Transcript for Creating Accessible Documents Video

Video is narrated by Andy Cragg.

Andy Cragg: Hello, welcome to this session on creating accessible documents in Microsoft Word.

There are a few basic things that you need to know about creating accessible documents in Word. This session will focus on primarily high level overview of those tools and things that you need to know. If you'd like more information or to have a special session for your department or office you can feel free to contact our office. We are the Centre for Human Rights, Equity and Accessibility and we'd be happy to answer your questions or work with you to set up a special training session. You can find our website at Trentu.ca/ohrea.

If you click "contact us" you can find contact information for all the staff in our office. Andrea Walsh is the Institutional Accessibility

Advisor and she will be happy to advise on any accessibility issues that you may have questions about. So, as I mentioned, there are a number of key things when it comes to creating accessible Word documents and I'll go through them one by one. First is has to do with setting the styles for your document to be in an accessible format.

You can do that on an individual basis, document by document, but the faster way to do that is to load a pre-formatted style template and to help you with that we've created an accessible style template and uploaded to our website. So, you can download it and load it into any document that you are working with. We recommend doing that because it has programmed into it the styles like font, font sizes and things like that that you will then know are accessible cause they've been created specifically to meet accessibility requirements. So, to load the style template first you need

to download the accessible style template and you can find that in this document which is also available on our website and hopefully you will be able to access this document as well as you are going through the session.

To find this document you can also go to our website and on the main page you can click "accessibility" and then "creating accessible documents" and you can download this primer on creating accessible MS Word documents.

You can also find this video on that webpage as well. So, to download the accessible style template click the link in this document and download it.

You will probably then need to go "save as" so I'm just going to save it to the desktop here. Close it.

So, then if you're working from an existing document or starting out with a fresh document, either way, you need to load this style template in so that it becomes the new default template for that document and it overrides the standard default template for Word document. I've downloaded a document at random from the website which happens to be this one here, Environmental Sustainability Actions: 2015

Highlights. Apologies to the Physical Resources Department and others involved in creation of this document. Nothing personal but we're going to work through making this document more accessible.

So, starting with this as our example document, I'm going to load in this accessible style template. So, the first thing that you wanna do is go to "file" "options" and then at the bottom on the left go to "add ins" and then you'll see there's a drop down menu beside where it says manage click on "templates". Click "go" and then go to "attach" and then navigate to where you saved the style template. I put it on the desktop. So you can see it here "accessible style template". I will open that.\I'm going to click this box "automatically update document styles" so that it applies this styles to the existing content of the document where possible and then I'm going to click "ok" and it'll load those style templates and you can see that some things changed. Looks like the formatting's been messed up in a way, here, that we don't quite like.

We'll go in and fix that in a minute.

So, now we have the styles programmed in and then now it's a matter of applying those styles to different parts of the document to make it more accessible. So, the first and probably most important thing about creating accessible documents is to create headings.

Headings allow people to navigate through the document in an easy way. So, for example, someone using a screen reader if there aren't headings they would have to, actually, have their screen reader read the whole document until they get to the place they want to be. People who are used to, people with good sight, are used to interacting with documents are used to skimming through it so you know, you scroll through and find the section that you want. If I'm looking for the extra spaces section and I was at the top, I would just scroll through it and look for it, but if you're not able to look for it very effectively you really become reliant upon headings to help you navigate through.

So, what programming in headings does is it populates the navigation pane, so under the "view" menu you can click navigation pane and this panel will open on the left and you can see these are all my headings here. And now, let's look at this document here and see what it has.

See there's no headings here because there's been no headings programmed into this document so the structure of this document is unknown in terms of the navigation pane so if someone trying to interact with this document would actually have to scroll through, oh, sorry, would actually have to have the program read through it or would have a difficult time trying to find a specific section and you can imagine with longer documents, dozens of pages long, that headings become all the more crucial.

Fortunately with that style template loaded and with a couple of tricks that I'll show you, it's very quick and easy to apply a heading to a document. So, the headings you can see are up here in the Style ribbon up here and there's a hierarchy of headings and the style template has them programed to be going down in size basically.

Now, the main trick that I want to show you is that the cursor when you go to the left margin, you can select text a lot more easily than just highlighting it. You might be used to just highlighting text, but with this left margin mouse highlight text a lot faster.

So, you see there's the cursor there and as I go to the left it changes to that arrow.

Now, if I click beside the line of text that I want to highlight and I just click once it highlights that whole row. If I'm beside a paragraph and I click once it highlights that line.

If I double-click it will actually highlight the whole paragraph.

Now, the other neat thing is that you can select groups of text, or lines of text in different places and do that by holding CTRL.

You may be used to doing that in other applications where by pressing control you can select multiple items.

It's the same here, so I clicked there.

Now I'm going to control and click down the next thing that I want to make into a header and then keep going down here like this.

I'm going to select all of the headings.

So, that's all my headings and now all I need to do is click heading 1 up here and it will have applied it as a heading.

And you can see that they are populated right away in the navigation pane.

Also, I'm just going to select this and make it a title.

So, that's the key thing about headings, is applying them and it you have subheadings all you have to do is highlight the text and select heading 2 or subheading, heading 3 etc.

The style template has programed in the first three headings.

If you want to do more than that you can change the styles yourself and I'll talk about that a bit more at the end of this session.

So, you'll notice that when we applied the accessible style template some things changed for example, the font in this paragraph changed to Arial which is coming from our style template.

The font in this paragraph didn't change and we got these bullets added in, which is usual.

So, um, what this is telling us is that there's certain styles that are being over-ridded.

So, the way style templates work is that imagine that especially if you are working with an existing document that there's a default template and that you start with and then someone goes in writes some text and puts some content in it and changes that content manually using the font menu up here, for example.

Now, what we did when we loaded the accessible style template was that we replaces the default template so that styling that had been manually added on top of the default style template is still there on top all we've done is change the underneath layer. So, in effect, when we're trying to get back to the underneath layer which now has our accessible styles from the template that we loaded we need to remove those styles that've been added on top.

So, an easy way to do that and hopefully this works, sometimes the program is a bit temperamental.

If you load the Styles pane, you'll see the Style ribbon up here on the far right there's a little half a box with an arrow; you get this Style pane. So you can select text and by clicking "clear all" it eliminates any formatting from that's been put manually on top.

So now it's reverted to the default paragraph font which is Arial 12 point font.

So, I'm going to go through and do that with all of my paragraphs.

So, again by hitting control and I'm just dragging down here, by hitting control while I'm doing that I can highlight multiple groups of text that I want to do the same thing to.

So, now we have gotten rid of those different fonts.

It's consistent.

You can just get rid of these extra bullet points in here.

I'm just hitting back space.

Ok, it's starting to look a bit better.

So, if you find yourself struggling with getting the styling to do what you want try highlighting it and clicking "clear all" and it'll set you back to the basics.

Strip away the styling that was put on top.

The next thing I want to talk about is alt text, alternative text, for images.

For people with low vision they or who are blind they won't necessarily be able to see the images that you have in a document, so they need to be provided with a description of what the meaning is of that image is conveying and that goes for all images, including, logos in your document.

So, for example, here, you would need to add alt text for these two logos.

And to add alt text, it's fairly straight forward, to access it, you click an image, right click it, and go down in the menu to the "format picture".

It opens up this panel on the side, the format picture panel.

You'll see these icons and there's this one here.

When you click it and open the alt text and this will give you a title and description.

So, I'm going to put in Trent University logo and then you want to actually describe it briefly, but, providing a sense of more than what, that it's a logo, but actually what it is.

So, text saying Trent University is green,

Excalibur logo sword and do the same thing for the Eco Trent logo.

Click here, alt text.

Eco Trent logo (inaudible).

Great so now you've programmed in the alt text for that.

For photographs you want to try and describe the content of the image so, for example, if you had a group of students standing on the bridge, you, instead of saying "group of students standing on the bridge" you might go a bit further by trying to describe the meaning that is trying to be conveyed, without being to wordy, you could say something like "group of 4 students, smiling, holding arms, standing on the bridge on a nice sunny day, smiling at the camera".

Something like that gives a bit more of a picture of the scene that's being painted by the picture.

So, that's alt text.

The next thing is hyperlinks, so, hyperlinks are things that take you to websites, URLs they are sometimes called as well.

So, hyperlinks are places in documents that you can click on and they can take you to a website.

The typical way that these get presented in an inaccessible format is where it generally just writes out the URL in the document.

The accessibility guidelines are actually telling us that we need to have descriptive text that you can click on and then that text points to the URL. So, for example, you can see in the guideline document here that rather than writing www.trentu.ca,you would write Trent University Website and have that be clickable.

So, the way that you change that around is again if you have an existing link, like this one here, you can right click it and you'll see this different options here and one of them is "edit hyperlink" so you click edit hyperlink and there's two places here to note, one is at the top.

It's called "text to display" and there's one at the bottom called the address.

So the address is what is being pointed to that's the URL from the top of your web browser.

The "text to display" as it suggests, is the text that gets displayed in the document.

So, the text to display should describe what the link is.

So, I believe the link's pointing to Trent School of the Environment (inaudible).

So, now that's the text that's being displayed and when you click that it goes to that website.

So, same thing here, you right click and edit hyperlink and I'm actually just going to go to here and grab this text.

I've erased it.

You need to do this for every link in the document.

I'm not going to do them all right now, but you get the idea.

The other thing to keep in mind is that you can go the other way around, so we've had a hyperlink cut and paste into the document and we've changed the text that's displayed.

You could also start with text and add a hyperlink to it.

So, for example, here it says Trent University.

We could highlight that text and right click it and click hyperlink and it gets us to that same window here it says the "text to display" because that's written and we can add in here the URL.

So, you could do that from the browser, by cutting and pasting for example, like that or you could just write it in.

For example, like that and now you see that there's also a hyperlink here.

So, you need to keep that in mind and make sure that all of your hyperlinks have descriptive text and aren't just the written URL.

It's easier for people to tell what is being pointed to; it's also for people using screen readers.

They, the screen readers, would actually, in many case have to read out every character in the URL.

You can imagine with some of these longer URLs and with a document with a lot of URLs that could be quite tedious so imagine this thing being read out as saying http://www.etc like that.

You can imagine that that would be a frustrating experience. It clearly wouldn't help someone interact with the document in an effective manner.

So that is hyperlinks.

So, extra spaces is similarly to the issue of reading out the hyperlinks.

Screen readers will often read out the extra spaces, either, um, in a sentence or between paragraphs.

So, to, where should we start?

So, between paragraphs, I think, is the most common place where extra spaces are added.

So, these are extra line breaks which are sometimes called hard returns.

I know I've been guilty of this in the past of if I want to have more space between paragraphs I would just hit enter.

So, you can see that that's the case here between this paragraph and this paragraph.

There's actually a line of possible text in here to create an extra space, so you know, if I was up here and I wanted to make more space I would just hit enter.

That actually makes the document less accessible, so the proper way to add space between paragraphs is to actually change the spacing function between paragraphs, which you can do from the paragraph menu.

I should say, first, that in loading that accessibility style template which we did at the beginning; it has programmed into it a certain amount of space between paragraphs.

So, that is already a feature that should be added into the document.

If you want to change the default spacing that we've programmed into the template, either to make it larger or smaller, you can do that from paragraph menu.

So, up here is the paragraph menu and here's where you go to line and paragraph spacing, so you go to line spacing "options" and here's the spacing section.

You can see there's one for before and one for after.

So, if I wanted to have more space between this paragraph and the following one I would go to after.

I'll do a lot just to show.

That looks like you can see that just got bigger by adding that spacing.

So, rather than hitting enter, I would go to the paragraph menu and change the spacing that way and then you, you don't get left with those extra spaces.

There's a quick way to check for extra spaces in your document which is to use the built-in accessibility checker in Microsoft

Word.

It's not totally comprehensive and just because it says there are no issues doesn't actually mean that there are no issues, but it nonetheless, is a useful tool.

So, to get to it you go to "file" and "check for issues" and "check accessibility.

If you come to this page or this menu and you don't see that option you'll probably see that right here it says "convert". Click convert and then click "ok" in the menu that opens and it will create an updated version of the document that you can then go back to this info menu by clicking "file".

You'll see these options will have appeared.

So, click "check for issues" and then "check accessibility" and this accessibility checker panel opens up on the right and it gives you a list of issues in your document. So, I'm going to go back to this document that we're working on and open up the accessibility checker.

So, you can see it gives us a list of issues, it also, it's nice, it uh will give you some information about why you need to fix it and how to fix it.

So, we talked about hyperlinks already.

Now we didn't do them all, which is why there's some appearing here. It doesn't like long headings.

Sometimes that's difficult to avoid depending on the content of the document, but it's something to keep in mind to try and keep headings short if you can.

So, repeated blank characters, so these are the extra spaces I've been talking about both in a line and between paragraphs. So, the accessibility checker is a real quick way to get rid of some of those extra spaces and to see those because sometimes it's hard to tell where those are extra spaces and where they're actually programmed in extra spaces using the paragraph feature. So, it will actually highlight those places and you can just hit delete. I just want to go back and talk about one thing with imagines that this reminded me about.

So, with imagines we talked about alt text.

It's also important with images to make them "in-line" so I'm just going to move this down here to show you what I mean. So, right now this is programmed to be in front of the text, which means a screen reader won't necessarily catch that alt text to read it out. Similarly, if you have it, the text, flowing around the image it, sometimes, it won't either catch the alt text or the text flowing around. It can also be challenging for someone with low vision to tell where those lines end and where the image ends and where the text is; making it more challenging to read, so to make the document more accessible you should use "in-line" images so that's where the image is actually is not being wrapped around significantly.

To do that you just click the image and you'll see this little box here.

If you click that you'll have it an "in-line with text" option and that's was the error message we were getting up here. I'm just going to do that with this one and then we can move on.

And again, something else with hyperlinks we talked about these hyperlinks; email addresses are another kind of hyperlink as well. But they can be left in this typical format of actually writing out the link like an email address here.

Just a couple of things left here in this quick overview of accessible documents, one is tables. So, it's, in general, it's best to avoid using tables if possible.

They can be challenging to navigate for people with learning disabilities, mental disabilities, people with low vision, blindness.

Screen readers often have a hard time telling what different parts of what tables come where and how to read them out in the proper manner.

So, in general it's best to avoid using tables when possible.

Sometimes you need to in order to present information clearly and in a certain way, but in other cases you may find if you ask yourself honestly that you don't need to use a table In particular, you should definitely avoid using tables to create structure for the document.

Sometimes people will use a table to actually replace setting columns for example and the table will be invisible, but it'll be a behind the scenes thing that might make the document more challenging to understand for a screen reader for example, as well the headings feature that we talked about at the beginning which is so crucial to creating an accessible document.

Tables really make headings challenging because it's difficult to program in headings to table to actually set structure for that document. If you do need to use a table, again, try to make it a simple table if possible, so not having complicating nesting areas of tables within each other or hidden parts of the table.

Try and make it a simple table if you do need to use a table. And just the last thing here, as I mentioned the features of the style of the document, font, size, colour, font type etc. have been programmed into the accessible style template for that we are providing with you You can certainly feel free to go outside

of that. If you need advice on the guidelines you can feel free to contact our office and we can provide you with more information.

In general though, you want to be using size

12 font or larger and use sans serif font, so that's a font with no ornamentation like Arial or Calibri are two common examples of sans serif fonts. You know, avoid Gothic or script-like font. Even Times New Roman has some, has the serifs on it, so it's not advised for accessibility purposes.

 Avoid all caps.

All caps create a block of text whereas the flow of lowercase text gives people visual clues about what letters they are and how the shape of the word. If you use all caps those kinds of cues are eliminated.

As well, try to avoid italics and underlines as they can be challenging for people to see.

The colours are ok. Black and white is preferable. Really the issue here is colour contrast, black on white or white on black are obviously the highest contrasts.

Particularly, if you are looking at putting text in front of an image you need to be very careful about the background colour behind the text and ensure that the contrast behind every character of text is sufficient that it can be readable.

Again, if you do have any questions, you can feel free to contact our office and specifically

Andrea Walsh the Accessibility Advisor.

Hope you found this overview helpful and that it will help you create accessible documents going forward.

I should mention just before closing, the legislation that is driving this will ensure that all of us, who are interacting with MS

Word documents, are becoming knowledgeable about this because by 2021 we are going to be required, that, to have all of our documents that are on the website be in accessible formats.

So, that means anything you're uploading to the website be it a Word document, PDF, or page itself need to be thinking about the kind of things that we talked about in this session.

Thanks again. Hope you've enjoyed!