

Technical Guide Sample

Because I am a full-time Technical Editor for a government contractor, almost all examples of my work are proprietary and/or confidential. The following, however, is a guide to creating documents that are compliant with Section 508, a federal regulation requiring government documentation to be accessible to individuals with disabilities. I prepared this document for the benefit of my team, and I received permission to submit it as evidence of my skills. Please note that, due to the recommended page limit of the portfolio, this is a selection from a larger document.

Section 508 Conformance in Microsoft Word Documents

Guide for Technical Editors

| | |
|--|---|
| Introduction..... | 2 |
| File Type and Name..... | 2 |
| • Give the file a name that describes its contents..... | 2 |
| • Save the file in .docx format..... | 2 |
| Document Organization | 2 |
| • Use the Styles feature to indicate headings..... | 2 |
| Images and Text Boxes..... | 3 |
| • Set images and text boxes “in line with text.” | 3 |
| • For meaningful images, include descriptive text..... | 3 |
| • For decorative images, set “ ” as the Alternative Text. | 4 |
| Tables..... | 4 |
| • Use Word’s Table tool, not work-arounds, to create tables..... | 4 |
| • Set tables in line with text..... | 4 |
| • Ensure the reading order is correct. | 4 |
| • Use “repeat header rows” for tables with headers. | 5 |
| Using Color and Other Sensory Characteristics | 6 |
| • Don’t use sense-dependent characteristics alone to indicate meaning. | 6 |
| • Use high-contrast color combinations. | 6 |
| Other Things to Consider..... | 7 |
| • Identify distinct languages with “set proofing language.” | 7 |
| • Duplicate any critical information in headers, footers, or watermarks..... | 7 |
| • Use descriptive link text..... | 7 |

Introduction

Section 508 of the Federal Code of Regulations requires federal documents to be accessible to people with disabilities. This is a guide to creating Microsoft Word documents that meet the minimum accessibility requirements of Section 508.

File Type and Name

- Give the file a name that describes its contents.

This ensures that visually impaired users using a screen reader can easily locate the content they need.

- Save the file in .docx format.

Some accessibility functions are not available in file types native to earlier versions of Word.

Document Organization

- Use the Styles feature to indicate headings.

We know that using section headings as guideposts is important to help readers find and remember content in a document. Assistive technology can only recognize those headings if they are coded as such in Word; boldface, font size, or other formatting is not enough to indicate to these programs that a line of text is a heading.

You can verify that your document is accessible by opening the Navigation Pane. The checkbox to toggle the Navigation Pane on and off is under the ribbon's "View" tab, in the "Show" group (the second group from the left).

If the Navigation Pane shows a multi-level list displaying all of your headings (as in the below image), you have coded the document correctly.

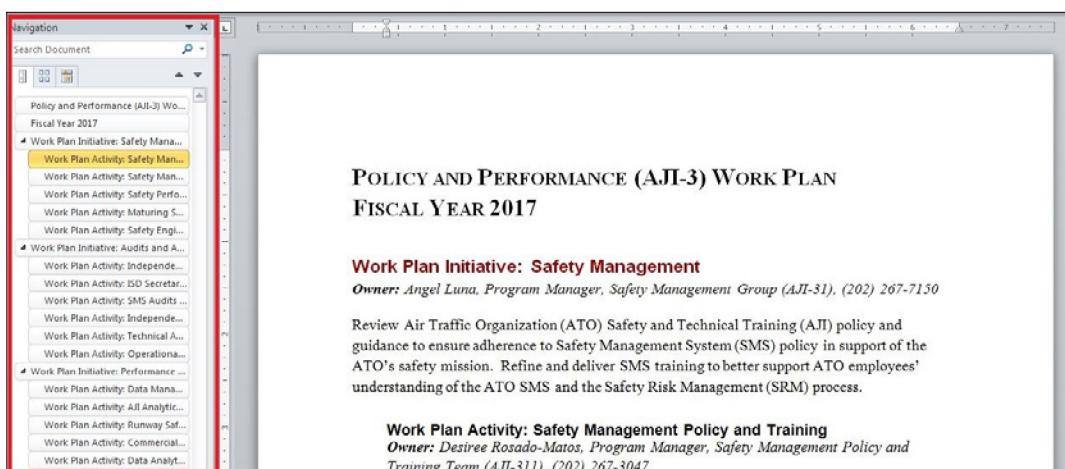


Figure 1: The Navigation Pane, Showing Headers Correctly Coded with the Styles Feature

Images and Text Boxes

- Set images and text boxes “in line with text.”

In order to translate written information to other modes successfully and correctly, assistive technologies must detect the order in which they should read the content. To make the correct sequence clear to screen readers and other software, images must be set to the “in line with text” position.

You can set an image’s position under the Picture Tools tab on the ribbon, which opens when you double-click the image. (You can also open it by clicking the image once and then clicking the Picture Tools tab that appears on the ribbon.) The Position icon is in the Arrange group; clicking it will open a drop-down menu displaying the position options. Select “In Line with Text.”

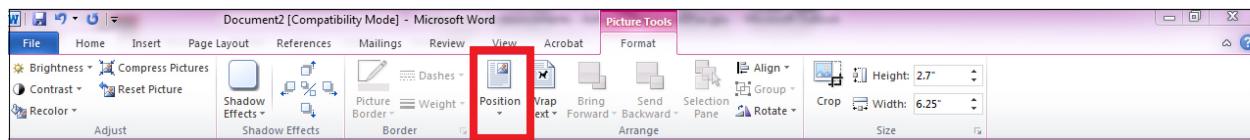


Figure 2: The Position Menu, in the Arrange Group

A few styles of text wrapping are also available as options. None of these are accessible to individuals with disabilities.

- For meaningful images, include descriptive text.

If an image contributes relevant information to the document, you must include a text description of it. If the image is of text, this description must include the image text exactly. You can do this in the figure caption, in the surrounding text, or in the image’s Alternative Text (or “Alt Text”).

To set Alt Text for an image:

1. Right click the image and select “Format Picture”
2. Select the far right tab, Alt Text
3. Describe the image in the Alternative Text field, then click “Ok.”

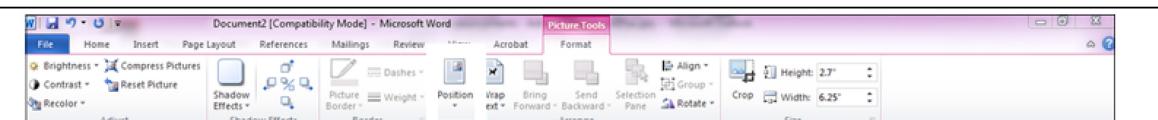


Figure 2: The Position Menu, in the Arrange Group

A few styles of text wrapping are also available as options. None of these are accessible to individuals with disabilities.

- Include descriptive text for meaningful images.

If an image contributes relevant information to the document, you must include a text description of it.

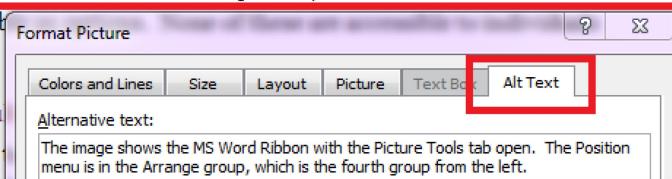


Figure 3: The Format Picture Menu Displaying the Alt Text Tab

- **For decorative images, set “ ” as the Alternative Text.**

This makes decorative images distinct from images that the author neglected to make accessible; it lets visually impaired users know that they can ignore an image without missing content. Follow the steps above to set the image’s Alt Text, but instead of describing the image, type “ ” in the Alternative Text field. (*Include* the quotation marks.)

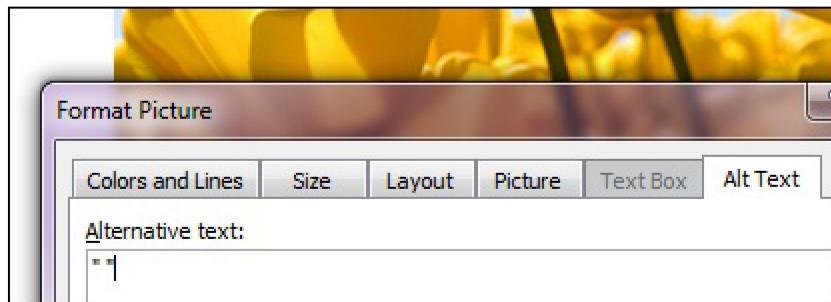


Figure 4: The Alternative Text Field for Purely Decorative Images

Tables

- **Use Word’s Table tool, not work-arounds, to create tables.**

Don’t use tabs or spaces to create the appearance of a table, and don’t insert an image of a table. Use the Table tool under the Insert tab to insert a Word table instead.

- **Set tables in line with text.**

Like images, tables must be in line with the text in order to be readable by assistive technology. To set a table in line, right click the table and select “Table Properties.” Under “Text Wrapping,” select “None.”



Figure 5: The Option to Set a Table In Line with Text

- **Ensure the reading order is correct.**

Assistive technology will reads a table from left to right and top to bottom, reading all the contents of each cell before moving on to the next. The cells in a table must be laid out in this order for assistive technology to read the table correctly. Below are examples of accessible and inaccessible tables.

Accessible:

| | |
|------------|------------------------|
| 10:00 a.m. | Welcome |
| 10:30 a.m. | Speaker: Mary Williams |
| 11:30 a.m. | Speaker: Dave Jones |

Not Accessible:

| | |
|------------|------------------------|
| 10:00 a.m. | Welcome |
| 10:30 a.m. | Speaker: Mary Williams |
| 11:30 a.m. | Speaker: Dave Jones |

• Use “repeat header rows” for tables with headers.

While shading or bolding are enough to indicate header rows to sighted readers, assistive technologies can't pick up on these visual cues. To ensure that a table is accessible, use the “Repeat Header Rows” option. Highlight the header row of your table; the Table Tools tab will be automatically selected on the Ribbon. The tab contains two sub-tabs, Design and Layout.

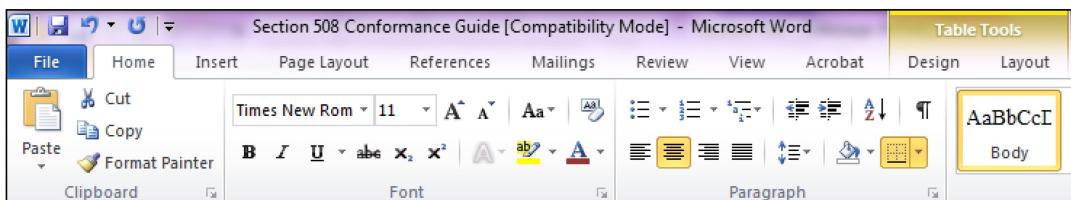


Figure 6: Select "Layout" from the Table Tools Tab

Click the Layout tab. Under the Data group, select “Repeat Header Rows.”

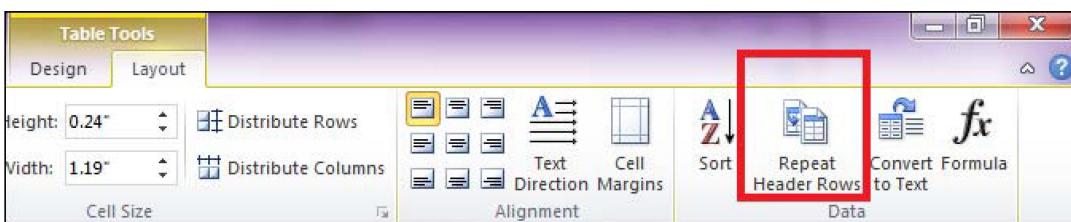


Figure 7: Click "Repeat Header Rows"

You can check your table to ensure it is formatted correctly by pressing Shift + F1, the shortcut for “Show Formatting.” If the Table section contains “Row: Repeat as header row,” the table is formatted correctly.

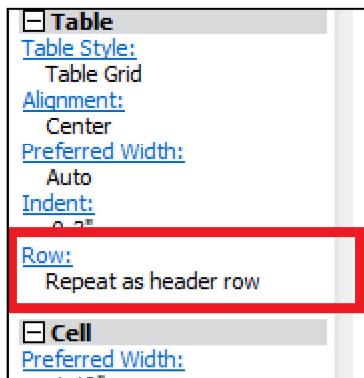


Figure 8: Show Formatting Displays
"Repeat as Header Row"

Using Color and Other Sensory Characteristics

• Don't use *only* sense-dependent characteristics to indicate meaning.

As an example, consider a report in which the results are categorized into groups that correspond with colors. The table on the left below would not be accessible, because in order to derive meaning from it, the user *must* be able to see color. To make it accessible, duplicate the color information in written form, as in the table on the right below.

| Item | Rating |
|--------|--------|
| Item A | |
| Item B | |

(Not Accessible)

| Item | Rating |
|--------|--------|
| Item A | Green |
| Item B | Blue |

(Accessible)

The method on the right allows you to use color as a visual aid for those who can perceive it, but it still makes the information available to those who can't.

• Use high-contrast color combinations.

In order to be discernible to assistive technology, text must be printed in a color that contrasts significantly with the background on which it displays. The minimums are:

- A contrast ratio of at least 3:1 for large text (at least 14-point if the text is bolded, and at least 18 point in regular-weight font)
- A contrast ratio of at least 4.5:1 for body text (any text smaller than the above parameters)

You can check this with the free tool available at www.contrastchecker.com.