

Making your documents accessible

Why is this important?

In September 2018 new accessibility regulations came into force for public-sector bodies. These regulations say you must make your documents, website and mobile app accessible so that they can be used by as many people as possible, including those with long-term illness, impairment or other disability. These regulations are to be applied from September 2020.

Accessible documents and web pages make it easy for people who use adaptive technology (for example screen readers, speech recognition and mouse alternatives) to access the information they contain and work their way through them. This guide will help make sure your documents comply with the new standards.

In this guide you will find information on how to:

- Bring up your navigation pane
- Create headings and subheadings
- Creating, customise and modify current styles
- Make images accessible
- Make tables accessible
- Create accessible hyperlinks
- Check your document is accessible
- Turn your document into an accessible PDF

This guide has been created for people using Word in Microsoft Office. If you are using a Mac document, the setup is similar to using Word in Microsoft Office.

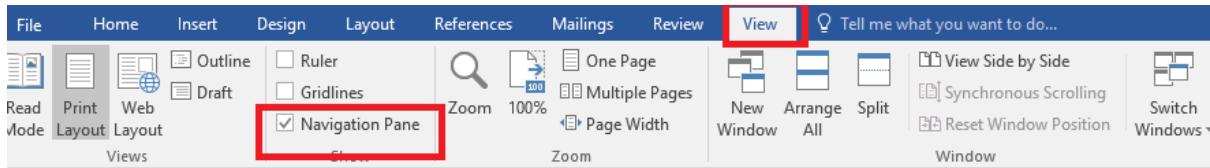
Where there are slight differences, screenshots and instructions have been provided for Mac users. These differences appear in:

- Navigation pane
- Create headings and subheadings and modifying headings and styles
- Making images accessible
- Creating accessible hyperlinks
- Checking your document is accessible
- Turning your document into an accessible PDF

Navigation pane

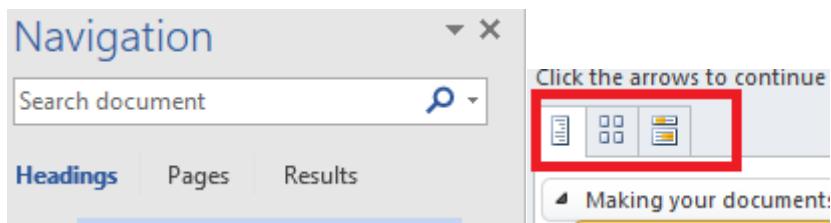
Make sure your navigation pane is always open, this will help show you what headings and subheadings you have added to the document.

- To open your navigation pane, click view in your menu,
- Select navigation pane.



The navigation pane will open on the left-hand side of your document.

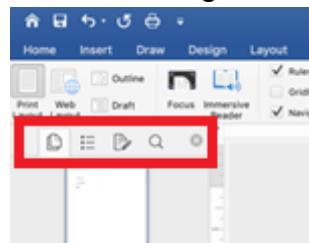
Depending which version of word you are using the navigation pane in Microsoft Word will look like:



Navigation pane for Mac users

If you are using a Mac, follow the same steps above. You will see the following icons that refer to:

- Thumbnails Pane
- Document map (lists headings and the document structure)
- Reviewing Pane
- Find and Replace



Create headings and subheadings

Headings and subheadings act like a bookmark, so when users click them in the **navigation pane** they jump to that section.

Headings and subheadings are important to help readers both determine the overall outline of the document and navigate to specific information on the page.



- On your toolbar, make sure you are on the Home tab,
- Then top right, there will be a selection of headers.
 - Heading 1 – your **title** to use at the top of the document,
 - Heading 2 – your **subheadings** used throughout the document, like chapters,
 - Heading 3 – for any **secondary subheadings** to be under heading 2,
 - Normal – your **body text**.

Select your heading from the toolbar and start typing your title. The text of the heading/ subheading will then appear in your navigation pane.

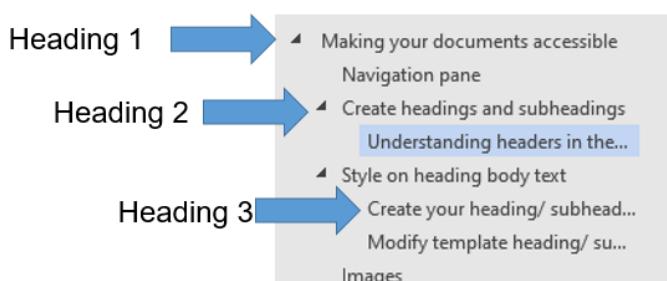
Make sure every time there is a new subheading you create a heading from the toolbar and that it appears on the navigation pane.

Understanding headers in the navigation pane

By selecting headers (Heading 1, 2 or 3) you create a layered structure for your document. Make sure you select the right heading for that part of the document:

- Heading 1 – is on the far left of the navigation pane to indicate it is a title
- Heading 2 – is a subheading and is slightly indented from heading 1
- Heading 3 – is another subheading but as it belongs to heading 2, it is indented to heading 2 in the navigation pane
- Body text does not appear in the navigation pane.

The next image shows how headings are set out in the navigation pane:



Creating and customising styles

The style is how the document should look in font type, size, colour, spacing etc. You may want to change your settings so you don't have to keep setting it up each time you open a new document.

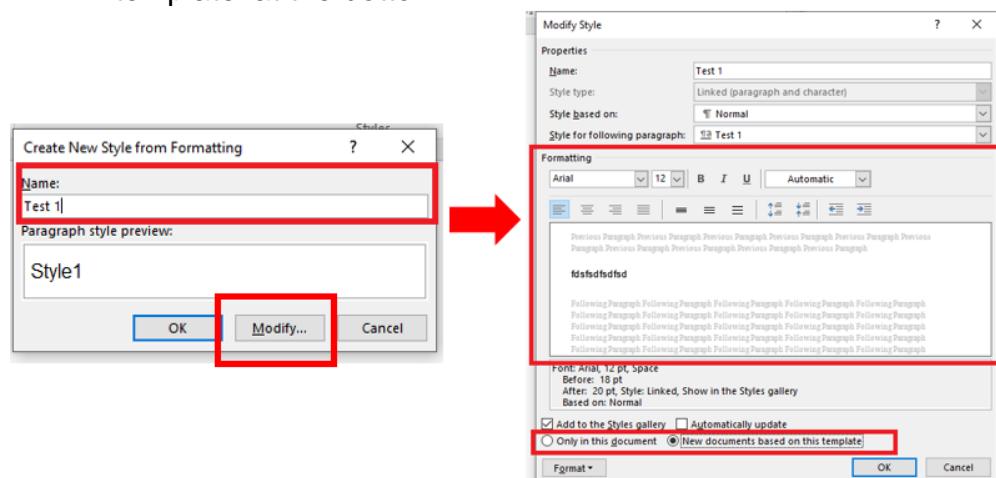
Create your heading / subheading style

You can create your styles so they are in the main toolbar, to do this:

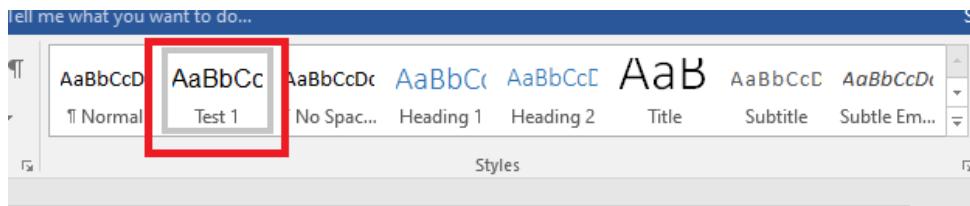
- In your heading pane, select the small drop down arrow highlighted in the styles toolbox
- Select 'Create a Style'



- A box will appear, name your style and click modify.
- You can then change how you want the style set up for that particular heading. For NIHR branded documents:
 - Font either Arial or Lato
 - Title headings – size 24
 - Subheadings – size 18
 - Secondary subheadings – size 14
 - Body text – size 12
 - Text colour – black
 - If you need to, you can set spacing in the document as well.
- When you have set up your style, select: 'New documents based on this template' at the bottom.



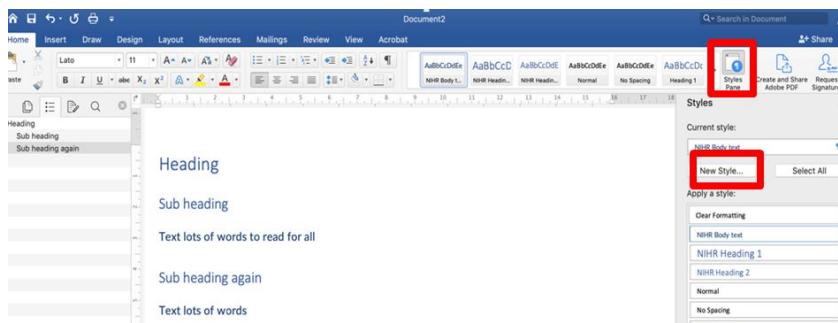
- When you click ok, your style will be added to the toolbox.



- If you already have text in your document, you can highlight it and select the style you have created and it will convert the text.
- When you begin a new document, select your style and it will automatically be applied.
- **Remember:** you will need to set each style for each heading, subheading or body text. Make sure you have 'heading 1, 2, 3 and normal' set to your preferences.
- **Do not use italics or underline text** as people with visual impairments can have difficulty reading the text or it can be mistaken as a link.

Creating headings for Mac users

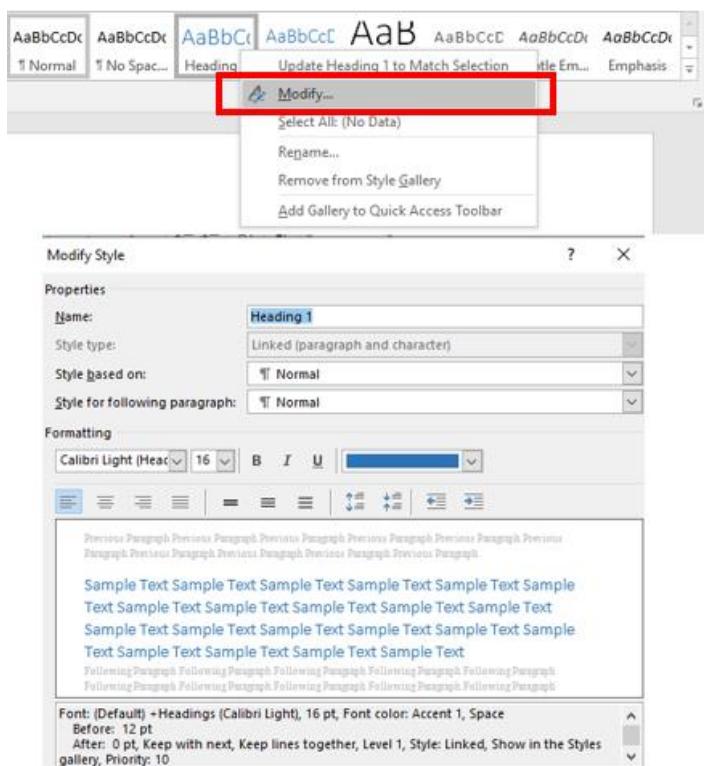
It is slightly different on a Mac. On the 'Home' menu on the right hand side, click 'Styles Pane' to bring up the styles panel. You can then create a new style in the pane.



Modify template heading/ subheading style

You can modify the template headers Microsoft Word has provided.

- Right-click on one of the styles
- Select modify
- You can then change the settings in the style, including name, font and size
- Make sure you select 'new documents based on this template' at the bottom to keep these changes.
- **For Mac**, click into an existing font and it will bring you up options to modify.



Images

All images in documents whether they are logos, illustrations, pictures or photographs must have alt text. This is to help people with screen readers know if there is a picture in the document and describe what it is.

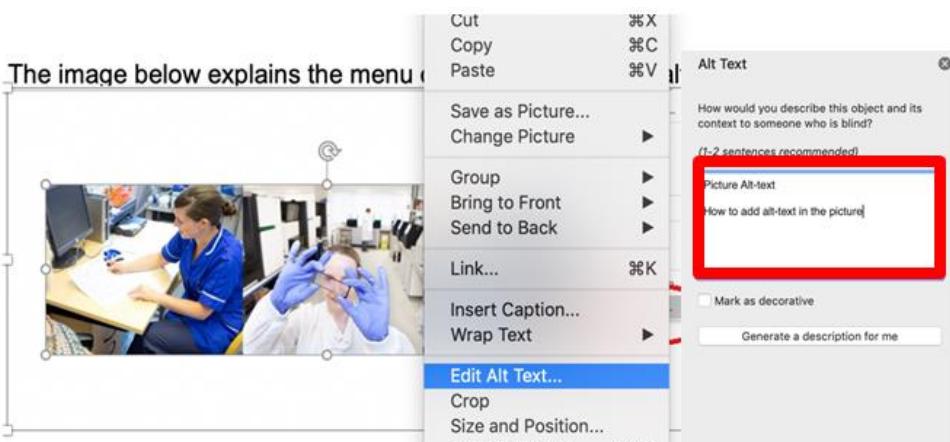
- Insert your picture like normal
- Right-click on the image
- 'Format picture' or select 'Alt Text' if using Microsoft 10
- 'Alt Text'
- Add the description
- Your images should be 'in line with text'. Double click on your image, select 'position' in your toolbar and 'in line with text' will be there.

The image below explains the menu options when adding alt-text.



Images for Mac users

- Click on the image
- Right-click
- It will bring up a menu, select 'Edit Alt Text'
- A panel will appear for you to add your text or description of the image.

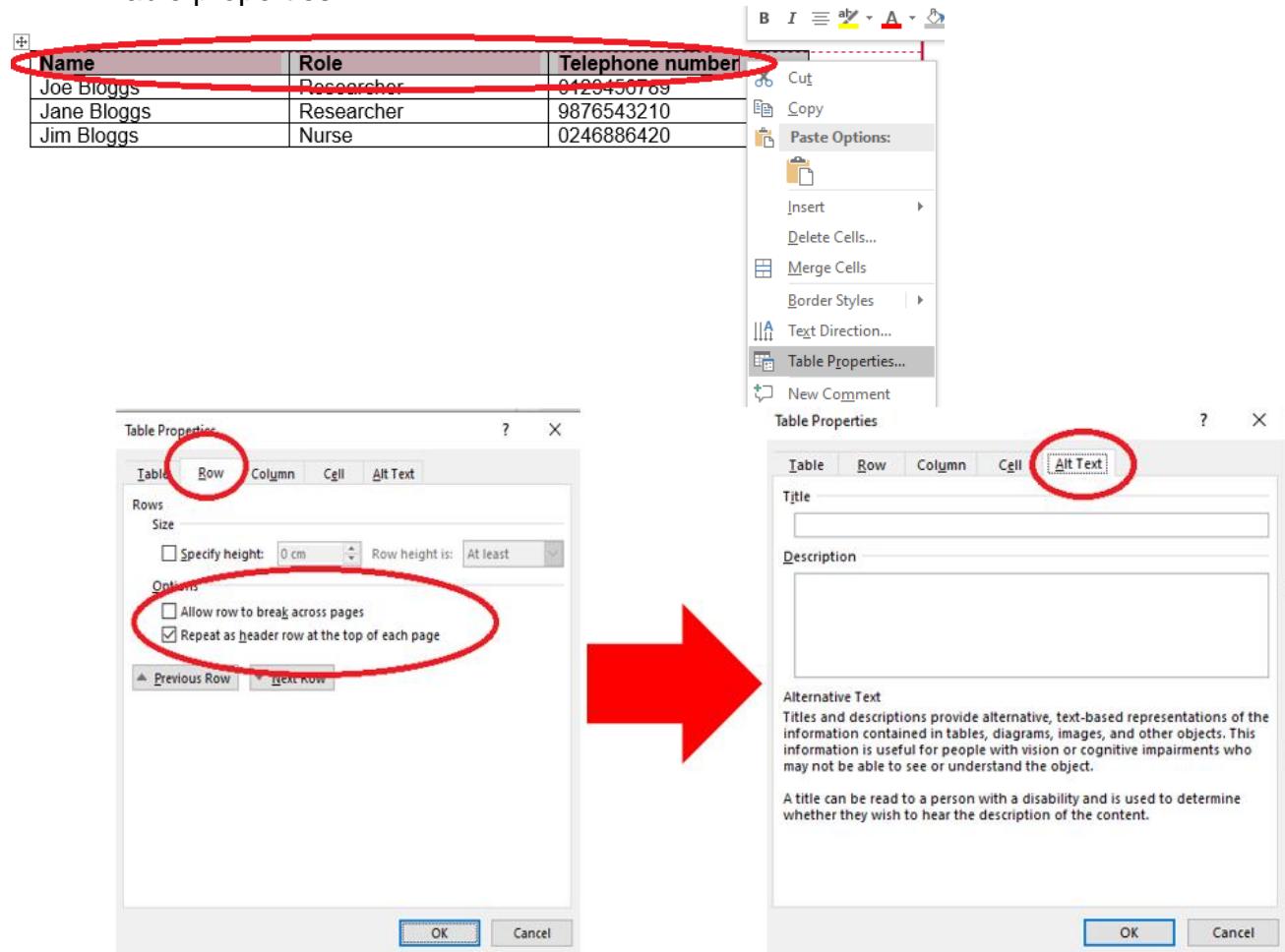


Tables

All tables need to be clear and accessible for people with specific requirements. The following instructions are the same for Microsoft Word and Macs.

Creating a table

- Create your table under insert
- Select the header row, by highlighting the top row (see below)
- Right-click
- Table properties.



- 'Row' tab
- Select 'repeat as header row at the top of each page' – so that if the table splits across two pages it will repeat the header row on the next page,
- Untick 'allow row to break across pages'. If you already have a table with data you can highlight it and select these options, it should automatically update
- In 'Alt Text' tab – add a title and description of the table, select Ok.
- **Do not split cells in your table.**
- Make sure your 'tab' button on your keyboard can move through each of the cells.

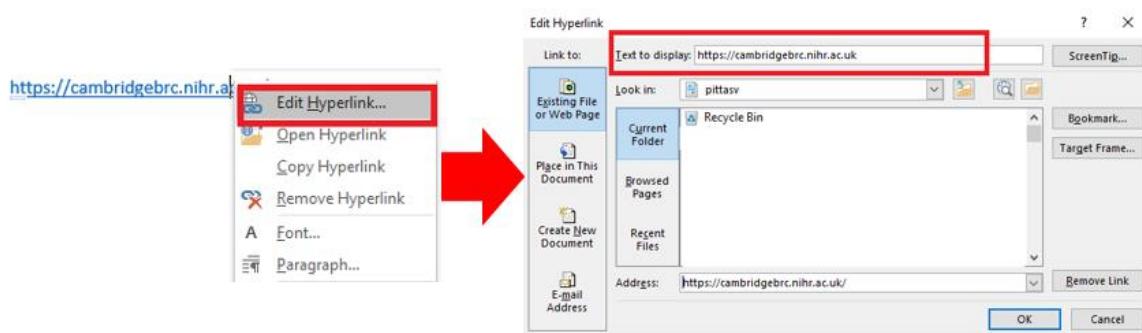
Creating hyperlinks

Hyperlinks in a document need to be meaningful, you should not use 'click here', 'learn more', 'link' etc. Explain what the hyperlink is.

When people have screen readers, the software will indicate if it is a link. Some software will say aloud 'click here'. If you have written 'click here' the software reader will read 'click here, click here' so the user will be unable to know which part they should be selecting.

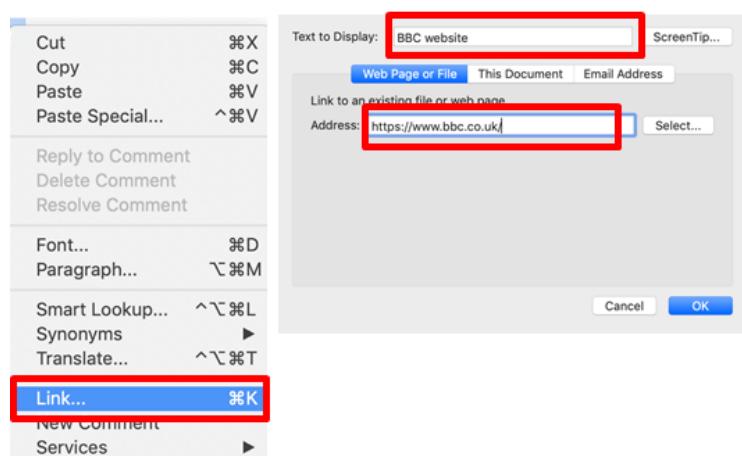
To create a more accessible link:

- Highlight the link on your document: e.g. <https://cambridgebrc.nihr.ac.uk/>,
- Right-click
- Edit hyperlink
- Change 'Text to display' at the top to text that is meaningful e.g. 'NIHR Cambridge BRC website' then press ok.
- The screen reader will now say aloud: 'NIHR Cambridge BRC website **LINK**'.



Creating hyperlinks in a Mac

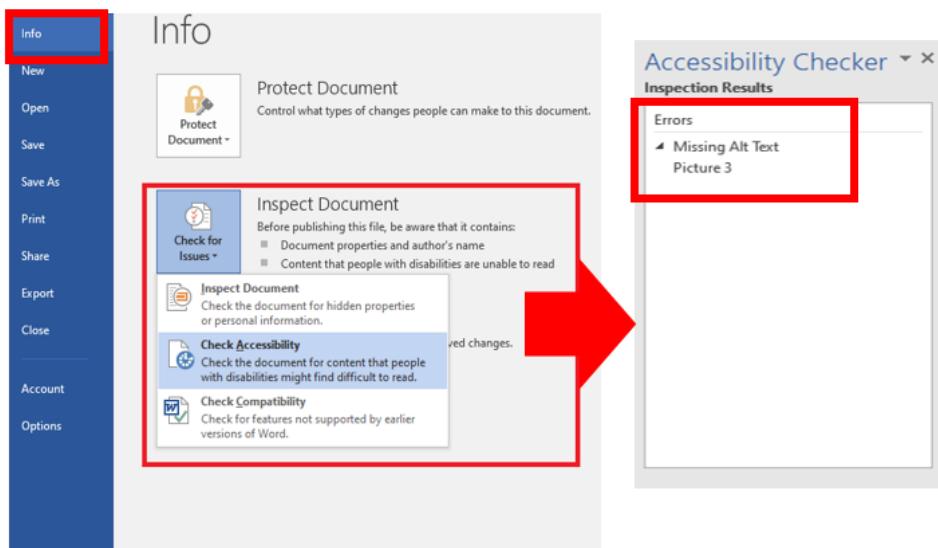
- Write the name of your hyperlink and highlight the text
- Right-click and select link
- A box will appear, make sure 'Text to Display' is the title you want and add the website address



Checking your document is accessible

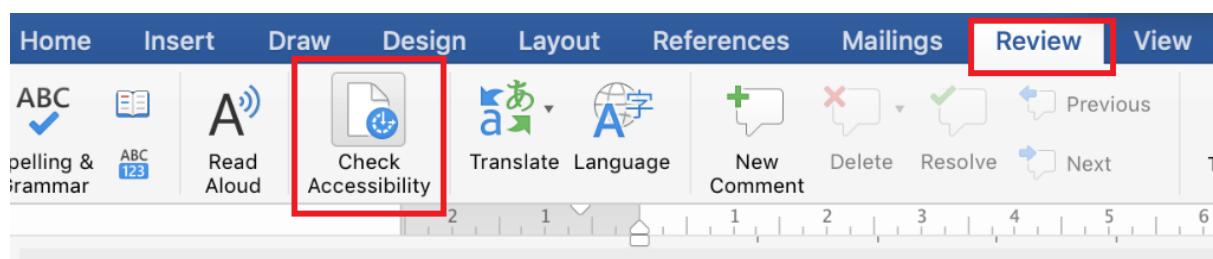
There is a tool to help you check for any accessibility errors in your document:

- File
- Info tab
- Select 'Check for issues' and select 'Check for Accessibility'
- A box will appear on the right hand side of the screen with any errors to address
- You can then work through any areas that have come up.



Checking accessibility on a Mac

- Under review
- Select accessibility
- The same panel in the Microsoft Office version will appear on your right showing any problems.



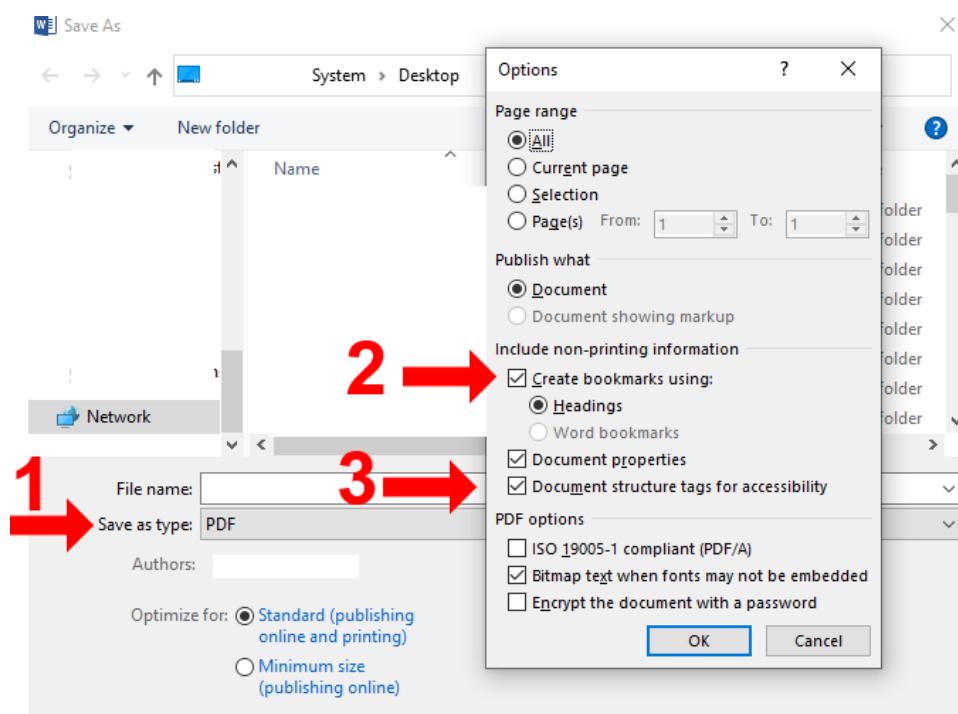
Creating an accessible PDF

You may want to format your word document into a PDF. You will need to make sure the headings and accessible settings you have created transfer over to the PDF document.

From Word to PDF

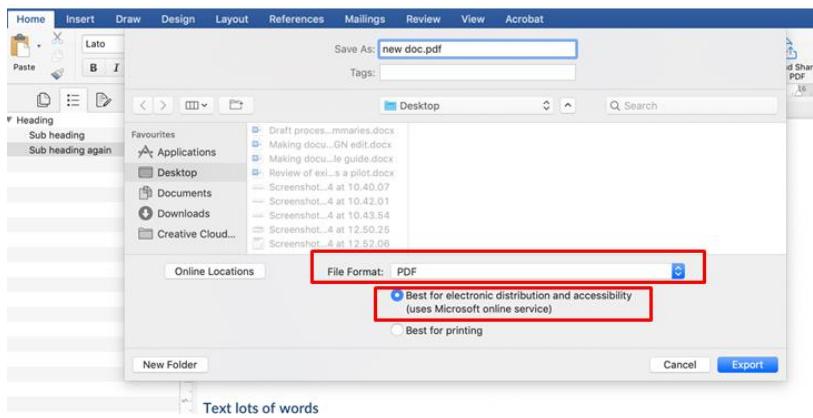
When you have completed your document and there are no errors:

- ‘Save as’ then follow the steps highlighted in red in the image below
- 1 – Change it to PDF
- Click options
- It will bring up another box.
- 2 – Tick ‘Create bookmarks using headings’
- 3 – Tick ‘Document structure tags for accessibility’
- Click Ok, then save to your designated location.



From Mac to PDF

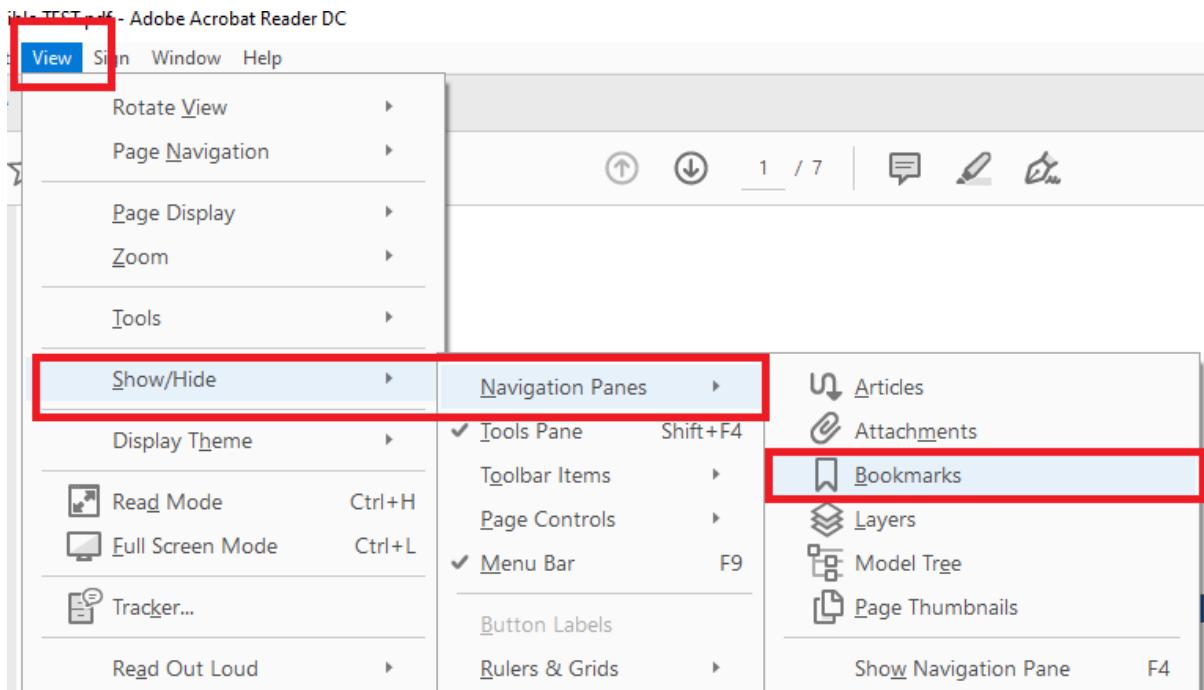
- In file, click save as
- In the window choose PDF
- Select ‘Best for electronic, distribution and accessibility’ – this will keep all your settings.



Your PDF

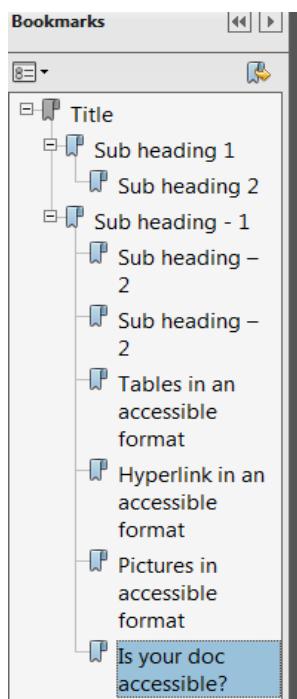
Follow the steps below after you have opened up your PDF document and check the bookmarks are there and there is alt text in any images and tables.

- In your toolbar select 'View'
- Show/Hide
- Navigation Panes
- Bookmarks
- It should then bring the pane on the left hand side of your screen where all your headings are set and you can click on them.
- If you have created subheadings you may need to expand the bookmarks with the plus/ arrow icon next to it.



Hover over any image and the alt text should also appear.

Any documents turned into PDFs, make sure the bookmarks in the PDF pane shows the correct structure you created in your Word document.



These settings also need to be applied to PowerPoint and Excel.