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cymru

Promoting equality for all
Hyrwyddo cydraddoldeb i bawb

Advice Guide: Making Documents Accessible

diversesecymru.org.uk

Introduction

This booklet aims to explain in plain language how to make your documents accessible to as many people as possible.

By 'accessible' we mean presenting information in a way that makes it easy to read and understand. This may be for people with a learning disability or a visual impairment.

Why make documents accessible?

It is in your best interest to ensure your materials are understood by a wide audience. Those who have difficulty reading can be easily overlooked and missing out on valuable opportunities.

This booklet focuses on Microsoft Word, but its principles extend to emails and PowerPoint presentations too.

Make Your Word Documents Accessible

Please read and follow these basic guidelines to help ensure your Word documents are accessible to all readers.

Please note that if you produce information in formats other than Word, such as PDFs or flowcharts, you may need to provide a Word version of the same information as this may be the only way to make it fully accessible.

The Importance of Headings

The picture on the right shows a page from a document. Even if we can't read it, we can see there is one large heading plus three smaller headings.

We can tell at a glance that the document has one main topic and three subheadings within the topic.

We recognise this information by scanning the page and the size of the headings provide us with a visual clue. We do not need to read the whole page to find the section that we are interested in and can use the headings to find what we are looking for.



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Screen-reader software

Visually impaired people using screen-reader software cannot quickly scan pages to pick out the information they need in the same way a visual reader can. Without properly formatted headings they are forced to read the entire document to find what they need.

To make documents accessible, the most important thing is to create headings and subheadings in a way that are recognised by assistive technology.

Headings are ordered. In the example of a book, we might say the book's title is Heading 1, chapter titles would each be Heading 2 and topics within chapters will each be Heading 3 and so on. Screen-reader software will list all your headings together with their level and this allows users to quickly work out the structure of your document and find relevant content. For example:

Heading 1

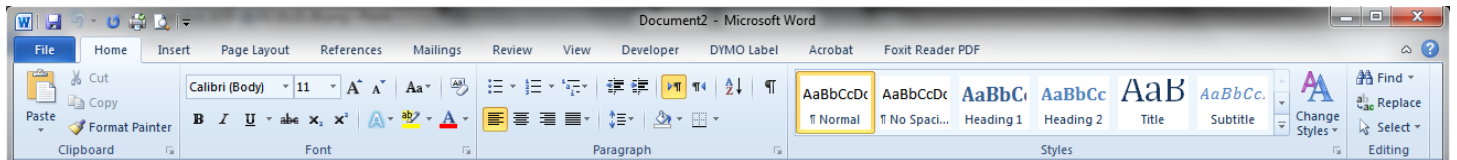
Heading 2

Body text

Formatting Headings

Visually impaired people rely on the use of headings to navigate their way through your document. We could make a heading stand out by increasing the font size, or using bold. This would certainly catch the readers' eye if they can see it, but to assistive technology this appears no different from any other text in the document.

To create headings that screen-reader software will recognise, the text must be formatted using Microsoft's inbuilt 'Styles' menu, shown on the next page.



Using the styles menu will not only give us the visual effect we want but it also 'tags' the text as a heading and allows the software to recognise it as such. It also enables you to create a table of contents if required.

To create a heading, highlight the text and choose the Heading Style you want from the Home tab in the Word Ribbon as shown above.

The default style settings will be too small for an accessible document, but you can easily change the font settings. Right-click any of the styles and select 'Modify...' and then change to the settings you need.

Font

Fonts broadly fall into two categories 'sans serif' and 'serif'. This document uses Arial, which is 'sans serif'. This means it does not have the flicks or curls at the end of the characters which some people find harder to read.

This is Times New Roman, a common example of a 'serif' font.

You should use a 'sans serif' font whenever possible as these are generally considered easier to read on screen and in print. This is because the characters are simpler and easier to distinguish at a glance.

Restrict your use of different fonts in a single document. It is acceptable to use a different font for headings and body text, but all headings should look the same and all body text should look the same.

Text Size

Diverse Cymru uses a 14 point font as standard, but 12 is also acceptable. Do not use a size less than 12 in any part of a document, including footnotes.

Large print can be anything above 16 point. If you are asked to provide large print you should ask the individual for their preferred font and size, and ensure your document still works when re-sized e.g. Contents page matches actual pages in the text.

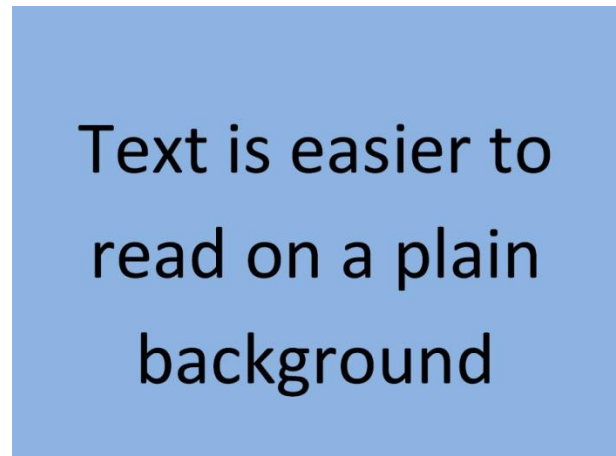
Colour and Contrast

Always set the font colour to 'automatic' instead of 'black'. Some visually impaired people usually use high contrast settings such as yellow text on a black background. If your font is set to 'black', then it will appear as black regardless of a user's settings. If the text is set to be 'automatic', it will change according to each user's preferences.

If you do need to use a different colour for design or branding reasons, keep your palette as limited as possible and avoid multiple colours for headings or body text.

Backgrounds

Any background that has text over it should be a single colour, without pattern or texture. Ideally, 'no colour' should be selected so that users' alternative settings can be used.



Text on top of images can be difficult to read and should only be used when there is a consistent high contrast level between text and background.

Alignment

Always align text to the left, do not centre or justify otherwise some readers will have difficulty finding the beginning of lines. Vertical text is not compatible with screen-reader software.

Spacing

Text can be difficult to read if the lines are too close together. Try to use a line space of at least 1.15. The 'Line and Paragraph Spacing' button can found on the 'Paragraph' panel of the 'Home' ribbon on Word.

Spaces can also be added before or after paragraphs via the 'Page Layout' tab. This document uses a 6pt space after paragraphs which helps define separations.

Never use the space bar to create a line break or indents. If you need to indent text, use the 'tab' key. This will ensure consistent indents throughout your document.

Content

Include a table of contents if your document is more than a few pages long.

Page numbers help a reader navigate through your document. Place them consistently on each page with at least size 12 font.

Avoid using abbreviations. Spell out words like "and" instead of an ampersand (&) except when part of a company name e.g. "Marks & Spencer" or a standard abbreviation like A&E

(which would not include an ampersand if written in full, i.e. Accident and Emergency).

Do not use ALL CAPITAL LETTERS except for recognised initialisms or acronyms such as BBC or RADAR. A large part of reading is simply recognising the shapes of words rather than reading each individual letter, and using capital letters makes this process much more difficult.

When using an initialism or acronym for the first time, be sure to write it out in full, even if it is a commonly used term in your area of work. For example, the first time you would use “Black and Minority Ethnic (BME)” and after this you can just use BME.

Underlining can make text harder to read for some users and can be mistaken for a hyperlink.

Italics also reduce readability and should be avoided, the main exception being legal case citations that are traditionally italicised.

Bold can be used for emphasis, but it should be used sparingly.

If you need to separate words with a forward slash (/) always include a space either side of it as this makes it easier to read e.g. clear / large print rather than clear/large print.

Bullets Points and Numbered Lists

Bullet points and numbered lists are an excellent way to pass on information. They can be understood at a glance

and are often much simpler than a block of text. Review your work to see where these could be included.

Bullet points and numbered lists can be read by screen readers, but make sure you introduce them with a descriptive sentence rather than rely on visual layout to infer meaning.

Blank Lines and Hidden Formatting

Even content that you cannot see is read out loud by screen-readers, and this can make documents confusing for the user. Paragraph Spacing and Page Breaks should be used instead of returns to create gaps between sections of text. Use the ¶ button, found on the 'Paragraph' tab of the 'Home' ribbon, to reveal the hidden formatting in your document and delete all unnecessary spaces, returns etc.

Headers and Footers

Do not put important information in headers and footers as screen-readers may not be set to read them.

Text Boxes and Tables

Information contained in text boxes is not accessible to screen-readers. The software can handle tables better but these can be difficult to navigate as they often rely on visual layout to make sense, so include a concise explanatory note above complex tables to assist users. For example,

"The table below shows the total number of enquiries taken this year. There are 5 rows showing the type of enquiries dealt with and 12 columns, one for each month."

Keep the text direction in tables horizontal, vertical text is difficult to read and inaccessible to screen-readers.

Hyperlinks

Use meaningful text for hyperlinks, do not use the file address or path name. Never just use words such as "click here" or "link", instead use words that identify what is being linked to.

Use '[Diverse Cymru's website](http://www.diversesecymru.org.uk/)' instead of '<http://www.diversesecymru.org.uk/>'

Some assistive software lists the links in a document so the link itself must be self-explanatory without using any additional text.

Text Only

If you convert your Word document to Text Only format (.txt), ensure that you make any necessary changes to the plain text to compensate for the loss of formatting. Check that the content is still clear and understandable.

Images

Images are not accessible to screen-readers and will appear as empty space so the user will not know if they are missing something important. Information should never be conveyed through images alone but they can be used to illustrate your words providing you add an alternative text description to the image.

The screen-reader software will read the caption you provide in the 'Alt' Text box so the user will know what is being depicted in the image before moving on to the next block of text.

How to use images

Images should only be used to illustrate your text and not convey new information without explanation.

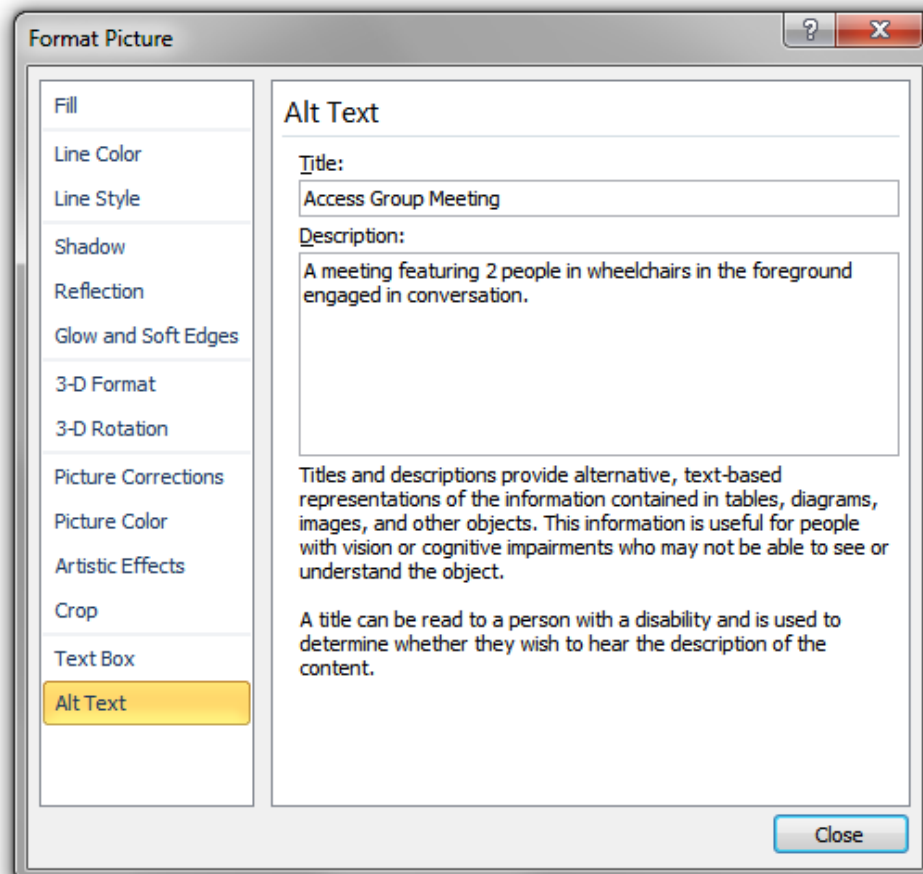
When resizing an image, always do so proportionally. Never change the width or height without changing the other. This leads to images being squashed or stretched.

Also be sure that your image is not too small to be seen clearly, or pixelated by being made too large.

Ensure there is a reasonable clear gap between an image and text or the layout will look crowded.

Adding 'Alt' Text to an Image

Right click on the image to open up the images menu. Select format picture then click the 'Alt Text' tab and type a description of the image into the box.



Adding alternate text to images to PDF documents

If you want screen readers to describe images in your document, you must provide the description.

The alt text attribute lets you create alternate text that can be read by a screen reader.

However, because a PDF file is fundamentally an image file, screen readers can have difficulty finding their way around and reading in the right order. They may be able to read the

text, but may not be able to follow formatting such as columns, boxes and captions.

A Word document is preferable in most cases, however if you must use a PDF, please ensure the text is laid out as simply as possible.

Using Alt Text in InDesign:

1. Select an image that does not have alt text.
2. With the selection tool, select the image.
3. Choose Object > Object Export Options.
4. Choose Custom from the Alt Text Source menu.
5. Enter the description in the text field, and click Done.

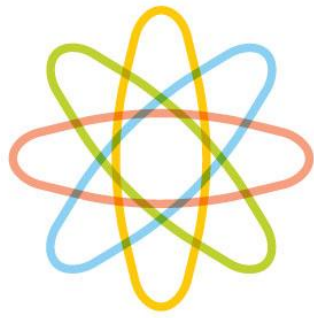
The alt text you entered is included whenever you export this InDesign file as an EPUB, HTML, or PDF document.

However, it is not added to the metadata for the image file itself, so you'll need to re-enter it if you use the image in a different document. To ensure the alt text remains with the image, enter it as metadata in Adobe Bridge.

You can import alt text:

If alt text was entered for an image in Microsoft Word or Adobe Bridge, for example, you can easily assign the same text in InDesign.

When you export the document, the alt text you've assigned will travel with the image.



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Diverse Cymru is a unique Welsh charity committed to supporting people faced with inequality and discrimination because of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

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