PowerPoint 2007 – Basics

Best Practices in MS PowerPoint

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INTRODUCTION

PowerPoint is a presentation software program that allows you to create slides, handouts, notes and outlines that accompany an oral delivery of the topic. It is widely used and is an effective tool. This document provides instruction for creating a basic slide presentation using PowerPoint 2007 on your desktop Windows computer and includes best practices for making your presentation accessible.

CREATE STRUCTURED DOCUMENTS

The Microsoft suite provides support for addressing most accessibility issues that arise with electronic documents. In order to ensure that PowerPoint documents are ultimately accessible, content authors must utilize the formatting and layout options within Microsoft PowerPoint that support structural markup. This structural markup ensures that assistive technology software such as screen readers can correctly discern and interpret the structure of the PowerPoint presentation.

BEST PRACTICE IN MICROSOFT OFFICE

Best practices refer to a collection of how to's and what to avoid when authoring Microsoft Office documents and the ability to convert the document.

- Following best practices will help you:
  - utilize the software more efficiently
  - simplify the conversion process
  - create structured documents

If in the original design and structure of the document, things are left out or are not done correctly, the final product will have missing information and display content incorrectly.

Get into the habit of always following best practices. Create tables, charts, layouts, without using outside sources and you will actually save time while preparing a quality document. The more structure that is added while authoring an office document before conversion the more accessible it will be after conversion.

- Accessibility means that people with disabilities can use and access the document. More specifically, accessibility means that people with disabilities can perceive, understand, navigate, and interact with the document.

One of the advantages of true structure in Microsoft Office documents is that the file can be easily exported to a PDF document retaining necessary structure and will be accessible and compliant when posted on the web. Secondly, when exported to HTML structure will also be retained and with a few code tweaks your document will be accessible and compliant. In both
cases, the added structure increases the readability of the document for people using assistive technology.

**USING THEMES – WHY IT’S IMPORTANT**

In PowerPoint, the correct way to provide structure is to use the delivered PowerPoint themes. Many people do not use straight themes in PowerPoint. For example, when creating a slide, they simply change the font, enlarge the font size, make it bold, etc. If this is done, the document has no real structure that can be discerned by assistive technology users.

**Using Themes is an important element in giving your document true structure.**

PowerPoint 2007 has dedicated most of the Design tab ribbon to Themes (see Figure 1, below).

**Figure 1 – Design Tab, Themes Group**

- The **Themes** group contains theme “templates” that include color and font themes. Use these themes to create your slides.
- Use the **Colors**, **Fonts** and **Effects** buttons to modify a given theme.
- Themes can be changed at any time by selecting a different theme. However, this may require some re-working of the content on each slide. Each theme has its own font grouping and the size of the font could be different than what was initially in place.
- Avoid changing color or fonts by highlighting a single line of text. All changes to fonts and color should be made at the Theme level so it will carry over to each slide seamlessly.

**Benefits of Using Themes:**

The use of Themes allows for formatting changes that can be made quickly and easily throughout the document without making changes to each individual slide. When the presentation is converted to another format, the use of Themes allows those changes to carry over as they were meant to be read.
THE NEW LOOK IN OFFICE 2007

The Office 2007 suite of software, which includes Excel, Word, Access and PowerPoint, now has a very different look and feel. The traditional toolbars as we know them in previous versions have been replaced with what is now called a Ribbons. This section of the documentation will orient you to the new terminology used and where to locate the necessary elements.

The PowerPoint Window in 2007

The PowerPoint window (see Figure 3) is comprised of a slide and outline tabs, toolbars, and the ribbon. These are all used to create the presentation. The window also includes options for viewing the presentation as a slide show, or in an outline format. The Office button contains common file and system commands.

POWERPOINT DEFINITIONS

The PowerPoint environment is easier to learn if you understand the way that PowerPoint “thinks” about slides. The following definitions will help you with this.

- **Themes**: Pre-defined backgrounds, which includes font and color themes. Themes set the mood for your presentation.
- **Views**: Different ways to view your presentation. There are three views to choose from to view your presentation:
  - Normal View (Slide/Outline Default)
  - Slide Sorter View (Thumbnails)
  - Slide Show View (Presentation View)
- **Masters**: Used to set the standard look and feel of the entire presentation by adding your own logo, special clip art, and the date and/or page numbers. For example, whatever is placed on the Master slide, will trickle down to each slide associated with that Master.
- **Layouts**: Guides for each individual slide. Includes layouts for inserting graphs/charts, tables and clip art. New to 2007 is the ability to create your own slide layouts. This enables you to re-use complex layouts without having to manually create them each time.
- **Object**: An object is anything that is in its own rectangular frame and can be sized, moved and formatted independently. This includes clip art, WordArt, pictures, audio, movies, graphs/charts and tables.
- **Animations**: transitions and effects that control movement from one slide to another, i.e. fading in and out, etc. Animations control the content flow of each slide.
- **Output**: Besides the electronic output and viewer, slides can be printed as overhead transparencies. Other print options include:
  - Handouts
  - Note Pages
  - Outline View
GETTING STARTED

Launching Your PowerPoint Application:

1. Click the Start button on the Taskbar at the bottom left corner of your Windows screen.
2. Select All Programs.
3. Click Microsoft Office from the submenu, and then select Microsoft Office PowerPoint 2007.
4. The Normal View pane appears (see Figure 1, below).

![Figure 1 - Normal View Pane](image)

5. From the Normal View pane, click on the Office button and select New (see Figure 2).

![Figure 2 - New Presentation Task Pane](image)
6. The **New Presentation** task pane contains a list of templates. For a new, blank presentation, select **Blank and recent**.

Figure 3 - The PowerPoint Window

1. **Office Button**: contains common file and system commands.
2. **Quick Access Toolbar**: contains shortcuts for the most commonly used tools.
3. **Tab Bar**: contains tabs that display tools and commands in the Ribbon.
4. **Ribbon**: contains groups of tools and shortcuts for standard PowerPoint actions.
5. **Slides and Outline Tabs**: displays slides as thumbnails or in a slide outline.
6. **Slide Pane**: displays the selected slide.
7. **Notes Pane**: displayed notes for the selected slide. This is also where notes are entered during the creation process.
8. **Status Bar**: contains presentation information and view shortcuts.
Customizing the Quick Access Toolbar

1. Click the **Customize Quick Access Toolbar** button (see Figure 1, below).

   Figure 1 - Customize Quick Access Toolbar Button

2. A menu opens (see Figure 2, below).

   Figure 2 - Customize Quick Access Toolbar Menu

3. Select **More Commands** from the menu.
4. The **PowerPoint Options** dialog box opens (see Figure 3).
5. Click the drop down menu in the Choose commands from field box and select a category from the resulting menu.

6. In the left menu box, select the command you want to add and click the Add button. This will add the command to the right-hand menu box. These commands appear in the Quick Access Toolbar.

7. To remove a command from the toolbar, select the command in the right-hand menu box and click the Remove button to remove it.

8. Click the OK button when you are finished.

**Using the Ribbon**

The Ribbon contains command groups by task.
• **Tab**: a tabbed page of the Ribbon.
• **Contextual Tabs**: a tab that appears only when certain content is selected, such as a graphic or a chart.
• **Group**: a section of a tab. The **Home** tab shown in the figure above has the following groups: Clipboard, Slides, Font, Paragraph, Drawing, and Editing.
• **Dialog Box Launcher**: a small icon in the bottom-right corner of a group, from which you can open a dialog box related to that group.

**Note**: to find out what a toolbar button does, position the mouse over it. A Screen Tip pops-up explaining its function.

## CREATING SLIDES: THEMES

PowerPoint 2007 includes design elements called **Themes**. These elements include font and color themes that allow for unified formatting across the presentation. As mentioned in the **Using Themes: Why It’s Important** section, themes are used to give structure to your presentation and should always be used when creating a slide presentation.

### Selecting a Theme

1. Click the **Design** tab (see Figure 1, below).
2. Select a **Theme** from the **Themes** group by clicking on one of the themes. *If the theme you want is not displayed, use the scrollbar to scroll through the available options.*
3. Once a theme is selected, the look and feel of the presentation will be consistent across all slides (see Figure 2, below).

Figure 1 - Design Tab
CREATING SLIDES: CHANGING LAYOUTS

Layouts are guides or placeholders for your content. Regardless of the theme selected, there is a placeholder for a title, text, clip art, etc.

**Layout Choices**

When a new presentation is created, the PowerPoint window opens with a pre-defined title slide (see Figure 1, next page).

**Note**: these screen captures use the theme titled “Equity”. Your slides may different depending on the theme selected.

Figure 1 - Title Slide
• To add text to a slide, single click on each section where noted and enter the desired text.
• Text boxes can be moved or sized individually to accommodate your needs.
• To select a different layout, click the **Layout** drop down menu, located under the **Home** tab and select a different layout from the list provided (see Figure 2).

**Figure 2 - Layout Drop-Down Menu Options**

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**Positioning or Resizing a Text Box**

1. Select the text box image by single clicking it. A gray, dashed-line border with small white boxes (handles) appears (see Figure 1).
   - To **reposition a text box**, single click the gray line border to make it “active”, next click the text box and drag it to the desired position.
   - To **reposition an image**, click the image and drag it to the desired position.
   - To **resize a text box or image**, single click the image or text box to make it active, next drag one of the handles to resize the text box or image.
   - To **maintain the proportions of the text box or image**, drag a corner handle as opposed to a side, top of bottom handle.
Changing Bulleted Items

Many of the slide layouts include bulleted items. Although pre-formatted, the bullet style can be changed at any time.

1. Set your cursor on the line of the bullet you want to change (or highlight all of the bullets to change them at once).
2. From the Paragraph grouping, click the Bullets drop-down menu.
3. Select a bullet style from the dialog box (see Figure 2, below).

Figure 2 - Bullets Dialog Box
WORKING WITH IMAGES

Images are used in presentations for reference, emphasis, explanation, or aesthetics. It is best practice to use images that are representative of the content. Placement is also important. Place images where they will make sense when an adaptive screen reader is used.

- It is best practice to left-align an image. This will be helpful when converting the document to HTML. Avoid placing images in tables.

Adding Clip Art from the Ribbon

Clip Art consists of ready-made illustrations, movies or sound clips that can be used to enhance a presentation. These clips are available from the application itself and if there is an internet connection established, many are available for download from the Microsoft Office site.

To add a piece of clip art to a presentation:

1. Select the slide you want to work with.
2. Click the Insert tab on the Ribbon, then click the Clip Art button (see Figure 1).
3. In the Clip Art task pane, enter a description for the type of clip you are searching for (cats, computers, trees, etc.) in the Search for field.
4. In the Search in field, select All Collections from the drop-down menu.
5. In the Results should be field, select the appropriate option from the drop-down menu.
6. Click the Go button to view results.
7. From the list of available options, select an image by clicking on it. This will place the image onto the slide.
8. Move or resize the image as needed. This can be done the same way as moving or resizing a text box.

Figure 1 - Adding Clip Art
Adding Clip Art to a New Slide

PowerPoint 2007 also provides a short-cut option for adding Clip Art when creating a new slide.

1. Click the New Slide button located on the Home tab (see Figure 1).
2. With the new slide active, click on the Clip Art icon (see Figure 2).

3. The Clip Art task pane opens. Enter the type of Clip Art you want to work with in the Search for field and click the Go button to retrieve the results.
4. Click on the image you want to add it to the slide.

**Inserting a Picture from a File**

In addition to clip art, a picture can be inserted from a file.

1. From the Insert tab, click the Picture button (see Figure 1, below).

2. The Insert Picture dialog box opens (see Figure 2, below).
3. Find the file that you want to work with and then click on the **Insert** button to insert the photo into the presentation.

**IMAGE LABELING - ALT TEXT (TAGS)**

It is important that all images have a text description attached to it. This allows for a description of an image when people do not have graphics enabled on their computers. This description is called an Alt Text.

The text supports the context of the document and/or conveys information to the user. Provide a short description of the image that briefly describes what the image is representing. If the example image was part of a technique for typing with one finger, a **short description** might read "One-finger typing technique with index finger" while the **long description** would include more details such as "The one-finger typing technique uses the index finger to strike keys while the remaining fingers and thumb are extended away from the keyboard."

To enter a text description for an image:

1. **Right-click** on the image
2. The short cut menu appears (Figure 1)
3. Click on **“Size and Position”**
4. The **Size and Position** dialog box appears (Figure 2)
5. Click the **Alt Text** tab
6. In the **Alternative Text: field**, enter the image description.
7. Click the **Close** button.
8. Use discretion in applying ALT tags. ALT tags need to be descriptive and convey the meaning behind why the artwork or illustration has been included in the text. They do not need to be lengthy.
USING CHARTS AND DATA TABLES:

Charts and Data Tables are visual ways of representing a group of data. A best practice for charts and data tables in Microsoft PowerPoint is to create the items within the document.

Charts – Charts are recognized as images when converted to html. A Chart will need to have information that describes the chart just like other images in your document.

Tables - A table is a row and column matrix of cells that can contain text, images and other objects. While the main purpose of tables is to present data in a grid format, they can also be used to control the layout of content on a page.

Creating & Editing Charts/Graphs:

There are two specific elements used when making a chart or graph:

- The chart itself, which is the graphical representation of your data.
- The datasheet, which contains the actual statistics used to generate the graph.

To create a new chart:

1. From the Insert tab click Chart
2. The Insert Chart dialog box appears (Figure 1, below)
3. From the left-hand menu select the chart or graph option.
4. From the right-hand display, select the chart type.
5. Click OK
6. The chart and accompanying datasheet are displayed in a minimized, side-by-side format (see Figure 2, below).

7. Select and delete the sample labels and data and then enter your own data into each cell.

   - Rows and Columns must have labels. This is important because it equates to items for the Axis and Legends of the chart.
   - You can also paste information from another source into a cell.
   - Information in the datasheet can be formatted for font, size, color, etc. from the **Formatting** toolbar.
Note: as the data is entered into the datasheet, the corresponding chart data will update automatically after you tab out of the cell.

**Inserting Tables:**

**Good Accessibility Practices for Tables**

- Keep tables simple with minimal nesting
- Avoid complex nested tables with multiple split and merged cells
- Avoid splitting or merging cells after data has been entered, as this can confuse the reading order of the cells
- Use percentage rather than pixels to set table and cell size. This will allow the table to resize gracefully
- Keep heading labels short and descriptive. Use comments if they need longer explanations
- Add descriptions before the table to provide information about the table
- The reading order of tables is linear starting from the top left cell to the bottom right cell. The contents of each cell, including nested cells, are read before moving to the next cell.
To create a table:

1. From the **Insert** tab click **Table** (see Figure 1)

2. Drag your mouse over the squares to designate the number of columns and rows to insert.
3. Left-Click the mouse once designated.

**Note:** As you move your cursor over the **Insert Table** dialog box to highlight rows and columns, the table will display in preview mode in the slide itself.

**Figure 1 – Inserting a table**

4. The table displays with an active border that includes “handles.” Use the handles to resize the table. The table can also be repositioned on the slide.

5. To enter data into the cell, click within the cell to position the insertion point and then enter the data (see Figure 2, below).

**Figure 2 - Entering Data in the Table**

**Note:** Adjust the columns and rows by clicking on the area between them, and then dragging to the appropriate size.

A new contextual tab named “Design” has also appeared on the Ribbon (see Figure 3). This is an on-demand tab and will appear any time the table is selected and active. Use the command elements on this tab to quickly format your table.
DIFFERENT WAYS TO VIEW YOUR PRESENTATION

There are three different ways to view your presentation. Each view is available by clicking the View buttons located at the lower right-hand corner of the PowerPoint application window (see Figure 1, below).

1. Normal View (Outline)
2. Slide Sorter View (Thumbnails)
3. Slide Show View (Presentation)

Normal View

The Normal View is the default view and consists of three panes (see Figure 1, below).

1. The left-pane displays either thumbnail images of the slides or a slide show outline, depending on the tab selected - Outline or Slide (default).
2. The right pane displays the active slide.
3. The bottom pane provides a place to enter notes about the slide.
**Slide Sorter View**

The Slide Sorter View displays all of the slides as thumbnails (see Figure 1). This view can be used to rearrange slides by drag-and-drop and it can also be used to set timing (automatic) and transitions (fade in, fade out, etc).

**Figure 1 - Slide Sorter View**

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**Slide Show View**

The Slide Show View shows how the presentation will look when projected onto a screen (see Figure 1).

To navigate through the presentation while in Slide Show View:

1. Use the spacebar or a mouse-click to advance.
2. Use the Up/Down arrows on your keyboard to go forward and back.
3. Use the Page Up/Page Down buttons to go forward and back.
4. Use the ESC (escape) key on your keyboard to exit this view.
WORKING WITH NOTES

When presenting, you may find the addition of notes helpful to you. PowerPoint allows you to enter notes for each slide so when printed as Notes Pages, you will be able to view your notes as well as the slide they reference at the same time.

Adding Notes To Your Presentation

To add notes to your presentation:

1. Click on the View tab in the Ribbon.
2. Click on Notes Page (see Figure 1, below)

Figure 1 - View Tab / Notes Page

3. The Notes Page displays. The top half of the page is the active slide, the bottom half is where you enter your notes. Enter your notes as needed.
4. Use the scroll-bar on the right of the **Notes Page** to move forward and back through your slides as needed (see Figure 3, below).

Figure 3 - Notes Page w/ Scroll Bar

Use the Scroll Bar to Navigate Through Your Slides
Printing Note Pages

Note Pages can be printed for presentation use:

1. Click on the **Office** button.
2. Click on **Print** (see Figure 1, below).

![Figure 1 - Office Button > Print](image)

3. In the **Print** dialog box, select **Notes Pages** from the **Print what** drop-down (see Figure 2, below).

![Figure 2 - Print Dialog Box](image)

4. Specify the number of copies and then click the **OK** button.
**POWERPOINT FINAL TOUCHES**

*Enter Additional Presentation Properties Information:*

Microsoft PowerPoint allows you to insert summary information about the presentation such as author name, date created, and comments. This is entered on the **PROPERTIES** box.

To access **PROPERTIES:**

1. From the **Office** Button, Select **Prepare** (see Figure 1).
2. From the submenu click on **Properties**.

**Figure 1 – Office Button Options (Prepare & Properties)**

3. The **Document Properties** box is displayed just below the **Ribbon**. (see Figure 2).

**Figure 2 – Document Properties Box**

4. Complete the appropriate fields such as, **Author**, **Title**, and **Subject**.
5. Click the “X” to close the window (see Figure 2, above).
**Saving Your Document:**

To save your presentation:

1. From the **Office** button, select **Save As** (see Figure 1).
2. Click on either:
   a. **PowerPoint Presentation** to save as a PowerPoint 2007 presentation.
   b. **PowerPoint 97-2003 Presentation** to save as a 97-2003 presentation. This is important if you plan to use it on a computer that is not running 2007.

![Figure 1 – Office Button menu – Save As](image)

3. The **Save As** dialog box appears.
4. Complete the **Save In** and **File Name** fields.
5. Click the **Save** button.

**Saving Your Presentation as a PDF File**

Saving a document as a PDF is a great way to save the content and formatting of a document so that when others want to print the document it maintains its integrity. If you will be posting the PDF document to a website it is recommended that you state that the PDF document link is a “printer friendly” version. It is not recommended that the PDF document be used as an accessible document.
If you have Adobe Acrobat Professional

1. From the Office button, select **Save As** (see Figure 1).
2. Click **Adobe PDF** from the right-hand menu.

Figure 1 – Office Button, Save As > Adobe PDF

1. The **Acrobat PDF Maker** warning window displays (see Figure 2).

Figure 2 - The Acrobat PDF Warning Window

2. Click the **Yes** button.
3. The **Save Adobe PDF File As** window displays (see Figure 3).
4. In the **Save in** and **File name** fields, fill in the appropriate information.
5. Click the **Save** button.
6. An Adobe processing window appears and displays the progress of the conversion (see Figure 4).

Figure 4 - Adobe Processing Window

7. Once processed, the PowerPoint presentation will open in Adobe Acrobat as a PDF file (see Figure 5).

Figure 5 - Presentation Displays in Adobe Acrobat Professional as a PDF File
Saving a document as a PDF is a great way to save the content and formatting of a document so that when others want to print the document it maintains its integrity. If you will be posting the PDF document to a website it is recommended that you state that the PDF document link is a “printer friendly” version. It is not recommended that the PDF document be used as an accessible document.

**If you DO NOT have Adobe Acrobat Professional**

1. For **Office 2007 users** -
   a. Download the FREE plug-in from Microsoft.com that will allow you to export and save to the PDF format.
   c. You can also us Internet Explorer and Google “Microsoft Save as PDF” and the link should come up as well.
   d. Once at the Microsoft Download Center click the Download button and follow the instructions.
2. For **Office 2003 users** - There is no plug-in from Microsoft. You must buy Adobe Acrobat.
3. Once Plug-in is downloaded and installed, Click the Microsoft Office Button in your Word document, Select Save As (See Figure 6)
4. Click **PDF or XPS** from the right-hand menu.

![Figure 6 - Office Button, Save As > PDF or XPS](Image)
5. Complete the **Save in** and **File name** fields.
6. Click the **Publish** button.
7. Once processed, the presentation will open in Adobe Acrobat Reader as a PDF file.
8. To perform a quick Accessibility check of your PDF document, click on the **Documents menu** and select **Accessibility Quick Check**. (see Figure 7)

Figure 7 – Perform an Accessibility Quick check on your PDF Document

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**Saving Your Presentation in HTML**

To save your PowerPoint presentation as HTML to publish to a website:

1. From the **Office** button, select **Save As**.
2. From the right-hand menu, click **Other Formats**.
3. The **Save As** dialog window displays (see Figure 1).
4. Give the file a name and select the appropriate file location.
5. In the **Save as type** field, use the drop-down arrow and scroll bar to show and select the **Web Page** option.
6. Click the **Save** button.

Figure 1 - Save As Dialog Window
QUICK TIPS TO ACCESSIBLE PRESENTATIONS

PowerPoint is a presentation tool, but if the presentation is posted on the web, then it is important to keep these tips in mind:

- Place content in logical reading order. This is fundamental to creating accessible documents.
- Do not use **TAB, Spacebar and Enter** keys to format for tables, columns, lists etc.
- Use the application's built-in features to encode semantic structure (headings, paragraphs, lists, sections, headers/footers, tables, columns, forms etc.).
- Define and use themes to format structural elements like headings, paragraphs etc. to control typography and layout.
- Use standard fonts. Do not use fonts that do not map to Unicode.
- Avoid complex layout, sidebars and other ornamentation as they make it difficult to maintain a logical reading order.
- Avoid placing content in drawing-canvases or text-boxes as these are floating objects and flow to the bottom of a page's reading-order.
- Group multiple graphic elements (created by drawing tools, charts etc) into one image.
- Provide alternative text descriptors for all non-textual elements (graphs, images, illustration, pictures, multimedia, etc) that provide essential information.
- Ensure that all navigation and interactivity can be performed using the keyboard.

OTHER RESOURCES OR TRAINING

1. **Microsoft Online – Create an accessible Office document**

2. **College ATI coordinators.** Each college has an ATI coordinator ready to help and assist you. To find out your coordinator go to:
   http://www.csun.edu/accessibility/aticoordinators.html

3. **The Accessible Technology Initiative (ATI) Office** can assist you with questions or information pertaining to accessibility. Their website: http://www.csun.edu/accessibility/ has many tools, references, FAQ’s, accessibility training and a listing of the collage ATI coordinators to assist you.

This manual is an introduction to accessibility coding in Microsoft Office 2007 and Adobe Acrobat 8.0. Any further questions can be answered by consulting Microsoft Office and Adobe Help documentation.