



## **OKDHS Style Guide**

**Version 02-2008**

### **Section 7.1**

**Microsoft Excel**

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## Overview

With assistance from staff from numerous Oklahoma Department Human Services (OKDHS) divisions, the OKDHS Office of Communications Web Content Management Unit has compiled this best practice document to help OKDHS staff create Microsoft Excel documents that meet the basic requirements of the Oklahoma Electronic and Information Technology Accessibility (EITA) Act standards.

The EITA standards require that all electronic and information technology should be accessible to persons using assistive technology. The standards and other pertinent Oklahoma accessibility information can be viewed on the official State of Oklahoma Web portal, OK.gov or by going to <http://accessibility.ok.gov>.

If you have suggestions, questions or comments about this information, please contact the Web Content Management Unit at (405) 521-3027 or by e-mail at [WebContent@OKDHS.org](mailto:WebContent@OKDHS.org).

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## *Data Tables*

### **General Information**

In using Microsoft Excel, your document should be used to convey tabular data. It should not be used for layout purposes. If you need to produce a document that requires layout, you should use Microsoft Word or request assistance from the OKDHS Publications Unit.

A consistent convention must be used throughout the entire Microsoft Excel document. For example, if the flow of the content goes top to bottom or left to right, it needs to retain that flow throughout the document.

Other basic conventions include the following:

- All link text must make sense out of context. Link text (or hyperlinked phrases) such as “click here” can be confusing to people who use assistive technologies. All link text must be descriptive of the content to which it links.
- No empty rows or columns are allowed
- All column headers must be in one cell
- Proper column justification is to left justify the first column, right justify the remaining columns. All cells are bottom justified.
- Use light colored text on dark colored backgrounds and dark colored text on light colored backgrounds.

### **Headings**

In creating the document, the author must identify all row and column headers. Headings must be clearly separated from the other text so that more easily understood.

- Column headings should appear in the same column as the data that goes with the heading. For example, if a column heading is placed in column D, then the data should follow in column D.
- Column headings must be kept to one cell. This makes it more usable for both sighted and persons with visual disabilities. Persons who use screen readers can configure their program to read a specific heading cell for a column.

### **Adding Row and Column Titles**

To create row and column titles follow the steps below:

- If the row or column contains both row and column titles, move to the cell where these intersect:
  - Go to the **Insert** menu
  - Select **Name**
  - Go to the right arrow and select **Define**
  - Enter the text “Title,” choose the **Add** button and then choose the **Enter** button
- If the entire row contains column titles, select all the cells with a title and do the following:
  - Go to the **Insert** menu
  - Select **Name**

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- Go to the right arrow and select **Define**
- Enter the text "ColumnTitle," choose the **Add** button and then choose the **Enter** button
- If the entire column contains row titles, move to the first cell with data and do the following:
  - Go to the **Insert** menu
  - Select **Name**
  - Go to the right arrow and select **Define**
  - Enter the text "RowTitle," choose the **Add** button and then choose the **Enter** button
- To define column or row titles for any worksheet other than worksheet one, add the number of the worksheet after the text Title, ColumnTitle or RowTitle.
  - For example, in order to define a row containing column titles in Worksheet four, enter the text "ColumnTitle4."
- To define more than one row or column as a column title range, select both rows and assign
  - For example, in order to define rows one and two as column titles, select both rows, go to the **Insert** menu, select **Name**, go to the right arrow and select **Define**, enter the text "ColumnTitle," choose the **Add** button and then choose the **Enter** button

### Defining Rows and Columns Titles for Worksheets with Multiple Regions

Individual row and column titles can be assigned to different regions of the same workbook. The process is much like the one described in the section above; however, the following additional steps below must be followed when defining names for row and column titles that are specific to one region:

- If the cell contains both row and column titles, move to the cell where these intersect:
  - Go to the **Insert** menu
  - Select **Name**
  - Go to the right arrow and select **Define**
  - Enter the text "TitleRegion" and if the cell is in the first region, type "1"; there is no space between the label and the number
  - Type a "." and then type the coordinates of the top, left cell in the region. For example, "A1"
  - Type a "." and then type the coordinates of the bottom, right cell in the region. For example, "N9"
  - Type a "." and then type the worksheet number. For example, type a "1" if the cell was on worksheet 1
  - Choose the **Add** button
  - Choose the **Enter** button
- If the entire row contains column titles, select all the cells with a title and do the following:
  - Go to the **Insert** menu
  - Select **Name**
  - Go to the right arrow and select **Define**

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- Enter the text “ColumnTitleRegion” and if the cell is in the first region, type “1”; there is no space between the label and the number
- Type a “.” and then type the coordinates of the top, left cell in the region. For example, “A1”
- Type a “.” and then type the coordinates of the bottom, right cell in the region. For example, “N9”
- Type a “.” and then type the worksheet number. For example, type a “1” if the cell was on worksheet 1
- Choose the **Add** button
- Choose the **Enter** button
- If the row contains column titles, move to the first cell with data and do the following:
  - Go to the **Insert** menu
  - Select **Name**
  - Go to the right arrow and select **Define**
  - Enter the text “RowTitleRegion” and if the cell is in the first region, type “1”; there is no space between the label and the number
  - Type a “.” and then type the coordinates of the top, left cell in the region. For example, “A1”
  - Type a “.” and then type the coordinates of the bottom, right cell in the region. For example, “N9”
  - Type a “.” and then type the worksheet number. For example, type a “1” if the cell was on worksheet 1
  - Choose the **Add** button
  - Choose the **Enter** button

For example, assume that a spreadsheet has a region whose boundaries are row 1, column A and row 9, column N. It also has a second region with boundaries of row 10 at column C and row 14 at column D. Both regions are on worksheet 1. To define row 1 as the row containing column headers for the cells in the first region, assign the following name to cell A1: ColumnTitleRegion.A1.N9.1. To define row 9 as the row containing column headers for the cells of the second region, assign the following name to cell C10: ColumnTitleRegion2.C10.D14.1.

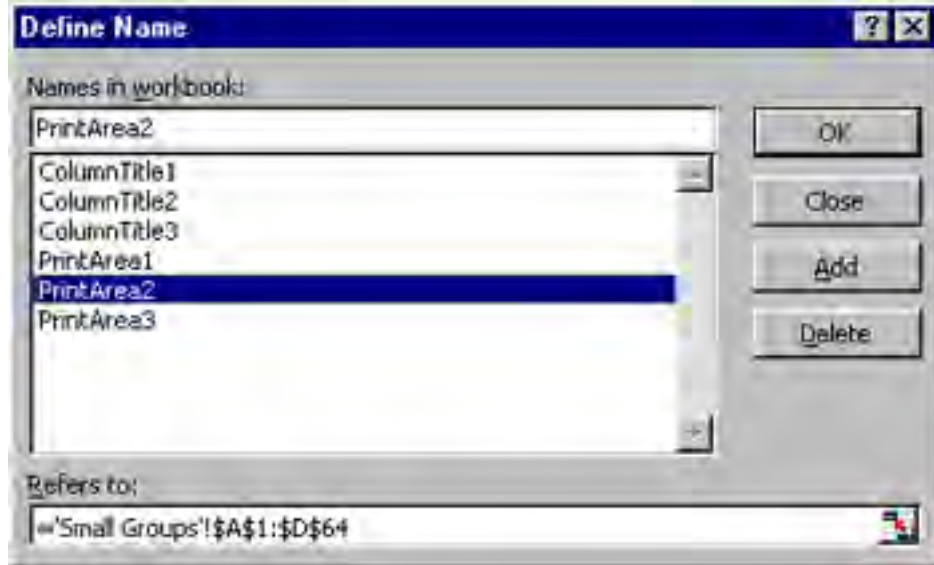
### Defining Print Area

Similarly, should you want to define a print area of a workbook, follow these steps:

- Start at the left and top most part of the worksheet and select all used cells of the worksheet going to the right and bottom most part. For example, a worksheet that starts in cell A1 and goes to cell N4, would have the whole area from A1 to N4 selected.
- Go to the **Insert** menu
- Select **Name**
- Go to the right arrow and select **Define**
- Enter the text “PrintArea” in the field for **names in workbook**:
- If there are multiple worksheets in the workbook, enter the number of the worksheet after the text “PrintArea.” For example, for the print area of the second worksheet, the entry would read “PrintArea2.”

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- Confirm the designated print area by looking in the **Refers To:** field. For example, the print area of a worksheet with the name Small Groups is show below. The worksheet begins in cell A1 and ends in cell D64.



**Define Name:** The Define Name window that shows the names of defined areas in a Microsoft Excel workbook. In this case, the Print Area for worksheet 2 is highlighted and shows that it extends from cell A1 to cell D64.

- Choose the **Add** button
- Choose the **Enter** button

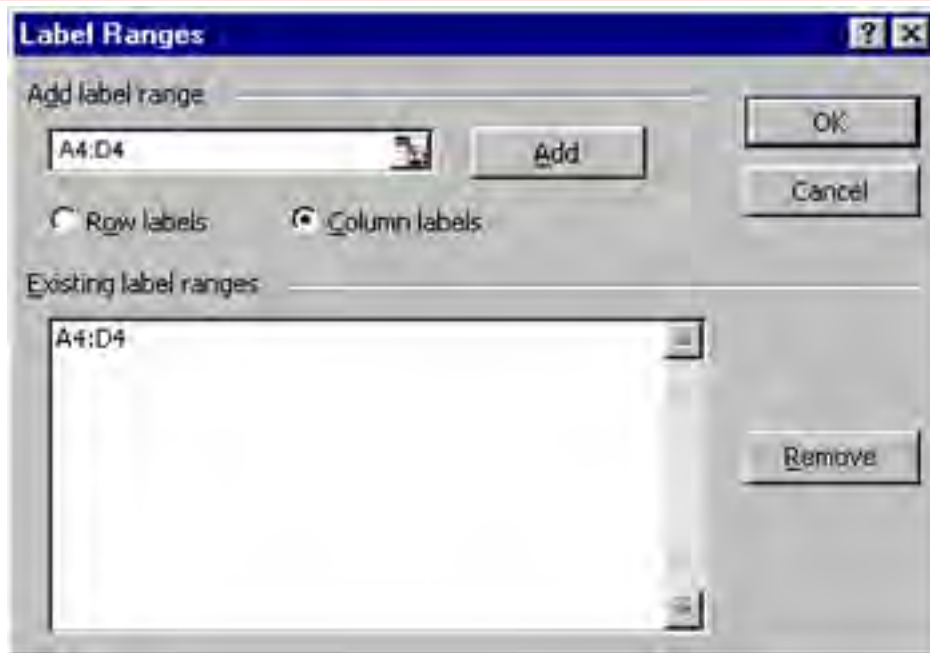
### Adding Row and Column Labels

To add row and column labels follow the steps below:

- If the row contains column headings, highlight the cells containing the column headings and do the following:
  - Go to the **Insert** menu
  - Select **Name**
  - Go to the right arrow and select **Label**
  - Confirm that the range listed in the field matches the range selected in the Microsoft Excel Spreadsheet.
  - Select the radio button for **column labels**
  - Choose the **Add** button and then choose the **OK** button

For example, if the spreadsheet had column headings in cells A4 to D4, this is what the Label Ranges display box should look like:

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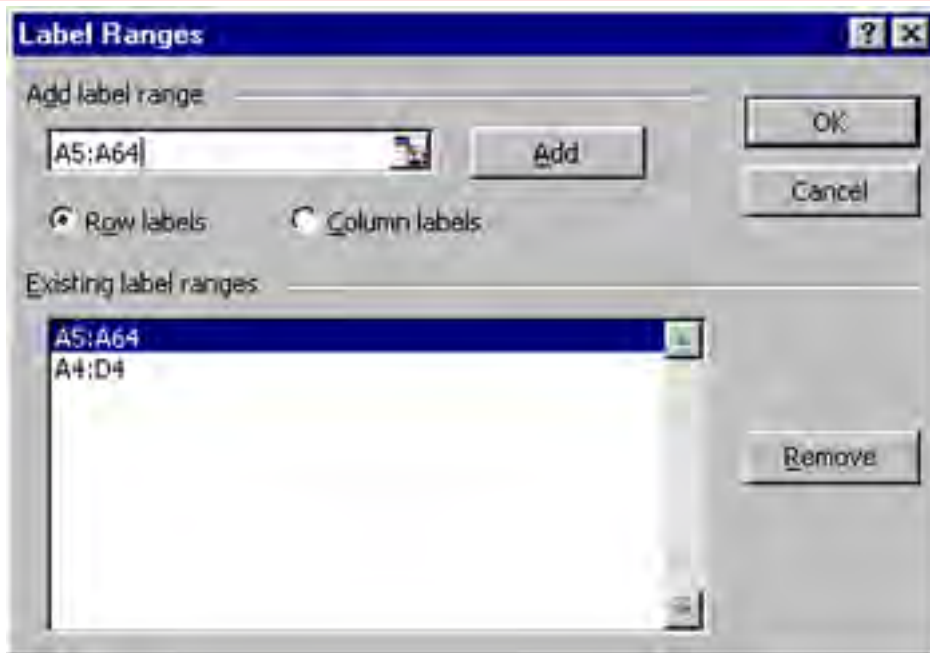
Label Ranges: The Label Ranges window that shows the names of label ranges in a Microsoft Excel workbook. In this case, the range for a worksheet is selected from cell A4 to D4 and it is designated as column labels.

- If the column contains row headings, highlight the cells containing the row headings and do the following:
  - Go to the **Insert** menu
  - Select **Name**
  - Go to the right arrow and select **Label**
  - Confirm that the range listed in the field matches the range selected in the Microsoft Excel Spreadsheet.
  - Select the radio button for **row labels**
  - Choose the **Add** button and then choose the **OK** button

For example, if the spreadsheet had row headings in cells A5 to A64, this is what the Label Ranges display box should look like:

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Label Ranges: The Label Ranges window that shows the names of label ranges in a Microsoft Excel workbook. In this case, the range for a worksheet is selected from cell A5 to A64 and it is designated as column labels.

## ***Non-Text Elements***

Under the EITA standard, all non-text elements require a text description. This can be done by creating descriptive text titles for elements or by adding descriptive text whenever a non-text element is added. For example, to make a worksheet compliant that contains a chart, add a descriptive title and descriptive text.

### **Charts**

Screen readers and other assistive technologies attempt to describe charts that Microsoft Excel generates. However, not all assistive technologies do this. If a chart is included in a Microsoft Excel workbook, the original data must also be included so it can be reviewed by the user. If data is difficult to review or understand (e.g., there is a significant amount of data), include a text description of the chart that explains the main points being conveyed.

### **Images**

Text equivalents must be added for all images. This is done by creating a caption. The only exception to this rule is that if the image is only decorative, then it does not need a text equivalent.

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## *Color*

If color is used, use a high contrast between background colors and text colors. Students with low vision may not be able to read text that does not have a high degree of contrast between text and background. Use light text on dark backgrounds and dark text on light backgrounds.

Often color and formats are used in Microsoft Excel to convey or bring attention to information. For example, in accounting it is common to highlight negative numbers in another color. A text equivalent is needed to convey this same information to users who cannot see or discern the different color. In this example, displaying the negative number using the minus sign (e.g., -1) will provide the needed equivalent. As a general rule, it is acceptable to use the color indications, provided that you use an discernable text equivalent along with them.

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## *Worksheet*

Each worksheet should be labeled aptly as opposed to Sheet1, Sheet2, etc which are the default sheet names. If color is used, use a high contrast between.

Renaming the sheet tabs in MS Excel to meaningful names—instead of leaving them as the default Sheet 1, Sheet 2, etc--- can greatly facilitate quick navigation between individual sheets in a Workbook.