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Updated for
Word 2007.

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Introduction and overview

The main aim of this workshop is to familiarise you with guidelines for creating accessible Word documents which can be converted into a variety of alternative formats to meet a range of diverse needs.

In general you should try to make your original publication accessible; by doing this it makes it suitable for the largest possible audience to read.

Workshop/tutorial outline.

Part 1

- Creating a properly structured document in MS Word.
- Headings and styles.
- Table of Contents.
- Alignment.
- Graphics/Pictures/Diagrams.
- Tables.

Part 2

- Create accessible PDFs

Resource files.

On your desktop there is a folder called 'Alt_format resources' this contains some of the files for today's workshop. The files consist of text, images, tables and charts.

Some useful guidelines.

The Scottish Accessible Information Forum (SAIF) recommends that a font size of no smaller than point 14 is used.

Dyslexia Scotland, along with the British Dyslexia Association suggests a non-serif font is used, e.g., Verdana, Arial etc, with 1.5 line spacing.

Headings

The following formatting should be applied to headings:

Heading 1 - 18 pt Arial bold;

Heading 2 - 16 pt Arial bold;

Heading 3 - 14 pt Arial Bold.

(However the font can be changed to another style – but it must retain the Heading format)

Bullet points and numbering

Use bullet points and numbering to layout information as appropriate.

Alignment

In general body text should always be left aligned.

Symbols

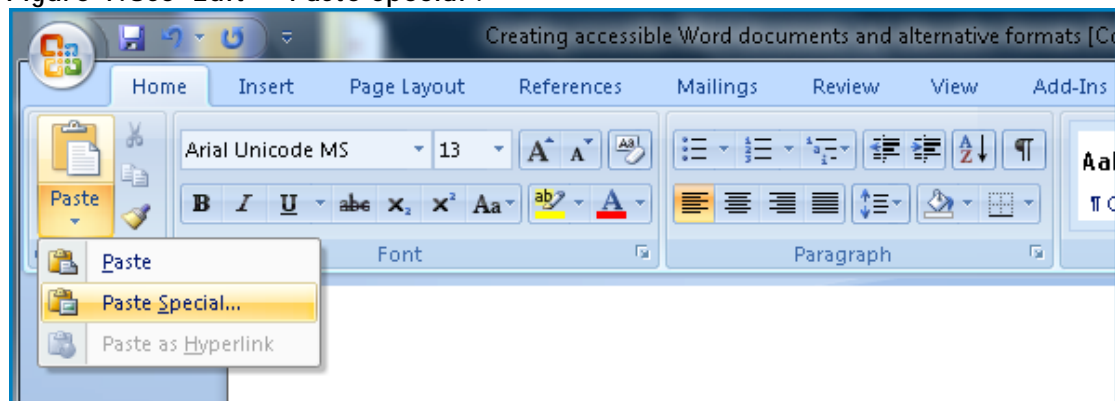
Symbols such as © should be changed to full word description e.g. copyright

Part 1

Getting started!

1. Create folder on the desktop with your name.
2. Open the file 'intro to library text' located in the Alt_format resources folder.
3. Open Microsoft Word.
4. Copy text from the 'intro to library text' file.
5. Paste the copied text into the Word document using 'Edit' 'Paste Special' and 'Unformatted Unicode Text' – this will remove any unnecessary tags etc.

Figure 1: Use 'Edit' - 'Paste Special'.

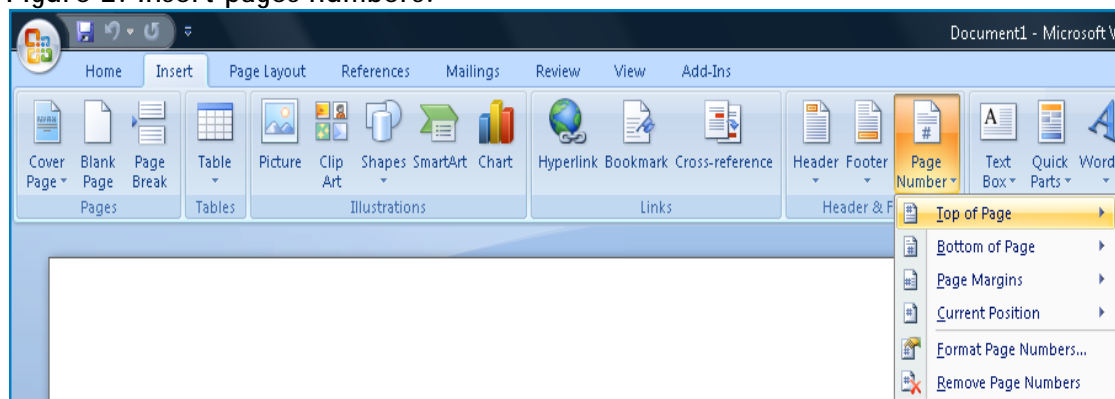


6. Check for any typos or spelling errors.
7. Save the Word document with an appropriate file name.

Formatting the document.

1. Insert or add page numbers to each page.

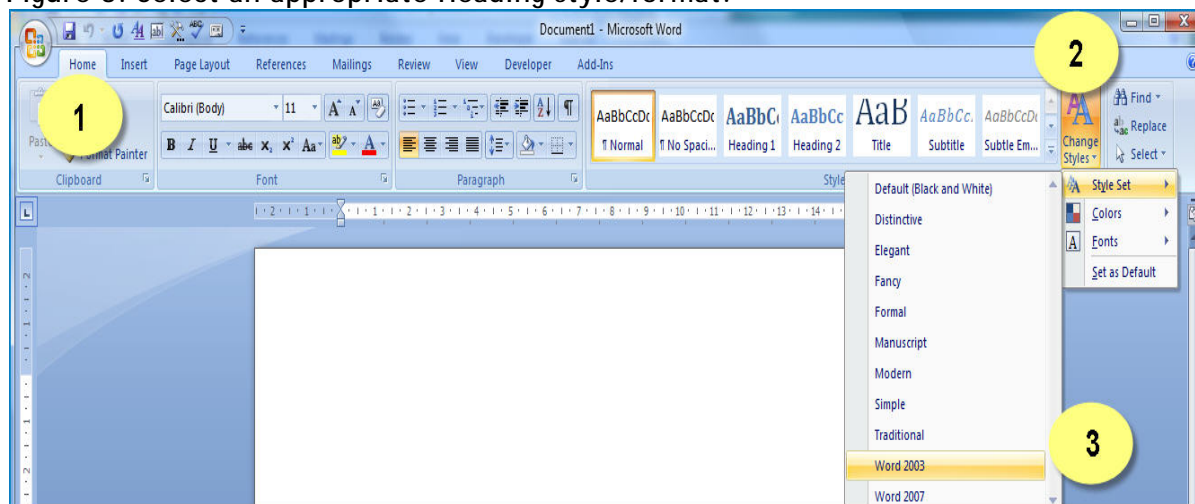
Figure 2: Insert pages numbers.



Insert page numbers video tutorial: http://bit.ly/page_numbers

2. From the 'Home' ribbon, select an appropriate formatting 'Style', for example, Word 2003. You can find this on the 'Change Styles' drop down menu.

Figure 3: Select an appropriate Heading style/format.



3. Apply appropriate heading styles to the text, e.g., Welcome: heading 1 and where appropriate heading 2, 3, etc.
4. Add a further heading/section to the document 'Online Resources' – this can be placed at your discretion.

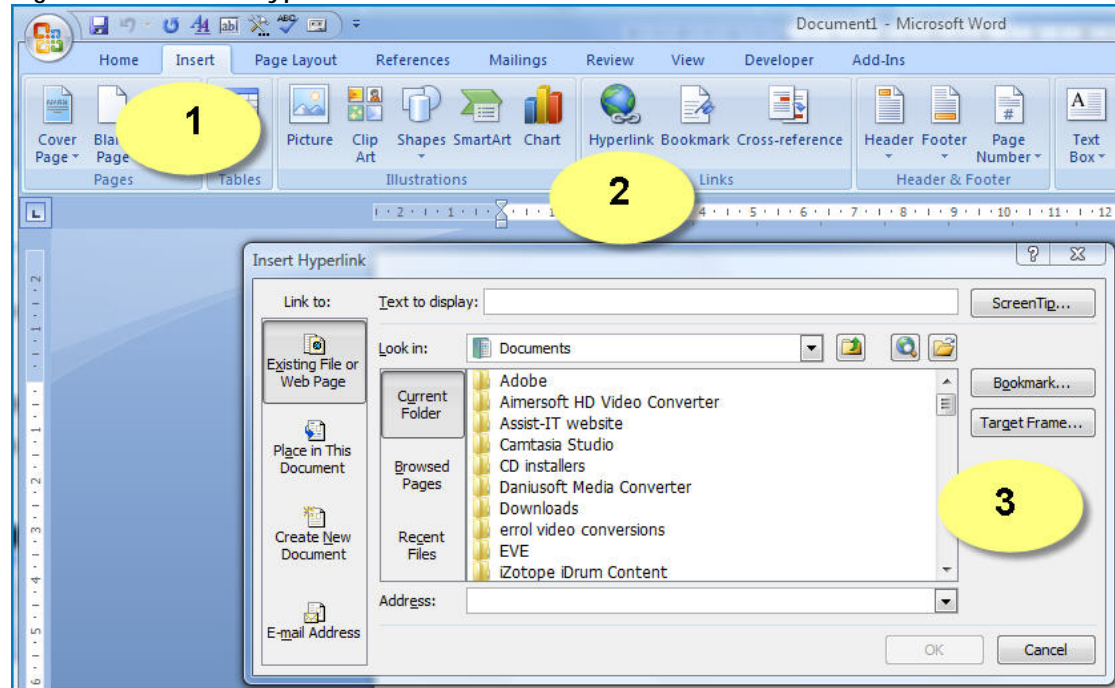
Styles video tutorial: http://bit.ly/styles_formatting

Setting the default font video tutorial: http://bit.ly/default_font

Adding hyperlinks (and email links).

1. Provide a general introduction to the new section and add some hyperlinks to external resources. Please ensure you use logical labels for you links – avoid click here.
2. To add a hyperlink select the text and press and hold the Ctrl key and then K (Ctrl + K) or go to 'Insert' ribbon and select Hyperlink – similar to the Figure 4.

Figure 4: Insert a hyperlink from the Insert ribbon.



3. Type or copy and paste the URL address into the Address box.
4. In the 'Target Frame' of the hyperlinks dialogue box select 'New window' to ensure your link opens in a new window.
5. You can also add a 'screen tip' to your hyperlink.
6. Remember to save your document, just in case!

Create hyperlink video tutorial: http://bit.ly/create_hyperlinks

Linking internally within a document.

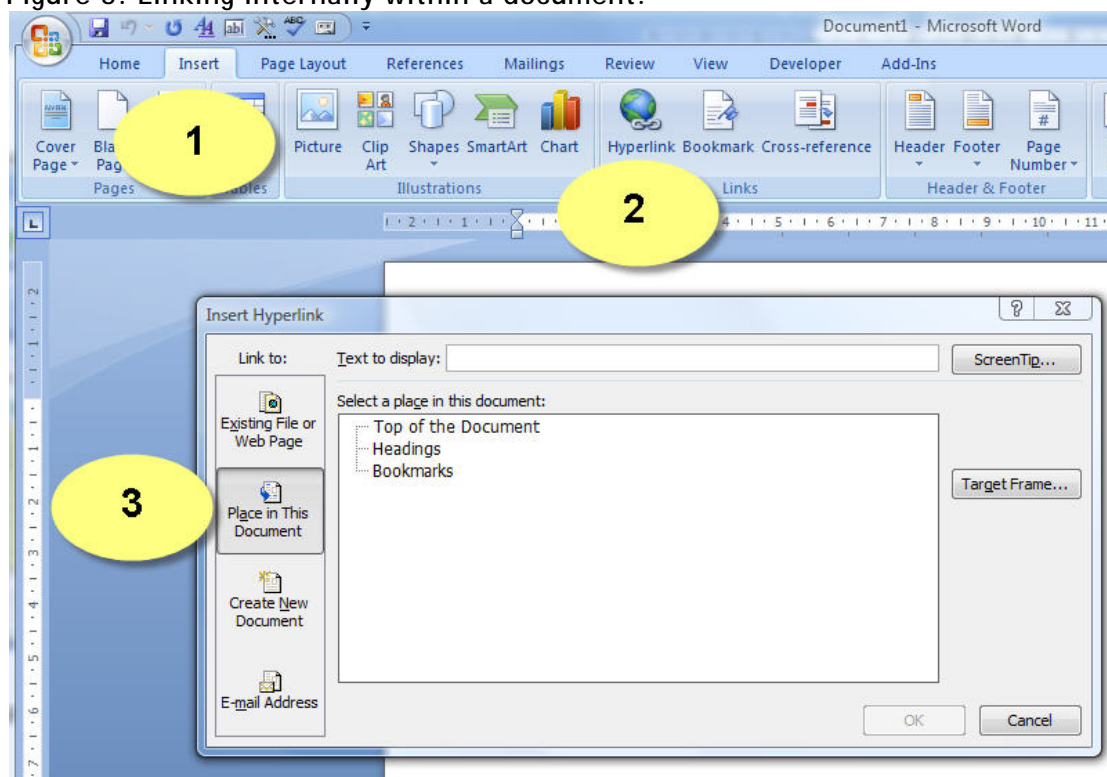
To increase navigation, words and images can be used to create hyperlinks within a document, e.g., 'go to top'

This can be used in a document to link users to different sections which may be of relevance to them or to cut down on scrolling.

1. Under the first section type 'Go to top'.
2. Select 'Go to top' in the document and from the menu navigate to Insert Hyperlink.

3. From the Insert Hyperlink dialogue box select 'Place in This Document' from the left hand side.

Figure 5: Linking internally within a document.



4. If a document has been created using appropriate headings and styles the headings will be available for selection by clicking the '+' next to the Headings option. Select the appropriate heading from the list, i.e., the title heading.
5. Now copy and paste each 'go to top' underneath each section.

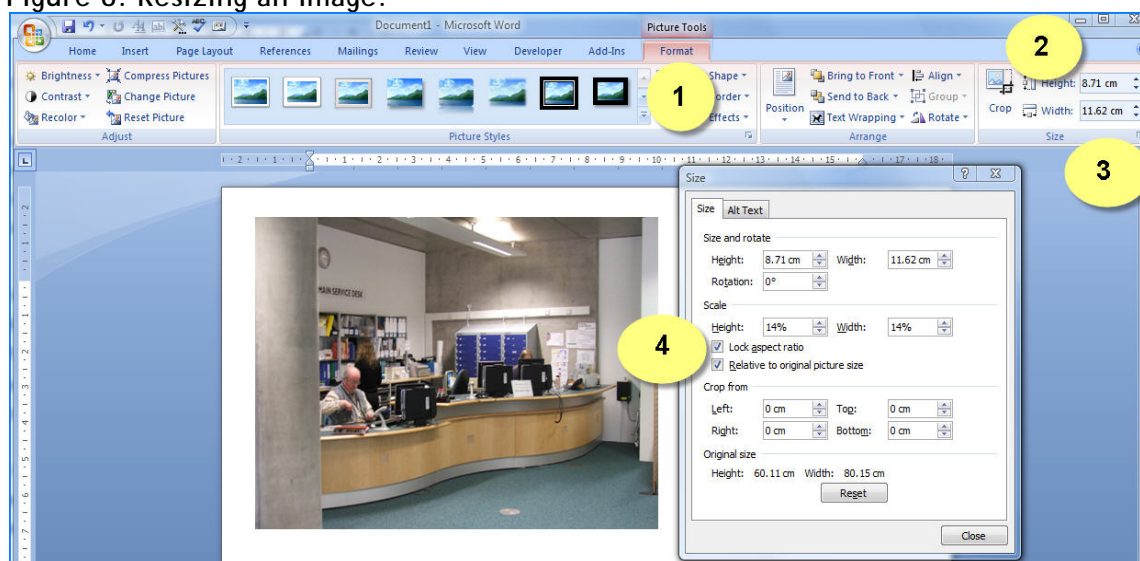
Insert internal links video tutorial: http://bit.ly/internal_links

Inserting images and adding 'Alt Text' descriptions.

1. Insert the appropriate images into the designated place holders, e.g., {place image file here: lib1.jpeg}, {place image file here: lib2.jpeg}.
2. Click the image and resize in the normal way. Or alternatively double click on the image and on the 'Format'(image) ribbon

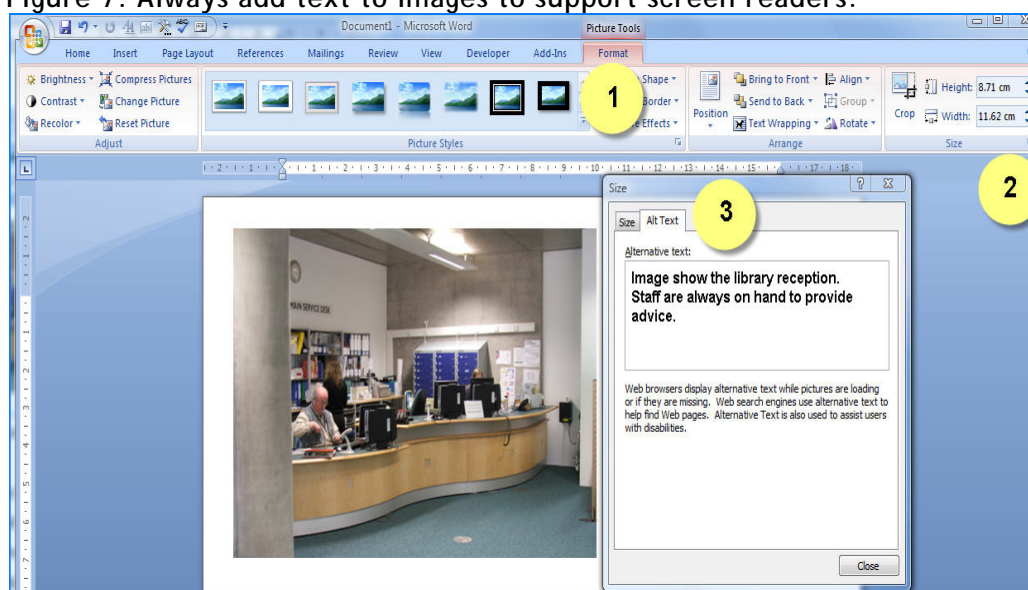
change the Height and Width settings to 8cm ensuring the 'Lock aspect ratio' option is ticked.

Figure 6: Resizing an image.



3. When the 'Size' panel appears, select the Size tab.
4. Locate the 'Lock aspect ratio' tick box ensuring it is ticked.
5. Select the 'Alt Text' tab and give the image a logical and informative description, e.g., image shows reception area of library etc.

Figure 7: Always add text to images to support screen readers.



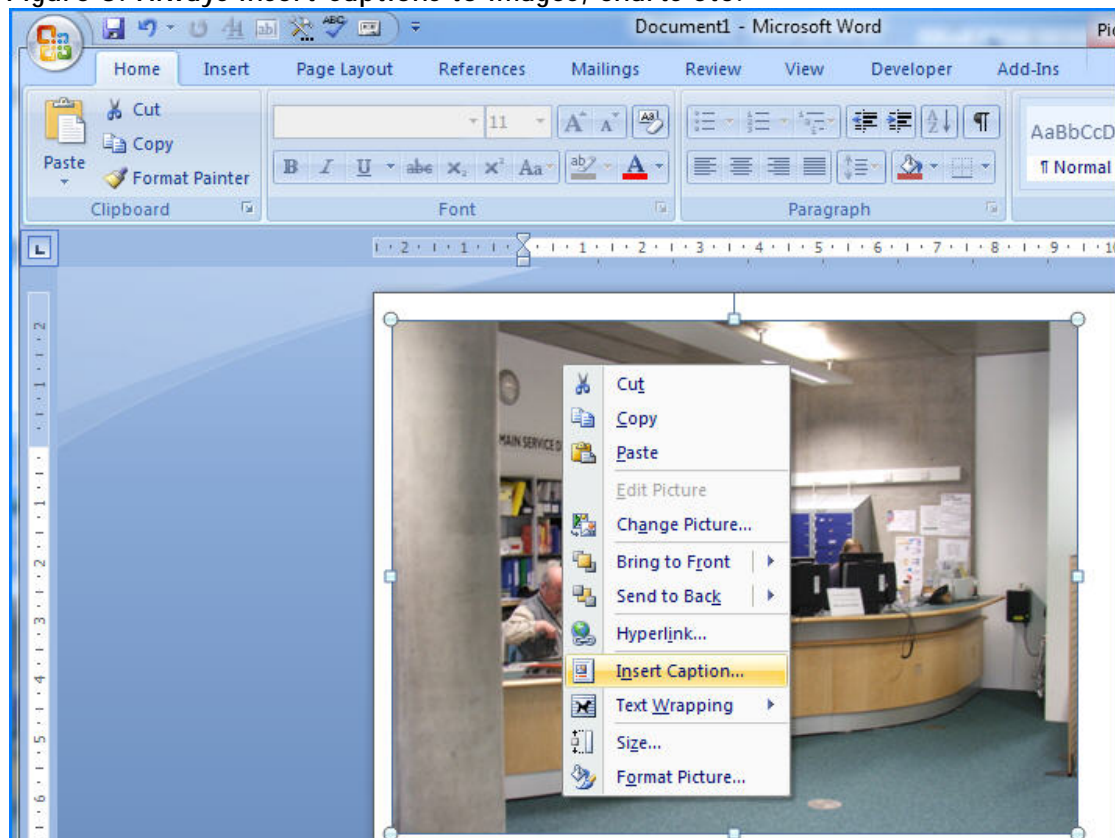
6. Select Okay.

Adding alternative text video tutorial: http://bit.ly/image_tags

Adding captions.

1. To add a caption to an image or diagram right click the image and select Caption. Add an appropriate caption, e.g., alt tags are important for visually impaired readers captions are important for sighted users.

Figure 8: Always insert Captions to images, charts etc.



2. Add captions to each of the images in your document – the captions should be similar to the 'alt tags'.

Adding tables.

It is important that tables are structured in a meaningful and logical way, particularly for screen reader users. As far as possible tables should be presented in linear fashion and should be captioned.

Imagine a table that you can only read/see one cell at a time. You may be able to remember the column or row headings for a few cells, but the complex the table the more difficult it becomes for a visually impaired reader to decipher.

For example, to find the number of females in the category 81-100, you would (remember you can only see/read one cell at a time) navigate down to Age, 81-100 and know that 2 columns left was the female column and find the result was 9.

Table 1: Male and Female Ages Distribution

Age	Male	Female
0-20	5	10
21-40	11	5
41-60	7	9
61-80	77	55
81-100	2	9
101-120	1	88

(Table example taken from Guidelines for creating accessible documents, Andy McMahon, Teaching Support & Training Unit)

1. Now create an appropriate table, e.g., 'Library Opening Hours' keeping accessibility in mind.
2. Add a Caption to your table placing it directly above the table.

Charts and Diagrams.

Charts and diagrams should also contain descriptions or alt tags. To do this copy and paste the appropriate charts from the Excel spreadsheet, file 'Library charts'.

To add a description simply repeat the process you did earlier for 'Inserting images and adding descriptions'. Ensure you give a detailed explanation of the diagram. 'This diagram represents the percentage of expenditure...'

Table of contents.

An important aspect of creating an accessible document is to use a Table of contents. A table of contents is a list of the parts of a document organised in the order in which the parts appear.

If the document is structured with appropriate headings it is easy to create a table of contents in Word.

1. Scroll to the top of the document.
2. Create a new blank page by pressing Ctrl + Enter.
3. Place the cursor at the top of the blank page.
4. Go to the 'References' ribbon and select the Table of Contents option.
5. You can choose from one of the 'built-in options or you can customise your own Table of Contents.
6. To customise your own Table of Contents (e.g., number of heading levels) select the drop down menu and select the Insert Table of Contents option – second bottom on the drop down menu.

Figure 9: Insert Table of Contents.

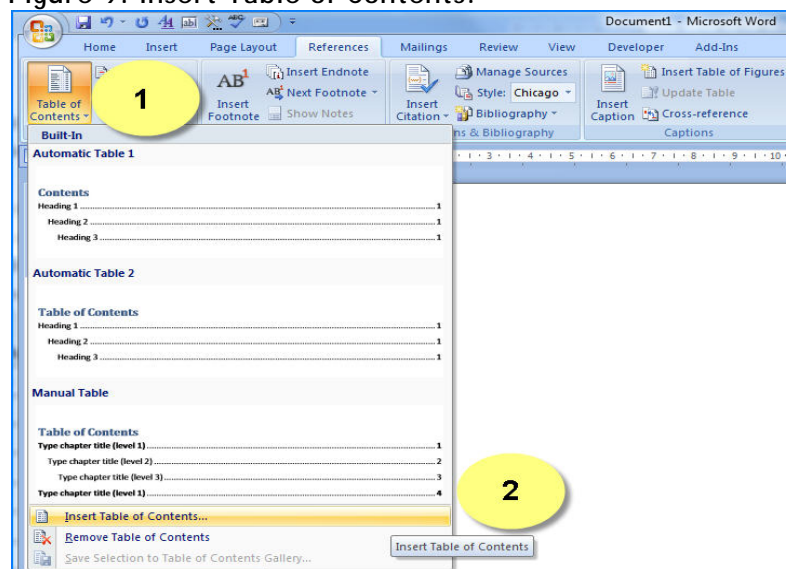
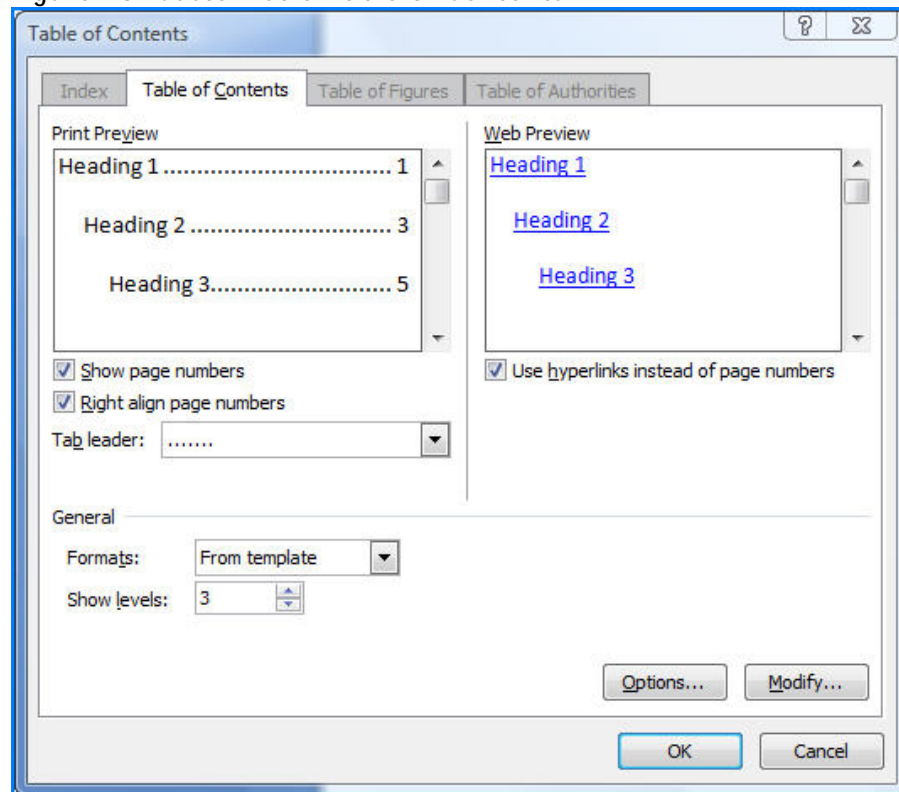


Figure 10: Customise a Table of Contents.



7. Ensure the Level Headings box is ticked (preferably 3 levels).
8. Select okay.

Save you document.

Part 2

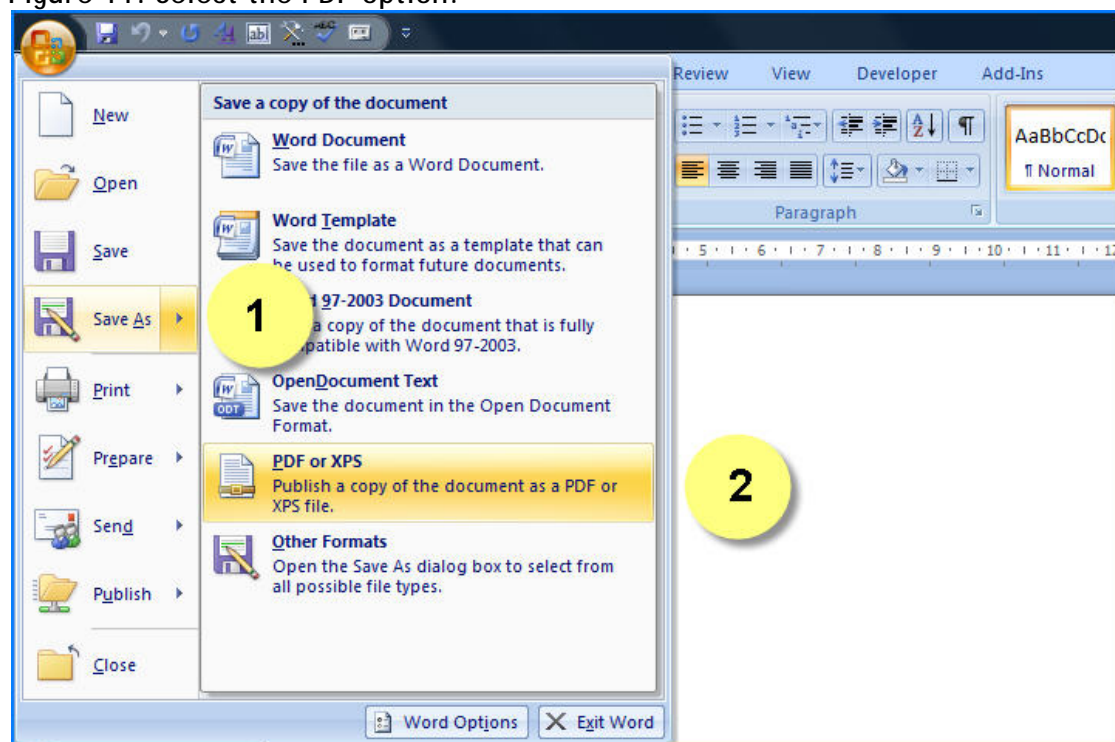
Create accessible PDFs.

If you've followed these guidelines you should now have a Word document which is accessible to a range of users, in particular screen reader users. Word 2007 features a new tool for converting Word documents into Adobe Portable Document Format (PDF) – which can also be made accessible.

If a Word document contains the appropriate headings, e.g., level heading 1, level heading 2 etc, the heading structure and image tags will be carried over to a PDF.

1. Select the Windows Office button and go to 'Save As' and select the PDF or XPS option.

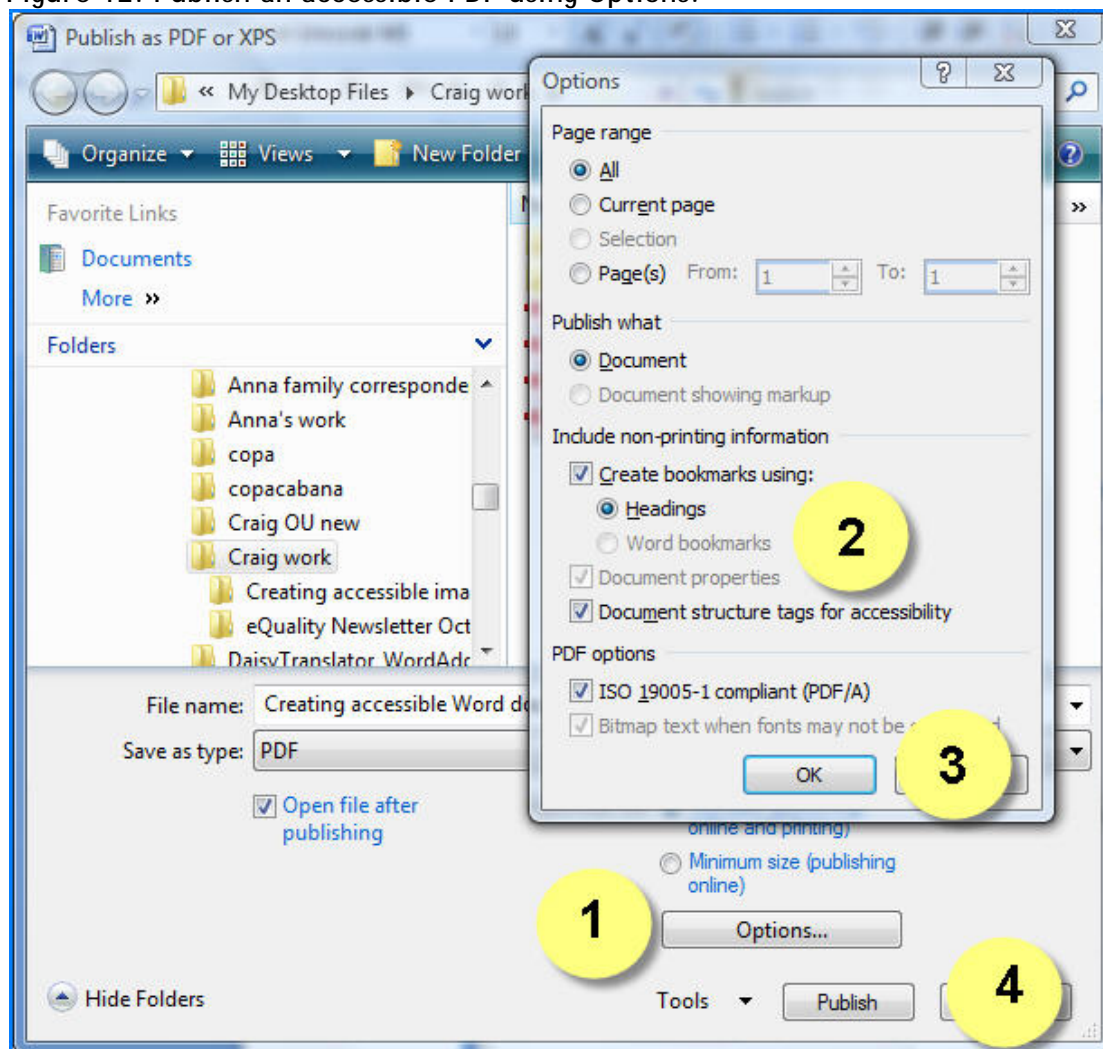
Figure 11: Select the PDF option.



2. When the Publish as PDF or XPS panel opens select the Options button.

3. When the Options panel appears select the 'Create bookmarks using: Headings' – unless you have used Word bookmarks.

Figure 12: Publish an accessible PDF using Options.



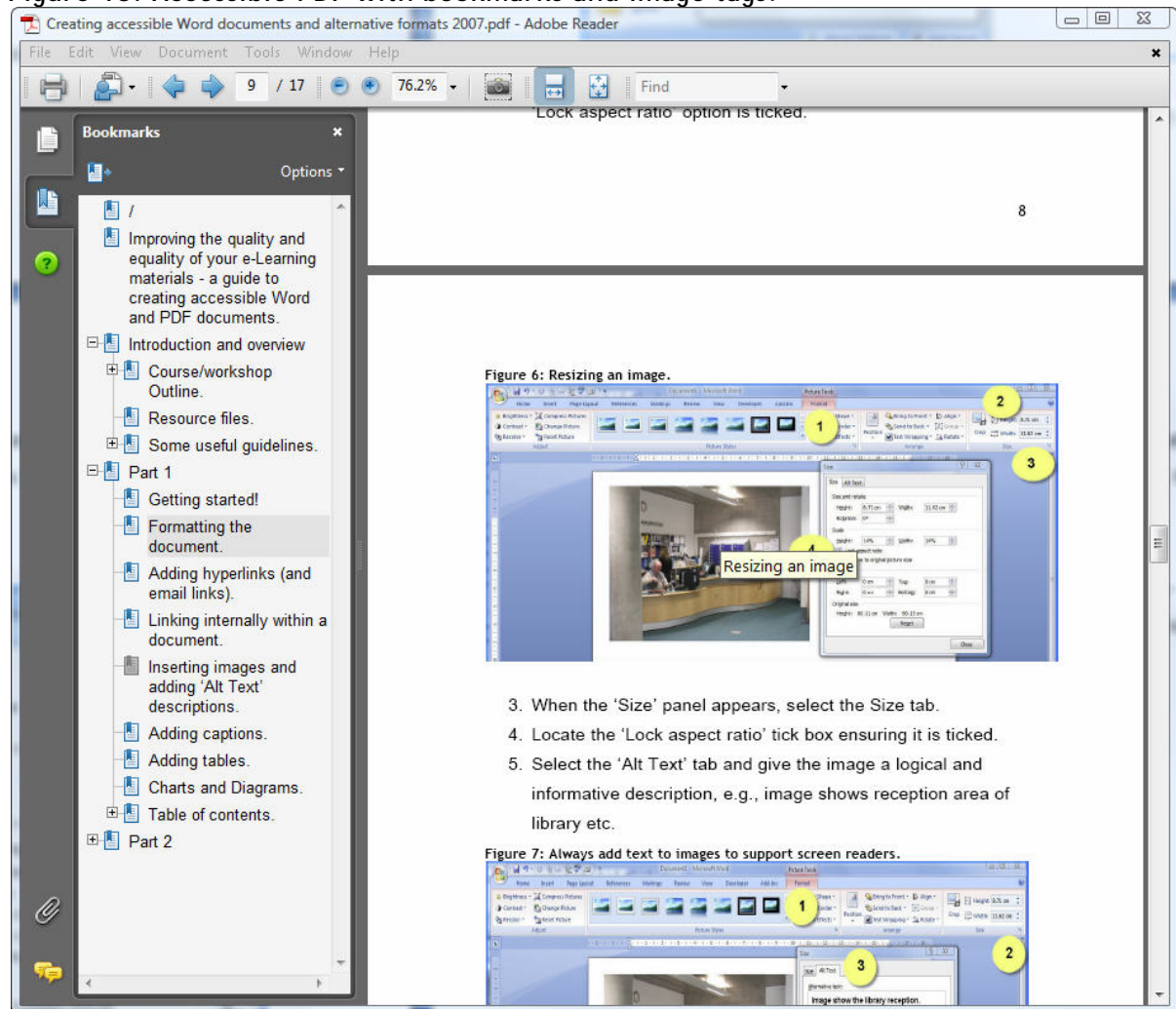
4. Select the Okay button.
5. Finally on the Publish as PDF or XPS panel select the 'Publish' button – Word will now create/publish your PDF.

Publishing an accessible PDF video tutorial: http://bit.ly/publish_pdf

Published PDF

As you can see from Figure 13, the Bookmarks appear on the left hand side of the PDF allowing for improved navigation of the document. Hovering a mouse over one of the images also displays the image tag/text.

Figure 13: Accessible PDF with bookmarks and image tags.



Test the navigation by selecting View and Document Map – the navigation pane on the left hand side of the screen will allow you to navigate through your document with ease.

Hints and Tips

Keyboard shortcuts to creating heading styles

To apply the Heading 1 style – press and hold Ctrl + Alt + 1 (either at the beginning or the end of the sentence)

To apply the Heading 2 style – press and hold Ctrl + Alt + 2

To apply the Heading 3 style – press and hold Ctrl + Alt + 3

Assigning keyboard shortcuts to a style

To assign a keyboard shortcut to a style, on the Format menu select 'Styles and Formatting' and then follow these steps:

1. In the 'Pick formatting to apply box' click the style to which you want to add a shortcut.
2. Click down the 'Format' button and then click the 'Shortcut key' button.
3. Click the 'Press new shortcut key' and then press the shortcut key combination you want to assign, say Ctrl + Alt + K
4. Click 'Assign' then click 'Close'
5. Place the cursor on any line of text in a Word document and press the shortcut key, e.g., Ctrl + Alt + K

The newly assigned shortcut key will format text in the document. You can set up multiple styles by assigning keyboard shortcuts to various styles. As well as increasing accessibility this will also improve efficiency and workflow.