

Microsoft Outlook 365

Basic Authoring and Testing Guide

Preconditions

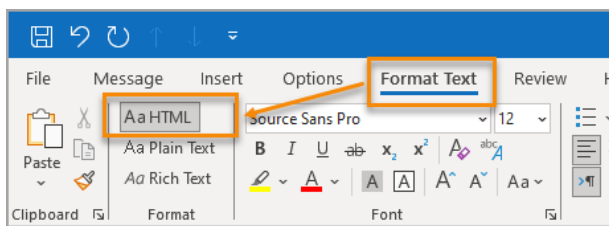
These tests and authoring guidance only apply to messages set to HTML and Rich Text format. Messages formatted as Plain Text do not require testing.

Messages formatted with **HTML** or **Rich Text** format allow application of specific structured elements, like headings or active hyperlinks. Using these features appropriately we can create a more accessible experience for assistive technology users.

How to Test A, B

Instruction A: Create new message (**Ctrl+N**); select **Format Text** tab, in the Format group select HTML. This is a sticky feature.

Figure 1: Message Format set to HTML



Test B: Is the email message format set to **HTML** or **Rich Text**? If not, the email fails this test.

Instruction B: Use a descriptive subject that clearly identifies the message by its purpose or content. An example of a descriptive subject is *Screen captures for Word Guidance Training Video*. An example of a non-descriptive subject is *Pictures*.

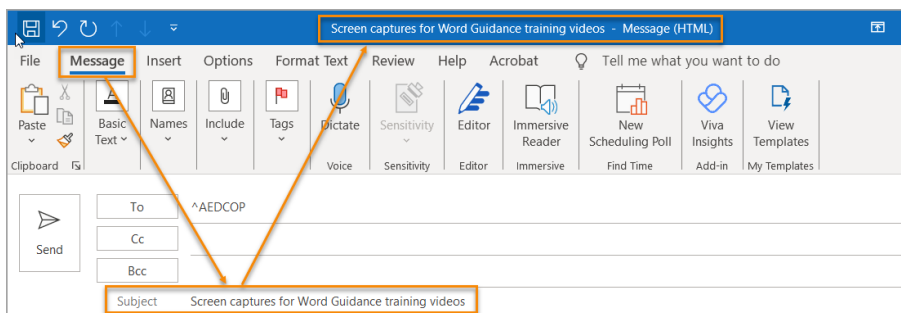
Test B: Does the email message use a descriptive subject in the **Subject** line? If not, the email fails this test.

How to author for accessibility:

A descriptive message subject helps everyone identify the purpose of the email.

- Start a new message.
- Use the Subject line to identify the purpose or content of the message.

Figure 2: Message with a descriptive Subject field



1. Do headings in the email use the MS Outlook heading styles?

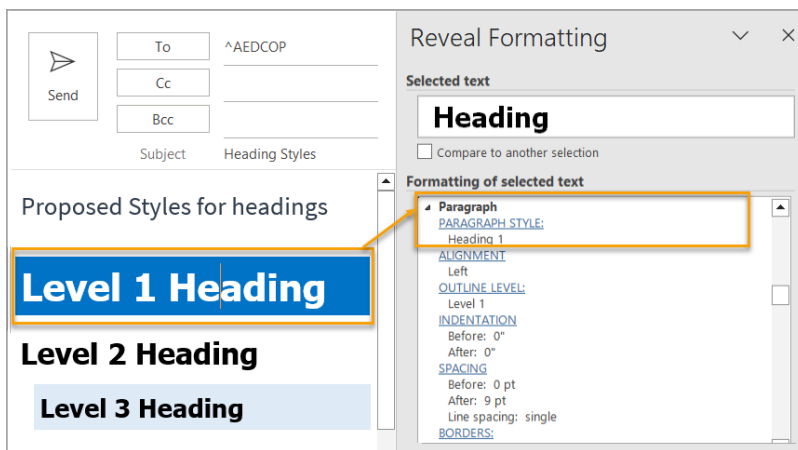
How to Test 1

Note: Most email messages will not contain headings. If a message does not contain headings, this test does not apply.

Instruction 1: Select text that may be a heading and open the **Reveal Formatting** pane (**Shift+F1**). Check under **Paragraph>PARAGRAPH STYLE** options for Heading 1, Heading 2, Heading 3, etc.

Test 1: Does the **Paragraph Style** in the **Reveal Formatting** pane (**Shift+F1**) display heading levels for the selected text? If not, the message fails this test.

Figure 3: Reveal Formatting pane showing **Paragraph STYLE** Heading 1

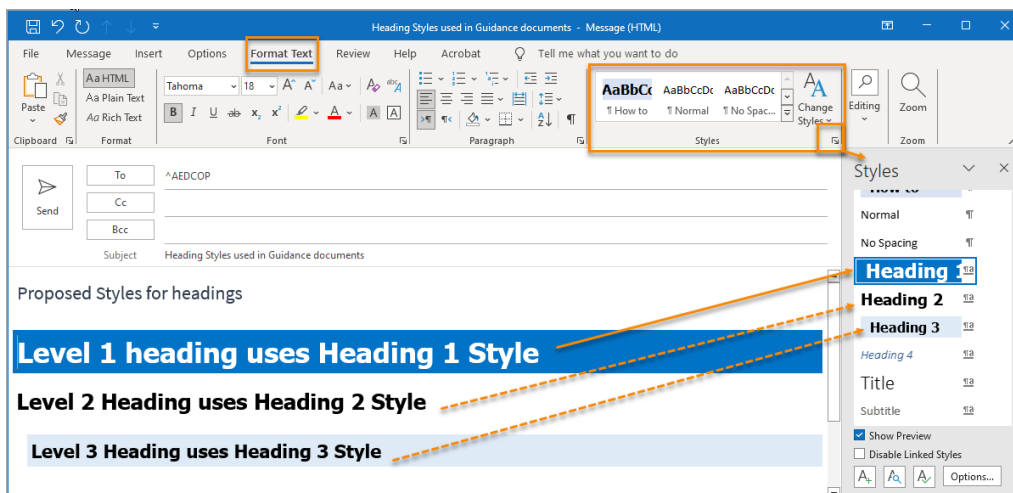


How to author for accessibility:

Headings help organize content and make finding information easier. Assistive technology users cannot infer meaning from formatted text appearing to be a heading, such as bold, underline, or increased font size. Heading styles create structure that assistive technology users can quickly access, and aids message navigation based on the heading levels.

Activate **Format Text** tab>**Styles** (**Ctrl+Alt+Shift+S** to open the **Styles** pane) and apply the appropriate level heading style to all headings in the message.

Figure 4: Heading styles applied to selected text

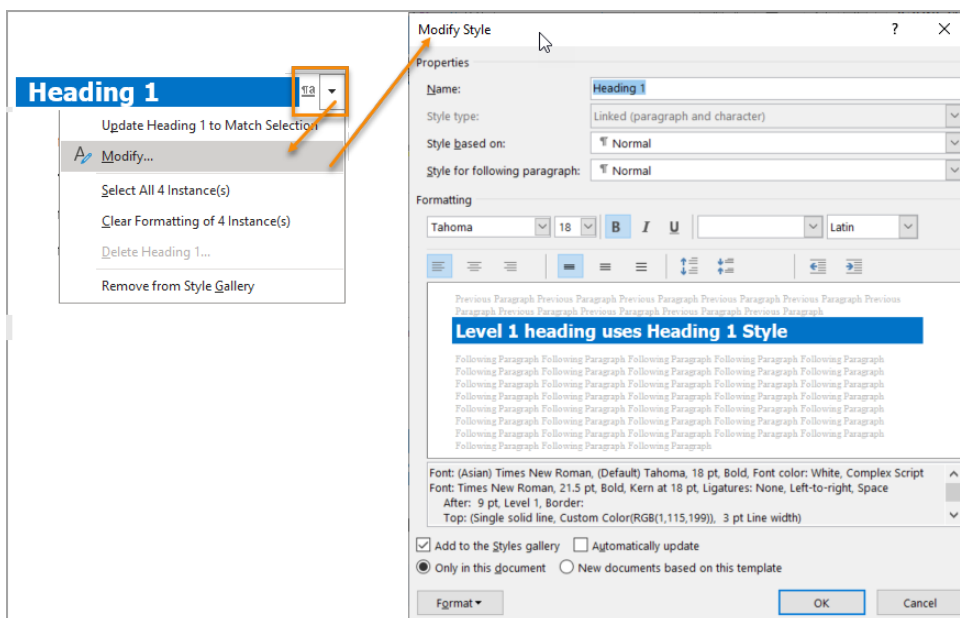


Either:

- Activate the heading style and type the heading, OR
- Type a heading, and with part or all text selected, choose the appropriate level heading style.

If the message contains multiple headings (H1, H2, H3, etc.), then each heading must use a different style. To change the appearance of the built in styles, expand the Style menu option, and select **Modify...** to change spacing and appearance (font family, color, size, shading, etc.)

Figure 5: Modify Style options window



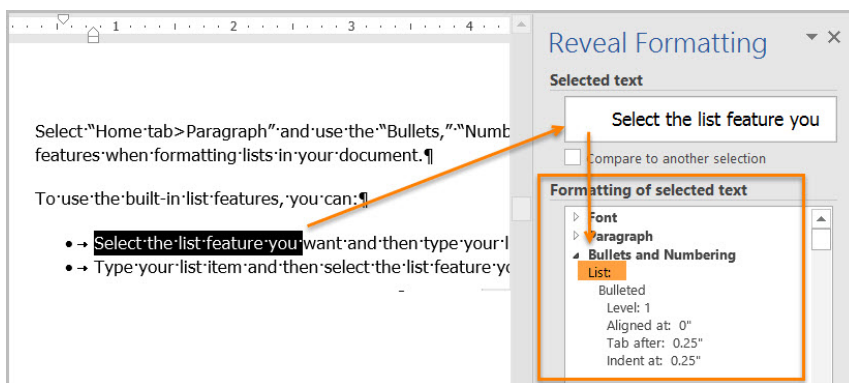
2. Are lists formatted correctly?

How to Test 2

NOTE: This test is not necessary if the message does not contain bulleted or numbered list elements.

Instruction 2: Place the cursor on a list item. Open the **Reveal Formatting (Shift+F1)** pane.

Figure 6: The **Reveal Formatting** pane displaying **List** option under **Bullets and Numbering**



Test 2: Is the **List** option visible under **Bullets and Numbering** in the **Reveal Formatting** pane? If not, the message fails this test.

How to author for accessibility:

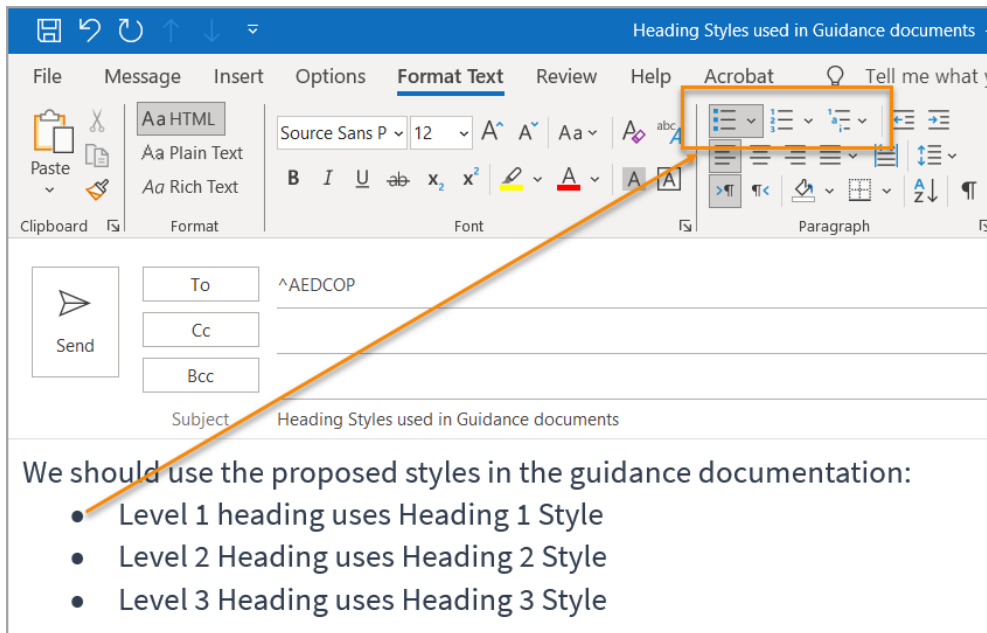
Lists help organize and structure content. Assistive technology users cannot infer meaning from lists created using only tabs, a dash, or manual numbering. Using built-in list options applies the formatting that assistive technology users need to easily identify and navigate lists.

Activate the **Format Text** tab>**Paragraph** group and use the **Bullets**, **Numbering**, or **Multilevel List** option when formatting lists in the message.

To use the built-in list options:

- Activate the list option and then type a list item, OR
- Type the list item and then activate the list option.

Figure 7: Paragraph group displaying options for bulleted, numbered, and multilevel lists



3. Are layout tables formatted correctly?

How to Test 3A, 3B

NOTE: This test is not necessary if the message does not contain tables.

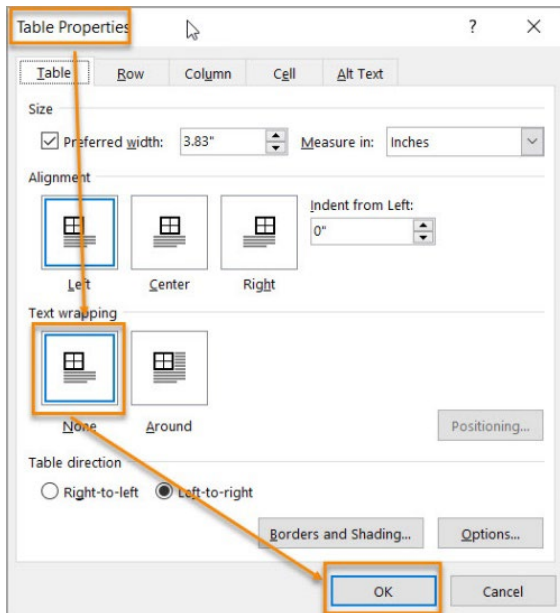
Layout tables allow authors to visually arrange content in email messages that assistive technology users can follow and read in a logical order (left to right, then top to bottom).

Instruction 3A: Select the first cell of the layout table. Use the **Tab** key to navigate through the table.

Test 3A: Does the tab order follow the logical (left to right, top to bottom) layout? If not, the message fails this test.

Instruction 3B: Right click (**Shift+F10**) inside a layout table and activate **Table Properties>Table** tab>**Text wrapping**.

Figure 8: Table Properties window with **Text wrapping** set to **None**



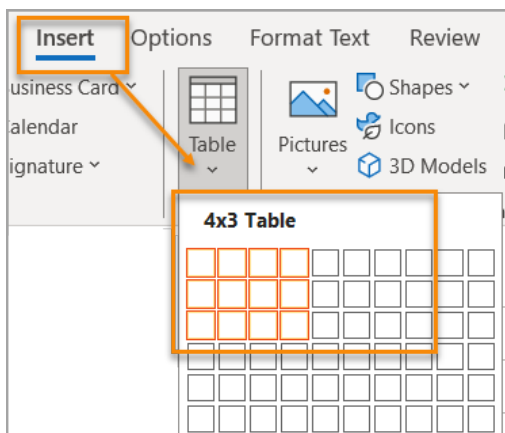
Test 3B: Is **None** selected? If not, the message fails this test.

How to author for accessibility:

To create a layout table using the table grid option:

- Activate **Insert** tab>**Table** to open the **Insert Table** options panel.
- Select the number of cells for columns and rows in the grid to draw the table.
- **Right click (Shift+F10)** inside the table and activate **Table Properties**>**Table** tab.
- Verify **Text wrapping** is set to **None**.

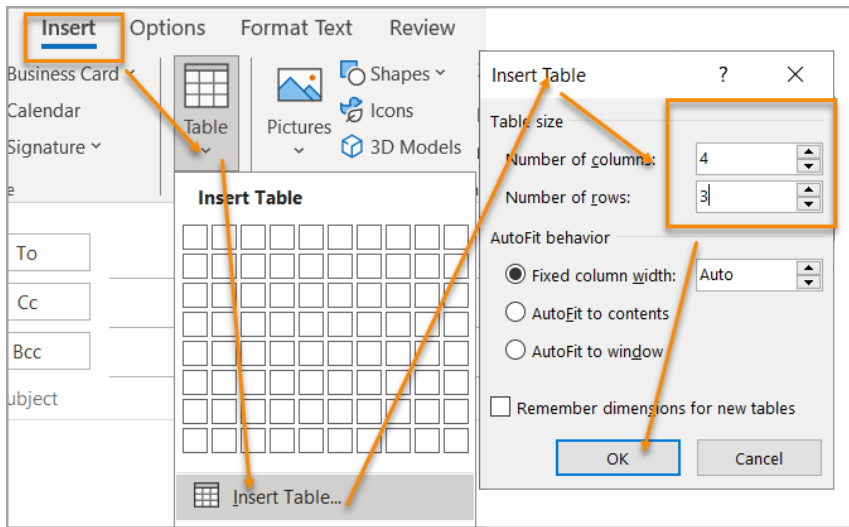
Figure 9: Insert Table options with a **4x3 Table** grid option activated



To create a layout table using the Insert Table dialog box option

- Activate **Insert** tab>**Table**>**Insert Table**>**Insert Table...** (**Alt+N, T, I**).
- In the **Insert Table** dialog box, specify the number of columns (**Alt+C**), and the number of rows (**Alt+R**).
- **Right click (Shift+F10)** inside the table and activate **Table Properties**>**Table** tab.
- Verify **Text wrapping** is set to **None**.

Figure 10: Insert Table options using the **Insert Table...>Insert Table** dialog box for a table with 4 columns and 3 rows

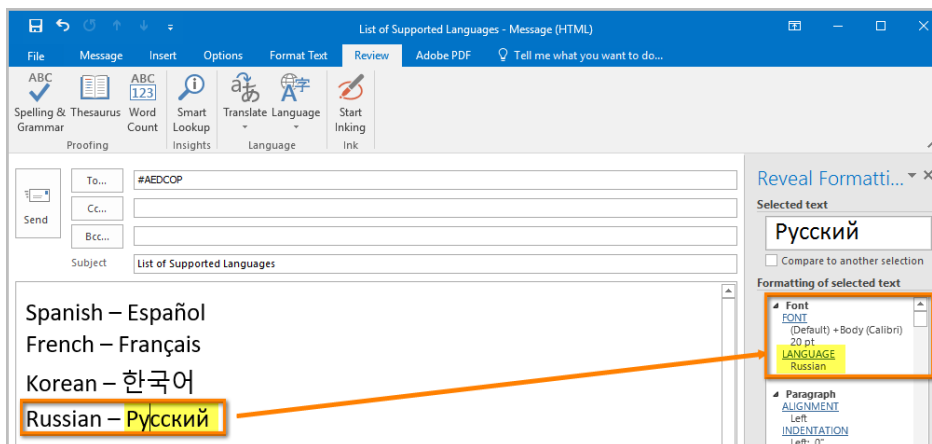


4. Is text formatted for the intended language

How to test 4

Instruction 4: If the email message contains words or phrases in multiple languages, or a language other than the defined default language, select that text. Open the **Reveal Formatting** pane (**Shift+F1**) and verify the listing under **Language** matches that of the selected text.

Figure 11: Reveal Formatting pane displaying **Russian** under **Font>Language** option for the selected text



Test 4: Is the text formatted using the identified language? If not, the message fails this test.

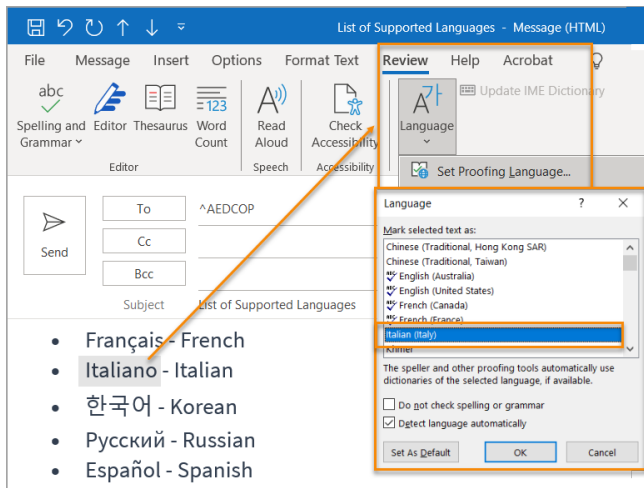
How to author for accessibility

A message may contain sections written in different languages. All non-default language text must be formatted to reflect its corresponding language so assistive technology can detect the assigned language and reproduce the text with the correct pronunciation.

To set a different language:

- Select text written in a different language.
- Activate **Review** tab>**Language** group>**Language**>**Set Proofing Language**.
- Select the appropriate language from the list.

Figure 12: Language selection for Italian



5. Are link names descriptive?

How to test 5

Test 5: Do links have meaningful names that describe their destination, function, and/or purpose OR are these determinable from context? If not, the message fails this test.

Uniquely Named Link:

www.section508.gov

Link Determinable from context:

[Get My Section 508 Questions Answered](#)

Ambiguous links with no context:

"Get more information [here](#)."

<https://site.44d76eb66f3943c395cd2d88207a7b57&aqs.docx>

How to author for accessibility

Assistive technology users rely on meaningful link names to determine the link destination, function, or purpose. For example, ambiguous *click here* links may hinder assistive technology users' access since the link names are all the same, while the destinations may be different.

Naming/creating links:

- Type the hyperlink (URL) text and press the **Space** bar or **Enter**
- Verify the hyperlink goes to the intended destination

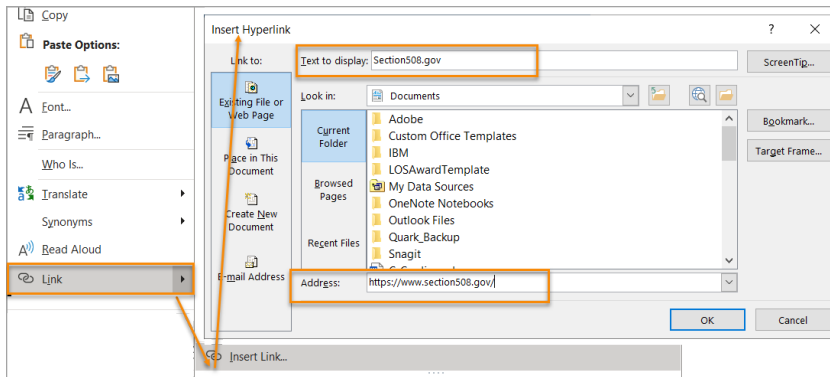
To open the Insert Hyperlink configuration window:

- Press **Ctrl+K**, or **right-click (Shift+F10)** to open the context menus and select **Link>Insert Link**
- In the **Insert Hyperlink** options window specify/verify the accuracy for the **Text to display**, the **Address** for the link and its destination, then select **OK**

Notes:

- Link destinations can be web pages, existing files (access restrictions apply), email addresses, and specified locations in a document
- Deleting or backspacing on the last character in the link name will remove the link

Figure 13: Insert Hyperlink configuration window



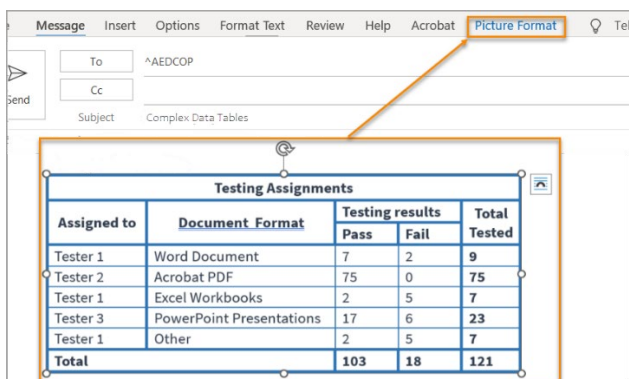
Object Formatting

6. Are data tables created using built-in features?

How to test 6A, 6B, 6C, 6D

Instruction 6A: Select a table and verify that the Ribbon displays the **Table Design/Layout** tabs instead of the **Picture Format** tab. If the **Picture Format** tab shows in the **Ribbon**, then it's a non-editable image of a table.

Figure 14: Picture Format tab instead of **Table Design** tab displaying in menu for what visually appears to be a table



Test 6A: Are all data tables in the message editable (data table is not an image)? If not, the message fails this test.

Instruction 6B: Launch the Check Accessibility Inspector **Review** tab>**Check Accessibility** to verify tables are free of merged and split cells

Test 6B: Are tables free of merged or split cells? If not, the message fails this test.

Figure 15: Complex table with merged and split cells

Assigned to	Document Format	Testing results		Total Tested
		Pass	Fail	
Tester 1	Word Document	7	2	9
Tester 2	Acrobat PDF	75	0	75
Tester 1	Excel Workbooks	2	5	7
Tester 3	PowerPoint Presentations	17	6	23
Tester 1	Other	2	5	7
Total		103	18	121

Instruction 6C: Place your cursor on any cell of a **Header Row**. Open the **Reveal Formatting** pane (**Shift+F1**) and verify **Repeat as header row** is listed under **Table>ROW**.

Figure 16: Table Row properties set to **Repeat as header row**

Reveal For... [X] [v]

Selected text: Document

Formatting of selected text:

- Table
 - TABLE STYLE: Grid Table 1 Light - Accent 5
 - ROW: Height: At least 0.2", Don't break across pages, Repeat as header row

Test Results

Document Format	Pass	Fail	Tested
Word Document	7	2	9
Acrobat PDF	75	0	75
Excel Workbooks	2	5	7
PowerPoint Presentations	17	6	23
Other	2	5	7
Total	103	18	121

Test 6C: Is **Repeat as header row** identified? If not, the message fails this test.

Instruction 6D: Place the cursor inside a table, **right click (Shift +F10)**, and select **Table Properties>Table Tab>Text Wrapping**.

Figure 17: Table Properties window with Text wrapping set to None

Table Properties [?] [X]

Size: Preferred width: 3.83", Measure in: Inches

Alignment: Left, Center, Right, Indent from Left: 0"

Text wrapping: None, Around

Table direction: Right-to-left, Left-to-right

Buttons: Borders and Shading..., Options..., OK, Cancel

Test 6D: Is **Text Wrapping** set to None? If not, the message fails this test.

How to author for accessibility

To understand the association between table cells and their respective headers, assistive technology users need to be able to identify column and row headers in data tables. Messages with complex data tables (data tables with more than one header row, one or more header column, and/or merged or split cells), must be converted to an accessible format (i.e. a PDF message remediated for accessibility). Complex data tables cannot be made accessible in MS Outlook.

To create a non-complex accessible data table:

- Select **Insert tab>Table**.
- Select the number of columns and rows.
- Do not merge or split cells.
- Place the cursor on the first row, **right click (Shift+F10)>Table Properties>Row tab>Repeat as header row** button.

7. Do images and other objects have alternative text?

How to test 7A, 7B

Images, Objects, Shapes, Charts, etc. allow authors to provide important, meaningful information in a visual format. Assistive technology users cannot infer meaning from selecting the illustration alone. To provide assistive technology users comparable access to the purpose or meaning of graphic content a contextual description in the form of a caption, nearby text, or **Alt Text** is required.

Instruction 7A: Select an illustration (picture, shape, icon, SmartArt, graph, etc.) and verify there is a contextual description in at least one of these options:

- Alt Text description. **Right click (Shift+F10)>View Alt Text...** to activate the **Alt Text** pane
- Figure caption (image can be marked as decorative), or
- Related in nearby text (image can be marked as decorative)

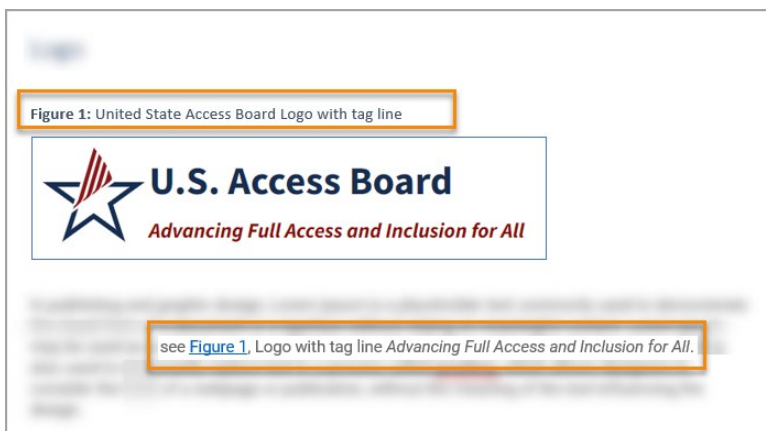
Figure 18: Example of a contextual description in the **Alt Text** pane



Figure 19: Figure caption showing below a selected image



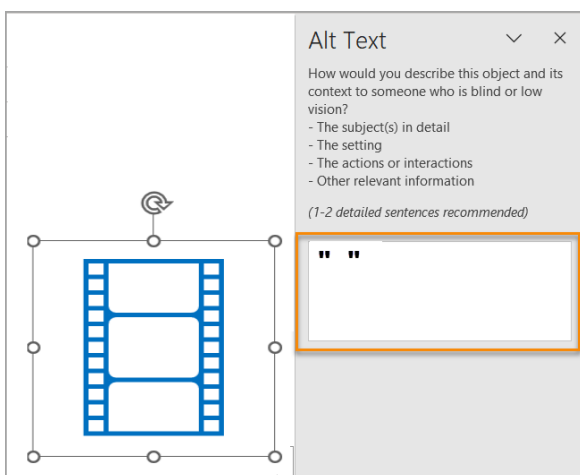
Figure 20: Image description in surrounding text with link to Figure caption



Test 7A: Does the image/object/shape have descriptive alternative text, a descriptive caption, or is it described in the surrounding text? If not, the message fails this test.

Instruction 7B: Select an image or object that is just for decoration, activate the **Alt Text** pane **right click (Shift+F10)>View Alt Text...**, and verify the description field contains two spaces between quotation marks.

Figure 21: Decorative content – alternative text description using " " (quote space space quote)



Test 7B: Does the description field of decorative content contain two spaces between quotes? If not, the message fails this test.

How to author for accessibility

Assistive technology users cannot infer meaning from images and other objects such as pictures, images of text, images of tables, shapes, icons with hyperlinks, etc. A brief description in the form of alternative text (**Alt Text**), a caption or information in the surrounding text relating the purpose or meaning of the image/object provides assistive technology users comparable access to the content.

Alternative Text Option:

- Select an illustration
- **Right click (Shift+F10)>Edit Alt Text...** to open the **Alt Text** pane
- Enter a brief, accurate description related to the purpose/context of the selected illustration. information that acc the purpose (in as few words as possible while remaining clear) for a meaningful image or object

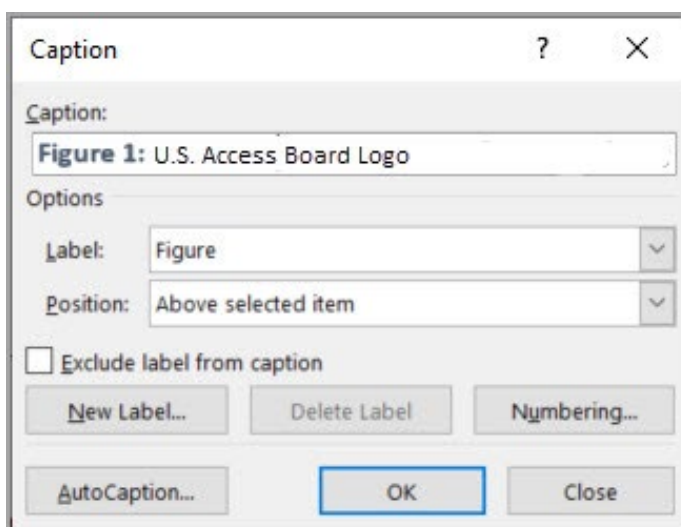
Notes:

- To add alt text to SmartArt, select the border instead of the individual shapes or pieces.
- In Microsoft Office 365, alternative text descriptions can be generated automatically. Users must verify that the generated description is accurately relating the illustration and its context.
- To disable automatic alt text, go to **File>Options>Ease of Access>Automatic Alt Text** and uncheck the **Automatically generate alt text for me** option.

Caption Option:

- Select the illustration.
- **Right click (Shift+F10)>Insert Caption...** to open the **Caption** options window.
- Type the information in the **Caption:** field after the label.
- Set the options for label, position, numbering, etc.
- Activate **OK**.

Figure 22: Caption options window



8. Are images, objects, and text boxes placed in line with the text?

How to test 8

Instruction 8: Select the image, object or text box in the message, right click (**Shift+F10**)>**Wrap Text**>**In Line with Text**.

Test 8: Is the text box set to **In Line with Text**? If not, the message fails test.

Figure 23: Image **Layout Options** set to **In Line with Text**



How to author for accessibility

Assistive technology users cannot access information in text boxes unless they are anchored **In Line with Text**.

To place images, objects, and text boxes in line:

- Select the image, object, or text box.
- **Right click (Shift+F10)>Wrap Text>In Line with Text.**

Color Formatting

9. Are colors and other visual characteristics that convey information also described with text?

How to test 9

Using only color or other visual characteristics, such as size, shape, or location, to convey meaning will not provide comparable access to people who are blind, have low vision, or are colorblind.

Instruction 9: Find where color and/or other visual characteristics, such as green, large yellow square, top left, etc., are used to convey meaning

Test 9: Is there text that conveys the meaning of the color or other visual characteristics? If not, the message fails this test.

How to author for accessibility

The following layout tables describe the progress for three projects using colors to symbolize the current project status. Adding text in addition to the color provides comparable information to assistive technology users and people who are colorblind.

Use text descriptions to duplicate the meaning of a color or other visual characteristics, such as size, shape, and location.

Table 1: Example of project status tables using only color, and color with text description

Project	Status
Project A	
Project B	
Project C	

Project	Status
Project A	On Time
Project B	At Risk
Project C	Late

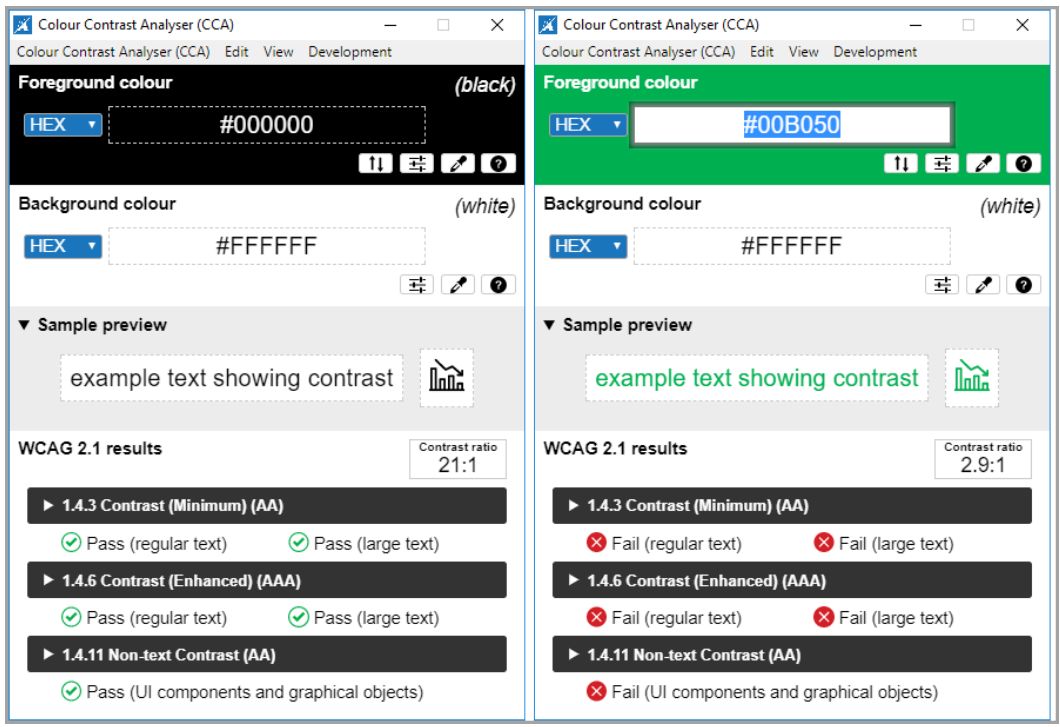
10. Is the contrast ratio between text and background sufficient?

How to test 10

Note: This test is not necessary, if the message text is black on white background (or close to it). This test requires the [Colour Contrast Analyser](#) (an external application).

Instruction 10: Execute the *Colour Contrast Analyser*. Drag the Foreground eyedropper icon over a sample of the text or image of text. Drag the Background eyedropper icon over a sample of the background color.

Figure 24: Examples of pass and fail results with the *Colour Contrast Analyser*



Test 10: is the message formatted with the correct color contrast ratio? If not, the message fails this test.

How to author for accessibility

People who are colorblind or have low vision will only have comparable access if there is sufficient contrast between the text and the background. The contrast standards are:

Table 2: Contrast ratios for types and sizes of text

Type or Size of Text	Contrast Ratio
Standard text (12 pt regular)	4.5:1
Large Text (14 pt bold or 18 pt regular)	3:1
Incidental text, text overlaid on images, and logotypes	Excluded from requirement

Create content with text, or images of text that use color or shading, with sufficient color contrast. If the contrast ratio fails, then adjust the foreground or background until it passes

Table 3: Examples of good and insufficient color contrast ratios

Good Color Contrast	Insufficient Color Contrast
White text on black background	Dark gray text on black background
Dark green text on yellow background	Orange text on yellow background
Light blue text on blue background	Red text on blue background
white text on red background	Dark green text on red background

Miscellaneous

11. Are there corresponding descriptions of embedded files and are they accurate?

How to test 11

NOTE: This test is not necessary, if the message does not contain embedded audio, video, or multimedia files.

Instruction 11: Activate the audio-only, video-only, or multimedia file.

Test 11: Is there an accurate and complete text transcript for multimedia files, text description for audio files, and synchronized caption and/or audio description for video files? If not, the message fails this test.

How to author for accessibility

MS Outlook messages with embedded audio-only, video-only, or multimedia files that contain meaningful information must have additional documentation so that individuals with disabilities have comparable access to the embedded information.

- **Audio only files** should have an accurate and complete transcript
- **Video Only files** should have accurate and complete text description
- **Synchronized media (audio and video)** files should have accurate and complete synchronized captions and audio descriptions

12. Are flashing objects excluded from the message?

How to test 12

Test 12: Is the message free of all flashing objects? If not, the message fails this test.

How to author for accessibility

Create content without using flashing objects. Flashing objects can cause seizures and should never be used.