Accessibility Checklist for Excel Spreadsheets

Excel provides a number of features that can be used to make your spreadsheets more accessible. Like other Microsoft products, an accessibility checker is available to identify and explain any accessibility problems.

Here is a list of things to consider when creating spreadsheets in Excel to make sure they are accessible to everyone:

1. **Use a sans serif font of an appropriate size**
   - While there is no definitive correct font choice for accessibility, it is recommended that a sans serif font, such as the default Calibri, is used.
   - Your font choice should be consistent throughout all content.

2. **Text colour should have good contrast with the background colour**
   - If your sheet has a high level of contrast between text and background, people with visual impairments will find it easier to read.
   - If background/watermark images are used, make sure they don't reduce the clarity of the text.

3. **Giving each sheet a unique name and title**
   - Give sheets meaningful sheet names to ease navigation. Screen readers can produce a list of the sheet names to be scanned through enabling the user to go to a specific sheet.
   - A title, preferably typed into cell A1, should also be used on each sheet. This is so people know exactly what the information on the sheet is about.

4. **Descriptive Alt text must be added for all images, tables, charts and other visual content**
   - Visual content includes pictures, SmartArt graphics, shapes, groups, charts, embedded objects, ink, and videos.
   - Alt text provides a description that will be read out by assistive technology to help people with visual impairments understand what's important in images and other visuals.
   - If your image is purely decorative, you can mark it as such by typing two quotation marks "" as the alt text. Examples of objects that should be marked as decorative are stylistic borders.
   - Avoid using text in images as the sole method of conveying important information. If you must use an image with text in it, repeat that text in the presentation or in the alt text.

   **Video: Add alt text to a chart**
   - **Add alt text to a chart**
     1. Right-click on the white space of a chart and select **Format Chart Area**.
     2. In the **Format Chart Area** pane, select **Size and Properties**.
     3. Under **Alt text** type a description and a title.

   **Video: Add alt text to a table**
   - **Add alt text to a table**
     1. Click anywhere in the table.
     2. Right click and hover over **Table**.
     3. Click **Alternative Text**.
4. In the box enter a Title and Description for your alt text.

Hyperlinks should be embedded into the text and not as URLs unless appropriate

Longer hyperlinks are difficult to understand and remember, especially when using assistive technology such as a screen reader. Screen reading software can extract a list of links from a spreadsheet. Links such as "click here" do not provide any information about their destination when taken out of the sheet content. Use descriptive hyperlink text, such as "More information can be found on the Information Systems Services website" to convey clear and accurate information about the destination.

Add hyperlink text

1. Select the text to which you want to add the hyperlink, and then right-click.
2. Select Hyperlink from the menu.
3. The Insert Hyperlink dialogue box will appear.
4. The text you selected displays in the Text to display field.
5. In the Address field, enter the destination address for the hyperlink.

To pass the accessibility check you need to include a ScreenTip. A ScreenTip is a bit of information that appears when a user hovers over the hyperlink. A screen tip does not work with a screen reader, although it is beneficial to people with cognitive difficulties or people with low vision who use a mouse. To add a ScreenTip, in the Insert Hyperlink dialogue box, select ScreenTip and provide more detail about the link.

Charts should have appropriate labels

Charts created in Excel should be clearly labelled.

Chart elements such as title, axis labels and legends should be used where appropriate. Using these elements can help a screen reader to recognise and explain the information provided in the chart.

To change the format of your chart:

1. Click on your chart and then in the design tab click Quick Layout.
2. Choose a layout. Layout 9 displays the chart title and legend as well as displaying the axis titles.
3. Give your chart a suitable title and axis titles.
4. To change where an element e.g. chart title, appears or to add or remove an element, in the design tab click Add Chart Element.
5. Select which element you want to edit and then make any necessary changes.

Use table formatting to enhance accessibility

Screen readers keep track of their location in a table by counting table cells. If a cell is merged or split, the screen reader loses count and can’t provide helpful information about the table after that point.

Effective use of row and column title headings can help to ensure that people using screen readers are able to keep track of where they are in a particular table. Using names to define row and column titles ensures that screen reader software is able to announce the headings as cells within the table.
Remember:

all tables will also need alt-text adding to make it accessible.

You do not need to format excel data into a table for it to be accessible - a screen reader will still be able to read it. However, the table would have alt-text describing the table in more detail and enhance accessibility.

To convert text into a table:

1. Highlight the text you wish to make into a table.
2. In the home tab under styles select Format as Table.
3. Choose a style.
4. Ensure ‘My Table has Headers’ is ticked.
5. Click Ok.

Blank or empty cells should be replaced

It is recommended that blank cells are replaced with 0, - or an NA. This is so that screen reader users won’t be confused when reading through a table or spreadsheet.

To fill any empty cells with a 0, - or N/A

1. Highlight the table that contains blank cells.
2. From the Home tab select Find and Select.
3. In the drop down select Replace.
4. In Find leave it blank.
5. In Replace type the value you want to display in the empty cells.
6. Click Replace All.

Avoid merged cells and resize cells to ensure all text is visible

Merged cells should not be used in your spreadsheets. This is because screen readers have navigation issues as they will not know how the cells relate to the columns - so will struggle to provide meaningful and accurate information to the user.

To ensure that all text is displayed without using merged cells:

1. Select the cell.
2. In the home tab select Wrap Text.

Alternatively,

1. Select the column containing the cell you need to resize.
2. Drag the edge of the column to expand the cells.

Working with complex data

If multiple sets of data are needed, instead of having one long sheet, split it into individual sheets.

If you have a complex spreadsheet with multiple sheets, make the first sheet a contents or instruction page to highlight what the following sheets are about and make sure you delete any blank sheets to avoid confusion.

Using comments to add more information

Use Excel comments if needed to provide additional information to cell contents, as they can be read by screen readers.
To add a new comment:

1. Select the cell you want to comment on.
2. In the review tab select New Comment.
3. Type your comment.

Use the Accessibility Checker tool in Excel

The Accessibility Checker will list any accessibility issues in your spreadsheet. These will be listed as errors or warnings. Errors must be fixed to ensure that your spreadsheet is accessible. Warnings are potential hazards that may need manually checking or require a judgement call (such as a hyperlink that isn't embedded in the text).

Run an accessibility check

1. Select File > Info.
2. Select the Check for Issues button.
3. In the Check for Issues drop-down menu, select Check Accessibility.
4. The Accessibility Checker task pane appears next to your content and shows the inspection results.
5. Follow the prompts to improve your spreadsheet's accessibility.