

Accessibility Best Practices

This is a DRAFT document.

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Formatting Text

Use standard, legible fonts

For body text, choose a standard font that's easy to read in small sizes and that almost everyone has on their computer like Arial or Verdana. These are both sans-serif fonts, meaning that they don't have serifs, or the little tails on the ends of letters like Times New Roman does, and it's been suggested that these are easier to read for body text. If you want to use a serif font, consider using it for headings rather than body text, and again choose one that most people will have on their computer.

Why should you use a font that everyone else has? If someone doesn't have the font you carefully chose, it'll be substituted with another font when the document is opened in Office. That could result in unfortunate effects like changes in where your page breaks occur, text overlapping the margin areas, and so forth.

Of course, if you intend to distribute your document as PDF, you have more freedom with the font you choose because PDFs are designed to preserve the appearance of the document, but you still need to choose something clear and legible.

Make body text reasonably large

A font size between 12 and 18 points is recommended for body text in a printed document. Now some fonts do appear to be much larger than others at the same font size so you may have some wiggle room here but if you're setting your body text at 10 points or below you're almost certainly making it too small for good accessibility.

Use bold and other text effects sparingly

Bold face, italics, all caps, small caps and other such text effects make text harder to read so you should never use them for long passages of text. Use them for emphasis only, and don't overdo it.

Sparkling, scrolling or blinking text is also poor form, where accessibility is concerned, and should never be used. Flashing effects are distracting at best and can actually trigger seizures, at worst.

Use high contrast between text and background

Some visual disabilities have the effect of "softening" the contrast between colours so it's important that the colours you choose for text and backgrounds have very high contrast to start with—black text on a white background or vice-versa, for example. And don't use a patterned or picture background behind text—that could make it much harder to read.

Use colour as decoration, not as content

Don't colour-code text in red and green to indicate good and bad, or right and wrong—or if you do, ensure that your reader can still understand what you mean if the colour is removed. And if your documents include hyperlinks, allow Office to format them using underlining, not just colour alone, so that people who can't see colour can still tell there's a link.

Remove repeated blank characters

A lot of people will create extra white space on a page by pressing the Enter key many times in a row. Someone using a screen reader will hear that as “blank, blank, blank, blank...”—this is not only annoying but it can fool a person into thinking there's no more content in the document! Use paragraph formatting commands to add space before or after a paragraph instead. Similarly, instead of pressing the Tab key or Spacebar repeatedly to move the insertion point, learn how to insert a tab stop so that you only have to press the Tab key once. Or use a table if that's the right tool for the job.

Avoid using picture fonts

Picture fonts such as Wingdings or Webdings are great fun to look at, but keep in mind that these little pictures are actually text—your little image of an arrow might be pronounced by a screen reader as the letter “W”. You can't add alternative text to a picture that is actually a character from a font, so you have no way to convey what that picture actually means. Write things out in plain language if you can, or use a real graphic that you can add alternative text to instead.

Similarly, keep in mind that the symbols you choose to use as bullets are purely decorative—you can't add alternative text to them, either, so ensure that your bullet symbols are not the only way that you convey important information.

Even when it comes to standard symbols, take care that your meaning will be clear to a screen reader. Does a # mean “pound key” “number” or “hashtag”? A sighted person might know by the context but a screen reader isn't as smart as a human and might say the wrong thing. When in doubt, write it out.

Using Images and Objects

Provide alternative text

Not only images but charts, tables, diagrams, videos, and just about any object that isn't part of the normal flow of text in the document requires alternative text to help anyone who may have trouble seeing that content to understand it. And alt text has to be added to every single image and object, even if it's purely decorative.

Excellent resource with lots of examples: <http://webaim.org/techniques/alttext/>

Alternative text for images

Good alt text is short and sweet. Imagine that you're reading a document over the phone to someone, and that you're in a rush. What can you say to convey the meaning of the image in as few words as possible?

A screen reader will inform the user that an image is present, so you don't have to include "image" in the alt text. You might want to include what type of image it is—"photograph of three penguins"—but only if that really matters to comprehending the content of the document. If it doesn't, "three penguins" will do. Or perhaps "Three penguins, a bonded pair and their chick", depending on the context and what is important to know.

If an image has a function, describe the function of the image in preference to its appearance. Something like "go to next page" would be good alt text for a navigation button, for example. When an image is also a link, you can expect a screen reader to say something like "image, link" followed by your alt text, so you don't have to include "this is a link". And only need to describe the appearance of that image if it really matters.

That goes for corporate logos and such, as well. You can usually write "York University logo" and leave it at that. You don't want to waste someone's time repeating a lot of information about the appearance of an image when it doesn't really matter.

If an image is purely decorative and conveys no meaning, don't leave the alt text blank! The user won't know whether the image is important or whether you just forgot to add alt text to it. Instead, insert two double quotation marks as the alternative text with nothing between them: `""`. This will be read as "image: null" and is a convention used to communicate that you assessed the image, determined it conveys no meaning, and don't want to waste the user's time on it. It has the added advantage that accessibility checkers will not alert you to missing alt text for that image any longer.

Be sure to double-check the alt text for all of your images, not just where it's missing. For example, if you drag an image into your document from your desktop, Office will insert the name of the file as alternative text. The filename is rarely useful alt text so you need to edit that, but an accessibility checker won't alert you to the problem. All it can tell you is that there's something in the alt text property for the image, not how useful it is.

Alternative text for other objects

Alternative text has to be added to many other kinds of objects, as well, including tables, charts, diagrams, and so on. In each case the purpose of alt text is to convey the essential information the user will need to understand and work with that object. We'll discuss alt text for tables and charts in more depth when we tackle each of those topics later on in the course.

Provide long descriptions

The full meaning of complex images like charts can't easily be conveyed with brief alternative text, so in this case you should also include a longer description of that content, either in the main body of the document or perhaps in an appendix.

In PowerPoint, use Slide Notes to expand on the content of a slide—the slide notes are accessible to screen readers, but you could also use this feature to create handout versions of your slides that include your notes, which will benefit everyone.

Use real text, not images of text

Sometimes to achieve a special effect, people will lay out text in an application like Photoshop and then export it as a jpeg or png image for use in Office. Don't do this. First, you shouldn't create situations where you need to use alt text unnecessarily. And images don't remain perfectly sharp when they are enlarged like real text does, so it's a problem for people who need to use a screen magnifier, as well. Use real text instead.

If you do have to use an image that contains text, like a corporate logo, be sure to include the same text within the alternative text for the image.

Use single, simple images

If you use images that consist of many individual shapes grouped together, convert that to a single image and add the alternative text to the simplified image.

Don't "float" images, text boxes or other objects

In Word, the text wrapping feature can be used to allow text to wrap around or appear in front of or behind graphics and other objects—but unfortunately objects that are formatted this way aren't accessible, even if they contain real text or you do provide alternative text for them.

They simply won't be included in the reading order. For such objects, the text wrapping setting has to be changed to "in line with text" or "Top and Bottom" to make them accessible—which

of course will change the appearance of your document somewhat. Now, that all said, if you plan to distribute a document as PDF, you may be able to fix this issue in Adobe Acrobat later on. But if you're distributing the Office document in its original format, don't float your images. (Watermarks are by their nature always a floating image or text box, and they can't be made accessible.)

Minimize decorative images

Since every image has to have alternative text, it makes sense to avoid including a lot of images that don't actually convey any meaning as these might interrupt the flow of the document when it's read aloud. A good example of this is a horizontal rule, which may act as a visual separator but is not essential to understanding the document. Instead of inserting a line as a graphic file, create the line using paragraph borders. The border will look nice to people who can see it, but it doesn't count as a real graphic and doesn't require alternative text, so it won't interrupt the flow of content for someone who can't see it anyway.

By the way, the bullet symbols on an unordered list are purely decorative—they won't be read by a screen reader. If you do choose a special symbol for a bullet, make sure that it doesn't convey any critical information in and of itself.

Use captions

Captions for images, tables, equations and other objects are useful if the document is printed in greyscale or in poor quality—someone reading the document will still have access to the caption. Captions can also make it easier to locate content in the document because you can easily make a table of figures or equations based on your captions in Word. As well, when you need to refer to an object, you can say "see Figure 9" instead of something that assumes someone can see the document, such as "see the larger of the two images above".

Position captions consistently throughout the document—don't have them above items sometimes and below at other times. Above is good for screen readers, but if you have to put them below just keep it consistent.

Use closed captioning & descriptive video

When you include audio in your document, that's of course going to be inaccessible unless you provide closed captioning for people who can't hear. And for people who can't see a video, only hear the audio, you can help by providing descriptive video that fills in the information missed by someone who can't see the images. When you're selecting media, make the availability of these features one of your criteria.

If you can't provide actual closed captions and descriptive video, be sure to include a separate text transcript and description of the audio and video content.

For PowerPoint 2010 you can download an add-on called STAMP, standing for Sub-titling Text Add-In for Microsoft PowerPoint, to create your own time-stamped closed captions for video and audio in your presentations. Unfortunately this add-on doesn't work in PowerPoint 2013.

Make accessible charts

Charts are complex objects that require special consideration. First, you'll need to add alternative text to describe the purpose of the chart. If you can't convey every bit of the information that the chart does in a brief sentence or two, you should write brief alt text and include a long description in the body of the document or in an appendix.

Include clear titles and labels for the axes and data points of the chart to help people understand what the information means.

Don't just stick with the default formatting provided when you create the chart. Office's chart styles may be attractive, but they're rarely fully accessible. A truly accessible chart doesn't rely on colour alone: format each data series with a simple pattern or dotted and dashed lines instead of solid colours. Unfortunately, that doesn't always look very nice. Here's one of the very rare instances where you may decide it's better to provide an accessible version of your chart in an appendix, especially if your document is a fancy report or proposal with high-end design requirements.

Even if you do use solid colours for one version of your chart, ensure that the colours contrast with each other enough that the differences would still be very clear if the chart were printed in greyscale on a really, really lousy photocopier.

Finally, consider providing the data that the chart is based on right within your document—place it in a table below the chart if it's a small set of data, or in an appendix if it's more extensive.

Make accessible diagrams

Office has a great feature called SmartArt that allows you to build professional-looking graphics based on your text. Some of the diagram types even allow you to add pictures within the diagram. You'll need to add alternative text to the diagram as a whole, as well as to any pictures that are within it.

Here's another area where it matters whether you're going to distribute this document in its original Office format or convert it later to a PDF or perhaps a website. The text embedded within this diagram is not going to remain accessible if the document is converted, so you'll need to take steps to ensure that all that information remains accessible. In a PowerPoint document, you could put a list version of the diagram into your slide notes and use the Notes layout when you convert the document to a PDF. In a Word document, you could include the

diagram's text in the alternative text, if it's not too long, or create an appendix including the complete information from the diagram.

Simplify visual effects

Some special effects, such as slide transitions and text animation in PowerPoint, can confuse screen reader software so it is best to remove these from the version of the presentation that you're going to distribute to the public.

Writing Clearly

Be clear

Try to write in short sentences using plain English, with the most important information appearing early in each chapter or paragraph. If you can, avoid including “nice to know” information that doesn’t speak directly to your point—stick to the essentials.

Spell out acronyms

Always spell out acronyms or short forms in full the first time you use them in a document.

Write link text in clear English

Ideally, linked text should be written in plain English that “flows” naturally within the paragraph—in fact the accessibility checker in Office will complain if you use long complicated web addresses because they may not be clear to the reader, so replace those addresses with plain English. The actual name of a website or title of a web page often makes good link text.

If you do have to provide raw web addresses, you might want to provide them in a table or bulleted list below the main text of the paragraph. Avoid putting long web addresses inside parentheses in the middle of the paragraph—again, that really disrupts the flow for your readers and ultimately makes the document harder to understand.

Someone using a screen reader might only want to locate a link that they know exists somewhere in your document. They can jump from link to link, reading just the linked text out of context of the rest of the document. So the linked text on its own should be clear enough to communicate where the link goes, and include all essential information that is in the text. For example, you might link this entire text: Economics 1010 course syllabus (pdf, 128K).

Link text should be unique for each different link. If you do use the exact same link text twice, those two links should go to the exact same place.

Never use “here” or “click here” as link text. If you’re tempted to do that, you’ll usually find that you need to re-write the sentence to include more suitable text to use for a link—here’s where the target website’s name or page title can be used: Instead of “Click here to see pictures of the White House holiday decorations”, write “Visit White House Photographs to see pictures of the holiday decorations...”

Finally, link text should also be long enough to be seen easily by people with low vision. If your link text is a single three-letter word, for example, consider revising it to include another word or two so that people can spot it more easily.

Mark language changes

The documents you create should already have a default language setting, the same one used by your spell checker. If you include passages of text in a different language than the rest of the document, ensure that the text is coded in the correct language so that screen readers can pronounce the words correctly!

Ensure content will be read in a sensible order

When a sighted person reads a document, they normally read from left to right and up to down on each page. But when an electronic document is read by a screen reader, that's not always the case. You may need to take steps to ensure that items get read in a sensible order, or what's often called a "natural reading order" or "tab order". Headings and labels should get read immediately before the content they apply to, and so forth.

In PowerPoint, all of the items on a slide are actually graphics that "float" above the background, each on its layer. PowerPoint slides get read from what is on the bottommost layer of the slide to what is on the topmost layer—that is, more or less in the order in which the object were added to the slide. It's really important to double-check the reading order of slides and make adjustments as needed before you release the document.

In Word, the main text content is of course going to be read from the top to the bottom of the document, but as we've mentioned, if you format images, charts, tables or any other objects using any of the "floating" wrap text settings to the document, those objects are inaccessible in the Word document itself.

Now that said, if you're going to end up converting your Word document to a PDF for distribution, you may be able to use some floating objects. The content and alternative text of those objects will be included in your PDF, but you do have to double-check that they're going to be read out in a logical order. Adobe Acrobat has a feature called the Touch Up Reading Order task pane that can help you to do just that.

Structuring documents

Use headings generously

This is a critical one—we can’t over-emphasize the importance of headings. Headings will help readers to understand the organization of your document and find the information they need quickly. This won’t only help sighted people—screen readers can use headings to summarize the document so that people with visual disabilities can find what they need on page 361 without having to read everything starting from page one.

Headings should be short and concise. If your heading is more than one line long you should consider editing it to be shorter. If your headings is too long, the Office accessibility checker will complain about it!

Format headings and titles with built-in styles

But its not enough to make text big and bold and call it a heading! You must use the built-in styles provided by your software to ensure that adaptive software like a screen reader can detect the headings in the document. And your headings must be nested correctly—a heading 2 is always a subheading of a heading 1 above it, and so on. Never skip a heading level because you prefer how a heading 4 looks over a heading 3—the headings must reflect the logic of your document.

Of course, you can re-design the heading styles to suit your needs, and the changes you make will be applied throughout your document automatically. If you’ve never used styles before, you’ll find that adopting this feature saves you an absolute enormous amount of time—so much that it’ll more than make up for any other work you have to do to make your documents accessible.

Similarly, use built-in styles to format other parts of your document according to the function. Word provides styles for up to nine heading levels as well as titles and normal paragraph text. Excel has heading styles, too, as well as “result” and other styles to keep your formatting consistent and help people understand your data. Be sure to apply the appropriate cell formatting like Currency or Date to the data in your worksheet. You should also title each Excel worksheet with a descriptive name and delete any worksheets you’re not actually using.

PowerPoint’s equivalent to styles are the placeholders for titles and content. Use them for their intended purpose—even if you reformat a Title block to look like content, that’s still the slide’s title as far as a screen reader is concerned.

Every PowerPoint slide needs a title, and each title should be unique so that readers can find the slide they need quickly.

Provide navigation aids

Page numbers, header and footer text, a table of contents, a table of figures—all of these tools help make your document more user-friendly for everyone as well as more accessible for people with disabilities. You will find that once you’ve used the built-in features for coding headings, captions, and other elements of the document’s structure that you can generate the table of contents and other navigational aids in a snap.

In Excel, you might want to add a general description of each worksheet in cell A1 so that it’s the first thing that a screen reader recites. Your description should help people to navigate the worksheet—for example, “This worksheet includes one data table starting at cell A12 listing revenue figures with columns for Region, Revenue Type, and Amount.”

Creating named ranges is also helpful in Excel—you can select a table or an area of your spreadsheet and assign a name to it. The name appears in the Go To dialogue box, allowing someone to get to that content quickly.

Use the correct feature

Headings are not the only structure in your document, of course. Anything that isn’t plain, flowing paragraphs (also called body text) must be formatted using the correct feature so that adaptive software can interpret it correctly. For example, a screen reader understands that a list is a group of related items, and can help a user navigate and find what they need within that list—but only if you format it correctly using the Lists feature. Otherwise, your list is simply a set of unrelated paragraphs.

Similarly, if you have to present data in columns and rows, you should use the Tables feature, instead of lining up text with the Tab key. If you want to create side-by-side columns, use the Columns feature, not a table.

Make accessible tables

Tables deserve an in-depth discussion because they are often mis-used, or poorly designed for accessibility.

Use tables only when you need to display data in rows and columns.

Don’t use tables to align text and objects on the page. Sometimes people will throw in a table with just a single cell and put text in it, or insert an “invisible” table with no borders to position items where they want them on the page. Both of these uses can create problems for accessibility, so you should avoid using tables this way.

Another poor use of a table is to lay out large amounts of text in paragraphs. A table like that should be converted to proper headings and paragraphs, which are much more accessible and usable for everyone, especially since you can make a table of contents with them.

So when you do have data that should be laid out in a table, how do you ensure that your table is accessible?

First, plan ahead to keep your table as simple as possible. Each table should be a simple rectangular grid of rows and columns, so that it can be easily understood and navigated. You need to include column headings in the first row, as well.

Your heading row must be coded as such so that screen readers can find the column heading if the user needs to be reminded of it—in Office, ensure that the Header Row checkbox is activated on the Table Design ribbon, and also turn on the Repeat Header Rows feature for your header row. This will also ensure that your header row will be printed at the top of each new page when your table is long enough to break across pages—also critical for accessibility.

Speaking of page breaks, you must also set your table's properties so that a page break can't occur in the middle of a row. A row must print entirely on one page, or your table fails the accessibility test.

Merging and splitting cells confuses screen reader software, so don't use that feature. That means that you are very limited as far as including things like column labels that span multiple columns, with subheadings underneath, and so forth. And this is a limitation of Microsoft Office at this point in time—it just doesn't have the ability to properly code for more complex table headers. If the table you are starting from has a more complex organization, consider splitting it into one or more smaller, simpler tables. If there are any merged cells that span the entire width of the table, that's usually a good place to split the table—that merged cell probably ought to be a properly-coded heading in the document.

Remove any entirely blank rows or columns from your table—you should never use a blank row or column to create space.

Last but not least, each table needs alternative text. For a table, alt text should describe the purpose and structure of the table—it might be something like "Inventory figures for March 2015 with columns listing the product name, item count, unit price, and total value. This may seem redundant, but think of it as giving the user an advance idea of what they're about to hear.

Final Steps

Describe accessibility features of the document

If you have a complex document with a lot of features like tables, charts, images, and so on, it might be a good idea to include a short section in the introduction that describes how the document has been made accessible so that people using your document know where to look. This is something you'll often see done for websites, and we think it's a good idea for documents too.

For example, let's say your document includes a lot of charts. You may have chosen to make an appendix with a fully accessible version of each chart formatted with patterns instead of colours, maybe along with the long description and the original data table. Say so in an introductory paragraph so that people will know to look for your appendix—and also use cross-referencing to link the charts in the main document to the versions in the appendix.

Add document metadata

Including a meaningful document title in the document's properties will help people if they need to search for your document later. In fact, a document title is required for PDF accessibility so if that's the format you're going to distribute the document in, add the title to your document in Office to avoid issues with your PDF later.

Use an accessibility checker

Do use built-in or even add-on tools that can help you to check the more mechanical aspects of document accessibility, such as whether alternative text exists on all of your images. But be aware that automated accessibility checkers don't understand the content of your document. They can tell you, for example, that alt text exists for an image, but can't tell you whether it's good and useful alt text. That you have to judge for yourself. To make a document that's truly accessible, you'll have to use your knowledge of document accessibility and your personal judgement to go farther than an automated checker can take you.

Export documents in an accessible way

When you save your document in another file type, you should check that the accessible features that you added to your source document in Office are actually included in the exported file. For a PDF, for example, there are some options you can check from the Save As dialogue box. Better yet, if you own the full version of Adobe Acrobat you can create your PDF from the PDF Maker toolbar, which does a better job of coding the document than the Save As method does.

And of course you should take it a step further and re-check your exported document—Adobe Acrobat Pro includes a full accessibility checker. If you find a problem in the PDF that you can fix in Office, make your fixes there and then re-save the PDF. This way, if you ever need to update your source document, you're not losing any of your work on accessibility. However, you may occasionally find an issue that can only be fixed within the PDF itself, and will have to make a few adjustments there.

Make accessible templates

If you've put a lot of work into making a document accessible, and you use that type of document frequently—say, a monthly report—save it as a template that you can reuse over and over again. This way you can focus on ensuring that the content that you add or modify is accessible instead of starting from scratch each time.

Don't assume that every template you download is accessible, even if it comes directly from Microsoft. Remember, the responsibility for whether a document you release is accessible lies with you. Always double-check any templates you use.

If your organization provides standard templates for electronic documents, verify if they're accessible. If they're not, use what you've learned to fix them up and consider asking for the accessible version to replace the one currently in use.

Plan for the intended output format

It's very common to do your writing in Word and later convert the document into a PDF before distributing it, or that document might even get converted into an HTML web page to be posted directly to the web. If you have an idea of how your document's going to be distributed later, it'll help you to make good decisions about how to make it accessible from the start.

Accessibility workflow

Here's a description of the general workflow.

You'll want to make your source document—Word, PowerPoint or Excel—as accessible as possible before you convert it to something like PDF. Check for accessibility on Office before you save as PDF.

Then, you'll want to use the full version of Adobe Acrobat Pro to double-check the resulting PDF to ensure that no accessibility issues arose as a result of the conversion.

If you do find problems, and it's something you could have done in Word, go back to your original document to fix the problem, and then re-create the PDF, and so on. Don't do anything in Acrobat that you could have fixed in Word. You don't want to lose your work on accessibility if you ever have to update and replace that document.

If there's anything that you couldn't fix in Word, fix it in Acrobat.

Impact of the output format on workflow

The output format is also going to impact some of the decisions you make about how you do your work in Office. For example, if you're going to distribute a PowerPoint document in its original format, you should remove the slide transitions. But if you're going to convert it to a PDF, you don't have to bother because those don't get included in the PDF anyway.

Alternative text is one area where the accessibility of your documents depends a lot on the output format you use.

When you add alternative text to an object in Office, you're given two boxes to fill in: Title and Content. If someone with a screen reader is using that document in its original Office format, they'll hear the Title field first, and then can choose to skip over the Description field if they want more information. So you'd think that it would be good practice to put short alt text into the Title field and optionally a longer description into the Description field. But what happens if you convert that document to PDF or HTML?

Well, in an HTML version of the document, the contents of the Title and Description fields are going to be concatenated together. You may end up with very long alt text.

In a PDF version of the same document, the contents of the Title field will be deleted. Gone. Only the Description field will remain. So you might lose all of your alternative text or be left only with long wordy descriptions.

Unless you are absolutely sure that your document is only going to be distributed in its original file format, avoid using the Title field for alternative text. Use the Description field only, and keep it short and sweet. What's in the Description field is the actual alternative text, and it should conform to all the guidelines for writing good alternative text.

Another, less critical, example has to do with floating objects. In a Word document, floating objects are simply not accessible to screen readers. To make the document accessible in Word format, you have to convert floating images, text boxes and so forth to the "in line with text" or "top and bottom" wrap text setting. But if you are going to distribute that document as a PDF, you might choose to keep your floating objects and do some work in Adobe Acrobat later to ensure that the reading order of those floating objects makes sense in your final version.