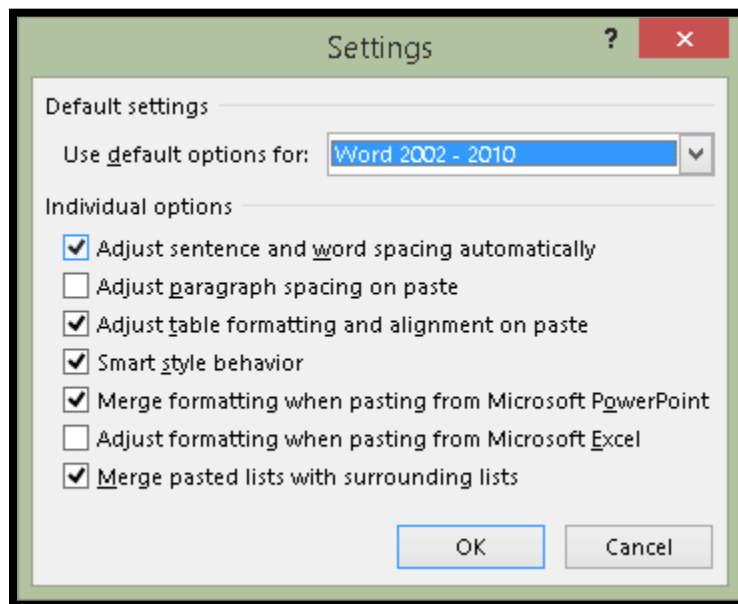


Figure 2 Smart Paste Settings in Word 2010.

The advanced copy and paste settings are:

- Alt + D for “Use default settings for Word 2002-2010.”
- Alt + W for “Adjust Sentence and Word Spacing Automatically”, which is checked by default.
- Alt + P for “Adjust paragraph spacing on paste”, which is not checked by default.
- Alt + G for “Adjust table formatting and alignment on paste”, which is checked by default.
- Alt + S for “Smart style behaviour”, which is checked by default.

- Alt + letter O for “merge style formatting when pasting from Microsoft PowerPoint”, which is checked by default.
 - I usually uncheck this.
- Alt + E for “Adjust formatting when pasting from Microsoft Excel “is not checked by default.
- Alt + M for “Merge pasted lists with surrounding lists “ is checked by default.
 - I usually leave this, but you might want to uncheck if you have problems copying and pasting content in lists or near lists.

It is helpful to know that these settings exist to change them if you need to.

Paste Options

When you paste text from another application or even another Word document, and you don't know if there is formatting attached to it, the last line of defense for pasting text only is in the Paste Options from the context menu.

1. Select some text.
2. Press Ctrl + C to Copy it.
3. Position the cursor where you want to put the text.
4. Press the AppKey and use the Down Arrow to get into the Paste Options.
5. Use the Right Arrow to locate Text Only.
6. Press Enter to paste only the text into the document.

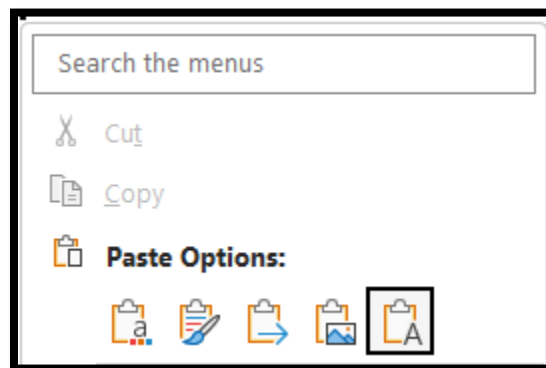


Figure 3 Paste Options showing Text Only.

Navigation Pane

Those who use adaptive technology, such as the JAWS screen reader, may have access to a document's headings list. Not all adaptive technology has this feature. It is also helpful for

those creating documents to check to ensure that the text they want is headings or navigational points using the Heading level style.

Word has the Navigation Pane (in Word 2007 or earlier, known as the “Document Map”) that anyone can use.

When remediating Word documents, I always keep this open. It shows what text is a heading and the hierarchical structure of headings.



Figure 4 View Ribbon Navigation Pane check box.

The Keyboard command to show or hide the Navigation Pane is Alt + W, K for View Ribbon, Navigation Pane. Pressing this keyboard command when the focus is on the document will either open or close it (check or uncheck it).

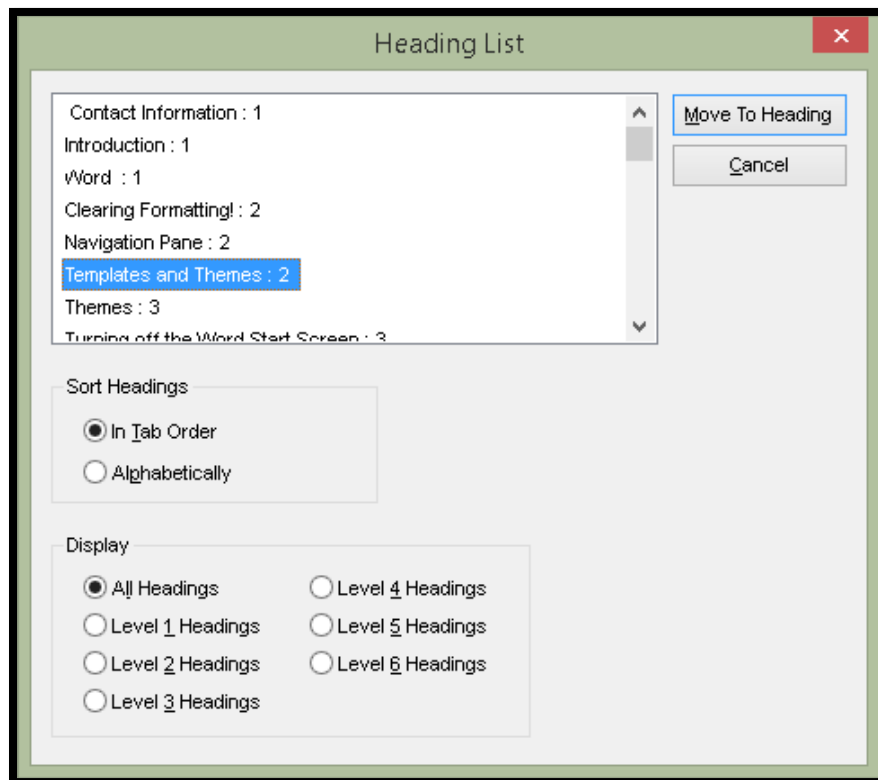


Figure 5 List of Headings in a Word document from the JAWS screen reader.

The preceding image shows the Headings List from the JAWS screen reader. Headings and their level are listed. This provides information on the hierarchy of content in the document and is a navigational tool to quickly move to the content you want to go to and read.

The following image shows part of the Navigation Pane for this document. The Navigation Pane opens to the left of your document.

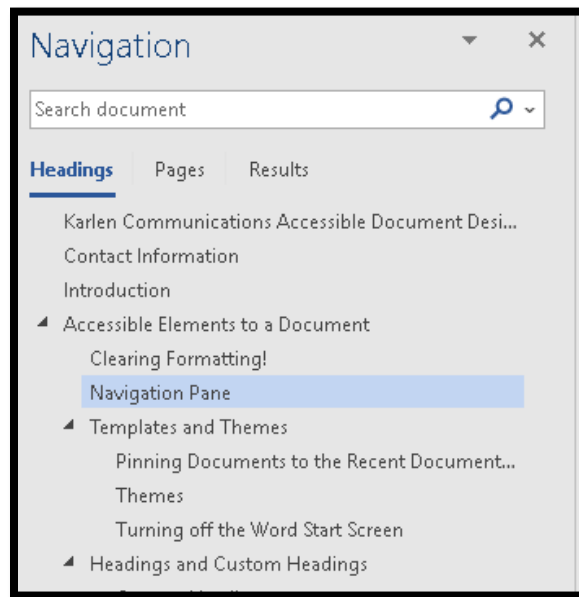


Figure 6 Navigation Pane in Word.

The Navigation Pane shows you the content hierarchy in your document and whether Heading levels have been skipped. Each Heading level is nested one under the other in incremental indents. **DO NOT skip Heading levels in documents!**

If you convert the document to a tagged PDF, the headings will become Bookmarks. The Navigation Pane gives you a preview of what items will be in the Bookmarks.

Headings are also the basis for generating a Table of Contents.

The Navigation Pane is accessible to those using adaptive technology with a keyboard or who use the keyboard alone.

Press Shift + F6 and F6 to move between the document and the Navigation Pane. Use Tab to move to the first Heading and then the Up and Down Arrows to go through the Headings. Press Enter on the one you want. You are taken to that point in the document and can begin reading. To get back to the Navigation Pane, press Shift + F6.

Templates and Themes

It is easier to use templates and Themes with documents in Word and PowerPoint.

The first step is to create a template.

There are two ways to create a template. The first is the easiest.

1. Open a new blank document and press F12. This opens the Save As dialog.
2. Give the new template a name such as "Report" or "Annual Report."
3. Press Tab to move to the Files of Type list and choose Word Template (DOTX).
4. Your template will be saved in the Custom Office Templates folder in your Documents folder as soon as you choose Word Template as your file type.

The second method goes through the File/Backstage area.

1. Press Alt + F for File.
2. Press A for Save As.
3. Press Y, 3 to move to the Filename edit area.
4. Press Y, 4 to move to the Files of Type and choose Word Template.
5. You can press Y, 6 to bypass this interface and launch the Save As dialog.

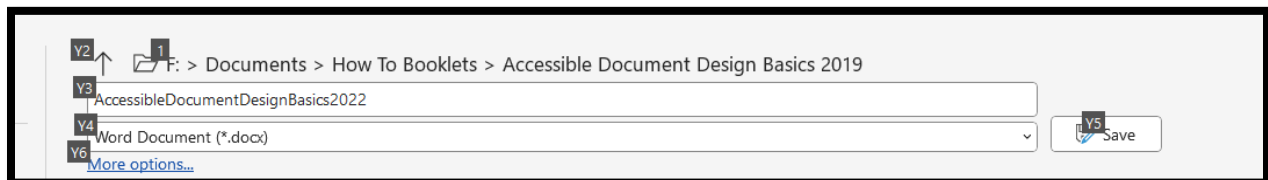


Figure 7 File, Save As area showing various parts of the save process for templates.

With any Office application, you can save templates to any storage device. However, if they are not in the Custom Office Templates folder, they will not be easy to find and use again.

Once you save your template, you can modify the default styles and add any static text to the template.

Note: Any content you place in the Page Header or Footer area of the document is not readily discoverable by adaptive technology. Do not put the title of the document in the Page Header only!

Pinning Documents to the Recent Documents List

I recommend pinning templates to the list of Recent Documents. It will be easier to find when you want to use it.

To pin a document to the list of Recent Documents:

1. The document does not have to be open but must be in the list of Recent Documents.
2. Press Alt + F, R for File/Backstage area, Recent Documents.
3. Press the Tab to move into the list of Recent Documents, then Tab again to move to the actual list. You will hear the name of the first document in the list using a screen reader. Use the Up and Down Arrows to find the document you want to pin to the list.
4. When you locate the template, press the AppKey or right mouse button and Choose "Pin to List."
5. Visually, the document is now placed in the top area of the list of Recent documents and has a push pin in dark blue to the right of the document's name. The list of Recent documents is alphabetical.

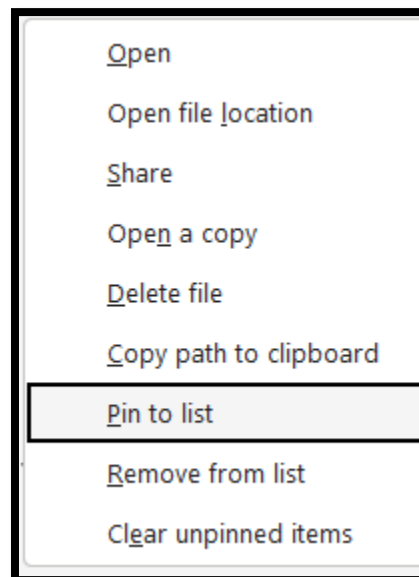


Figure 8 Document context menu in the list of Recent Documents showing Pin to List option.

You can pin or unpin any document by following the same process. If a document is pinned, the text will say, "Unpin from list."

Press Alt + F, R for File/Backstage area, Recent Documents to use the template.

When you locate the document in the list of Recent Documents, right-click or press the AppKey and choose "Open a Copy."

Note: Do not press Enter on the template from your list of recent documents. This will not create a document based on the template but will open the template for you to modify.

You can go through the File/Backstage, New (Alt + F, N) process, but once you get the Start Screen, you will need to press Tab to move into the list of Templates and then E to list your Personal or Custom Office Templates. You will need to Tab to the list of templates, then Arrow around the templates to find the one you want. If you are using a screen reader, this may take a while. Pinning documents and templates you use often or are working on over a long period makes using templates much easier if you use adaptive technology.

Themes

You can use Themes to mix and match colours, fonts or effects. You can even create a new Theme with your branding colour palette or modify an existing Theme (and give it a new Theme name).

Press Alt + G, T, H to open the Themes Gallery. This will let you choose an entirely different Theme for the look and feel of the document.,

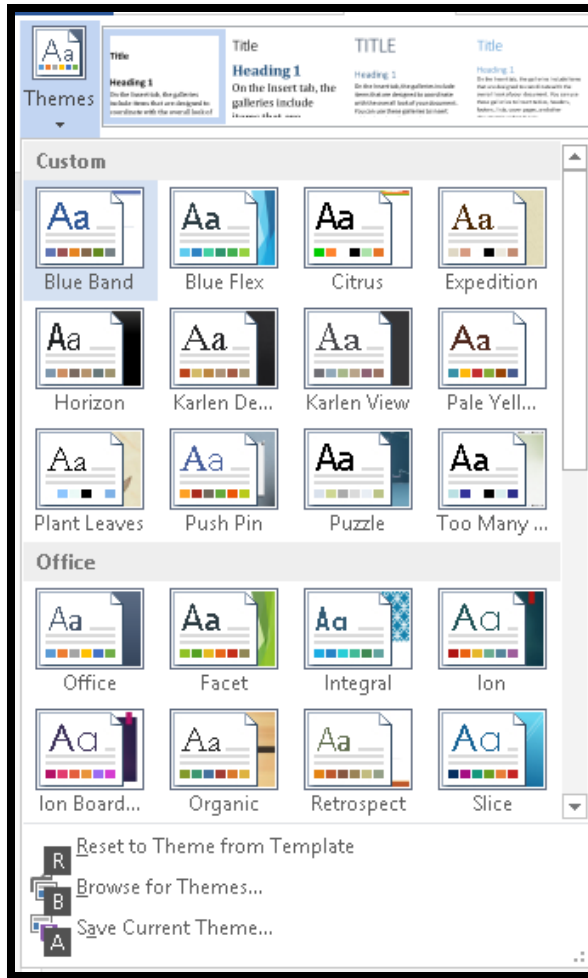


Figure 9 Themes Gallery in Word.

Press Alt + G, T, C to open the colour choices, Alt + P, T, F to open the font choices, or Alt + P, T, E to open the Effects choices. You can't change the Effect's colours. They are based on the Theme colour palette.

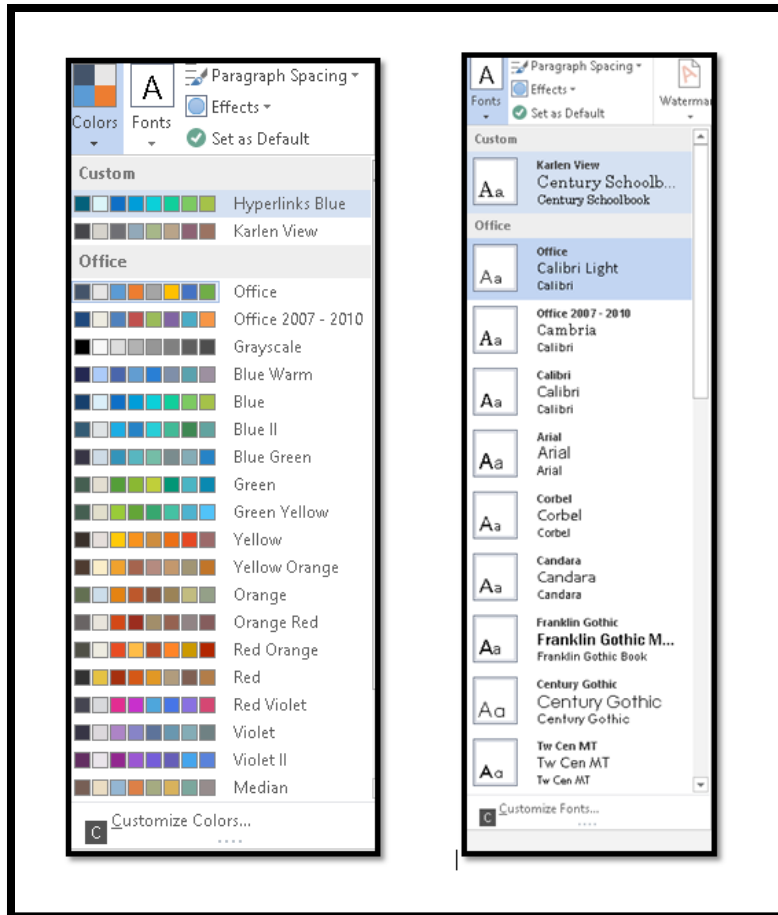


Figure 10 Themes Colour and Themes Font Galleries in Word.

A Theme is made up of four parts:

- The Theme itself.
- Theme Fonts.
- Theme Colours.
- Theme Effects.

You can modify the fonts and colours of the Themes but not the Theme Effects. We'll look at changing the colour in the PowerPoint section of this handout.

You can make your template a Theme that can be applied to any document.

While the template is open, just before you close it, press Alt + G, T, H, S to save the current Theme (Design Ribbon, Themes, Save Current Theme).

Focus is in the area where you can give the Theme a name.

Once you give the Theme a name and save it, your new Theme will appear in the Themes Gallery for all Office applications. It will include its Theme Fonts and Theme Colours based on your choices.

You can choose an existing template such as a report, invitation, flyer or another type of document by pressing Alt + F, N, then number 1 for Business, 2 for Industry, 3 for Personal, 4 for Design Set, 5 for Event, 6 for Letter or 7 for Education.

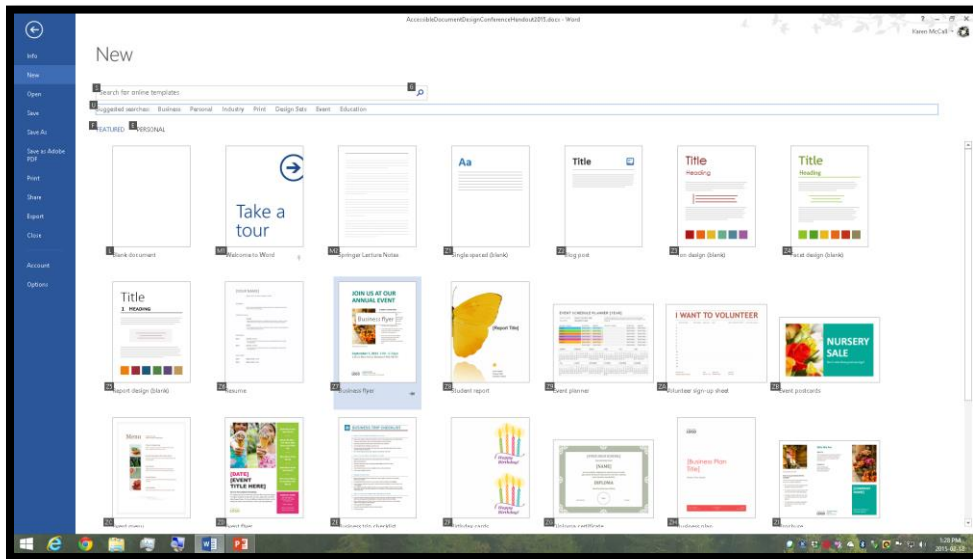


Figure 11 New document Template for Word.

Press Tab to move into the list of document templates and then the Up, Down, Left and Right Arrow keys to locate the template you want to use. Press Enter on the document template to use it.

If you want to work with the default blank Word document, press either Alt + F, N, L for File/Backstage area, New, Blank Document or Ctrl + N if the Start Screen is not visible.

Headings and Custom Headings

One of the most critical structural elements of a document is the use of heading styles in our documents. Typically, our first instinct is to fling formatting at the text to make it look like a change in topic.

To create a more accessible document, use proper and custom heading styles based on existing ones. It would help if you also used Heading Styles in a hierarchical order, moving from Heading 1 to Heading 2 and not from Heading 1 to Heading 3. Headings are navigational points in a document and help everyone find the content they need when they need it. The Table of Contents is generated from the Headings in a document.

Headings must be in sequential order in a document. This means that you have Heading 1 followed by Heading 2 followed by Heading 3 and Not Heading 1 followed by Heading 3 or Heading 2 followed by Heading 4.

Using screen readers or Text-to-Speech tools depend on sequential Headings to navigate documents. If a Heading level is skipped, we begin troubleshooting to see if our adaptive technology is not working correctly. We somehow missed content, or that content needs to be added to the document. Using sequential Headings in documents means that we don't start flinging content on the Page without first designing the structure of that content. We plan the structure and Headings of our documents. We also don't use Heading levels just because they look a certain way. We modify the look and feel of Headings so that the hierarchical or sequential structure of the document is retained.

To apply a heading style:

1. Select the text to be formatted with the heading style.
 - a. Press Ctrl + Alt + the number 1 for a heading level 1.
 - b. Press Ctrl + Alt + 2 for a heading level 2.
 - c. Press Ctrl + Alt + 3 for a heading level 3.

If you are unfamiliar with keyboard commands, use the Apply Styles Pane by pressing Ctrl + Shift + S.

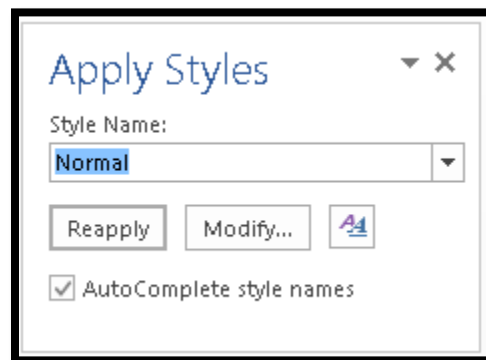


Figure 12 Apply Styles Pane showing the Normal Paragraph Style in use.

You can either type the name of the style you want to apply or press Alt + Down Arrow and use first character navigation to locate it. Press Enter and the style is applied to the selected text.

When you are finished working with the Apply Styles Pane, pressing Ctrl + Space, C while the focus is in the Apply Styles Pane will close it. To focus back on the Apply Styles Pane, press Ctrl + Shift + S again.

I recommend putting the Apply Styles Pane on the Quick Access Toolbar. There are instructions on doing this in the [Office 2013 Settings and Changes](#)³ document on the Karlen Communications website. There are also instructions for this later in this document.

You can use the Quick Styles Gallery on the Home Ribbon to apply a Style by pressing Alt + H, L and clicking on it. While the Styles in the Quick Styles Gallery are accessible using the keyboard, you cannot use first-character navigation, so this tool is better left to mouse-dependent users.

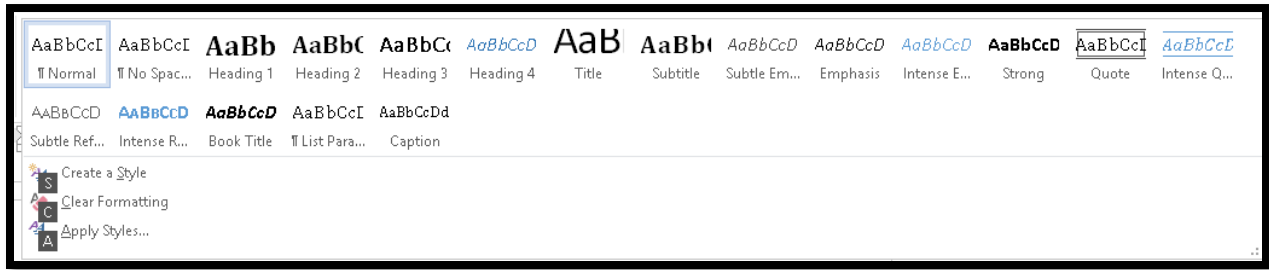


Figure 13 Quick Styles Gallery from the Home Ribbon.

Additionally, you could use the Styles Pane by pressing Alt + H, F, Y. This is one of those tools where the icon on the Home Ribbon is tiny and using the keyboard command to show the Styles Pane will save you time.

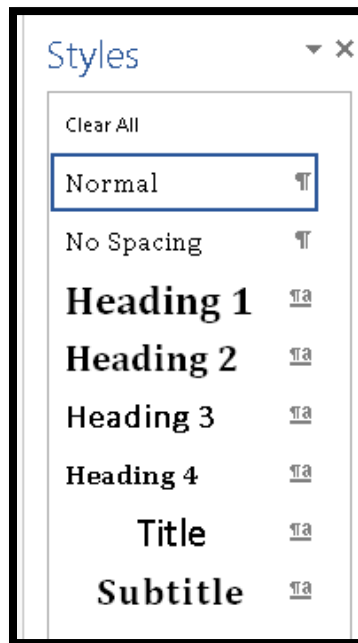


Figure 14 Styles Pane in Word.

³ Office 2013 Settings and Changes, Karlen Communications web site:
<http://www.karlencommunications.com/MicrosoftOfficeAccessibility2013.html>

Pressing Alt + H, F, Y again while focusing on the document will close it. If the focus is on the Styles Pane, press Ctrl + Spacebar, C to Close it.

An advantage of using proper heading styles to create a logical structure is the ability to generate a linked table of contents. In turn, conversion tools leverage headings in Word to create navigational points in tagged PDF, EPUB, Braille and other formats.

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Figure 15 Linked Table of Contents for this document.

If you want keyboard commands for heading levels 4 through 6, there is⁴ a document on the Karlen Communications website.

Putting the Apply Styles Pane on the Quick Access Toolbar

Word has the Quick Styles Gallery that is visible to see the Style in use. However, it is sometimes faster to use the keyboard. The Apply Styles Pane is easier to glance at and verify the formatting for the selected text if you are using the keyboard.

The Apply Styles Pane is a floating dialog located to the right of the document when you open it using Ctrl + Shift + S.

⁴ Customizing Keyboard Commands in Word, Karlen Communications:
<http://www.karlencommunications.com/MicrosoftOfficeAccessibility2013.html>

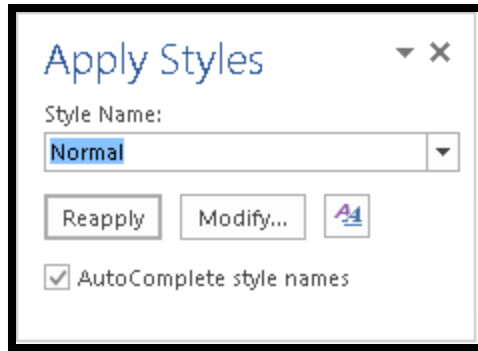


Figure 16 Apply Styles Pane.

To put the Apply Styles Pane on the Quick Access Toolbar:

1. Press Alt + F, T to open the Word Options dialog.
2. Press Q to move to the Quick Access Toolbar category.
3. Press Tab to move into the options for the Quick Access Toolbar. You are on the list of possible types of commands to list.
4. Choose All Commands from the list of commands.
5. Find "Style" with no other verbiage or icon associated with it.
6. Press Alt + A to add it to the Quick Access Toolbar.
7. Tab to and press Enter on the OK button to confirm the addition.

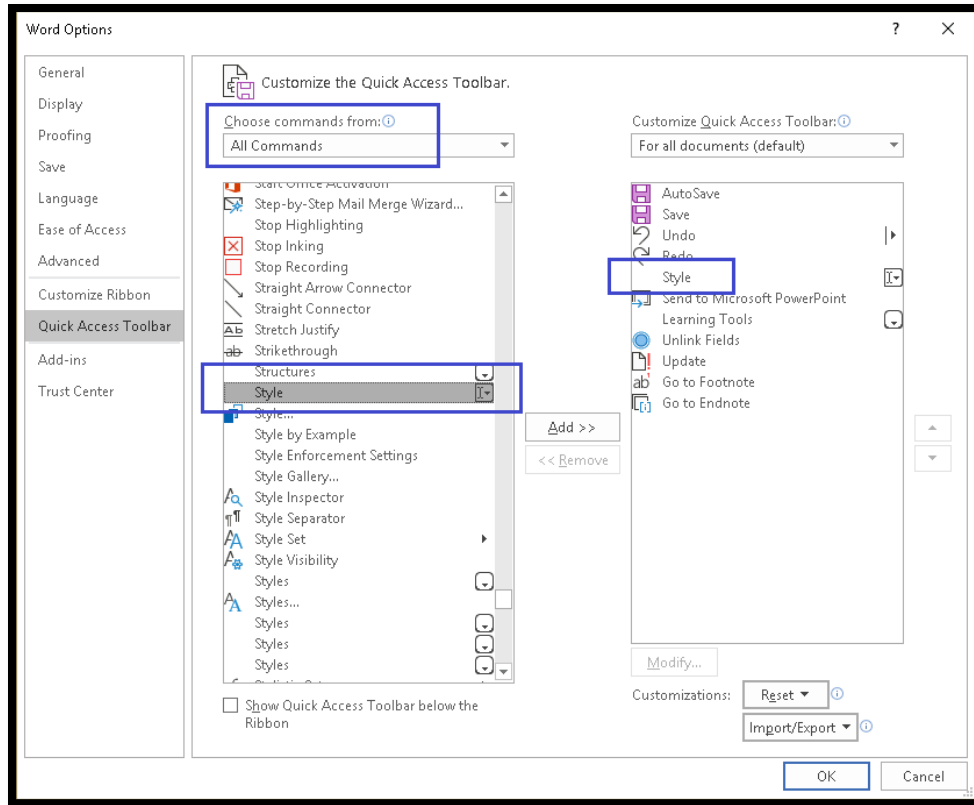


Figure 17 Word Options dialog showing the Quick Access Toolbar category and process to put Apply Styles Pane on Quick Access Toolbar.

The Quick Access Toolbar can be accessed by pressing Alt + a number. In this case, the Apply Styles Pane is Alt +5 because it is the fifth item on my Quick Access Toolbar.

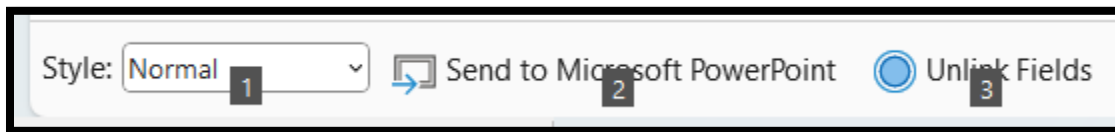


Figure 18 My Quick Access Toolbar.

Other tools you will want to put on the Quick Access Toolbar are:

- Unlink Fields if you work with journal articles.
- Send to Microsoft Office PowerPoint in the Commands, Not in the Ribbons. This will let you create your PowerPoint content in Word and then send it to PowerPoint to add the bling or eye candy.
- Reveal Formatting, which is in the Commands, Not in the Ribbons. (Shift + F1 is the only way to see the Reveal Formatting Pane if you don't put it on the Quick Access Toolbar.)

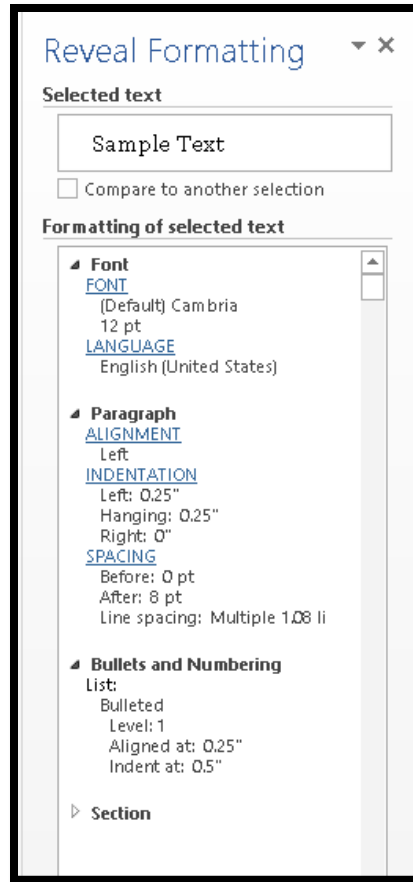


Figure 19 Reveal Formatting Pane.

Pressing Shift + F1 again will close the Reveal Formatting Pane.

The Reveal Formatting Pane shows you the formatting at the cursor point.

Modifying an Existing Style

If you don't like the way Heading 1 looks, you can change it. Creating a template is the best way to do this without corrupting the normal blank document in Word. For example, if we have a Report template, we can modify Heading 1 to look the way we want. We can also modify the Normal Paragraph Style font and font size to create a new document based on the template; it will have the look and feel we want.

To modify an existing style:

1. Select some text and format it with the Style you want to modify.
2. Press Ctrl + Shift + S to open the Apply Styles Pane.
3. Tab to the Modify button and press Enter.

You don't need to rename the style because you will modify it. The Modify Style dialog looks the same as the New Style dialog.

You can right-click on a style in the Quick Styles Gallery and choose Modify if you are mouse-dependent. You can also do this from the Apply Styles Pane. While this can be done from the keyboard in both places, it is faster using the Apply Styles Pane.

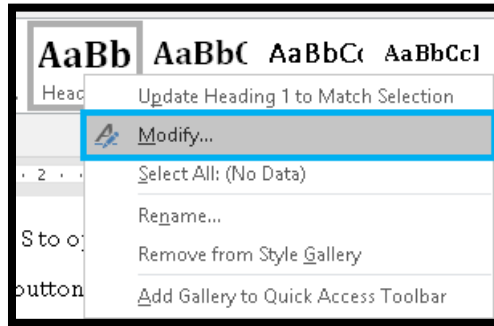


Figure 20 Modify option from the context menu in the Quick Styles Gallery.

The Modify Style dialog looks the same as the New Style dialog. You can make any changes to the font, font size, font colour, Paragraph spacing, borders or alignment.

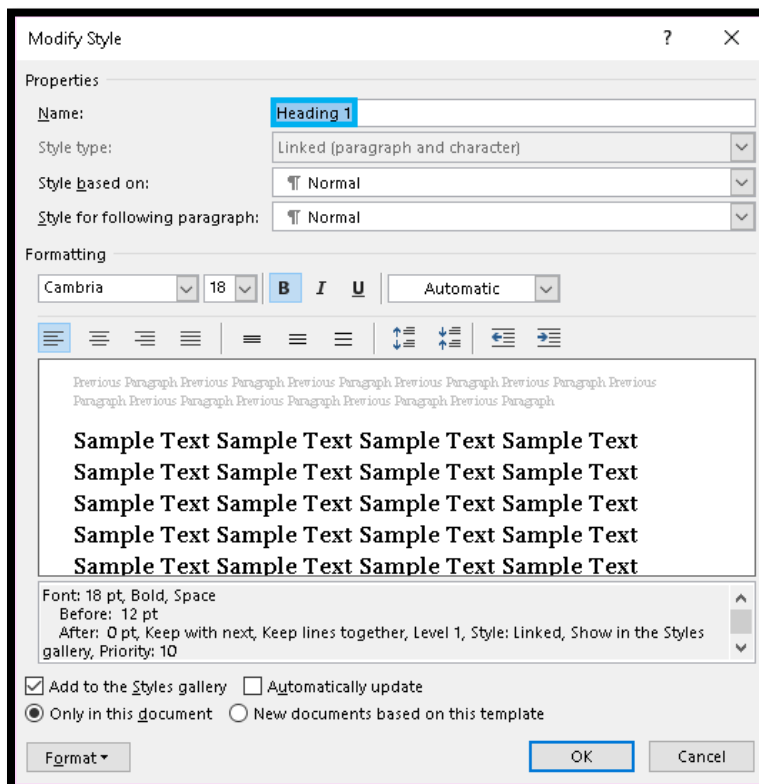


Figure 21 Modify Style dialog for the Heading 1 Style.

Custom Headings

You can create custom headings based on existing headings if you need more than one look and feel for a heading level. This is the key to accessibility: the new headings are based on the existing heading structure in Word.

I usually add some text to the template, select it and then apply the inherent heading or another style I need to use as the base for the new style.

You can add random text to a Word document by typing one of the following and pressing Enter after the right parenthesis.

=rand(x)

Where “x” represents the number of paragraphs inserted, each having 3 sentences.

You can also type:

=rand(x, y)

Where “y” represents the number of sentences in each paragraph. If you prefer Latin text, use the same syntax but type the following:

=lorem(x, y)

Once you have some text in a document, you can begin modifying and adding Styles.

To create a new Style:

1. Open the Styles Pane by pressing Alt + F, Y.
2. The New Style button is at the bottom left of the Styles Pane. It is the button to the far left with three buttons.
3. Once activated, the New Style dialog opens, and you are ready to create the new style.

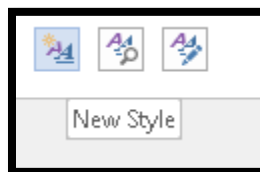


Figure 22 New Style button in the Styles Pane.

If you are creating a new Heading Style, I recommend that you name the Style something like Heading 1A so that it falls alphabetically in line with other Styles in the Styles Pane. This makes it easy to find and use, especially if you create a template for others to use. If you are the only one using the template, using a standard naming convention will help you remember what Style to use months or years later.

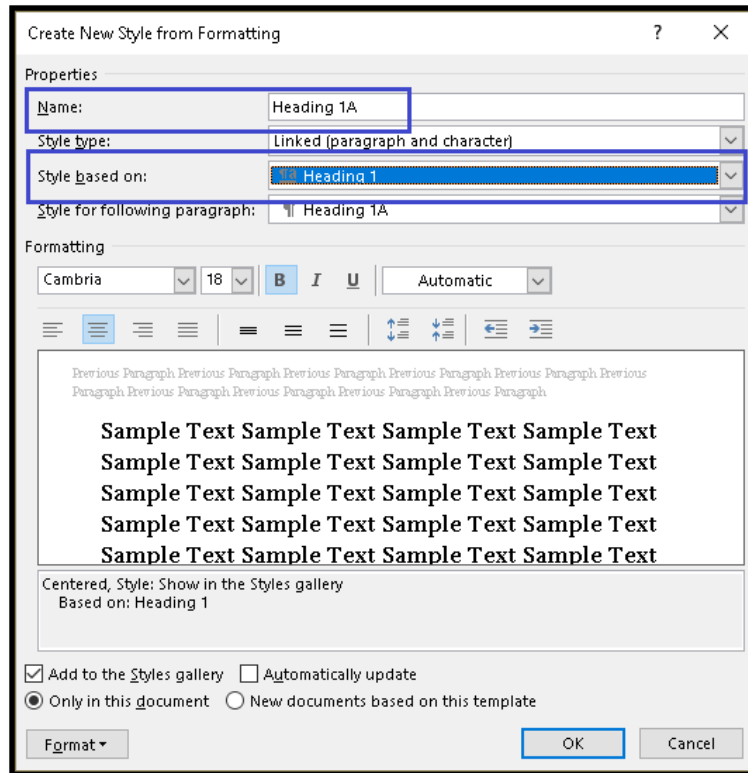


Figure 23 Custom Heading 1A Style based on Heading 1.

Note: In the preceding image, I've created a Heading 1A based on Heading 1. This is important. Creating a Heading 1A based on the Normal paragraph style will not be a real heading. You **must** make any new heading styles based on an existing heading style.

You can now make formatting changes that apply to a Heading 1A in your documents.

When you are finished, don't check automatic updates! This will add a new style for EVERY one-off formatting you apply in subsequent documents creating a "dog's breakfast" of formatting that is impossible to sort through and use.

You need to decide whether you want the new style to be available only in this document or for new documents based on this template. The keyboard command to move to the first radio button is Alt + D while in either the Modify Style or New Style dialog.

Putting a Heading on the Next Page

As shown in this tutorial, there are times when you want to put a heading on the next page for either visual effect or to further separate content/topics/chapters.

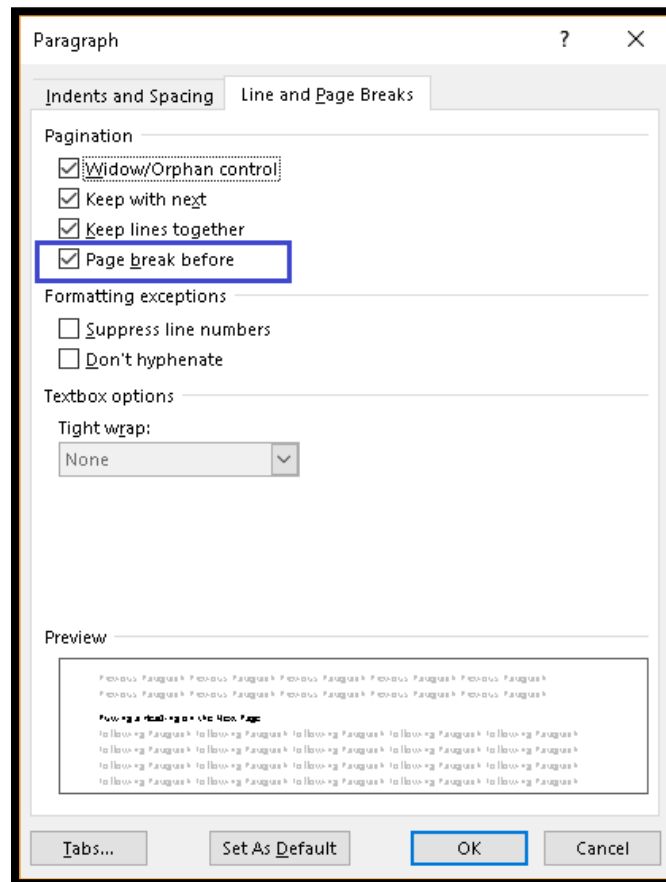


Figure 24 Paragraph dialog, Line and Page Break tab, Page Break Before check box.

To add a page break before the text in a document:

1. Select the Heading or piece of content you want at the top of the next page.
2. Press Alt + H, P, G for Home Ribbon, Paragraph dialog.
3. Press Ctrl + Page Down to move to the Line and Page Breaks tab.
4. Press Alt + B to move to and check the check box to put a Page Break Before.
5. Tab to and activate the OK button by pressing Enter.

This technique provides a cleaner page break than Shift + Enter and is easy to remove if you have to due to additional content or reorganising of content.

To remove the page break before, go back to the Paragraph dialog and uncheck this check box. This method consistently makes adding or removing the page breaks before content faster and easier.

Bulleted and Numbered Lists

Use the Bullets and Numbers tools to create standard lists. Avoid using non-Unicode symbols for lists.



Figure 25 Bullets and Numbering icons in the upper left of Paragraph Group.

The following image shows the Bullets Gallery, the Numbering Gallery and the Multilevel List Gallery.

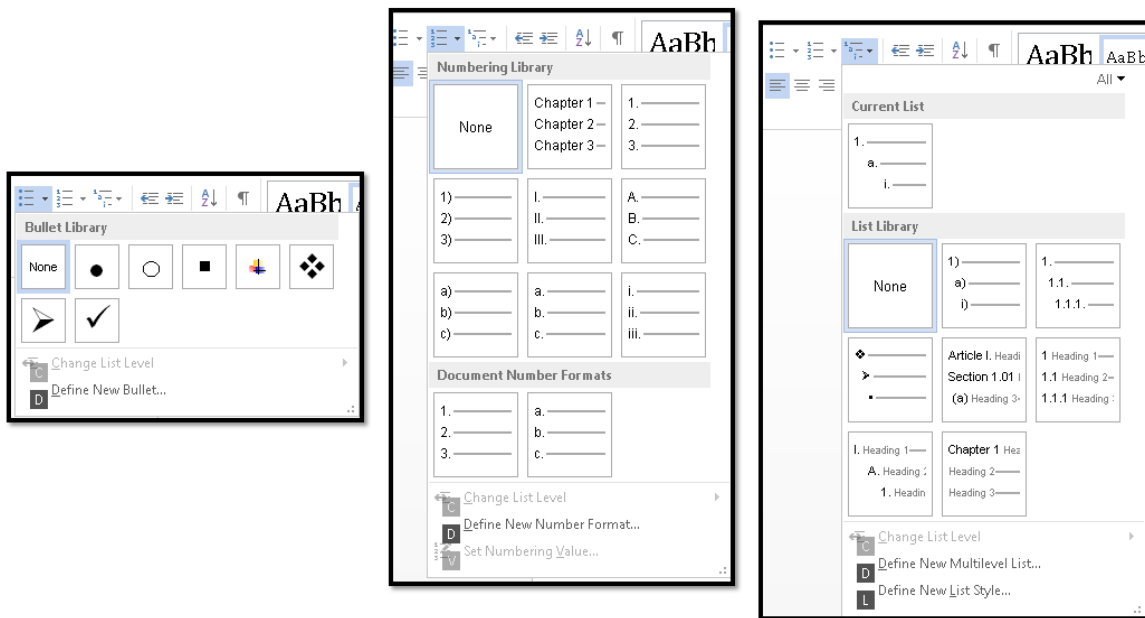


Figure 26 Bullets Gallery (Left), Numbering Gallery (Centre) and the Multilevel List Gallery (Right).

Adding Space Between Bulleted or Numbered List Items

Do not press Enter to put space between list items. This breaks the list into several individual lists rather than one list of items. Select the list and use the paragraph dialog to add space after each list item.

Modify the List Paragraph Style to ensure that all lists in a document have the same spacing.

Select the text in a list, so the List Paragraph Style is identified as used. You can look at the Quick Styles Gallery to see if it is highlighted, or using the JAWS screen reader, you can press JawsKey + F to get font information at the cursor point. If you are using another screen reader or Text-to-Speech tool, look up the keyboard command for font information for that technology.

By modifying the List Paragraph Style, all lists in the document will be affected. This means that every bulleted, numbered, or multilevel List structure will have the same spacing, and the document will retain a consistent look and feel for those creating it and reading it.

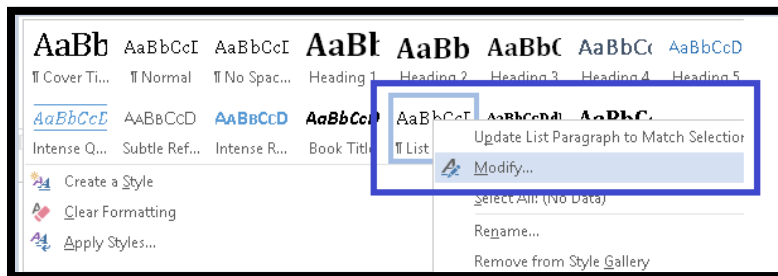


Figure 27 Modify the List Paragraph Style from the Quick Styles Gallery.

With a list item selected, either activate the Modify option from the List Paragraph Style on the Quick Styles Gallery or press Ctrl + Shift + S to open the Apply Styles Pane and Tab to the Modify button press Enter/Spacebar.

The Format button is in the lower-left of the Modify Style dialog (and the New Style dialog). The keyboard command to open the Paragraph dialog is Alt + H, P, G. This is another tool that is accessed faster using the keyboard than the mouse. The small icon is located in the lower right of the Paragraph Group on the Home Ribbon.

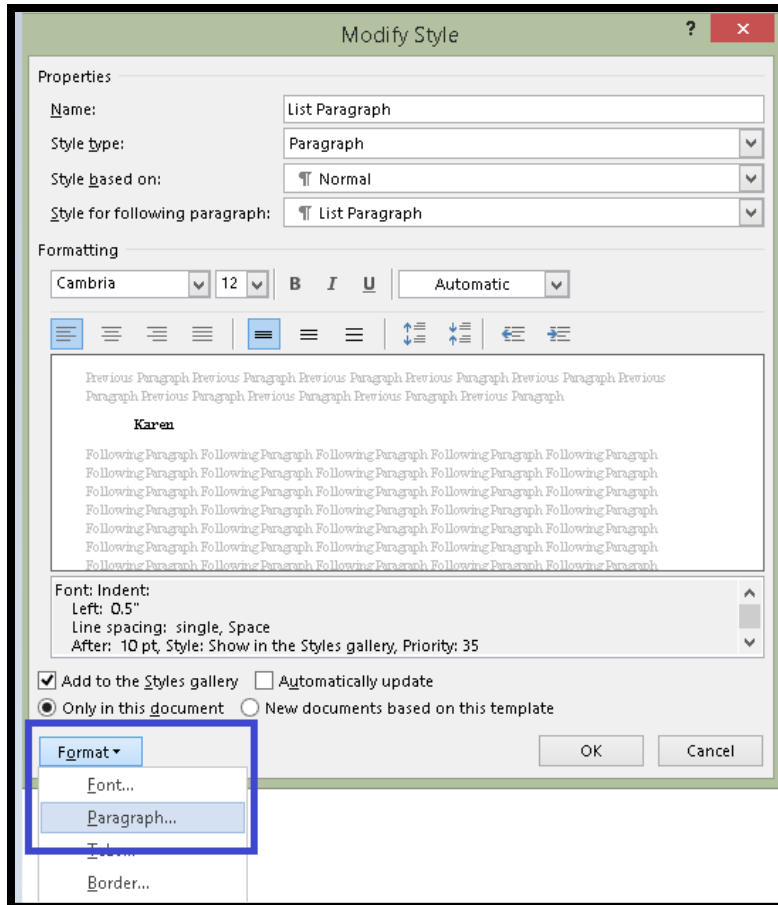


Figure 28 Format button expanded to show the context menu and Paragraph selected.

To add space between list items, uncheck the check box to “Don’t add space between paragraphs of the same style.”

Usually, 8-point to 10-point spacing after a list item works well visually. I don’t generally add spacing above each list item because the purpose is to add a bit of spacing. As you can see from this document, adding space below each list item provides just enough spacing to separate the list items. (In this template, the spacing is 8 point after each list item.)

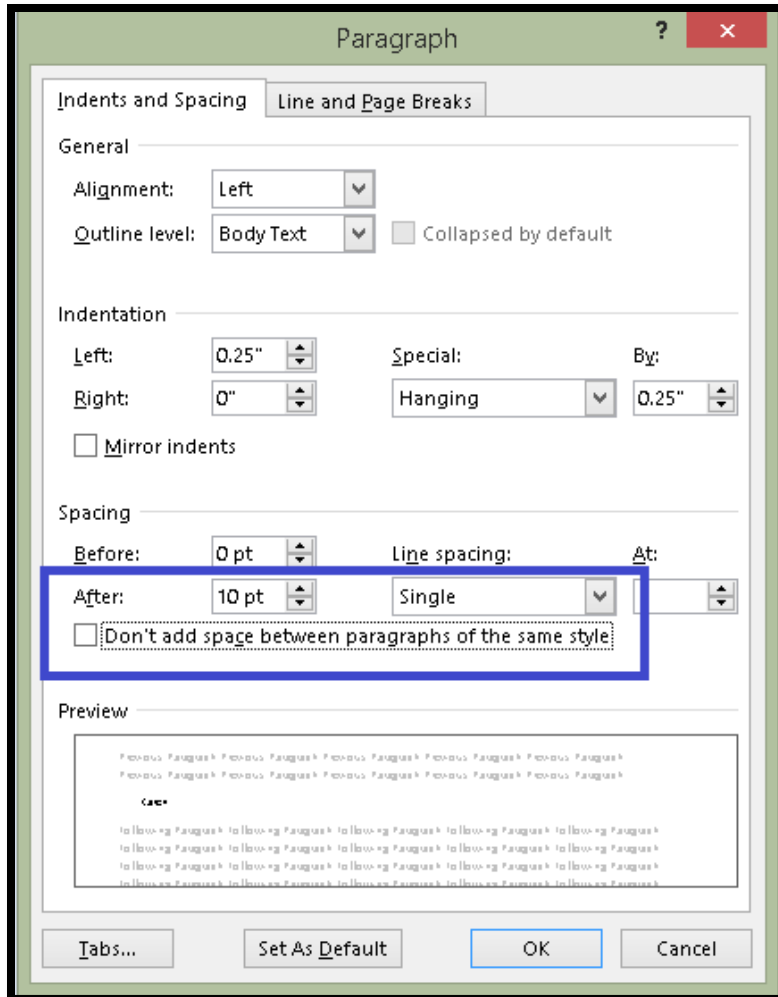


Figure 29 Paragraph dialogue showing changes to spacing below each list item.

I generally match the spacing below a list item to the font size used for the list or the document. This gives that professional space below each list item without the lists looking awkward or unprofessional/too much space between list items.

The Role of Sub-Lists and their List Items

Sometimes, in poorly designed documents, we see several paragraphs of content loosely “associated with a single bulleted or numbered list item. The following image demonstrates the visual effect in a document (Left). And the fundamental role of that paragraph in the document (Right).

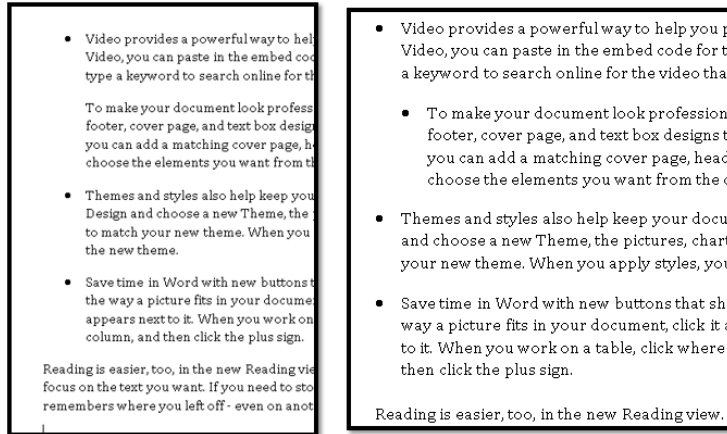


Figure 30 Visual effect of sub-list without structure (Left) and the fundamental role in the document (Right).

The technique shown on the left breaks the list structure. This means that someone using a screen reader or Text-to-Speech tool will hear that they are entering a list of one item, the first bulleted item will be read, and the person will be told they are leaving the list. The paragraph will be read, and then the person using a screen reader or Text-to-Speech-tool will be told they are entering a list of two items.

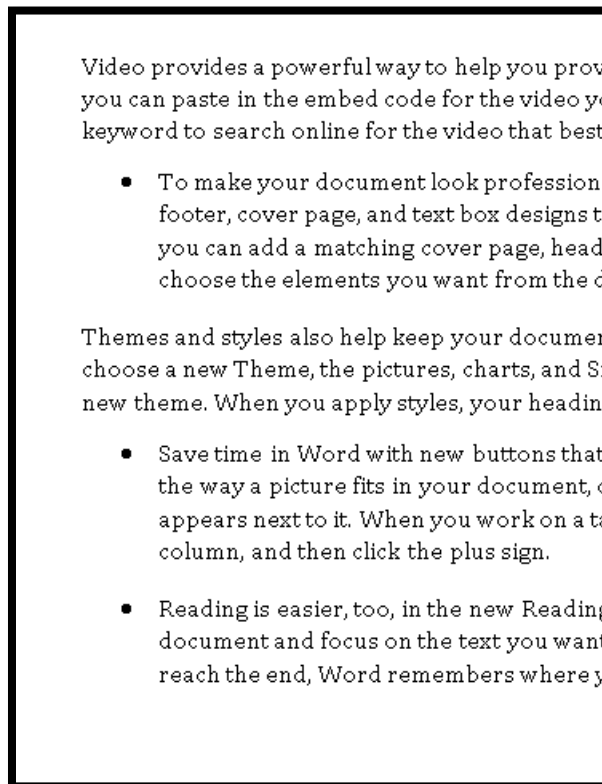


Figure 31 Two lists separated by a paragraph of text

The paragraph is a sub-list because it is placed directly under the first bulleted item. If it were text/content separate from the list of three items, it would be positioned as a normal paragraph at the margin, as in the following image.

As document designers and authors, we need to pay attention to how we construct/design our documents so that someone who can't see them knows what role content has and its relationship to surrounding content and other document structures such as Headings, lists and paragraphs.

Images, Tables, Columns and Text Boxes

I've attached recent updates to the techniques for Adding Accessible Images to Documents, Tables and Columns, and Text Boxes and Accessibility to this PDF document. They are tagged PDFs.

Update 2022: PowerPoint has a new feature that lets you approve Alt Text generated automatically. This is not currently available in Word. However, it is a feature to look out for in upcoming versions.

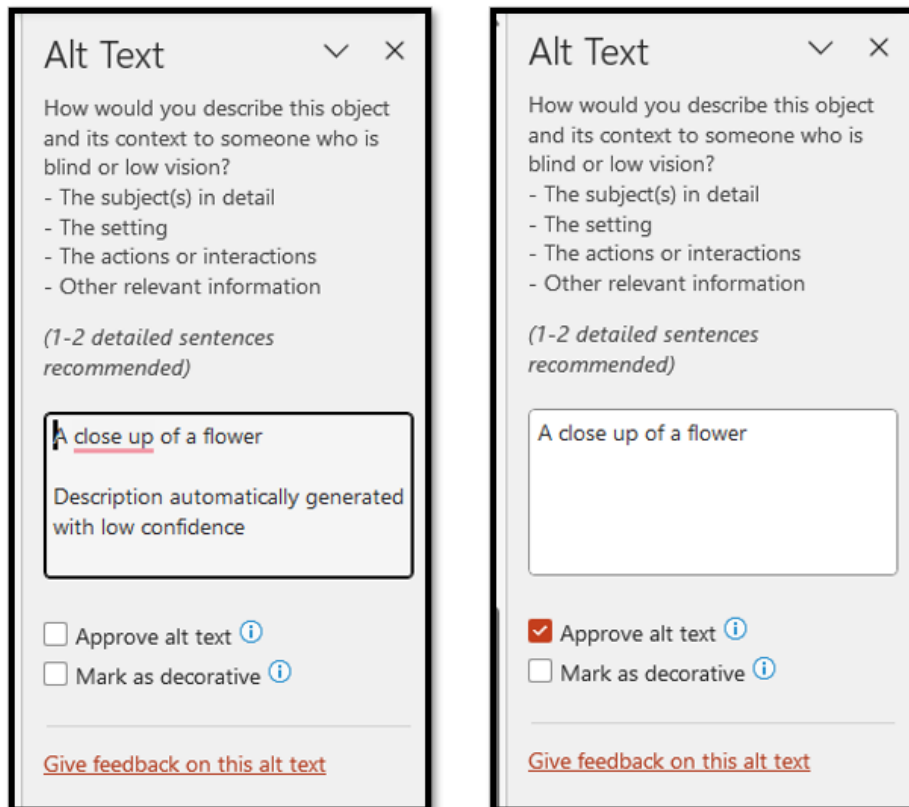


Figure 32 Approve Alt Text check box in PowerPoint 365, before and after approval.

Word Accessibility Checker

Word has an Accessibility Checker to help with accessibility barriers lurking or overlooked in the document. Sometimes I write and forget to add Alt text to an image, and the Accessibility Checker keeps me on track.

There are three ways to work with the Accessibility Checker in Word. Keep in mind that it is an automated tool and no substitute for skill and knowledge of accessible content design.

Accessibility Check from File/Backstage Area

1. Press Alt + F, letter I for File/Backstage area, Info tab.
2. Press the letter I again to open the Inspect Document sub-menu.
3. There is no keyboard command once you are in the Inspect Document sub-menu. Press Down Arrow to move to Check Accessibility and press Enter.

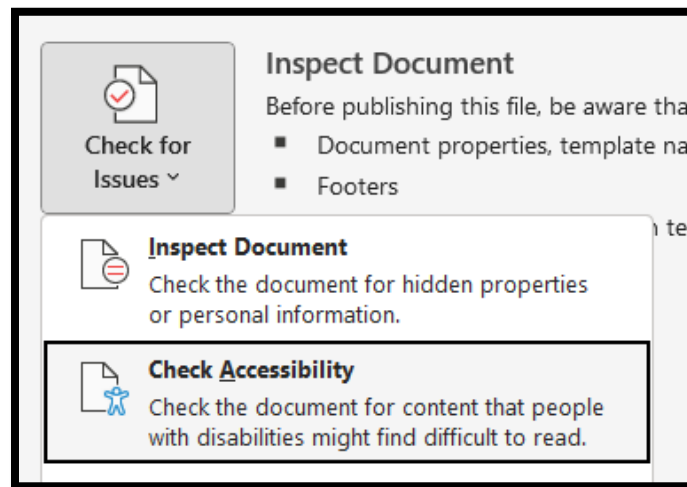


Figure 33 Word Accessibility Checker under the Info tab.

You can also press Alt + R, A, number 1, A to access the Accessibility Checker from the Review Ribbon.

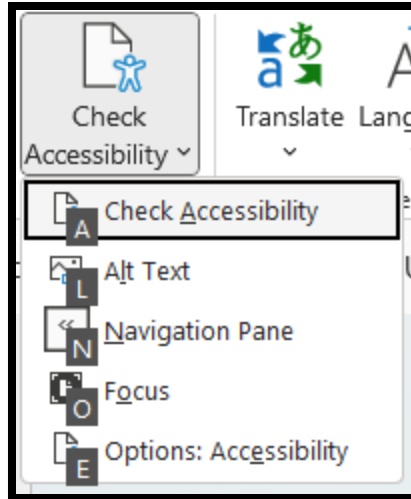


Figure 34 Check Accessibility from the Review Ribbon.

As of January 2019, the Accessibility Checker can run in the background as you work. This setting is turned on by default. It is found in the Word Options, Ease of Access category (Alt + F, T, E).

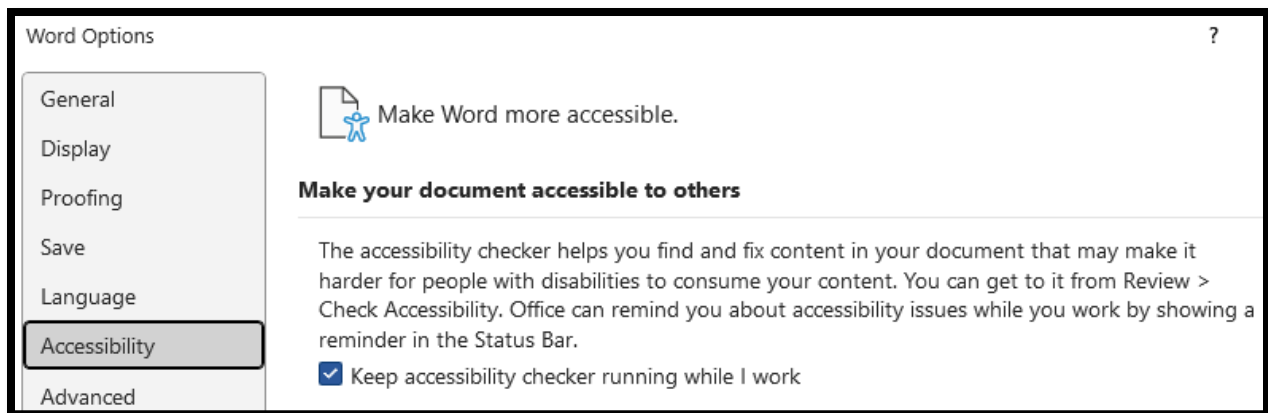


Figure 35 Word Options, Accessibility category, Keep accessibility checker running while I work.

With the Accessibility Checker running in the background turned on, it is turned on for all applications. You can find it in the Status Bar below the main document area. Access it by pressing F6 until you get to the Status Bar, then use the Arrow keys to find it. Press Enter to open the Accessibility Checker. When you close it, it will continue running in the background.

The Accessibility Checker opens to the right of the document in the Accessibility Check Pane and begins checking the document.

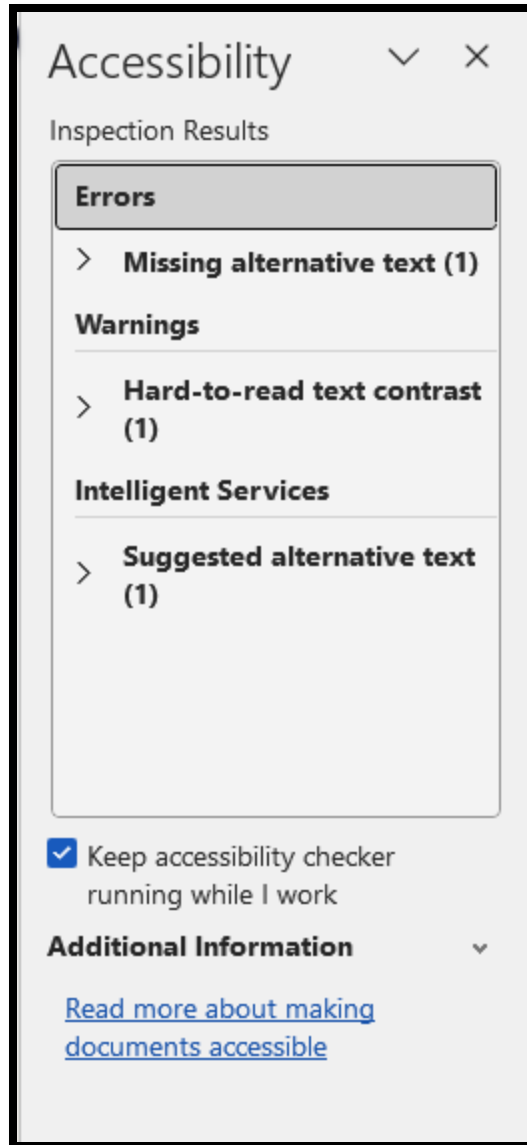


Figure 36 Accessibility Pane shows three issues in a Word document.

You can make remediations from the Accessibility Pane. The one “issue” I have with the Accessibility Check is the remediation for hard-to-see text. Microsoft wants you to use direct formatting. Direct formatting is an accessibility barrier. Use a style instead and modify the colour of the text in the style.



Figure 37 Hard to see text flagged in the Accessibility Pane.

You can turn the Accessibility Check running in the background on or off from the Accessibility Check Pane.

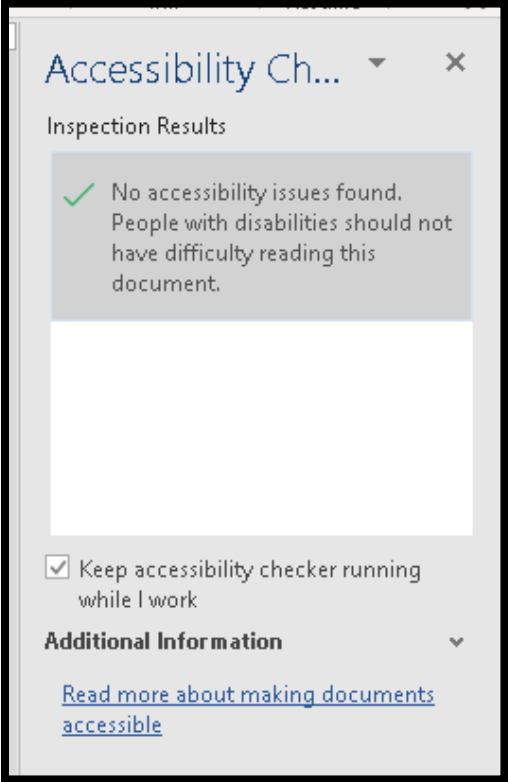


Figure 38 Final Accessibility Check for this document