



# **Guide: Checking and Optimizing Word Document Templates**

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## 1 Introduction

You can use **axesWord**<sup>®</sup> with any Word document, including those based on the default document template (Normal.dotx). This default template contains all the common styles, such as headings, lists, and captions.

However, the best results are achieved by working with custom document templates in which the role mappings for styles, layout tables, etc. are predefined.

You can create your own template that contains the paragraph and character styles that you regularly use. You can also define role mappings in the **axesWord**<sup>®</sup> document settings.

Such templates make it easier for authors to create accessible documents because authors only have to:

- Use the appropriate paragraph styles or, if available, use the prepared quick parts.
- Add alternative text to images.
- Specify the document title.
- Assign the **Artifact** role to decorative elements.

We have a free prepared template. Feel free to use the **axesWord master template** which is available at [Instructions & manuals for axesWord, axesSlide & axesPDF - axes4](#).



## 2 Paragraph styles and their assigned roles

A major advantage of axesWord® is the ability to determine which semantically appropriate structural elements (“tags”) should be created in the PDF for each paragraph style. To define role mappings for paragraph styles, click the **axesWord** tab and then click the **Document settings** button. For more information, see the [Button "Document settings" article](#).

### 2.1 Are all necessary paragraph styles available?

- Are all the paragraph styles you need for the document available? As a rule, you need styles for:
  - Title/subtitle
  - Headings (numbered/not numbered)
  - Body text
  - Lists (numbered/not numbered; multilevel/one level; list continues)
  - Captions (for images or tables)
  - Table heading cells (simple or complex tables)
  - Tables of contents
  - Header and footer
  - Block quotes

Tip: Use the styles that are already included in Word as often as possible.

### 2.2 Multilevel Lists

- Are paragraph styles available for multilevel lists and has the multilevel list been created correctly?
  - For further information, see the [Create a new multilevel list article](#).

### 2.3 List Continues

- Are paragraph styles for list continues available and do they have the correct role mapping in the **axesWord Document settings**?
  - For information, see the [List continue article](#).

### 2.4 Tables

- Are paragraph styles available for header cells in simple/complex tables and do they have the correct role mapping in the **axesWord Document settings**?
  - For information, see the [instructions for creating accessible tables with axesWord®](#).



## 2.5 Correct role mappings?

- Are there paragraph styles whose role mappings need to be adjusted in the **axesWord Document settings**? Check for:
  - Header cells in simple/complex tables
  - List continues
  - Block quotes (if the Word internal styles "Quote" or "Intensive quote" are not used)
  - Unnumbered headings that organize text or information and are therefore effectively headings:
    - Table of contents headings
    - Imprint headings
    - Appendix headings
    - Subheadings
    - Headings in text boxes

Tip: Specify the outline level in the style using the paragraph settings of the style. In this case, no further role mapping in the **axesWord Document settings** is necessary; **axesWord**<sup>®</sup> will automatically recognize that it is a heading.

## 3 Header and footer

- Is relevant content included in the header or footer? If yes, then assign the **Section header** or **Section trailer** role in the **axesWord - role mapping** pane. Otherwise, headers and footers are treated as decorative elements by default.

## 4 Language settings

- Is the language setting of the document correct?
- If necessary, create separate styles for paragraphs that differ from the basic language and set the language directly in these styles.

## 5 Check color contrast

- Are the color contrasts between text and background, as well as the contrasts within graphics and charts, in accordance with the criteria of the Web Content Accessibility Guidelines (WCAG)? See also the success criteria 1.4.3 and 1.4.11 (<https://www.w3.org/WAI/WCAG21/Understanding/>)

Note: Minimum values for color contrasts are not relevant for the PDF/UA check.



## 6 Other points worth noting

- Ensure that text boxes and images are correctly anchored. This affects the reading order. The content of an image or a text box always follows the paragraph to which the object was anchored.
- Are there layout tables? These are tables that are only used for the specific arrangement of text. If so, have they been assigned the **Layout table** role in the **axesWord - role mapping** pane?
- Are there definition lists? Common use cases are lists of abbreviations or glossaries (created as a two-column table without column headings). If so, have they been assigned the **Definition list** role in the **axesWord - role mapping** pane?
- Are all tables structured logically? See also our guide [“Create accessible tables with axesWord”](#).
- Are there purely decorative elements? If yes: have they been assigned the **Artifact** role in the **axesWord - role mapping** pane?
- Is the structure of the document clear and comprehensible for the reader?
- Is the reading order on each page clear?
- Are internal links created as cross-references?
- Are external links (e-mail, Internet links) created as active links?
- Have footnotes and/or endnotes been created correctly using the appropriate Word functions?

## 7 Create a PDF and check it

Create an accessible PDF based on your document template using **axesWord**<sup>®</sup> and check the results:

- Check the PDF using the automatic PDF/UA check with the [PDF Accessibility Checker \(PAC\)](#) or [axesPDF](#)<sup>®</sup> or [axesCheck](#): Are there any errors or warnings?
- Also check the PDF using the screen reader preview of PAC or [axesPDF](#)<sup>®</sup>.