These guidelines have been extracted and edited from Bob Moyce’s document How to Create Accessible Documents in Microsoft Word from the Center for Teaching and Faculty Development at San Francisco State University. For additional accessibility resources for other versions of Microsoft Word, please visit the Center for Teaching and Faculty web site online at http://ctfd.sfsu.edu/accessibility-resources.htm.

INTRODUCTION TO ACCESSIBILITY IN MICROSOFT WORD

Accessibility in documents is all about structure. A properly structured document allows it to be used with screen-reading software. Structure in a document refers to the order in which document elements are accessed. Therefore, when you are creating a new document, it is important to consider the structure of the document first.

Accessibility can be added to a Microsoft Word document either during its creation or after all content has been finalized. It is easier to get in the habit of creating a new document with accessibility in mind rather than going back over a finished document.

These guidelines were written for the two most recent versions of Microsoft Word for the Apple OS X Macintosh platform. Although the Windows and OS X versions have many similarities, there are enough differences between them to warrant a separate tutorial for Macintosh users.

FORMATTING WITH STYLES

All text in your document should be formatted using the Styles features within Word. Proper formatting should be used in order to maintain consistency and help with accessibility. The Styles formatting features will allow you to specify and even customize the way your document looks and behaves. Formatting using Styles is achieved by using the various options for headings, paragraphs, and other elements of the document. Most documents will only require Title and Heading elements (entitled Title, Heading 1, Heading 2, and Heading 3) and the basic paragraph element (entitled Normal).

It is best to get in the habit of using the Styles features in all your documents. For instance, instead of changing the font size of certain text and making it bold, it is a better practice to use one of the heading options. Once you build a complete style set for your documents, you will save time and effort by relying more on the built-in formatting instead of recreating it for each new document.

On the floating Formatting Palette, there is a section for Styles. Click on the arrow to expand all available Styles. You will see a number of options available, which refer to the formatting for each element.
CHANGING THE LOOK OF INDIVIDUAL STYLE ELEMENTS

Word has a number of default settings for Styles, which can be modified to match any look you may want for your document. Changing the look of a particular element in your document can be achieved by modifying the existing style to the look you want. For example, you may want all elements formatted as Heading 1 to be Verdana, sized 14, centered, and bold. To do this, scroll to find Heading 1 in the Styles list and roll over the paragraph symbol to the right with your mouse; the paragraph symbol will turn into an arrow. Click on the arrow and select Modify Style... When the dialog box appears, select from the Formatting options that are shown for font type, font size, alignment, color, etc. For even more formatting options, click on the Format pull-down menu.

NOTE: IF YOU CLICK ON THE AUTOMATICALLY UPDATE CHECKBOX AT THE BOTTOM OF THE MODIFY STYLES DIALOG BOX, MICROSOFT WORD WILL AUTOMATICALLY UPDATE ANY OTHER USES IN THE DOCUMENT THAT YOU HAD PREVIOUSLY MADE FOR THIS PARTICULAR STYLE (I.E. IN THIS CASE, IT WOULD AUTOMATICALLY UPDATE ANY PREVIOUS HEADING 1 STYLES YOU HAD CREATED.)
Figure 2: Modify Styles Dialog Box
HEADINGS

Headings are used to separate the content of the document into individual sections. Documents will typically have a number of different headings depending on how much material is presented within the document. Typically, documents will only have a Title style for the title of the document and the following section titles would be Heading 1, Heading 2, Heading 3 and so forth.

Using this document as an example, the Title style is reserved for the title of this document: Sections within this document (such as Introduction to Accessibility in Microsoft Word, Formatting with Styles, etc.) would be considered Heading 1. Further subsections under Heading 1 would be considered Heading 2, etc.

PARAGRAPH TEXT

Settings for paragraph text in Word are listed as the Normal style. Word defaults standard text to the Normal option, which ensures the document is accessible at the bare minimum level if other style and formatting options are not set.

WORKING WITH IMAGES: CAPTIONS

Images in documents are effective at conveying visual data. In order for the information to still be useful to someone who cannot see the image, it is necessary to explain the image as completely as possible. This can be done using alternate text or captions. Word 2004 and 2008 do not support alternate text, therefore you must use captions in these versions of Word. The caption can either be the title of the image or a brief description of what the image depicts. In your caption, be sure to define the medium (photograph, painting, etc.) and describe the meaning the image is supposed to convey in one or two sentences or less. To determine whether to provide a title for an image or provide a description, think about the image you will be using. Is it important to describe the image in detail to achieve the learning objective?

Before you add a caption, it is best to set up the style for your caption. Go to the Styles area of your Formatting Palette and find the style called “Caption.” Click on the arrow to its right and select Modify Style… and change the style as you desire for it to look.

Now, to add a caption to your image, first insert the image as you normally would by selecting Insert > Picture > From File... Select the image and choose Insert > Caption... from the main top menu. You can then choose to have the caption appear either above or below the image. You can also choose between Equation, Figure, Table or create a new label for your image.
Tables are useful for displaying a large amount of data in an organized manner. Relationships and changes between data can be shown in a table format. However, tables become problematic in terms of accessibility. Tables make sense visually since someone reading a document can refer back to the column and row headings for the table to make sense of the data. Consider the example of a simple table below:

<table>
<thead>
<tr>
<th>Student</th>
<th>Exam Test Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Exam 1</td>
</tr>
<tr>
<td>Dan</td>
<td>80%</td>
</tr>
<tr>
<td>Carly</td>
<td>90%</td>
</tr>
</tbody>
</table>

Even though this is a relatively simple table, we can easily see the data and the relationships between the data. We can easily see the change in test scores for Dan and Carly individually and easily compare the scores between the two students. This is done by visually referring to the column and row headings and knowing which cells of the table relate to which particular student. Since the data in tables is displayed and understood visually, it poses a problem for those who cannot see the table.

If you are including a table in your document, you will want to include a description of the contents of the table. For example, a description for the above table could be: “Test scores on multiple exams for students are as follows: Dan scored 80% on Exam 1 and 90% on Exam 2. Carly scored 90% on Exam 1 and 95% on Exam 2.” This will allow for the information in your table to be of use to those who cannot see the table.
If you are including tables in your document, it is recommended that you format the table so that the first row repeats if the table runs onto multiple pages. With your table inserted into your document, click on the table and choose **Table > Table Properties...** from the main top menu. Click on the **Row** tab and make sure that the option for **Repeat as header row at top of each page** is checked.

*Figure 5: Table Properties Dialog Box > Row Tab*
TABLE OF CONTENTS

If you have a rather long and complex document, you may decide to include a table of contents to improve navigation of your document. Table of contents are built from the use of headings, so the table of contents can be added to a properly formatted document with ease. Once a table of contents has been added, users can follow the links to the various sections within the document.

The process for inserting a table of contents is slightly different for Word 2004 vs. 2008. Please review the instructions as it pertains to the version of Microsoft Word you are using.

CREATING A TABLE OF CONTENTS IN MICROSOFT WORD 2004

Choose Insert > Index and Tables... and then click on the Table of Contents tab. Select the format you desire from the left column and click OK.

![Figure 6: Table of Contents Dialog Box - Microsoft Word 2004](image)

NOTE: IF YOU MAKE CHANGES TO YOUR DOCUMENT THAT NEED TO BE REFLECTED IN YOUR TABLE OF CONTENTS, CONTROL-CCLICK (OR RIGHT-CCLICK) ON THE TABLE OF CONTENTS AND SELECT UPDATE FIELDS. WORD WILL ASK YOU IF YOU WISH TO UPDATE THE PAGE NUMBERS ONLY OR IF YOU WISH TO UPDATE THE ENTIRE TABLE.
CREATING A TABLE OF CONTENTS IN MICROSOFT WORD 2008

Choose **Insert > Document Elements > Table of Contents** from the main top menu. Within the **Document Elements** ribbon (Figure 6), you will be given the choice of either creating the table of contents based on the **Heading Styles** or through **Manual Formatting**. Since you already have created Heading Styles, it’s easiest to create the tables with the Heading Styles by clicking on the radio button next to **Heading Styles**.

![Figure 7: Table of Contents Ribbon - Microsoft Word 2008](image)

**NOTE:** IF YOU MAKE CHANGES TO YOUR DOCUMENT THAT NEED TO BE REFLECTED IN YOUR TABLE OF CONTENTS, CLICK ANYWHERE IN THE TABLE OF CONTENTS, CLICK ON THE ARROW NEXT TO **TABLE OF CONTENTS**, AND CHOOSE **UPDATE TABLE**.