



State of California
Franchise Tax Board

Making

Microsoft Word® 2007

Documents Accessible

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Table of Contents

Table of Contents	2
Section 1 – Introduction	4
Franchise Tax Board policy	4
Accessible document defined	4
Purpose of this document.....	4
Audience for this document.....	4
Section II – Structured Word Documents	4
The importance of structure	4
Section III – Features of Word 2007.....	5
The ribbon	5
The office button	6
Quick access toolbar	6
The status bar.....	6
Zoom slider	6
Document view buttons	6
Mini toolbar	6
Live preview	7
Opening an existing document.....	7
Saving a file as a Word 2007 document	7
Saving a file as an earlier version of Word	7
Closing files	8
Section IV – Styles and Themes	8
Styles defined	8
Themes defined.....	8
Quick styles	8
Style types	9
Style descriptions	9
Character styles.....	9
Paragraph styles.....	9
Linked styles	9
List styles	9

Making Microsoft® Word 2007 Documents Accessible

Table styles.....	10
Styles versus direct formatting	10
Section V – How to use Styles and other Formatting Features in Word 2007	11
Apply a quick style.....	11
Change the style set	11
Change a style by example	11
Change a style using “modify”	11
Create a new style	12
Delete a style.....	12
Create your own bullet or numbered list.....	12
Insert a table	13
Create a table of contents	13
Margins.....	14
Line spacing.....	14
Page breaks.....	14
Page numbers	14
Headers and footers.....	14
Footnotes or endnotes.....	15
Images	15
Insert images from a file.....	15
Resize images	16
Alternative (ALT) text	16
Add a caption to a diagram or table.....	16
Add borders to text	16
Check spelling and grammar	16
Section VII – Resources	17

Section 1 – Introduction

Franchise Tax Board policy

The Franchise Tax Board (FTB) is committed to providing accessible documents on its public website.

Accessible document defined

When a document is accessible, it's usable by anyone with or without a disability.

Purpose of this document

To provide staff with the information they need to create accessible Word documents for conversion to a Portable Document Format (PDF) file.

Staff who create documents for publication on our public website (ftb.ca.gov) must abide by:

- California Government Code 11135 (d) (1-3) that adopted the Federal Rehabilitation Act Section 508.
- The State Administration Manual (SAM) Chapter 4800, Section 4833 – Information Technology Accessibility Policy.
- California's Website Accessibility Standards written by the Information Organization, Usability, Currency, and Accessibility working group (IOUCA).

Audience for this document

This document is written for staff who:

- Create and design Word documents for publication on our public website.
- Create and design Word documents for conversion to a Portable Document Format (PDF) file for publication on our public website.

Section II – Structured Word Documents

The importance of structure

To create an accessible PDF file, a Word document must have a defined structure with elements such as a title, headings, sub-headings, and any numbered or ordinary bullet points. In Word, these structured elements are called "styles." A style is a set of formatting characteristics such as font name, font style, font size, color, paragraph alignment, and spacing.

If "styles" are used throughout a Word document, the document will be:

- Consistently formatted.
- Easier to update.
- Easier to read.
- More professional looking.

During conversion to a PDF file, Adobe Acrobat:

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- Creates tags from the “style” elements contained in the Word document.
- Converts the heading “styles” to bookmarks within the PDF.

The tags within the PDF describe the layout of the document to assistive technology, such as a screen reader, and enable screen readers to navigate and read the document correctly to a disabled (e.g., blind, visually impaired) user. The bookmarks help sighted readers to easily navigate through the document.

When “styles” are used, a Table of Contents can be generated automatically, the document’s contents can be quickly reordered using Outline view, or the Outline can be exported to generate a PowerPoint presentation.

Section III – Features of Word 2007

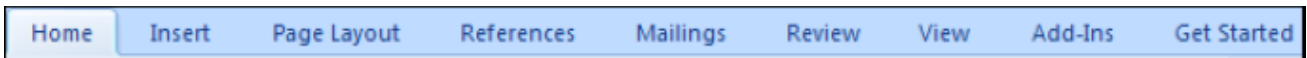
The ribbon

An outstanding feature of Word 2007 is the ribbon, which replaces the menus and toolbars found in previous versions of Microsoft Word.



The ribbon consists of three areas:

Tabs – These are at the top of the ribbon.



Groups – Each tab has its own set of groups. For example, the Home tab contains the clipboard, font, paragraph, styles, and editing groups. Some groups also have a small button in the lower right-hand corner known as the **Dialog Box Launcher**



from which additional options are available. When a different tab is selected, the available groups change.




Commands – These are buttons, boxes, or menus relative to each group. The alignment, bullets, and numbering buttons are in the paragraph group. Find and replace is in the editing group.

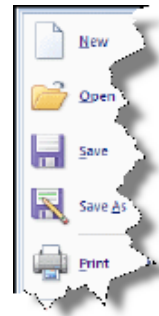


Note: Resting your mouse pointer on a command will display a tip describing the feature.

The ribbon is easy to use. Whenever you need to change something, click the relevant tab, find the correct group, and then click the command you need.

The office button

The office button  is in the top left-hand corner of the Word window. When you click the office button, you find commands such as open, save, print, and close your document.



Quick access toolbar

Next to the office button is the quick access toolbar, which contains items you use regularly such as save, undo, and redo buttons.



The status bar

The status bar at the bottom of the Word window can display items such as the current page number, section, number of words in the document, etc. Right-click the bar to select the items you prefer.

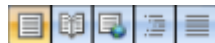
Zoom slider

In the bottom-right hand corner of the window, on the status bar, is the zoom slider. To view your document at different percentages, click the plus or minus buttons.



Document view buttons

These are located next to the zoom slider. Simply click one of the five buttons to view your document as print layout, full screen, web layout, outline, or draft.




Mini toolbar

You can add formatting (fonts, alignment, color, bullets, etc.) to documents by using the mini toolbar. **Note:** If you're creating a document for publication on our public website, use styles to format your document.

When you select text in your document, the mini toolbar will appear unless you hide it.

To turn off or hide the mini toolbar:

1. Click the **Microsoft Office Button** , and then click **Word Options**.
2. Click **Popular**, and then under **Top options for working with Word**, clear the **Show Mini Toolbar on selection** check box.

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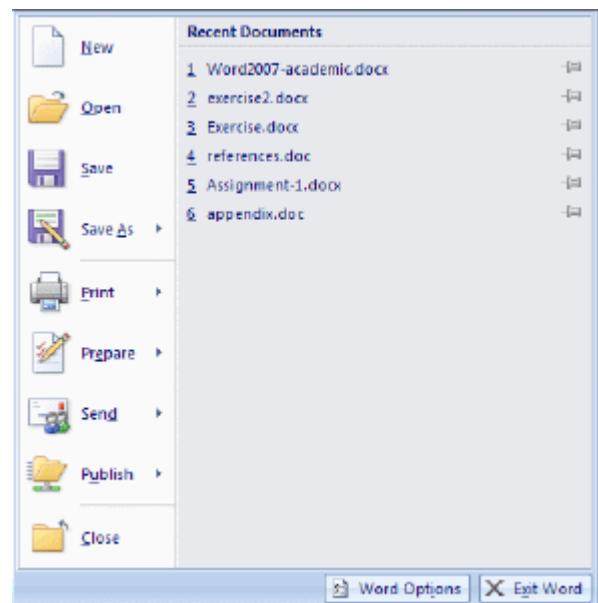
Live preview

Word 2007 includes a new live preview feature that enables you to experiment with changes before selecting them. To preview different themes in your document, select the page layout tab and click themes. The themes gallery opens to display a number of different theme choices. The theme you currently have applied to your document is highlighted in the themes gallery.

When you point to a theme that you want to preview, the changes appear in the document window while your current theme remains highlighted in the themes gallery. This allows you to see what the theme you are pointing to would look like if you applied it to your document. When you find a theme that you want to use, simply click on it to apply it to your document.

Opening an existing document

1. Click the **Office** button.
2. The recent documents list will show the last files you opened. If the file you are looking for is listed, click on it.
3. To open a file not shown, click the **Open** icon and then navigate to the folder where it's located.



Saving a file as a Word 2007 document

When you save a new file in Word 2007, by default it will be saved as a **.docx** file. This file type allows you to use the new features specific to Word 2007.



Always save a new file as soon as you create it, and then save it regularly while you work on it.

Always save a backup copy of your work before you modify it. When you save it, include the word "backup" in the file name. File corruption without recovery is always a possibility. Once you have successfully modified and saved your document, you can then delete your backup copy.

Saving a file as an earlier version of Word

1. In the **Save As** window, click the **Save as type** arrow and choose the Word 97-2003 document (.doc) option. You can also click on the **Office** button and select Save As the Word 2003-97 document option.
2. Click **Save**. The file name and its extension will now be displayed in the title bar of the window.

Closing files

To close a file, click the **Office** button and then click the **Close**  icon. To close Word completely, click the **Exit Word**  button.

Section IV – Styles and Themes

Styles defined

A style is a set of formatting characteristics, such as font name, size, color, paragraph alignment, and spacing. Some styles include borders and shading.

Themes defined


A theme is a collection of coordinated “styles” used to format a document’s content. Word 2007 includes a selection of 20 themes. You can modify existing themes to create new ones or design themes from scratch.

Themes represent a huge addition to Microsoft Office 2007, not just Word. You can use the same theme in Word, PowerPoint, and Excel to create a package of coordinated documents.

You can also apply a theme to an existing document with a single click of the mouse. However, beware; before you apply a theme, you need to make sure each element in your document is assigned a “style” such as a heading, sub-heading, etc. to keep the formatting of your document consistent.

Quick styles

Quick styles are combinations of different coordinated formatting styles that are displayed in the Word 2007 **Styles group** (also referred to as **Quick Styles gallery**) on the **Home** tab. When you create a new document in Word 2007, a theme of coordinated styles titled “Office” is automatically applied. The quick styles displayed in the styles area of Word’s home tab are from the Office theme. If you choose a different theme of coordinated styles, the styles displayed in the styles group on the home tab change to reflect your selection.

If you click the **Dialog Box Launcher**  in the lower right-hand corner of the **Styles** area of the **Home** tab, and choose **Style Set**, a list of design categories appear. You can choose a category that reflects a style you want to create. Once selected, all styles (fonts, colors, and formatting) for that category are applied to your document.

Style types

There are three style types in Word. Each has an icon that appears next to it in the Styles task pane:

- **Paragraph (¶)**: Click anywhere within the paragraph or select the paragraph to apply the style to the entire paragraph.
- **Character (a)**: Click anywhere within the word or select the word or phrase to apply the style to the entire word or phrase.
- **Linked (¶a)**: Behaves as a paragraph style if you click in a paragraph or select a paragraph, but behaves as a character style if you select a word or phrase.

Style descriptions

Character styles

Character styles contain formatting characteristics that can be applied to text, such as font name, style, size, color, bold, italic, underline, borders, and shading.

Character styles do not include formatting that affects paragraph characteristics, such as line spacing, text alignment, indentation, and tab stops.

Paragraph styles

A paragraph style includes everything that a character style contains, and it controls all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing, and borders. For example, you can have a character style called Important that formats text as bold and red and a paragraph style called Headline that formats the text as bold and red with the text indented with spacing before and after the text.

Linked styles

A linked style behaves as either a character style or a paragraph style, depending on what text you select. If you click in a paragraph or select a paragraph and then apply a linked style, the style is applied as a paragraph style. However, if you select a word or phrase in the paragraph and then apply a linked style, the style is applied as a character style (applied only to the selected text), with no effect on the paragraph as a whole.

List styles

A list style applies characteristics for formatting a list. A list can include levels of hierarchy, like an outline, that can be indicated by indentation and numbering schemes. A list style can define formatting for as many as nine levels of a list.

List library

Unlike the other types of styles (character, paragraph, linked, and table), predefined list styles are not available when you first create a document in Word. Instead of predefined list styles, Word provides several multilevel list templates, which are displayed under the **List Library** heading in the gallery of multilevel lists. These preformatted designs can be applied to lists in your document, and they can serve as a starting point for creating your own list styles. Consider creating your own list style when you want to:

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- Change list formatting consistently throughout your document. After list styles are defined and applied, they can be changed. The changes affect all instances where the list style is applied in the document.
- Use complex list formatting that varies from one multilevel list design to another. List styles provide great flexibility, and each one is named separately, which makes it easier to distinguish among them in the list of list styles.
- Apply formatting to a multilevel list by using a keyboard shortcut. You can assign keyboard shortcuts to list styles that you create, but not to the preformatted multilevel list templates.

Warning: While more elaborate bullet designs are available, many do not convert into accessible characters. Therefore, it is recommended that you use the standard round bullet shapes.

Tip: If you use the built-in heading styles in your document, e.g., Heading 1, Heading 2, etc., you can use multilevel list templates to apply a numbering scheme to your headings. For example, you can number top-level headings as 1, 2, 3, and second level headings as 1.1, 1.2, 1.3, and so on. Multilevel list templates that number headings are marked in the list gallery with **Heading** in gray text.

Table styles

A table style provides a consistent look to borders, shading, alignment, and fonts in a table. To apply a table style, you select the table that you want to format, and then you click a table style from the gallery of table styles on the **Design** tab, on the **Table Tools** contextual tab.

Within a table cell, you can use styles and direct formatting to format the content of the cell. Formatting that you apply this way overrides the formatting that comes from the table style. **Warning:** If you use a style or direct formatting to format the content of a table cell and then switch to a different table style, the content that you formatted with the style or direct formatting is not updated to match the new table style.

Tip: You can change the selection of table styles in the gallery by selecting or clearing check boxes in the **Table Style Options** section on the **Design** tab, before you open the gallery of table styles. For example, if you don't want rows to alternate shading, clear the **Banded Rows** check box. When you open the gallery of table styles, you see previews that do not include formatting for banded rows.


Styles versus direct formatting

Direct formatting is a tedious, multiple step process of manually applying a font name, size, color, and paragraph alignment to text. For example, if you want to change the look of headings in your document, you must select each heading individually and apply the formatting changes. It's easy to make mistakes with this type of formatting.

Styles allow you to quickly and easily make a change in one step. For example, if you want to change the font type of your Heading 1 style, once you update the style with a new font type, all occurrences of the Heading 1 style within your document change to the new font type you selected.

Section V – How to use Styles and other Formatting Features in Word 2007

Apply a quick style

1. In the document, either position your cursor in the text you want to change (to apply a paragraph style), or select the text or phrase (to apply a character style).
2. In the **Styles** group, click the style you want in the **Quick Styles** gallery. To see the expanded gallery, click the **Dialog Box Launcher**  to the right of the gallery.

Change the style set

1. In the **Styles** group on the **Home** tab of the **Ribbon**, click **Change Styles**.
2. Point to **Style Set** to see the list of style sets.
3. Click the style set you want. **Note:** If you point to the style set without clicking, you can see a preview of what your content will look like with that style applied.

Change a style by example


1. In the document, select the text that has the style you wish to alter. Make the formatting change to the text.
2. You can use either the **Quick Styles** gallery or the **Styles** task pane to update the style.
 - In the **Quick Styles** gallery, look for the selected style; it reflects the style that's applied to the selected text in your document. Right-click that style, and click **Update to Match Selection**. (This command will refer to the style you've got selected, for example "Update Heading 1 to Match Selection.")
 - In the **Styles** task pane, point to the style, and click the arrow on the right to display the style's menu. Click **Update to Match Selection**.

Change a style using "modify"

1. In the **Styles** task pane, right click the style, and click **Modify**.
2. Make the change you want in the dialog box, for example, select a different font color.
3. **Applying the modification to the template** - If you want this style change applied to the document's template, you need to select the **New documents based on this template** option.
4. Click **OK**.

All text that has this style applied will update to reflect the change.

Create a new style

1. Select the text that has the style you want to save as new.
2. Open the **Quick Styles** gallery by clicking the **Dialog Box Launcher**  in the **Styles** group on the **Home** tab.
3. Select Save selection as a **New Quick Style**.
4. Rename the style in the **Create New Style from Formatting** dialog box, and click **OK**.

Applying the style to the template: If you want this style to apply to the document template, you need to click **Modify** in this dialog box. Then, in the **Create New Style from Formatting** dialog box, select the **New documents based on this template** option, and click **OK**.

When you open the **Quick Styles** gallery or **Styles** task pane again, you will see your new style.

Delete a style

1. In the **Styles** task pane, right-click the style you want to delete.
2. You will have different choices for deleting or hiding the style, depending on which style you are trying to delete.
 - If you can delete the style, you will have the option to delete it on the menu, such as **Delete Title**.
 - If Word doesn't allow you to delete this style, you can choose **Remove from Quick Style Gallery**.
 - If you are deleting a style that you created using a quick style as the basis, you will select the **Revert** command, not **Remove**.

Create your own bullet or numbered list

Use bullets to mark important points that don't need to be in order. Use numbered bullets for instructions or steps that need to be followed in order.

Warning: While more elaborate bullet designs are available, many do not convert into accessible characters. It is therefore recommended that you use the standard round bullet shapes.

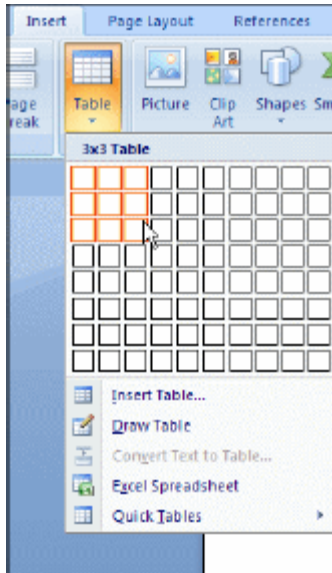
The easiest way to create a list style is to start with one of the preformatted multilevel list templates.

1. Select the list that you want to format.
2. On the **Home** tab, in the **Paragraph** group, click the arrow next to **Multilevel List**.
3. Under **List Library**, click the design that most closely matches the look you want for your list style.
4. Click **Multilevel List** again, and then click **Define New List Style**.
5. Make any modifications you want to the preformatted design.
6. In the **Name** box, type a name for your list style.
7. If you want your list style to be available for all new documents that you create, click **New documents based on this template**.

Insert a table

Tables can be used to lay out information in rows and columns.

1. Click where you want the table placed, then on the **Insert tab, Tables group**, click the **Table** icon.
2. Drag over the grid to select the required number of cells.



Another way to insert a table is to click on **Quick Tables** at the foot of the menu and choose one from the gallery. This will insert a table with sample data, which can be replaced with your own.

Whenever you click in a table, a “contextual” tab called **Table Tools** appears on the ribbon, beneath which are a **Design** tab and a **Layout** tab. Each tab contains many table options. If you click away from the table, these tabs disappear.

3. To prevent a row from breaking across a page, click the **Layout** tab and select **Properties** in the **Table** group. Choose the **Row** tab, and deselect the **Allow row to break across pages** option.
4. To have the header row repeated at the top of each page (in tables that span more than one page), select the header row, select the **Layout tab, Data group**, and click **Repeat Header Rows**.
5. To add color or borders, select the table, and click the **Design tab**. Choose a table style, or click the **Borders** arrow and choose from the list.

Create a table of contents

Always create a table of contents when producing a large document.

You can quickly create a table of contents when you have used “heading styles” for headings in your document.

1. Position the cursor where you want the table of contents located. Then click the **References** tab.
2. In the **Table of Contents group**, click the **Table of Contents** icon, and then choose a design from the gallery.
3. To update a table of contents at any time, click the **Update Table** button in the **Table of Contents group**.

You will then be presented with options to either update the page numbers only, or update the entire table.


4. Make your choice, then click **OK**.

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Margins

1. To adjust page margins, click the **Page Layout** tab. In the **Page Setup** group, click the arrow on the **Margins** icon.
2. Choose from one of the samples, or click on **Custom Margins** to enter your own settings.
3. To adjust the Header and Footer margins, select **Custom Margins**, and then on the **Layout** tab insert new values in the Header and Footer boxes.

Line spacing

To change line spacing, select the text, and then select the **Home** tab, **Paragraph** group. Click the **Line spacing**  button and choose from the options. For example, if you want double-spacing, choose 2.

Page breaks

If you need to start a new page, **do not press the Enter key repeatedly** to move the cursor to the next page. This can cause gaps in your document if you add more text to the preceding pages.

Create a page break by positioning your cursor where you want the next page to start, and then select the **Insert** tab, **Pages** group, **Page Break**.

Page numbers

Never type page numbers beneath the text on a page. They will not only move if you add more text, but will be out of sequence if you insert additional pages. Use Word's built-in page numbering feature, which will insert the number in the header, footer, or margin area of the document. The page numbers will also update accordingly as you add more text.

1. Click the **Insert** tab. In the **Header and Footer** group, click **Page Number**.
2. Choose an option e.g., Bottom of Page, and then select a design from the gallery.
3. Click the **Close Header and Footer** button to return to the document.

Headers and footers

Headers and footers are generally for text that is repeated on every page such as page numbers, the name of the document, and the document's version number.

1. To insert a header or footer, click the **Insert** tab, and in the **Header and Footer** group, select either **Header** or **Footer**.
2. Select a design from the gallery. For example, to add three items such as your name, page number, and document date to the footer, choose the Blank (Three Columns) option. The footer area of your page will now display the text holders.



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3. Click in a holder and type the text. You can also delete a text holder if you don't require it. Simply click inside it, and then press the delete key.
4. To add a page number, click the text holder, and then on the **Insert** tab, **Header and Footer** group, click the Page Number icon and select **Current Position**.
5. Choose a design from the gallery. Your page number design choice will now be displayed in the text holder.
6. To return to the body of the document, click the **Close Header and Footer** button, or double-click in the document above the footer.
7. To edit a header or footer at any time, double-click the header or footer area in the document.

Footnotes or endnotes

Footnotes and endnotes provide supplementary information such as a comment or reference citation for text within a document.

A footnote appears at the bottom of a page and an endnote appears at the end of the document.

1. In the text, click where you want the raised reference mark to go, and then on the **References** tab, **Footnotes** group, click the **Insert Footnote** (or **Insert Endnote**) button.
2. Type your supplementary information at the flashing insertion point beneath the separator line, and then click back in the document to continue typing. Repeat the process for additional notes.
3. To change the footnote text, click the **Show Notes** button in the **Footnotes** group.
4. To remove a footnote, select the raised reference mark in the body of text and press **Delete**.

You can also change the format of the numbering, or starting number. To do this, click the **Dialog Box Launcher**  in the **Footnotes** group.

Images

You can insert or copy and paste images into a document. **Note:** Save a copy of important images in a separate file just in case something goes wrong with your document.

Insert images from a file

1. To insert an image from a file, select the **Insert** tab, **Illustration** group. Click on the **Picture** icon, and then locate your image and click **Insert**.
2. As soon as the image is inserted, save your file. You should also save it regularly, if you change the formatting or positioning of the image.
3. One way to position an image is to click it, then on the **Picture Tools** tab, click the **Format** tab, and then select the **Position** icon in the **Arrange Group**. You can hover your mouse over the options to see the effect. Click on the one you wish to apply.
4. You can also click the **Text Wrapping** button for more advanced layout options to position the image.

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5. The **More Layout Options** at the foot of the **Text Wrapping menu** is for making further adjustments, such as the distance between the text and image.

Resize images

1. To adjust the size, right click the image and choose the **Size** option from the shortcut menu.
2. Select the **Lock aspect ratio** box to maintain the proportion, and then adjust the values in the **Height** and **Width** boxes.

Alternative (ALT) text

If you have an image or images within your Word document, you must add alternative text. Screen-reading software reads alternate text to a blind user.

When you create alternative text for an image, consider what you might say if you were reading the document contents to someone over the telephone. Alternative text should be brief, no more than a few words (150 characters).

1. To add alternative text, right click on an image and select **Format Picture**, **Format Object**, or **Size**.
2. Select the **ALT Text** tab, and then enter your description of the image in the Alternative Text box.
3. Click the OK button.

Add a caption to a diagram or table

Use Word's insert caption option to add a label or figure number to diagrams, tables, etc.

1. Select the item, then click the **References** tab, **Captions** group, and select the **Insert Caption** icon.
2. Choose an option from the label list, or click on the **New Label** button and type an alternative name.

Numbered captions applied to subsequent items increase by one number from the previous caption number e.g., Caption 1, Caption 2, etc. If you insert a caption before existing ones, the numbering automatically adjusts.

Add borders to text

1. To add a border to text, first select the text, then click the **Home** tab.
2. In the **Paragraph** group, click the **Borders and Shading** icon, and then select an option from the list. For more options, select **Borders and Shading** at the bottom of the list.

Check spelling and grammar

To check the spelling and grammar in a document, on the **Review tab, Proofing Group**, click the **Spelling & Grammar** icon.

Note: You can also correct spelling and grammar as you type. Suspect words are underlined with either red (spelling) or green (grammar) wavy lines indicating possible errors. Right-click on the words, and then choose the appropriate suggestion from the pop-up list.

Section VII – Resources

- www.microsoft.com