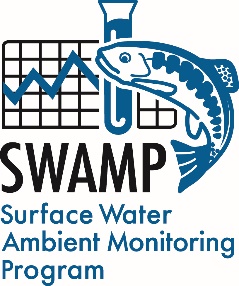
** **

**Surface Water Ambient Monitoring Program (SWAMP) Accessible Report Template Instructions**

# Accessible Content Requirements for Contractors

The Contractor shall ensure that all data, plans, drawings, specifications, reports, computer programs, operating manuals, notes, and other written or graphic work submitted to the State Water Board or uploaded directly to any State internet website or database in the performance of their Agreement comply with the accessible content requirements set forth in Government Code sections 7405 and 11135; section 508 of the federal Rehabilitation Act (29 USC 794d) and the regulations promulgated thereunder (36 CFR part 1194); and the most current Web Content Accessibility Guidelines published by the Web Accessibility Initiative of the World Wide Web Consortium at a minimum Level AA success criteria.

If the Contractor provides any electronic or information technology, or related services, under their Agreement, the Contractor shall respond to and resolve any complaint brought to the attention of the Contractor regarding the accessibility of its products or services.

While Contractors are not required to follow the process outlined below, we hope it can be used as a tool that will make the development of accessible documents easier.

# How to Use This Template

***First, please save this template in your directory and then read through all sections thoroughly.***

Once you have read through everything and are ready to begin writing a document:

1. Save a copy of this template (.dotx) as a Word document (.docx) in your directory
2. Rename the Word document (.docx) whatever you want to call your document
3. Select all content in the template (Press Ctrl +A) and delete everything (press Delete)
4. Begin writing as you normally would but remember to apply accessibility principles as you work (e.g. add Alt Text to all figures, use appropriate table formatting, etc.) and use the styles and formatting provided in this template.

Once the author has finalized the document, it should be sent (as a Word document) to the appropriate SWAMP Program Coordinator or Accessibility Liaison (i.e. SWAMP contact) to be run through a series of accessibility checks. Once the document has passed all checks, it can be converted to a PDF for posting, distributing, etc.

If a document is sent as a PDF to the SWAMP contact, and the PDF has major accessibility issues, the SWAMP contact may send it back to the author and ask they read this template and remediate the PDF before resending it to the SWAMP contact. *This can be tremendously time consuming and may entail* [*converting the PDF to a Word document*](https://acrobat.adobe.com/us/en/acrobat/how-to/pdf-to-word-doc-converter.html) *or manually retyping and formatting the entire document in Word.*

Depending on the complexity of the document, the standard time required for accessibility checking and remediation ranges from 6 to 50 pages per hour; PDFs are expected to be on the lower end of that scale and Word documents are expected to be on the higher end of the scale.

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# Cover Page Template

SWAMP Staff are updating the SWAMP cover page template, so it meets accessibility standards. Once complete, it will be posted on the [SWAMP Wiki](https://sites.google.com/site/swampwikihomepage/) and distributed accordingly.

# Style and Formatting Examples

# Heading 1

Use Heading 1 for the title *and* main section headings

## Heading 2

### Heading 3

#### Heading 4

##### Heading 5

###### Headings 6 through 9

“Body Text” is the default style for text after all headings (i.e. to be used as text for the body of the document).

## Lists

Use the default lists provided in the Home Ribbon, Paragraph Section

* List paragraph, or

1. Numerical list, or
2. Multilevel list for small, isolated instances. However, using the Word built in “list” styles (List Paragraph) for whole document outline purposes is prohibited due to problems with ADA document compliance. See the “[List Styles for Document Outline](#_List_Styles_for)” section for more details.
   1. QAPPs currently utilize multilevel lists for document outline purposes.
   2. We can still structure documents the same (i.e. using numerals to track location in the document), but the numerals need to be formatted as headings, not as a list.
   3. We can no longer utilize Roman numerals in lists or as a way to organize documents. Screen readers may not understand that a Roman numeral is being used rather than an actual word. For example, “I” would be read as “eye” not as “Roman numeral 1”

## Tables

Table : Always provide a table caption above tables. The caption should describe the table using as much detail as needed to make it a stand-alone object (i.e. readers should not need to read the body text to understand the table)

|  |  |  |
| --- | --- | --- |
| **Column Header** | **Column Header** | **Column Header** |
| **Row Header** | Text/Data Cell | Text/Data Cell |
| **Row Header** | Text/Data Cell | Text/Data Cell |

Table notes: Please use shading or bold text to indicate headers. Column headers are required but row headers are not.

Screen shots of tables, or tables that are actually lists will no longer be permitted. Screen shots (i.e. figures), lists, and tables are read differently by screen readers and need to be formatted accordingly. If we want to include a table in the document, it should be selectable and formatted like the above example table.

More complex tables (e.g. tables with merged cells) are permitted, but it is highly recommended to make tables as simple as possible. See the [Table Structure Section](#_Table_Structure) for more details.

## Figures

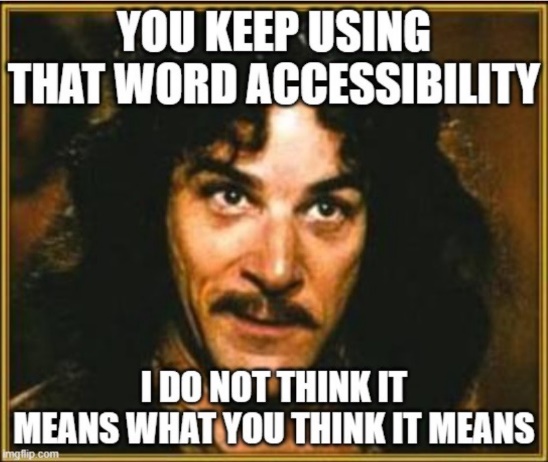


Figure . Always provide a figure caption below figures. The caption should describe the figure using as much detail as needed to make it a stand-alone object (i.e. readers should not need to read the body text to figure out what is provided in the figure). Alt text will also need to be included for every figure but should not duplicate the caption.

# Style and Formatting Recommendations

The Water Boards encourage staff to use the styles provided in this template for document creation. These styles will assist in creating documents that follow the ADA compliance goals of the organization. Authors are allowed to use/create other styles as needed. The standard font should be Arial 12 or larger for modified or created styles.

Some important points to keep in mind when formatting your documents are:

## Font Type and Size

All fonts (including in tables and figures) must be sans serif (e.g. Arial, Calibri, Helvetica), 12 point or larger. Serif fonts (e.g. Times New Roman) will no longer be supported.

## Heading 1 Style

Heading 1 typically should be at the top of the document and should only be used once. More than one Heading 1 is acceptable in some cases, such as when multiple documents are combined into one. Web staff will not kick a document back if they find thoughtful use of multiple Heading 1s.

## Body Text Style

Body text is preferred over Normal and you are encouraged to use Body Text as your regular text content style in your document

## Normal Style

The Normal style should not be modified.

## No Spacing Style

The No Spacing style may be used for single line spacing with no additional spacing after the paragraph, if needed

## Body Text Indent Style

The Body Text Indent Style is not often used but may indents the paragraph .25 inches with normal line spacing

## Superscript and Subscript

Be cautious when using superscript or subscripts. The screen readers may read the super/subscript as part of the word, rather than the word and super/subscript (“bgsa” would be read as “bgsa”). It is recommended that authors add a space between the word and super/sub script to ensure it is read correctly (e.g. “bgs a”)

## Lists

Use the default lists provided in the Home Ribbon, Paragraph Section. Be sure to keep list items together (i.e. don’t break lists by inserting paragraphs between bullets), and do not use lists for formatting the sections of the document. See the “[List Styles for Document Outline](#_List_Styles_for)” section for more details.

## Table of Contents

A Table of Contents (TOC), Table or list of Figures, Table or list of Tables, etc. (henceforth referred to here as TOC) are essentially preformatted lists. As such, they should be created using the built-in lists provided by Word, as opposed to the author typing up the TOC as a list or by adding an inserted table.

The TOC tool will include headers down to Level 3. If including level 3 will be too much in the TOC, the author can [customize the TOC](https://support.microsoft.com/en-us/office/format-or-customize-a-table-of-contents-9d85eb9c-0b55-4795-8abb-a49885b3a58d) to make it only go to level 2. If anything should not be included in the TOC, it should not be given a Header Style.

[Insert a TOC](https://support.microsoft.com/en-us/office/insert-a-table-of-contents-882e8564-0edb-435e-84b5-1d8552ccf0c0) by:

1. Put your cursor where you want to add the table of contents.
2. Go to References | Table of Contents. and choose an automatic style or select “Custom Table of Contents”.

If you make changes to your document that affect the TOC, update the table of contents by clicking on the TOC and selecting Update Table at the top left side of the TOC. It is always a good idea to update the TOC before finalizing a document, just in case the author made changes that impacted the TOC but didn’t realize it.

## Table Structure

To facilitate proper conversions to PDF, remember to format tables using a simple data structure that includes the following settings:

### Column and Row Headers

Highlight/select the entire table and make sure the Header Row and First Column are selected in the Table Design / Table Style Options section on the Ribbon.

### Table Text

Any cell that is not a row or column header should be formatted using the “Table Text” style.

### Table Notes

Preferably, most of the text associated with a table is in the table caption. However, if it is necessary to include notes that are associated with the table that are separate from the caption, be sure to keep them simple and format them using the “Table Notes” style.

### Do Not Allow Rows to Break Across Pages

To do this you will need to highlight/select the entire table, right-click on the table and display the Table Properties. Make sure option “Allow row to break across pages” is not selected. It is selected as a default and there is no way to change that default setting. ***Authors will need to perform this step for each individual table.***

### Repeat Header Rows

Select/highlight the header row(s), check the Repeat Header Rows in the Table Layout / Data option on the Table Layout Ribbon. ***Authors will need to perform this step for each individual table.***

### Blank or Colored Cells

Avoid using blank cells; screen readers do not tell the reader that the cell is blank but skip it altogether. Instead use a dash ( - ) within the formerly blank cell.

If you are concerned with the esthetics of including a dash in the table, you can change the color to match the background (i.e. white, like this: - ; highlight the text between the colon and semicolon and change the text color to see the object). This will ensure the screen reader reads each cell correctly while meeting

Screen readers also do not tell the reader the color of a cell. So, do not use color or shading alone to convey data or information. Authors may use color to improve the esthetics of a table, but if the color is representative of data or information, it should be coupled by text, symbols, or data that also convey that information.

### Table Complexity

More complex tables (e.g. tables with merged cells) are permitted, but it is highly recommended to make tables as simple as possible.

### Example Simple Table

| **Column Heading 1** | **Column Heading 2** | **Column Heading 3** |
| --- | --- | --- |
| **Row Heading 1** | Text/Data Cell | Text/Data Cell |
| **Row Heading 2** | Text/Data Cell | Text/Data Cell |

### Example Complex Table

| **Col Heading 1** | **Col Heading 2** | | **Col Heading 3** | |
| --- | --- | --- | --- | --- |
| **Col Heading 2a** | **Col Heading 2b** | **Col Heading 3a** | **Col Heading 3b** |
| **Row Heading 1** | Data Cell | Data Cell | Data Cell | Data Cell |
| **Row Heading 2** | Data Cell | Data Cell | Data Cell | Data Cell |

## Figures

Figures should be flat (i.e. a single image) and inserted as .JPG or .PNG (not Office graphics or objects). In other words, the entire figure must be created outside of the Word document and then inserted as a single item. Adding shapes or text boxes on top of an inserted figure will not be supported.

When inserted, the “Wrap Text” formatting (See Picture Format Ribbon, Arrange Section) should be set to “In Line with Text”.

Screen shots (i.e. figures) of tables, or tables that are actually lists will no longer be permitted. Screen shots, lists, and tables are read differently by screen readers and need to be formatted accordingly.

Always provide a figure caption below figures. The caption should describe the figure using as much detail as needed to make it a stand-alone object (i.e. readers should not need to read the body text to figure out what is provided in the figure).

*Detailed* Alt Text is required for *ALL* figures (including graphs, charts, maps, photos, logos, etc.), and should not duplicate the text provided in the caption. This is different than the caption unless the caption is detailed enough to adequately describe the figure, in which case “See caption for more details” should be included as the Alt Text. If there is text in the body of the document that describes the figure in detail, then the author can reference that section in the Alt Text (e.g. See Section 2 for more details). **To add Alt Text to a figure:** right click the figure, select “Edit Alt Text” and then add the descriptive text into the box provided.

It may be tempting to mark a figure as decorative instead of providing Alt Text. If an author truly feels a figure is decorative (and therefore does not contribute to the document in any way), it is recommended that the figure be removed from the document altogether. Otherwise, Alt Text is required.

## Color

Many readers may experience some form of color vision deficiency. Use this [Color Blindness Simulator](https://www.color-blindness.com/coblis-color-blindness-simulator/) to get a better understanding of the different types of color blindness.

### In Text

Refrain from using color for body text - black text on a white background is always safe. It is recommended that authors use the colors already defined in the template that correspond to the text style.

If the author feels adding color to a specific type of text is unavoidable, it is recommended the author format that type of text as desired, select it, navigate to the corresponding Style, right click and select “Update *Style* to Match Selection”. This will make sure the formatting is applied to that style of text consistently and throughout the entire document.

A color contrast ratio of at least 4.5:1 is required for text smaller than 18 pt. Use the [Colour Contrast Analyser (CCA)](#_Colour_Contrast_Analyser) to determine if text meets the ratio requirement.

### In Tables

Do not use color or shading alone to convey data or information. Authors may use color to improve the esthetics of a table, but if the color is representative of data or information, it should be coupled by text, symbols, or data that also convey that information.

### In Figures

Do not use color or shading alone to convey data or information. It is recommended figures and maps avoid the use of green and red, and that color be replaced by or coupled with patterns or textures when the color needs to convey data or information.

A 3:1 contrast ratio is required for figures if a person must perceive a graphic in order to understand the content (e.g., colored lines in graphs, points on maps). However, text that is embedded in a graphic must meet a contrast ratio of 4.5:1 unless the text is incidental or there is no way of presenting the graphic with sufficient contrast without undermining the meaning. Use the [Colour Contrast Analyser (CCA)](#_Colour_Contrast_Analyser) to determine if the figure meets the ratio requirements.

As one would expect, some figures and maps may be too complex to meet accessibility requirements. However, **authors should do their best to meet recommendations described above, use accessible color ramps/symbols, and follow best practices to make figures as accessible as possible.**

Listed below are some resources that will assist in making maps, applications, and story maps more accessible to visually and manually impaired users:

#### ****Informational Resources****

* [State of Minnesota Map Accessibility Page](https://mn.gov/mnit/about-mnit/accessibility/maps/) – provides much good information on best practices for accessibility in static maps, web maps and applications.
* [Maps and Technical Content guidance](http://waternet.waterboards.ca.gov/dit/websupport/accessibility/docs/cdt_maps_technical_guidance_20191115.docx) – Information from CDT: Digital Accessibility Guidance for Maps and Technical Content (v 1.0)
* [Accessible Web Mapping Apps](https://www.youtube.com/watch?v=miTPT68kjto&list=PLaPDDLTCmy4Ys8vfmC7DbX3FHSsyosvh7&index=94&t=0s) – presentation at 2020 ESRI Developer Summit
* [ESRI ArcGIS Accessibility Showcase](https://arcgis-accessibility-showcase-science.hub.arcgis.com/)
* [ESRI GitHub Accessibility Repository](https://esri-es.github.io/awesome-arcgis/arcgis/accessibility/) – includes links and info on making AGOL/Portal maps accessible
* [Web Accessibility Best Practices](https://jimmieego.github.io/Web-Accessibility-Best-Practices/#/)– ESRI accessibility webinar PPT
* [Improve accessibility of your Story Map by adding alternative text](https://www.esri.com/arcgis-blog/products/story-maps/sharing-collaboration/improve-accessibility-of-your-story-map-journal-by-adding-alternative-text/) – ESRI blog post
* [WAB accessibility](https://doc.arcgis.com/en/web-appbuilder/create-apps/accessibility-support.htm)– ESRI Web App Builder accessibility support documentation

#### ****Accessibility Tools****

* [HEM](https://www.usgs.gov/core-science-systems/ngp/national-hydrography/tools#HEM/)– Hydrography Event Management (HEM) Tool (requires ArcMap10.5.1)
* [WebAIM](https://webaim.org/resources/contrastchecker/) – color contract checker
* [Color Oracle](https://colororacle.org/) – color blindness simulator
* [Color Brewer](http://colorbrewer2.org/#type=sequential&scheme=BuGn&n=3) – color schemes for maps, including colorblind and photocopy safe schemes
* [Color Brewer palettes for R](https://rdrr.io/cran/RColorBrewer/man/ColorBrewer.html)
* [ESRI a11y-map template](https://github.com/Esri/a11y-map) – prototype ArcGIS JSAPI 4.x map application for testing accessibility features (GitHub repository)
* [ESRI WCAG Basic Viewer](https://github.com/EsriCanada/WCAG-BasicViewer) – configurable JSAPI 3.x web map application with WCAG 2.0 AA/AAA capabilities

## Formulas

Formulas should be inserted as images and alt text provided.

It is recommended that authors create a separate document just for formulas, type the formulas out using the Equation tool (see the Insert Ribbon, Symbols Section) or using [Microsoft Word’s Equation Editor](https://support.microsoft.com/en-us/office/equation-editor-6eac7d71-3c74-437b-80d3-c7dea24fdf3f), and then copying and pasting the equation as an image into the report document.

## Hyperlinks

Use a descriptive text for the hyperlink so the reader knows where the link will take them and individuals using screen readers do not have to listen to the entire URL. The only time URLs should be added in text is when the document may be printed. In this case, the appropriate text should be hyperlinked AND the spelled-out URL should be provided parentheses afterward the linked text.

Appropriate text should describe where the link would take the reader (e.g. SWAMP Webpage). Phrases like “here” or “click here” will not be supported.

For example: Information about the Surface Water Ambient Monitoring Program (SWAMP) can be found on the [SWAMP webpage](https://www.waterboards.ca.gov/water_issues/programs/swamp/).

If the document will be printed the above sentence would read: Information about the Surface Water Ambient Monitoring Program (SWAMP) can be found on the [SWAMP webpage](https://www.waterboards.ca.gov/water_issues/programs/swamp/) (https://www.waterboards.ca.gov/water\_issues/programs/swamp/).

Hyperlinks can be inserted by:

1. Selecting text associated with URL
2. Right click | Link | Insert Link… *or* Click on Insert Ribbon | Link (in Links Section) | Insert Link…
3. Insert URL in Address field and Text to Display field will be filled (or insert it)
4. Click OK

## Headers and Footers

Headers and footers MUST be 12-point font or greater.

Use header for listing document name, version, date (as needed)

Use footer for page numbers, using the Page X of XYZ format

Check “Different from first page” box as appropriate

## Appendices

Appendices should be used for information or data that are supplementary to the main report. We can no longer support appendices that are screen shots of documents.

If we need to reference a document or report that was developed externally to the current document, it should be cited or linked in text and then included in the “Literature Cited” or “References” section, as appropriate.

# Style and Formatting That Should Not Be Used

To create document that can readily be converted to an ADA compliant PDF, it is important that you refrain from using the following styles.

## Font Type and Size

Serif fonts (e.g. Times New Roman), and fonts sized 11 points or lower (even in captions, tables, figures, etc.) will no longer be supported.

## Underline or Strikethrough Text

Underline and ~~strikethrough~~ text are not read properly by screen readers when the document is converted to PDF. Screen readers are capable of reading documents properly created using Track Changes (see the Review Ribbon, Tracking Section). If you need assistance with using track changes visit the Microsoft video on [how to track changes and show markup in Microsoft Word](https://www.youtube.com/watch?v=ymBMonYehFA).

## Title

The Title style must be avoided because CommonLook converts it to a Heading 4 and Acrobat converts it to Normal. The title of your document should be Heading 1. If you need larger text, increase the font point size as desired.

## Normal

Do not use the “Normal” style for the body text. Instead use the “Body Text” style.

## Roman Numerals

We can no longer utilize Roman numerals in lists or as a way to organize documents. Screen readers may not understand that a Roman numeral is being used rather than an actual word. For example, “I” would be read as “eye” not as “Roman numeral 1”

## Empty Carriage Returns

On computers, adding a carriage return (also known as a hard return) means pressing the "Enter" key to add a hard line break so your cursor returns to the left margin to start a new paragraph. It is common for authors to use empty carriage returns to add space between paragraphs, instead of adjusting the paragraph spacing.

Using empty carriage returns…

…Like the one above will no longer be permitted.

If you want to increase space between paragraphs, tables, or figures - format the line and paragraph spacing as needed (see the Home Ribbon, Paragraph section).

## Double or Triple Spacing Between Sentences

One space. Like that is sufficient between sentences.

Two spaces. Or three spaces. Like those are unnecessary.

## List Styles for Document Outlines

Using the Word built in “list” styles (List Paragraph) for whole document outline purposes is discouraged due to problems with document accessibility compliance. Many Water Board documents (e.g. Quality Assurance Project Plans (QAPPs), Permits, and Orders) have historically been created as one large list, which creates problems with accessibility remediation of the document.

It is recommended that staff turn off the automatic list creation settings and manually create lists when needed (i.e., click the bulleted or numerical list options on the Home Ribbon, Paragraph Section). The settings are located at: File | Options | Proofing | AutoCorrect Options button | AutoFormat As You Type Tab. Uncheck the Automatic bulleted lists and Automatic numbered lists under the “Apply as your type” section.

Example formatting of acceptable list-like document outlines are provided at the end of this document.

# Other Resources

## Screen Readers

Screen readers read the text aloud and include programs like NVDA, JAWS, Acrobat, Word. [NVDA](https://www.nvaccess.org/download/) is free to download and is the Water Boards standard.

## Colour Contrast Analyser

The [Colour Contrast Analyser (CCA)](https://developer.paciellogroup.com/resources/contrastanalyser/) helps you determine the legibility of text and the contrast of visual elements, such as graphical controls and visual indicators. The CCA is free to download.

## Adding Captions

To add a caption to a table, figure, or equation: select the object, right click, select “Insert Caption”, and select the settings appropriate for the specific object. This will ensure the caption is formatted correctly so the screen reader identifies the text as a caption associated with the specific object; it will also ensure numbering is automated and updated when new objects are added.

## Web Content Accessibility Guidelines (WCAG) 2.1

World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) is a globally recognized voluntary consensus standard for web content and ICT, and the standard Water Board documents must meet.

A complete list of WCAG 2.1 accessibility standards and guidelines can be found on their [website](https://www.w3.org/TR/WCAG21/).

# Acceptable List-Like Document Outlines

# Example 1

# 1. Section Title

## 1.1. Subsection title

### 1.1.1. Something About the Subsection

### 1.1.2. Something Else About the Subsection

# 2. Section Title

# Example 2

# Element 1. Title

## 1.1. Subsection Title

### 1.1.1. Something About the Subsection

### 1.1.2. Something Else About the Subsection

# Element 2. Title

## 2.1. Subsection Title

## 2.2. Subsection Title