

Document Information

Document Name/URL:	
Tester Name / Signature:	
Testing Date:	
Authorization Name / Signature:	
Authorization Date:	

Requirements for use of MS Excel format

USDA expectation is that an MS Excel document is only posted if the spreadsheet is a tool for download and use in MS Excel, or contains multiple, linked tables that are inter-dependent and cannot be provided in HTML due to those dependencies.

Single data tables should always be provided in Comma Separated Values format (.CSV), with a formatted HTML page as the preferred reading option. In such instances, an Excel file may be provided as an additional option. Charts not part of a tool (e.g based on static data) should always be provided in HTML with the accompanying data table and an appropriate descriptive text.

Requirements Checklist

The following checklist should be used Department wide by USDA staff to verify that when MS Excel documents must be used, that they meet the requirements established by USDA. The checklist includes compliance with Section 508, in addition to other USDA requirements. It is intended to be used as a companion to WCD Training. USDA expectation is that an MS Excel document may be intended for conversion to PDF format. This Checklist therefore incorporates elements necessary for that conversion as well.

For guidance specific to a requirement, refer to the Requirement Guidelines section of this document, to your Web Council representative, or the USDA Web Communications and New Media Division.

ID	1.0 General Layout and Formatting Requirement	Pass	Fail	N/A
1.1	Are no merged cells contained in the data area of the table (e.g. only headers and for titles)?			
1.2	Do all active worksheets in the workbook should have clear and concise names that allows the user (and assistive technology) to identify the source and contents of the table?			
1.3	Are tables prefixed (Titled) with the table name and table number?			
1.4	Are table header rows formatted to repeat on the top of the table as it goes from one page to another?			
1.5	If color is used to emphasize the importance of text, is there an			

	alternate method?			
1.6	Does each separate table have its own worksheet?			
1.7	Have track changes been accepted or rejected and turned off?			
1.8	Have extraneous comments been removed?			
1.9	Is the document free of text boxes?			
1.10	Has the Document been reviewed in <i>Print Preview</i> for a final visual check?			
1.11	Do all URL's contain the correct hyperlink and display the fully qualified URL (i.e., http://www.samhsa.gov and not www.samhsa.gov)?			
1.12	Are all URL's linked to correct Web destinations?			

ID	2.0 Charts and Images Requirement	Pass	Fail	N/A
2.1	Do all images, grouped images and non-text elements that convey information have alternative text descriptions?			
2.2	Do complex images (i.e., charts and graphs) have descriptive text immediately after the image?			
2.3	Is the document free of background images or watermarks?			
2.4	Does each Chart have its own worksheet or is a single chart on the same worksheet with its associated data table?			
2.5	Are multiple associated images on the same page (e.g., boxes in an organizational chart) grouped as one object?			
2.6	Have all multi-layered objects been flattened into one image and use one Alternative Text (Alt Tag) for this image?			
2.7	Do all charts have a Title, Legend and Axis labels associated with them?			
2.8	Does the chart provide sufficient contrast between colors (when printed in grayscale?)			

ID	Notes/Additional Requirements	Pass	Fail	N/A
A	Does the document file name not contain spaces and/or special characters?			
B	Is the document file name concise, generally limited to 20-30 characters, and makes the contents of the file clear in the context in which it is presented?			
C	Does the document utilize recommended fonts i.e. Times New Roman, Verdana, Arial, Tahoma and Helvetica?			
D	Are the Document Properties (i.e. Subject, Author, Title, Keywords, and Language) properly filled out? Note: For Author, do not use individuals name or contractor name. Should use government organization name (i.e., USDA)			
E	Has a separate accessible version of the document been provided when there is no other way to make the content accessible? (Example: An organizational chart).			

Requirement Guidelines

The following guidelines have been established by USDA to ensure that MS Excel documents meet Section 508 Compliance requirements.

1.0 Document Layout and Formatting

- 1.1. Merged cells should only be used for formatting purposes i.e. within the non-data section of the table. For example, merging the cells within a table header would be acceptable but would not be acceptable within the data area of the table.
- 1.2. The document must refrain from using flashing/flickering text and/or animated text.
- 1.3. Tables should be prefixed with the table name and table number (if applicable). This information should be separated from the actual data table so that the assistive technology can present it prior to reading the data table
- 1.4. Table header rows are formatted to repeat on the top of the table from one page to another (frozen). This will allow assistive technology to re-state the header information to the user as the table continues through the pages
- 1.5. If color is used to emphasize the importance of selected text, there must be an alternate method. (e.g. in parenthesis or via bold)
- 1.6. Each separate table must have it's own "tab". Note: A tool that has data entry components may have a separate tab for all data entry tables.

- 1.7. Track Changes must be accepted or rejected and turned off.
- 1.8. All comments and formatting marks must be turned off.
- 1.9. The document must be free of text boxes. Use merged cells (outside of data tables) for graphics and formatted text.
- 1.10. The Document must be reviewed in *Print Preview* for a final visual check.
- 1.11. All URL's must contain the correct hyperlink and display the fully qualified URL be hyperlinked with the full address (i.e., <http://www.samhsa.gov> not www.samhsa.gov)
- 1.12. All URL's must be linked to active Web destination.

2.0 Document Images

- 2.1. All images, grouped images and non-text elements that convey information must have alternative text descriptions. This is normally done through the Alternative Text function. Decorative images should not have alternative text.
- 2.2. Complex images must have descriptive text immediately after the image.
- 2.3. The document must be free of background images or watermarks.
- 2.4. A chart must have its own tab (worksheet), or be placed (1 chart only) alongside its associated data table.
- 2.5. Multiple associated images must be Grouped as One Object (i.e., Organizational Charts).
- 2.6. All multi-layered objects must be flattened into one image and use one Alternative Text (Alt Tag) for the image.
- 2.7. All charts must have a Title, Legend, and (when applicable) Axis labels.
- 2.8. Charts must provide sufficient contrast between colors. This can be tested by printing in grayscale.

Notes/Additional Requirements

- A. The document file name must not contain spaces and/or special characters.
- B. The document file name must be concise, generally limited to 20-30 characters, and make the contents of the file clear in the context in which it is presented.
- C. The document must utilize the recommended fonts i.e. Times New Roman, Verdana,

