

Microsoft Word 365

Basic Authoring and Testing Guide

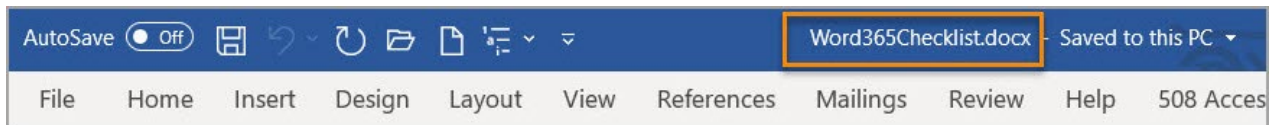
Document Formatting

1. Are the filename and document title descriptive, is the file in the *.docx format, and is the file NOT protected?

How to test 1A, 1B, 1C, 1D

Instruction 1A & 1B: Find the filename in File Explorer OR the **Title** bar in MS Word. For example, *MSWord365Checklist* is a descriptive filename, while *Document1* is not. The file must be in the ***.docx** format for accessibility testing to be possible.

Figure 1: Descriptive filename *Word365Checklist.docx* displayed in the **Title** bar

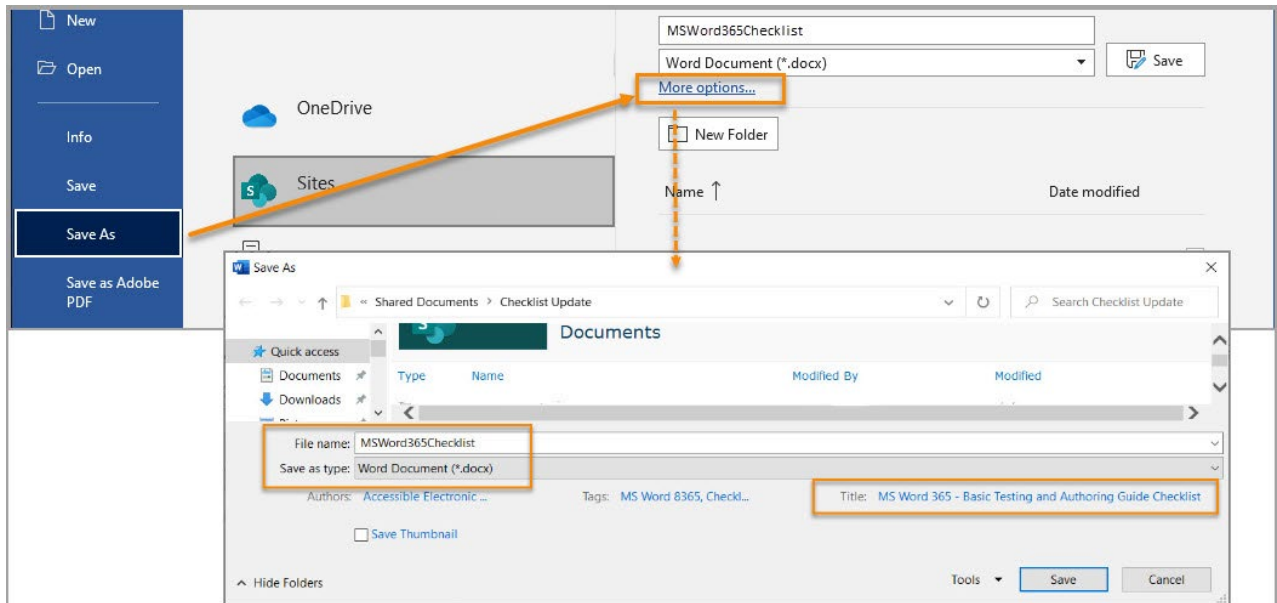


Test 1A: Is the filename descriptive and does it identify the document or its purpose? If not, the document fails this test.

Test 1B: Is the file in **Word Document (*.docx)** format? If not, the document fails this test.

Instruction 1C: Activate **File** tab>**Save As**>**More Options** to open the **Save As** options window and verify that the **Title** field displays the document's title.

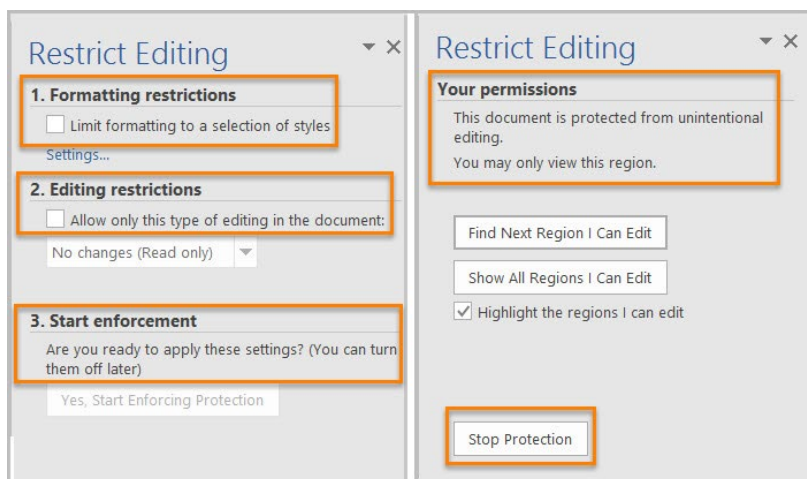
Figure 2: **Save As** options window displaying a descriptive filename, ***.docx** file type, and the document title in the **Title** field.



Test 1C: Does the **Title** property field display a document title? If not, the document fails this test.

Instruction 1D: Document protections limit the ability to test for accessibility and can make portions or the entire document inaccessible. Activate the **Review** tab>**Protect Group**>**Restrict Editing** option and verify the **Stop Protection** button appears at the bottom of the **Restrict Editing** pane. If the **Restrict Editing** pane shows options 1, 2, and 3, then restricted editing is turned off.

Figure 3: Restrict Editing pane showing unrestricted and restricted enabled options



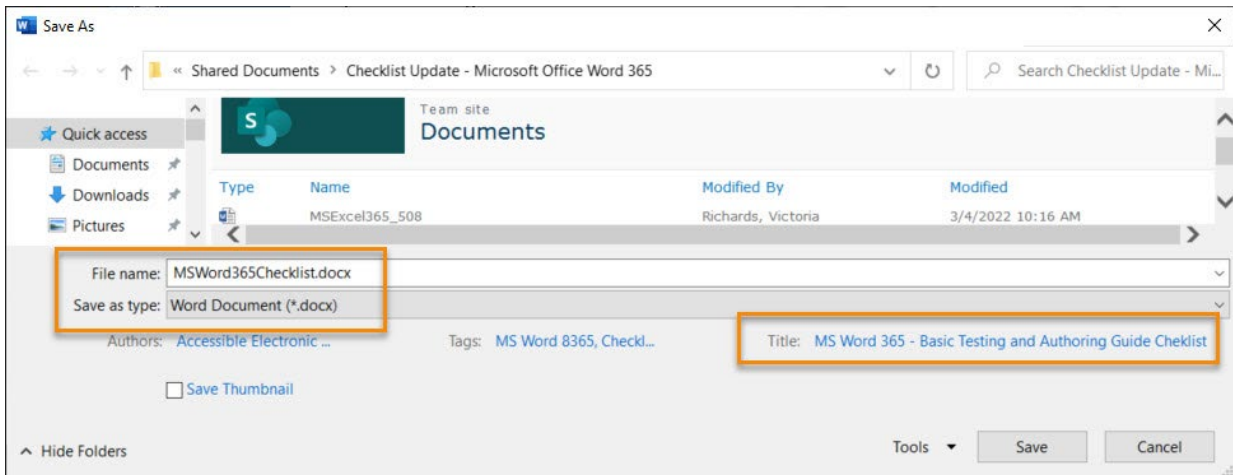
Test 1D: Does the **Restrict Editing** pane show options 1, 2, and 3? If not, the document fails this test.

How to author for accessibility

A descriptive filename and document title identify documents and their purpose, helping everyone locate, open, and switch between documents. The document must be in a ***.docx** format because these authoring and testing instructions will only work if the file is in the ***.docx** file format.

- Activate **File** tab>**Save As**.
Note: The **Save As** option is only available if **AutoSave** is set to **Off**.
- Select file location.
- Verify **Save As** type is set to **Word Document (*.docx)**.
- Activate **More Options**.
- Add the document title in the **Title** field.

Figure 4: More Options>Save As window, showing the file name and type, and displaying a title in the **Title:** property field



Document restrictions limit or prevent assistive technology users from reading or editing the document. Turn editing restrictions off during testing and ensure assistive technology users have access to the password for documents that are protected or require protection.

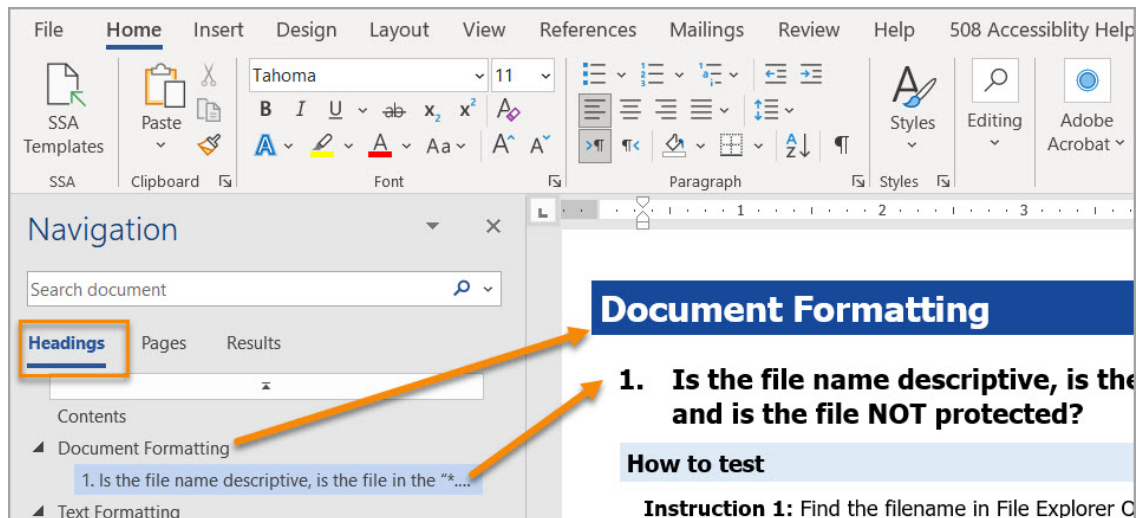
Text Formatting

2. Do document headings use the MS Word heading styles?

How to test 2A, 2B

Instruction 2A, 2B: Open the **Navigation** pane (**Ctrl+F**) and activate the **Headings** tab.

Figure 5: Headings in **Navigation** pane mirror **Headings** in document



Test 2A: Do the headings in the **Navigation** pane mirror the headings in the document? If not, the document fails this test.

Test 2B: Do the headings in the **Navigation** pane match the visual outline (hierarchy) of the document? If not, the document fails this test.

How to author for accessibility

Headings help organize content to facilitate finding and navigating information. Assistive technology users cannot infer meaning from manually formatted text appearing to be a heading (increased font size or application of bold, italics, and underline). Built-in **Heading Styles** have structure that assistive technology users can access to aid document navigation based on the assigned heading levels.

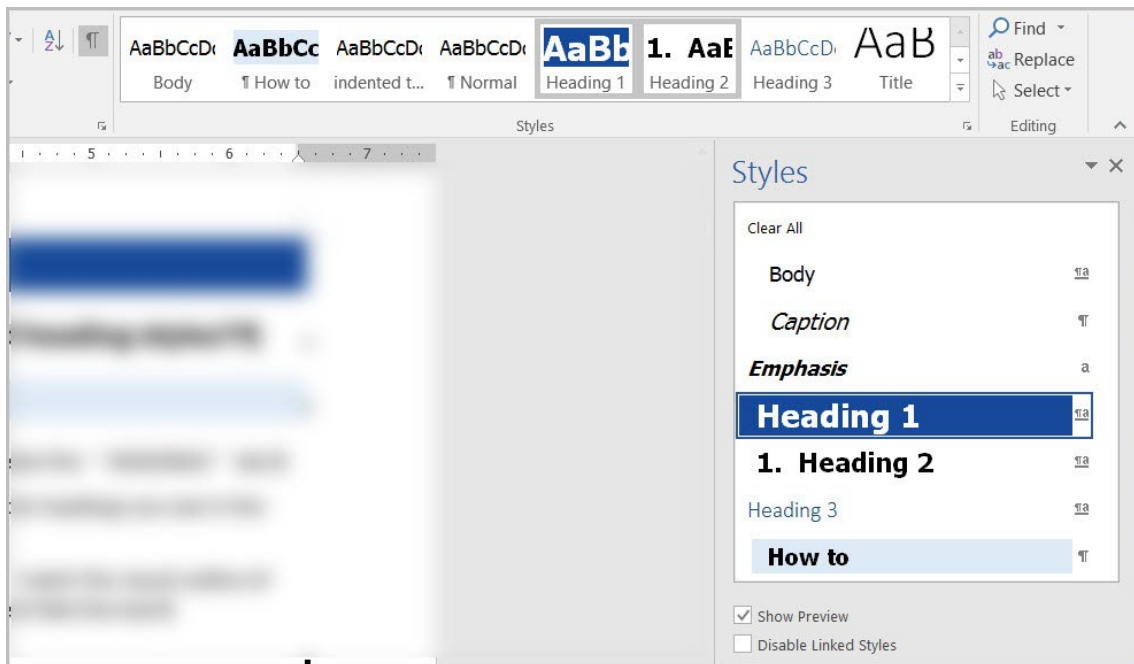
Activate **Home** tab>**Styles** (or **Ctrl+Alt+Shift+S** to open the **Styles** pane) and apply the appropriate level heading style to all headings in the document.

Either:

- Activate the heading style and type the heading, OR
- Type a heading, and with part or all text selected, choose the appropriate level heading style.

If the document contains multiple same level headings (such as level 1 headings assigned to chapter, article, section, topic, etc.), then each heading of the same level must use a different style name based on the existing built-in style of the same level. Modify/create heading styles to generate the desired appearance in the document.

Figure 6: Styles group and **Styles** pane with built-in **Heading 1** style selected



3. Are lists formatted correctly?

How to test 3

Instruction 3: Activate a list item. Open the **Reveal Formatting (Shift+F1)** pane.

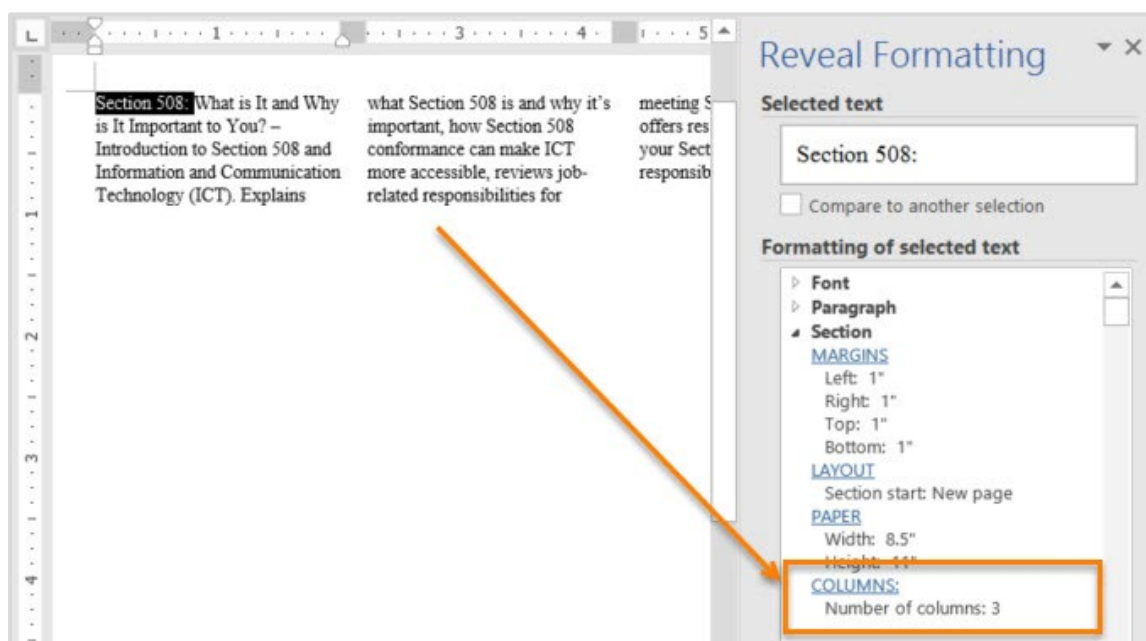
4. Are columns of content formatted correctly?

How to test 4

Note: This test is not needed if content does not appear in columns.

Instruction 4: Select content that appears formatted in columns, like a newspaper or magazine article. Activate **Reveal Formatting (Shift+F1)** pane and expand the **Section** option.

Figure 9: Reveal Formatting pane **Section>COLUMNS** option displaying **Number of columns** for activated text



Test 4: Are **COLUMNS:** listed in the **Reveal Formatting** pane under **Section**? If not, the document fails this test.

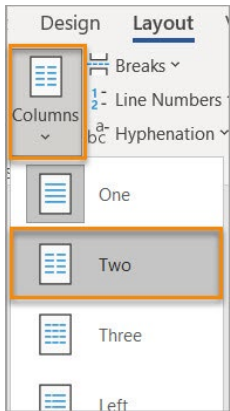
How to author for accessibility

Assistive technology users cannot interpret information in the intended reading order when tabs or spaces are used to separate content into columns.

To create columns in a document:

- Select the content you want to format.
- Activate **Layout** tab>**Page Setup** group>**Columns**.
- Select the number of columns.
- Activate **More Columns** to set or change/update columns options.

Figure 10: Columns option menu with **Two** columns option selected



5. Are layout tables formatted correctly?

How to test 5A, 5B

Layout tables allow authors to visually arrange content in a document that assistive technology users can follow and read in a logical order (left to right, then top to bottom).

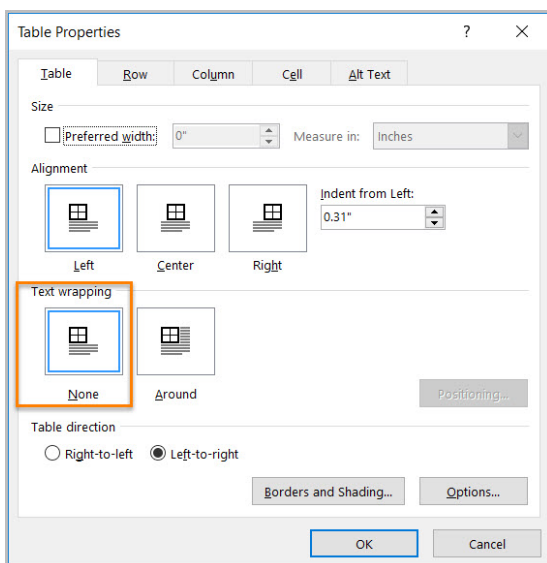
Instruction 5A: Select the first cell of the layout table. Use the **Tab** key to navigate through the table.

Test 5A: Does the tab order follow the logical (left to right, top to bottom) layout? If not, the document fails this test.

Table Properties>Text wrapping should be set to **None** to anchor the table, so assistive technology users can access the surrounding text.

Instruction 5B: Right click (Shift+F10) inside a layout table and activate **Table Properties>Table** tab>**Text wrapping**.

Figure 11: Table Properties window with **Text wrapping** set to **None**



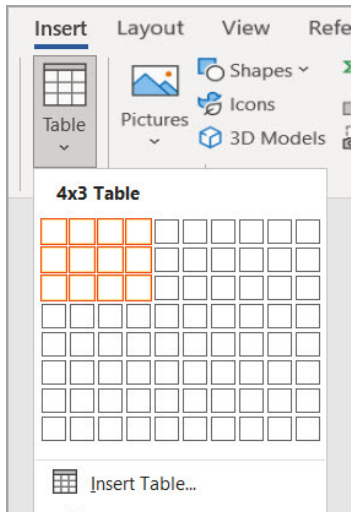
Test 5B: Is **None** selected? If not, the document fails this test.

How to author for accessibility

To create a layout table using the table grid option:

- Activate **Insert** tab>**Table** to open the **Insert Table** options panel.
- Select the number of cells for columns and rows in the grid to draw the table.
- **Right click (Shift+F10)** inside the table and activate **Table Properties>Table** tab.
- Verify **Text wrapping** is set to **None**.

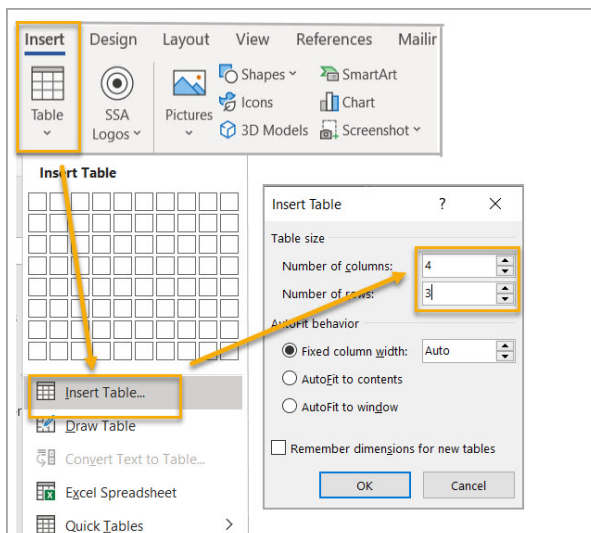
Figure 12: Insert Table options with a **4x3 Table** grid option activated



To create a layout table using the Insert Table dialog box option

- Activate **Insert** tab>**Table>Insert Table>Insert Table...** (or **Alt+N, T, I**).
- In the **Insert Table** dialog box, specify the number of columns (**Alt+C**), and the number of rows (**Alt+R**).
- **Right click (Shift+F10)** inside the table and activate **Table Properties>Table** tab.
- Verify **Text wrapping** is set to **None**.

Figure 13: Insert Table options using the **Insert Table...>Insert Table** dialog box for a table with 4 columns and 3 rows

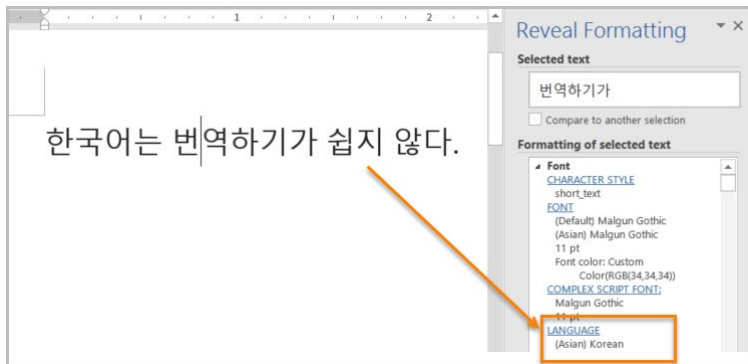


6. Is text formatted for the intended language?

How to test 6

Instruction 6: If the document contains words or phrases in multiple languages, or a language other than the defined default language, select that text. Open the **Reveal Formatting** pane (**Shift+F1**) and verify the listing under **Language** matches that of the selected text.

Figure 14: Reveal Formatting pane displaying **(Asian) Korean** under **Font>Language** option for the selected text



Test 6: Is the text formatted using the identified language? If not, the document fails this test.

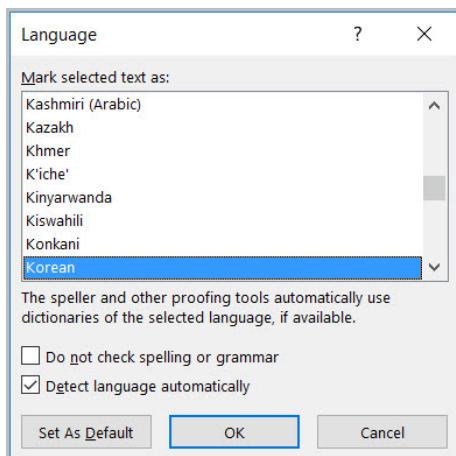
How to author for accessibility

A document may contain sections written in different languages. All non-default language text must be formatted to reflect its corresponding language so assistive technology can detect the assigned language and reproduce the text with the correct pronunciation.

To set a different language:

- Select text written in a different language.
- Activate **Review** tab>**Language** group>**Language**>**Set Proofing Language**.
- Select the appropriate language from the list.

Figure 15: Language options window with **Korean** language option selected



7. Are link names descriptive?

How to test 7

Test 7: Do links have meaningful names that describe their destination, function, and/or purpose OR that are determinable from context? If not, the document fails this test.

Uniquely Named Link:

www.section508.gov

Link Determinable from context:

[Get My Section 508 Questions Answered](#)

Ambiguous links with no context:

Get more information [here](#).

<https://site.44d76eb66f3943c395cd2d88207a7b57&aqs.docx>

How to author for accessibility

Assistive technology users rely on meaningful link names to determine the link destination, function, or purpose. For example, ambiguous *click here* links may hinder assistive technology users' access since the link names are all the same, while the destinations may be different.

Naming/creating links:

- Type the hyperlink (URL) text and press the **Space** bar or **Enter**
- Verify the hyperlink goes to the intended destination

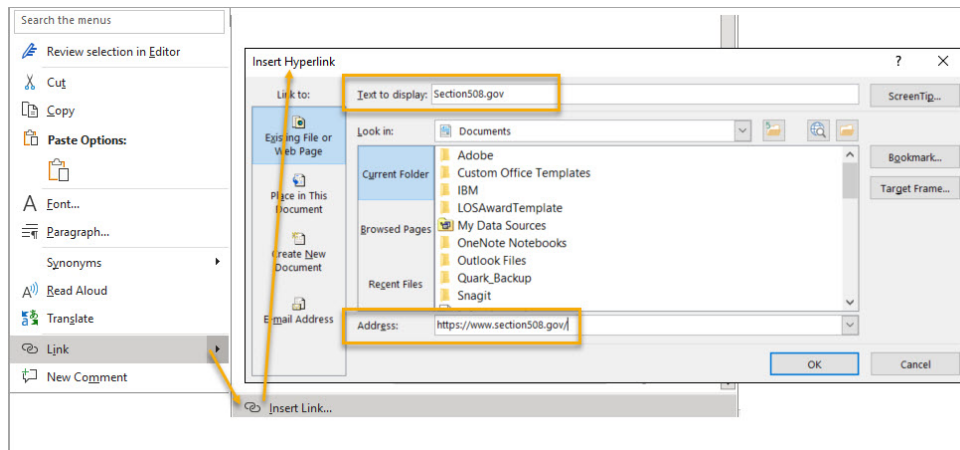
To open the Insert Hyperlink configuration window:

- Press **Ctrl+K**, or **right-click (Shift+F10)** to open the context menus and select **Link>Insert Link**
- In the **Insert Hyperlink** options window specify/verify the accuracy for the **Text to display**, the **Address** for the link and its destination, then select **OK**

Notes:

- Link destinations can be web pages, existing files (access restrictions apply), emails, and specified locations in a document
- Deleting the last character in the link name will remove the link

Figure 16: Insert Hyperlink configuration window



Object Formatting

8. Is vital information in headers, footers, and watermarks duplicated in the document?

How to test 8

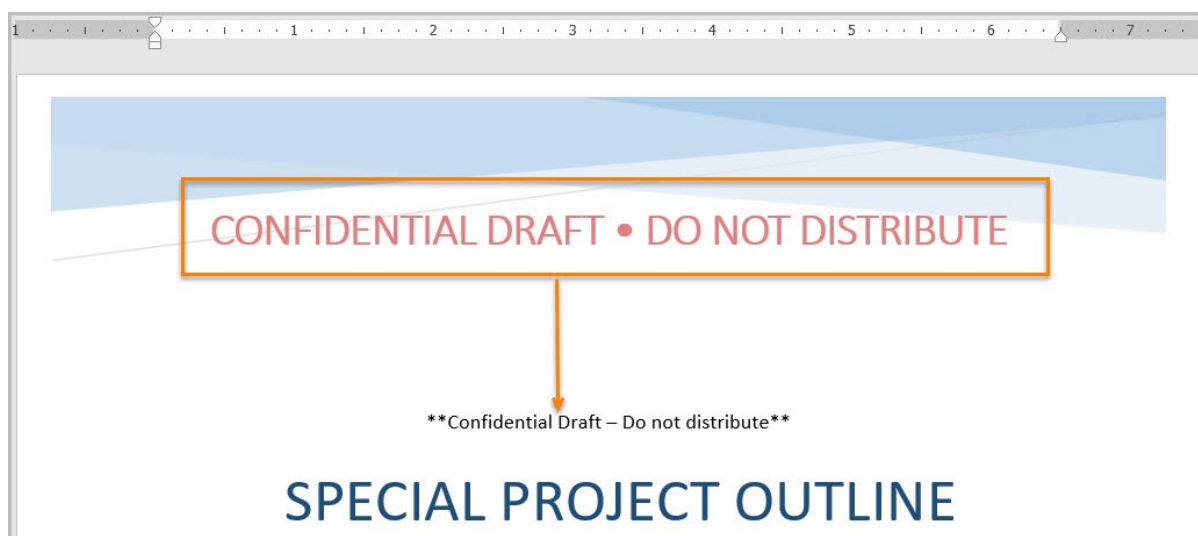
Instruction 8: Search for vital information in headers, footers, and watermarks (e.g., Respond by X Date, CONFIDENTIAL, or Do Not Distribute).

Test 8: Is the vital information duplicated near the beginning of the document, or corresponding section? If not, the document fails this test.

How to author for accessibility

Assistive technology does not automatically access information in headers, footers, and watermarks. It is necessary to duplicate any vital information at or near the start of the related section in the document.

Figure 17: Example of vital information (**Confidential Draft - Do not distribute**) in a header repeated in the body of the document

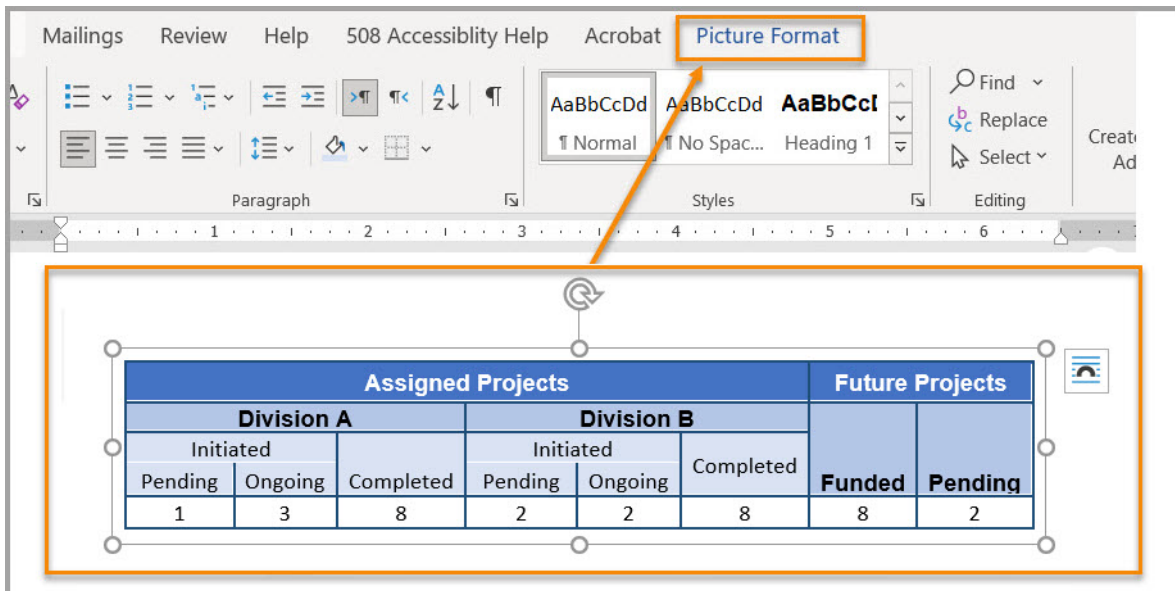


9. Are data tables created using built-in features?

How to test 9A, 9B, 9C, 9D

Instruction 9A: Select a table and verify that the Ribbon displays the **Table Design/Layout** tabs instead of the **Picture Format** tab. If the **Picture Format** tab shows in the **Ribbon**, then it's a non-editable image of a table.

Figure 18: **Picture Format** tab instead of **Table Design** tab displaying in menu for what visually appears to be a table



Test 9A: Are all data tables in the document editable (data table is not an image)? If not, the document fails this test.

Instruction 9B: Launch the Check Accessibility Inspector **Review** tab>**Check Accessibility** to verify tables are free of merged and split cells

Figure 19: Complex table with merged and split cells

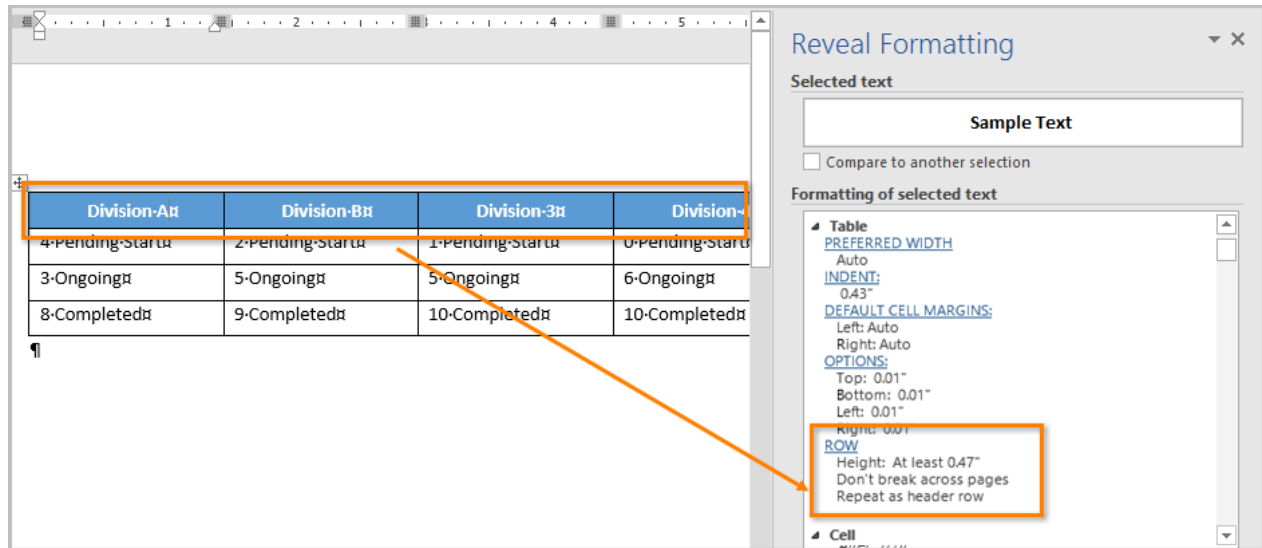
The screenshot shows the same table as in Figure 18, but with annotations. A box labeled 'Merged Cells' points to the 'Assigned Projects' and 'Future Projects' headers. A box labeled 'Split cells' points to the 'Initiated' and 'Completed' cells in the 'Division A' and 'Division B' rows.

Assigned Projects						Future Projects	
Division A			Division B			Funded	Pending
Initiated			Initiated				
Pending Ongoing	Completed			Pending Ongoing	Completed		
1	3	8	2	2	8	8	2

Test 9B: Are data tables free of merged or split cells? If not, the document fails this test.

Instruction 9C: Select any cell in a header row. Open the **Reveal Formatting** pane (**Shift+F1**) and verify that **Repeat as header row** is listed under **Table>ROW**. If the header row option is not set, **Repeat as header row** will not show up in the **Reveal Formatting** pane under **Table>ROW**.

Figure 20: Reveal Formatting pane>Table>ROW showing **Repeat as header row**

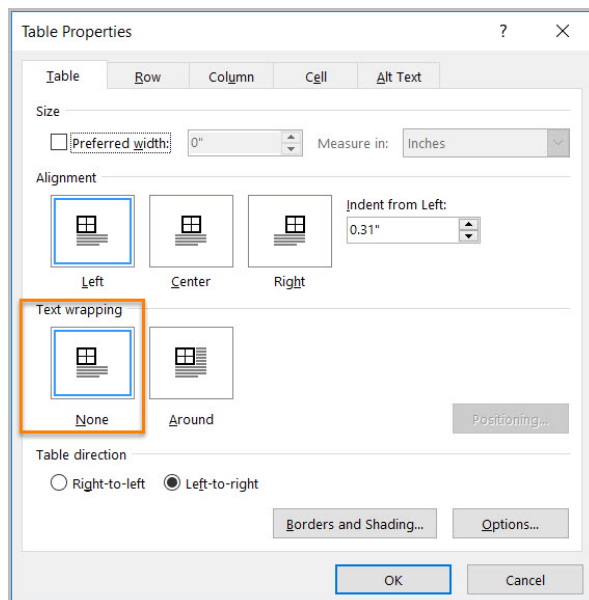


Test 9C: Is **Repeat as header row** in the data table identified? If not, the document fails this test.

Table Properties>Text wrapping should be set to **None** to anchor the table, so assistive technology users can access the surrounding text.

Instruction 9D: Right click or **Shift+F10**, inside the data table and activate **Table Properties>Table tab>Text wrapping**.

Figure 21: Table Properties window with Text wrapping set to None



Test 9D: Is **Text wrapping** in the **Table Properties>Table** tab set to **None**? If not, the document fails this test.

How to author for accessibility

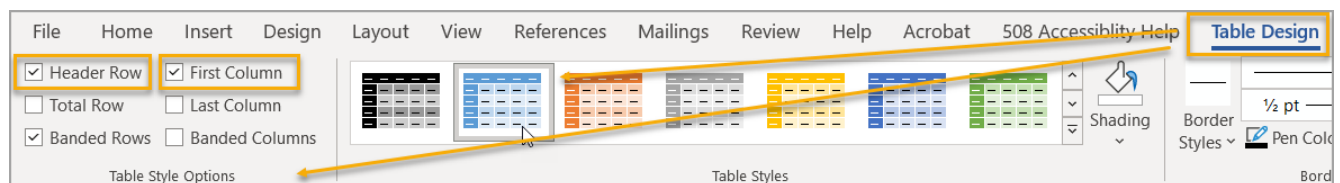
Assistive technology users need to be able to identify column and row headers in data tables to understand the association between table cells and their respective headers. Data tables with

multiple header columns and rows and/or that contain merged/split cells (complex data tables) cannot be made accessible in MS Word. Documents with complex data tables must be converted to an accessible format (i.e., a PDF document remediated for accessibility).

To create a simple accessible data table:

- Activate **Insert tab>Table>Insert Table>Insert Table...** (or **Alt+N, T, I**).
- In the **Insert Table** dialog box, specify the number of columns (**Alt+C**), and the number of rows (**Alt+R**).
- With the table selected, go to the **Table Design** menu>**Table Styles** and choose a table option that uses column header, or column and row header styles, or
- Manually style the table to include header row (column header) or first column (row header) formatting from the **Table Style Options** group.
- **Right click (Shift+F10)** inside the table and activate **Table Properties>Table** tab.
- Verify **Text wrapping** is set to **None**.
- Do not merge or split cells.
- Select the first row, **right click (Shift+F10)** and activate **Table Properties>Row** tab>**Repeat as header row** button.

Figure 22: Table Design menu for built-in **Table Styles** with **Header Row** and **First Column** options selected



NOTE: If you need to create complex data tables (data tables with multiple header rows or columns, and/or contain merged or split cells), then you must convert the document to a more accessible format (i.e., a PDF remediated for accessibility). Complex data tables cannot be made accessible in MS Word.

10. Do images and other objects have alternative text?

How to test

Images, Objects, Shapes, Charts, etc. allow authors to provide important, meaningful information in a visual format. Assistive technology users cannot infer meaning from the activated illustration alone. To provide assistive technology users comparable access to the purpose or meaning of graphic content a contextual description in the form of a caption, nearby text, or **Alt Text** is required.

Instruction 10A: Select an illustration (picture, shape, icon, SmartArt, graph, etc.) and verify there is a contextual description in at least one of these options:

- Alt Text description. **Right click (Shift+F10)>View Alt Text...** to activate the **Alt Text** pane
- Figure Caption (image can be marked as decorative), or
- Related in nearby text (image can be marked as decorative)

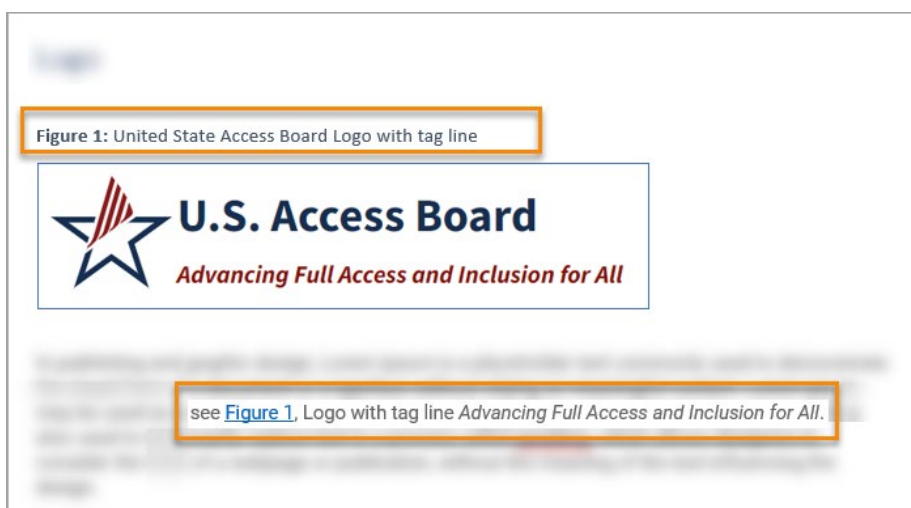
Figure 23: Example of a contextual description in the **Alt Text** pane



Figure 24: Figure caption showing below a selected image



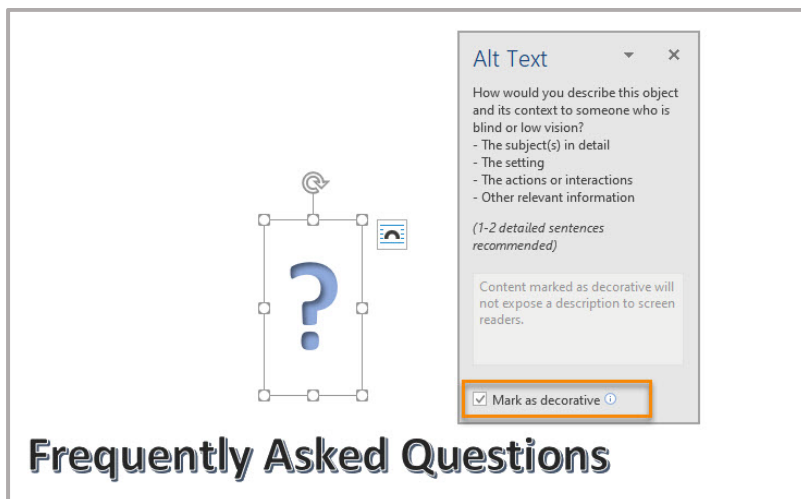
Figure 25: Image description in surrounding text with link to Figure caption



Test 10A: Does the illustrative content have either descriptive alternative text, a caption, and/or is it described in the surrounding text? If not, the document fails this test.

Instruction 10B: Select an image or object that is just for decoration, activate the **Alt Text** pane **right click (Shift+F10)>View Alt Text....** Verify the description field is grayed out and the **Mark as decorative** option is checked.

Figure 26: Decorative content – **Mark as decorative** option checked in **Alt Text** pane



Test 10B: Is the **Mark as decorative** option in the **Alt Text** pane checked? If not, the document fails this test.

How to author for accessibility

Assistive technology users cannot infer meaning from images and other objects such as pictures, images of text, images of tables, shapes, icons with hyperlinks, etc. A brief description in the form of alternative text (Alt Text), a caption, or surrounding text relating the purpose or meaning of the illustration provides assistive technology users comparable access to the content.

Alternative Text Option:

- Select an illustration
- **Right click (Shift+F10)>Edit Alt Text...** to open the **Alt Text** pane
- Enter a brief, accurate description related to the purpose/context of the selected illustration. information that acc the purpose (in as few words as possible while remaining clear) for a meaningful image or object

Notes:

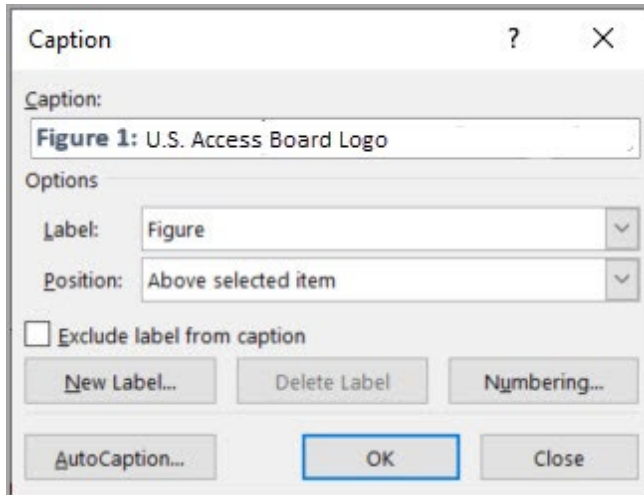
- To add alt text to SmartArt, select the border instead of the individual shapes or pieces.
- In Microsoft Office 365, alternative text descriptions can be generated automatically. Users must verify that the generated description is accurately relating the illustration and its context.
- To disable automatic alt text, go to **File>Options>Ease of Access>Automatic Alt Text** and uncheck the **Automatically generate alt text for me** option.

Caption Option:

- Select the illustration.

- **Right click (Shift+F10)>Insert Caption...** to open the **Caption** options window.
- Type the information in the **Caption:** field after the label.
- Set the options for label, position, numbering, etc.
- Activate **OK**.

Figure 27: Caption options window

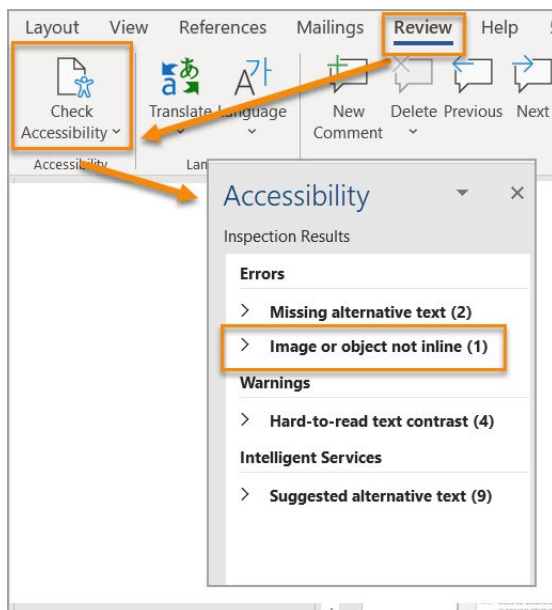


11. Are images, objects, and text boxes nested in line with the text?

How to test 11

Instruction 11: Activate **Review>Accessibility>Check Accessibility**. Check the Inspection results for **Image or object not inline** errors.

Figure 28: Accessibility pane showing **Image or object not inline** error.



Test 11: Are there any **Image or object not inline** errors? If so, the document fails this test.

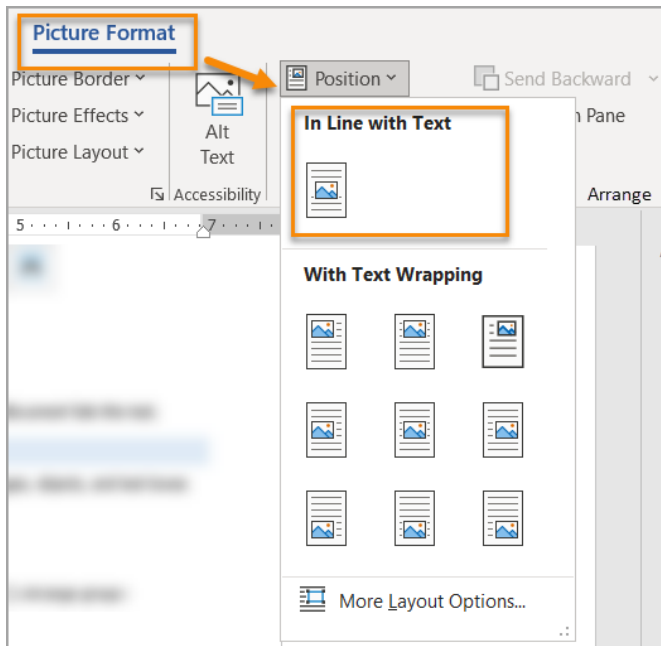
How to author for accessibility

Assistive technology users cannot access or edit information in images, objects, and text boxes unless they are nested in line with text.

To place images, objects, and text boxes in line with text:

- Select the image, object, or text box.
- Activate the **Format menu (Picture Format/Shape Format, etc.)>Arrange group>Position>In Line with Text**

Figure 29: Format tab, Position menu option In Line with Text selected



Color Formatting

12. Is meaningful information conveyed only with color or other visual characteristics also described with text?

How to test

Using only color or other visual characteristics (size, shape, location, etc.) to convey meaning will not provide comparable access to people who are blind, have low vision, or are colorblind.

Instruction 12: Find where color and/or other visual characteristics, such as top green square, large yellow rectangle, bottom center, etc., are used to convey meaning.




Test 12: Is there text that conveys the meaning of the color or other visual characteristics? If not, the document fails this test.




How to author for accessibility

The following layout tables describe the progress for three projects using only color to represent the current project status. Adding text in addition to the color provides comparable information to assistive technology users and people who are colorblind.

Use text descriptions or alternative text to emphasize the meaning of a color or other visual characteristics, such as size, shape, and location.

Table 1: Example of project status tables using only color, and color with text description

Project	Status
Project A	
Project B	
Project C	

Project	Status
Project A	 Green - On Time
Project B	 Yellow - At Risk
Project C	 Red - Late

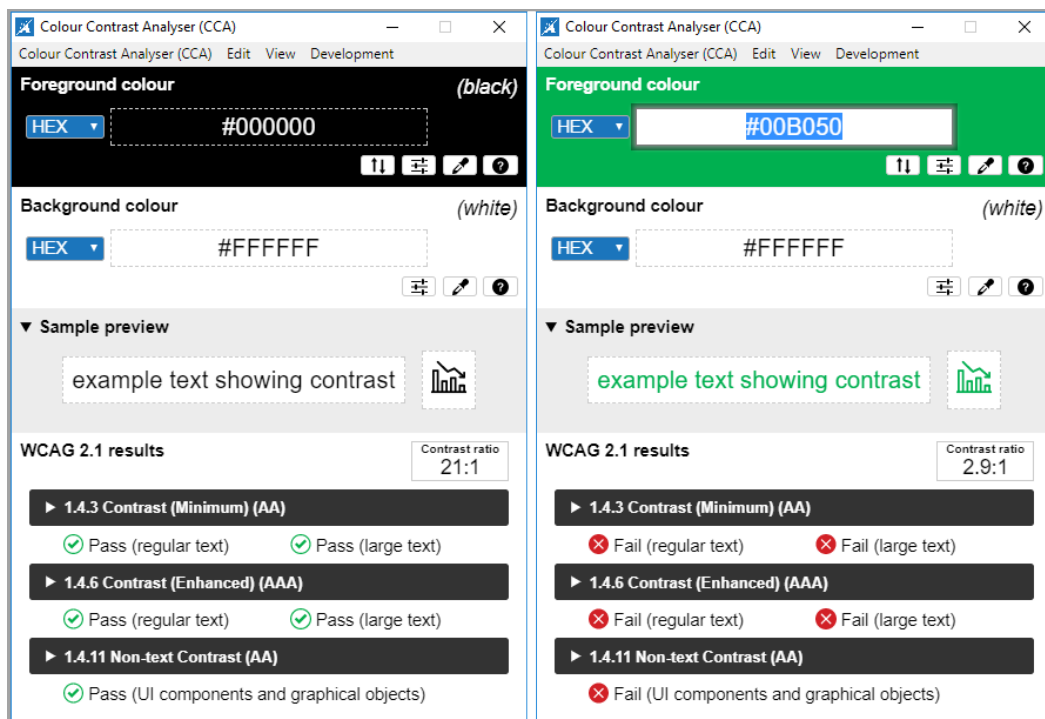
13. Is the contrast ratio between text and background sufficient?

Note: This test is not necessary, if the document text is black on white background (or close to it). This test requires the [Colour Contrast Analyser](#) (an external application) to get accurate ratio numbers. The Accessibility pane (Keyboard navigation).

How to test

Instruction 13: Execute the *Colour Contrast Analyser*. Drag the **Foreground eyedropper** icon over a sample of the text or image of text. Drag the **Background eyedropper** icon over a sample of the background color.

Figure 30: Examples of pass and fail results with the *Colour Contrast Analyser*



Test 13: Does color contrast ratio of **Foreground** (text) and **Background** ratio meet the minimum contrast ratio (4.5:1)? If not, the document fails this test.

How to author for accessibility

People who are colorblind or have low vision will only have comparable access if there is sufficient contrast between the text and the background. The contrast standards are:

Table 2: Contrast ratios for types and sizes of text

Type or Size of Text	Contrast Ratio
Standard text (12 pt regular)	4.5:1
Large Text (14 pt bold or 18 pt regular)	3:1
Text or images of text that are part of an inactive user interface component, that are pure decoration, that are not visible to anyone, or that are part of a picture that contains significant other visual content	Excluded from requirement

Create content with text, or images of text that use color or shading, with sufficient color contrast. If the contrast ratio fails, then adjust the foreground or background color until it passes.

Table 3: Examples of adequate and insufficient color contrast ratios

Good Color Contrast	Insufficient Color Contrast
White text on black background	Dark gray text on black background
Dark green text on yellow background	Orange text on yellow background
Light blue text on blue background	Red text on blue background
white text on red background	Dark green text on red background

Miscellaneous

14. Are there corresponding descriptions of embedded files and are they accurate?

How to test

NOTE: This test is not necessary, if the document does not contain audio, video, or multimedia files.

Instruction 14: Activate the audio-only, video-only, or multimedia file.

Test 14: Is there an accurate and complete text transcript for multimedia files, text description for audio files, and synchronized caption and/or audio description for video files? If not, the document fails this test.

How to author for accessibility

MS Word documents with embedded audio-only, video-only, or multimedia files that contain meaningful information must have additional documentation so that individuals with disabilities have comparable access to the embedded information.

- **Audio-only files:** Should have an accurate and complete transcript
- **Video-only files:** Should have an accurate and complete text description
- **Synchronized media (audio and video) files:** Should have accurate and complete synchronized captions and audio descriptions

15. Are forms fields within the document avoided?

How to test

Instruction 15: Check for interactive Word form fields. Ignore blank table fields, blank spaces, or underlines used to create fillable spaces; these are not interactive Word form fields. Search for the Word built-in form features that are interactive and can collect data. Automated, interactive, fillable Word form fields cannot be made accessible.

Test 15: Is the document free of all MS Word form fields? If not, the document fails this test.

How to author for accessibility

Forms created in Word cannot be made accessible for users of assistive technology.

Note: Depending on agency policies, forms may also require special approvals and Office of Management and Budget (OMB) certifications.

16. Is flashing content excluded from the document?

How to test

Test 16: Is the document free of all flashing content? If not, the document fails this test.

How to author for accessibility

Create content without using flashing content. Flashing content can cause seizures and should never be used.