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**Instructor Guidance on Meeting Excel Accessibility Standards**

This document shows you how to meet the Checklist Standards for Excel documents. The Checklist and Guidance are based on [Microsoft’s accessibility documentation for Excel](https://support.microsoft.com/en-us/office/make-your-excel-documents-accessible-to-people-with-disabilities-6cc05fc5-1314-48b5-8eb3-683e49b3e593#bkmk_fontformatandcolor_win) and other documents and tries to keep directions simple.

**General Guidance**

1. Start with an accessible template.

* PC: Select **File** > **New** and search for “accessible templates” using the **Search for online templates** field.
* Mac: Not available.

1. Use the built-in Accessibility Checker that runs automatically in the background when you're creating a document. Monitoring it and following its tips will take you far in meeting our standards. If the Accessibility Checker detects accessibility issues, you will get a notice in the status bar.

* To launch the Checker manually:
  + Select **Review** **> Check Accessibility**. (See this [video on using the Accessibility Checker](https://support.microsoft.com/en-us/office/video-check-the-accessibility-of-your-document-9d660cba-1fcd-45ad-a9d1-c4f4b5eb5b7d) for more.)
* Run the checker any time you make significant revisions to the content.
* Run the checker one last time, close the document, and rerun the checker before submitting your document for accessibility review by MLA staff.
* **IMPORTANT:** The Checker does not address all accessibility requirements. No errors reported by the Checker does not mean that all accessibility requirements are met.

**Guidance on Meeting Standards**

1. Fonts are sans serif and 12pt or larger

* Use Georgia, Helvetica, Open Sans, Futura, or other sans serif fonts.

1. The spreadsheet uses a simple table structure and is only for data

* Avoid blank cells, columns, and rows.
* If you cannot avoid a blank cell, column, or row, enter text explaining that it is blank. For example, type N/A or Intentionally Blank.
* Do not split or merge cells.

1. The spreadsheet specifies column header information

* To create column headers:
  1. Place your cursor on Row 1 of the column you want to name
  2. On the **Insert** tab, select **Table**.
  3. Select the **My table has headers** check box.
  4. Select **OK**.  
      Excel creates a header row with the default names **Column1**, **Column 2**, and so on.
  5. Type a new, descriptive, name for each column in the table.

1. Cell A1 contains text
   * Enter text in A1.
2. All visuals include alternative text of 1 or 2 sentences or are marked decorative.

* To add Alt text in Windows
  + Right-click the object and select **Edit Alt Text**. Enter text or mark as decorative.
* To add Alt text on a Mac
  + When you insert an image or object, Mac adds alt text and lets you edit it or mark as decorative.
  + To add alt text to existing image, double click or right click the image and select View Alt Text
* For guidance on writing alt-text, see [Everything you need to know to write effective alt text](https://support.microsoft.com/en-us/office/everything-you-need-to-know-to-write-effective-alt-text-df98f884-ca3d-456c-807b-1a1fa82f5dc2)

1. Hyperlink text is accurate, concise, makes sense out of context, and stands out. (Information and text taken from [Accessible Hyperlinks](https://accessibility.oit.ncsu.edu/accessible-hyperlinks/).)

* To determine whether hyperlink text makes sense as standalone information, look over your document and read the links. Do they make sense on their own? Are they concise?
  + - Links that don’t make sense on their own:
      * URLs (e.g., <https://classroomaccess.oit.ncsu.edu/simple-wayslesson2/part-6-hyperlinks/>)
      * "Click here," "See this page" “Benefits," "Learn more"
    - A link that makes sense out of context but is verbose: [This page lists ways in which accessible hyperlinks can benefit screen reader users](https://classroomaccess.oit.ncsu.edu/simple-wayslesson2/part-6-hyperlinks/)
    - Meaningful, concise hyperlinks: “Lesson 2.6: Hyperlinks,” “Creating Accessible Hyperlinks”
  + Hyperlink text is usually blue but may be any color that contrasts with surrounding colors. Use the same color for all hyperlinks in a given document. Underline links.
  + To create a basic web hyperlink: Press Enter after you type the address of an existing webpage (such as <http://www.contoso.com>).
  + To make a link accessible:
    - Select the whole URL, including the "http" or “https” at the beginning and the domain at the end.
    - Right-click to open the context menu, then find and select **Edit Hyperlink** (PC) **/Hyperlink> Edit Hyperlink** (mac).
    - In the dialog box, look for a text box labeled **Text to display** and type in the description you want.
    - Click **OK**.
  + Tips
    - If the title on the hyperlink's destination page gives an accurate summary of what’s on the page, use it for the hyperlink text.
    - If a hyperlink downloads a file, be sure to mention that. Example: [Campus Map (PDF, 5.62 MB)](https://accessibility.oit.ncsu.edu/wp-content/uploads/sites/47/2019/03/CampusMap_11x17.pdf)
    - If a hyperlink opens in a new browser tab or window, be sure to mention that. Example: [NC State University Homepage (opens in new tab)](http://www.ncsu.edu/)
    - Write out full email addresses to convey that it is an email address

1. There is sufficient contrast between text and background colors.
   * Set all font colors to **Automatic** and the background to **No Fill**, i.e., use black font on white background.
2. All worksheets have unique, clear, and descriptive names.

[This video](https://support.microsoft.com/en-us/office/insert-or-delete-a-worksheet-19d3d21e-a3b3-4e13-a422-d1f43f1faaf2) explains how to name, rename, and move worksheets (the tab(s) at the bottom of an Excel file).

1. There are no blank worksheets
   * Delete blank worksheets.
2. Cells and ranges are named.
   * Name cells and ranges so that screen reader users can quickly identify the purpose of cells and ranges in Excel worksheets.
   * To name a cell or range:
     + Select the cell or range of cells that you want to name.
     + Select **Formulas** > **Define name**.
     + Enter the name and select **OK**.
3. Tables within a file are named and accessible.
   * To name a table
     + Place the cursor anywhere in the table.
     + On the **Table Design** tab, under **Table Name**, replace the default name, such as 'Table1,' with a more descriptive one.
   * Follow guidance above on headers, contrast, and table structure or see [Create accessible tables](https://support.microsoft.com/en-us/office/make-your-excel-documents-accessible-to-people-with-disabilities-6cc05fc5-1314-48b5-8eb3-683e49b3e593#createaccessibletables_win)
4. The Excel Accessibility Checker returns no errors.
   * To manually launch the Accessibility Checker, select **Review** > **Check Accessibility**. If there are no errors, complete your checklist and submit it with your file.