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A collaborative program between the  
ADA National Network and the  
U.S. Access Board



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**We will be testing sound quality periodically**

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  - Screen Reader users will not have access to the content during the portion of this session when “application sharing” will be used. The presenters will provide detailed audio description of the content during this time.
    - Screen Reader Users - When the application sharing ends screen readers will not have focus in the webinar room.
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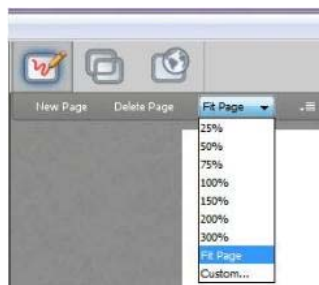
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## Customize Your View *continued*



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  2. Email [webinars@accessibilityonline.org](mailto:webinars@accessibilityonline.org); or
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# Presenters



**Bruce Bailey**  
U.S. Access Board



**Jutta Treviranus**



**Jan Richards**

**Inclusive Design  
Research Center**

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## Using WCAG 2.0 to Evaluate Document Accessibility



## Agenda

- What is WCAG? What is 508?
- Why you don't have to wait for the 508 refresh
- Accessibility: The Curb-Cut Perspective
- What is an "office document"?
- How to apply WCAG 2.0 to office docs
- Authoring Techniques for Word 2010
- Word 2010 Demonstration
- Workflow Integration

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## What is WCAG? What is 508?

- Web Content Accessibility Guidelines
  - Standard developed by World Wide Web Consortium (W3C)
    - Same folks that define what makes "HTML"
- Section 508 of Rehabilitation Act
  - Defines accessible electronic information technology (EIT)
    - Contemporary term is ICT (information communication technology)
  - Requirement for Federal Agencies when ICT developed, maintained, or procured
    - Adopted by many local and state governments, and non-government organizations

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## What About the 508 Refresh?

- Updating of existing Section 508 Standards
- Most recent proposal: ANPRM 2011
  - Organize by function: What does the ICT do?
  - Define covered electronic content
- Propose direct reference to WCAG 2.0
  - Level A and AA success criteria are the metrics
- ANRPM as proposed applies WCAG SC to:
  - Web Content
  - Web Applications
  - Software
  - Documents
- NPRM pending

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## What To Do Now?

- Agencies should be thinking ahead to when the Final Rule from the U.S. Access Board is issued.
- Agencies should review proposed rule (2011 ANPRM), and public comments
  - Regulations.gov: ATBCB-2011-0007
- What if an agency or developer wants to start using WCAG 2.0 now?

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## Equivalent Facilitation is the Key

- The current 508 Standards *already* allow for “equivalent facilitation” (1194.5).
- “Nothing in this part [the 508 standard] is intended to prevent the use of designs or technologies as alternatives to those prescribed in this part provided they result in substantially equivalent or greater access to and use of a product for people with disabilities.”

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## Accessibility: The “Curb-Cut” Perspective

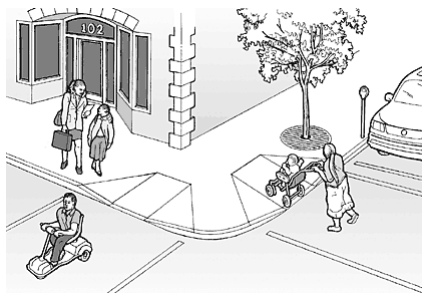
- “Accessible” documents, products, services, or environments are those that can be used by people with varying (dis)abilities
- Accessibility requirements may be mandated (e.g. Sec. 508)
- Additional planning may be required
- Retrofitting is much more expensive than building accessibility in from the beginning



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## Accessibility: The Curb-Cut Perspective

- Sidewalk curb-cuts benefit many other beyond people who use wheelchairs (e.g. strollers, delivery carts)
- Generically referred to as “curb-cuts”



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## Accessibility: The Curb-Cut Perspective

- Many “mainstream” technologies began as accessibility accommodations and became curb-cuts:
  - Telephone
  - Loudspeaker
  - Speech synthesis
  - Voice recognition
- These are highlighted as **\*Curb-Cut\***
  - Short term gains to authors and organizations that come from long-term improvements to document accessibility

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## What is an “Office Document”?

- “Office documents” are:
  - **Intended to be used by people**
    - Not computer code
  - **Text-based**
    - Not simply images, although they may contain images
  - **Fully printable**
    - Dynamic features are limited to automatic page numbering, table of contents, etc.
    - Do not include audio, video, or embedded interactivity)
  - **Self-contained**
    - Without hyperlinks to other resources unlike web content
  - **Typical of office-style workflows**
    - E.g., reports, letters, memos, budgets, presentations, etc.

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## What is an “Office Document”?

- Documents without such characteristics are not “office documents”
  - Even if they have been created using an “office application” (e.g. MS Word)
- If the document includes interactive content or video
  - WCAG 2.0 probably applies directly
  - See: <http://w3.org/TR/WCAG20>

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## How to Apply WCAG 2.0 to Office Docs

- WCAG 2.0 was originally developed to assess the accessibility of web content
- Why WCAG 2.0 works well for assessment of other types of electronic content:
  - Widespread, international adoption
  - Open development process (W3C-WAI)
  - Low price (free)
  - Robust guidance materials
- Approach has been critically reviewed
  - “Guidance on Applying WCAG 2.0 to Non-Web ICT”
  - <http://w3.org/TR/wcag2ict>

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## How to Apply WCAG 2.0 to Office Docs

- In 2011, the IDRC, in association with the Government of Ontario and UNESCO, developed the **Accessible Digital Office Documents (ADOD)** website:
  - <http://adod.idrc.ocad.ca/>



- Site includes “Assessment Framework” and “Authoring Techniques”

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## Assessment Framework

- Web content can be as simple as plain text or as complicated as dynamic web apps
  - WCAG 2.0 is formulated broadly
- Process of applying WCAG 2.0 to office documents
  - Primarily involves defining an applicable subset of WCAG 2.0.
- When using WCAG 2.0 for office documents
  - Web-specific terms such as “web content” need to be mapped
- For more information, see:
  - <http://adod.idrc.ocad.ca/framework>

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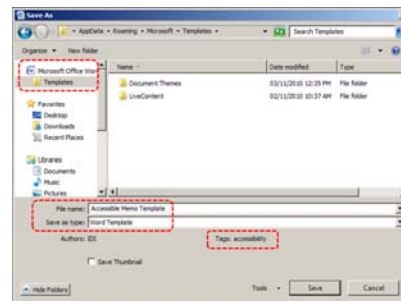
## Authoring Techniques for Word 2010

- For most people
  - Creating office documents as part of their work
  - More important resources are the “authoring techniques”
- Publically reviewed resources cover many of the most popular office suites including:
  - Word 2003, 2007, 2008:Mac, 2010, 20011:Mac
  - OpenOffice 3.4
  - iWork '09
  - Adobe Acrobat 9, 10, 11

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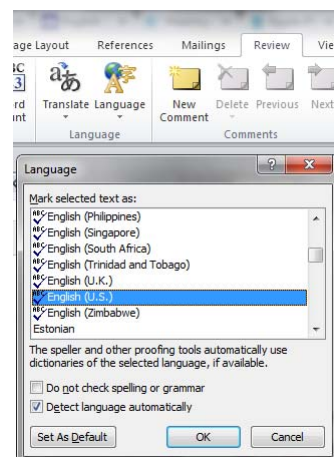
## Technique 1

- **Use Accessible Templates**
  - Starting point for documents, so accessibility is critical
  - How to create an accessible template
  - How to select accessible templates (empty templates tend to be accessible)
- **\*Curb-Cut\***
  - Effective templates also support document management and branding



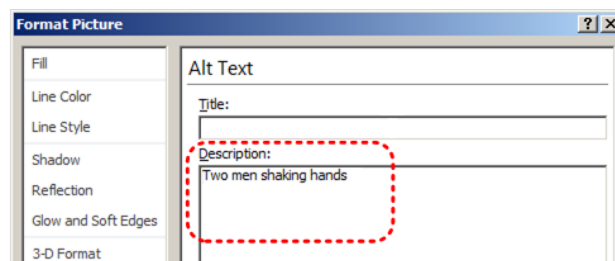
## Technique 2

- **Specify Document Language**
  - Indicate primary natural language
  - Indicate if a different language is used for select text
  - Enables assistive technologies (AT) to accurately present content
- **\*Curb-Cut\***
  - This language is also used for spelling and grammar checking



## Technique 3

- **Provide Text Alternatives for Images and Graphical Objects**
  - Ensure information is conveyed by AT to people who cannot see the object
  - More complex objects require longer description (e.g. artwork, flowcharts)



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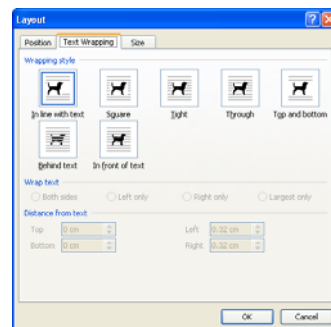
## Should Graphics be Avoided?

- **Accessible documents should not be equated with text-only documents**
  - In fact, some people with disabilities will find it easier to understand graphics than dense text

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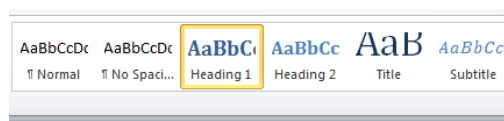
## Technique 4

- **Avoid “Floating” Elements**
  - Ensures that objects are part of the reading order
- **\*Curb-Cut\***
  - Floating objects are more difficult to control as pages repaginate



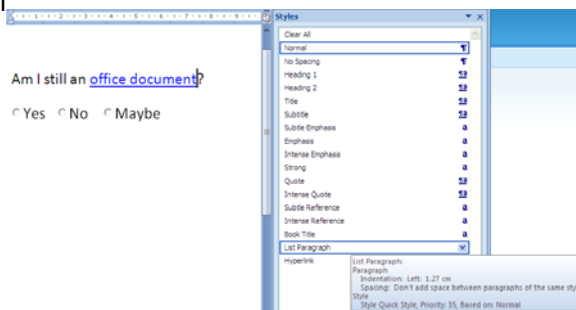
## Technique 5

- **Use “True” Headings**
  - Documents require structuring to make them more straightforward for readers to understand
  - “True Headings” create logical divisions that AT can communicate
- **\*Curb-Cut\***
  - Headings used by Word to auto-generate a table of contents
  - Headings used by Word for “Navigation Pane”
  - Easier to update document styles and keep them consistent



## Technique 6

- **Use Named Styles**
  - Similar to “True Headings”
  - Helps to understand why something was formatted in a given way
  - Use Paste > Special
- **\*Curb-Cut\***
  - Easier to keep update document styles and keep them consistent



## Technique 7

- **Use Built-In Document Structuring Features (rather than tabs and spaces) to create:**
  - Tables (and “Convert Text to Table” feature)
  - Lists
  - Columns
  - Page Breaks
  - Table of Contents
  - Page Numbering
  - Document Title
- **\*Curb-Cut\***
  - Much easier and more consistent than using typography



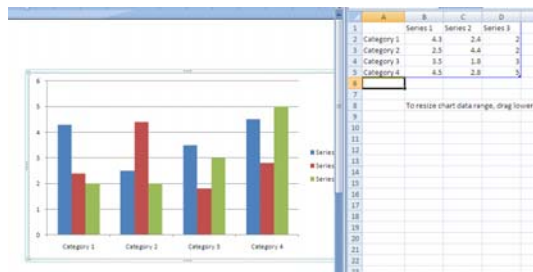
## Technique 8

- **Create Accessible Charts**

- Same basic accessibility considerations as rest of document
- Ensure contents are clear and labeled
- Consider also providing the data in tabular form

- **\*Curb-Cut\***

- Tabular data is easier to copy and work with.



## Technique 9

- **Make Content Easier to See (especially when printed)**

- Use font sizes between 12 and 18 points for body text
- Use fonts of normal weight, rather than bold or light fonts
- Use bold, italic, all-caps and underlining sparingly
- Use standard fonts
  - Sans serif fonts (Arial) may be easier to read than serif fonts (e.g., Times New Roman)
- Avoid animated or scrolling text
- Use sufficient contrast
- Avoid using color alone or relying on visual characteristics
- Avoid using images of text

- **\*Curb-Cut\***

- Everyone benefits when documents are easier to read

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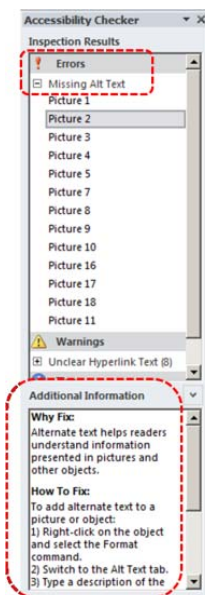
## Technique 10

- **Make Content Easier to Understand**
  - Whenever possible, write clearly with short sentences
  - Introduce acronyms and spell out abbreviations
  - Avoid making the document too “busy”
  - Use lots of whitespace
  - Avoid too many different colors, fonts and images
  - If content is repeated on multiple pages within a document or within a set of documents (e.g., headings, footings, etc.), it should occur consistently each time it is repeated.
- **\*Curb-Cut\***
  - Everyone benefits when documents are easier to understand

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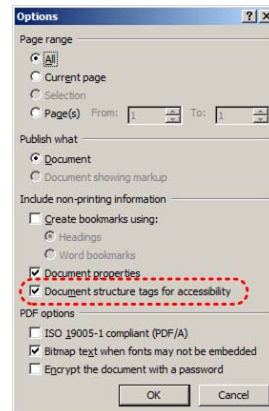
## Technique 11

- **Check Accessibility**
  - Use the Word 2010 Accessibility Checker.
  - Identifies potential accessibility errors and describes how to repair them
  - Not all issues can be identified automatically
    - List of checker rules:
      - <http://office.microsoft.com/en-us/word-help/accessibility-checker-rules-HA101823437.aspx>



## Technique 12

- Use Accessibility Features when Saving/Exporting to Other Formats
  - Saving as “tagged” PDF
  - Saving as HTML
- **\*Curb-Cut\***
  - Text-based, tagged PDFs are easier for search engines to parse



## Word 2010 Demonstration

- Live demonstrating how some of these techniques can be used to improve the accessibility of a document using MS Word 2010
  - Shared application screen that will be used for this demo is not accessible to screen readers
  - Presenter will be incorporating audio description
  - See [earlier slide \(6\)](#) for details

## Workflow Integration

- Techniques and feature support are not enough!

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## Workflow Integration

- Accessibility needs to be integrated into the organizational workflow — the daily routine way that people do their jobs
- Successful integration of accessibility into the workflow of an organization requires considering:
  - Whether accessibility is enabled
  - Follow through to determine if accessibility is improved
- This integration should achieve the following goals...

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## Workflow Integration Goals

- All staff use the same office applications
  - Separate versions increase cost and decrease consistency
- All office documents produced for internal or external use be accessible.
  - Documents are often shared in unexpected ways
- Accessible office documents be efficiently created and maintained
  - Via accessible templates
  - Use of the accessible checker
- Identify synergy with other organizational goals
  - Look for the **\*curb-cuts\*** (e.g. branding, archiving, etc.)

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## Resources

- Accessible Digital Office Document Guides:
  - <http://adod.idrc.ocad.ca/>
- WebAIM Articles:
  - <http://webaim.org/articles/>
- MS Word 2010 Resources:
  - <http://www.microsoft.com/enable/products/office2010/>
- Great lakes ADA Center:
  - <http://adagreatlakes.com/>

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# Questions?

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