

MAKING AN ACCESSIBLE-FRIENDLY DOCUMENT IN ADOBE INDESIGN

STEP 1 – Document Colors

Good color contrast is required for a document to be accessible. There are many online tools to check this in your document. Just Google “color contrast checker” to see and choose an option you prefer.

STEP 2 – Document Fonts

Clear, sans serif fonts, and adequate line spacing are necessary for accessibility success.

STEP 3 – Document Title

– Go to “File/File Info/Document Title” and name your document, then press the “OK” button.

STEP 4 – Build a Tag Tree

A “Tag Tree” is an invisible, hierarchical structure that organizes document elements logically for screen readers. It ensures content is read in the correct order by grouping text and images logically.

Using Paragraph Styles, you need to create a level of hierarchy for **all text** in size and importance from headings, to subheads, to paragraph/body text so that screen readers announce text in proper order:

- Go to “Window/Styles/Paragraph Styles”
- In Paragraph Styles, click the multi-horizontal line icon in upper right corner, create and name new, individual paragraph styles for **Headings (H1)**, **Major Sections (H2)**, **Sub-Sections (H3)** and finally **Paragraph Text (P)**. If you include the respective abbreviation with each style name, it makes them easier to identify in the styles list.
- Before you finish assigning font, size, etc. to your new, respective paragraph styles and save each one, click on “Export Tagging” at bottom of lower left column in menu to assign appropriate “PDF/Tag:” level.

Next, all your **photos and/or graphics** need to be identified as either meaningful images or just decorative artifacts. Meaningful, figure images need “Alt. Text” assigned to them which basically works as a brief caption describing the image in detail on a screen reader. If the image itself contains text, all of the text should be included in the Alt text window. Decorative artifacts are images that support visual design but are not vital elements to a visually-impaired person to be aware of.

- Go to “Object/Object Exporting Options,” choose the “Alt Text” tab and then “Alt Text Source: Custom” for meaningful images and either copy-and-paste text or type text into white area. For artifacts, select “Alt Text Source: Decorative Image (No Alt Text)” Then press the “Done” button.

STEP 5 – Table of Contents

Longer documents should have a linked Table of Contents for ease of navigation. PDF Bookmarks are also required for longer documents and can be created directly from the Table of Contents. Both are based upon your paragraph styles.

- Go to “Layout/Table of Contents” and a window opens that shows your options to choose and assign. Be sure to check the “Options/Create PDF Bookmarks” box.

STEP 6 – Tables

InDesign Tables are generally exported to PDF with proper tagging. However, you will need to assign your header rows in InDesign.

- To set a table header row, highlight the row(s), then go to “Table/Convert Rows/To Header”

STEP 7 – Bulleted and Numbered Lists

Screen readers will announce the presence of bulleted and numbered lists with a count of the number of items in the list. It can do this because of the tag tree for paragraph/body text previously created. However, for this to automatically work, these lists must be created using the “built-in” InDesign bulleted list/numbered list option, otherwise it will just be read as continuous text. These lists can be customized in the bullets/numbering dialog boxes.

STEP 8 – Build Articles

Using Articles, you need to create a reading order of all relevant content (Text, photos, graphics) page-by-page or spread-by-spread.

- Go to “*Window/Articles*” to open window.
- Select content with “shift” key and click your cursor on content (everything except decorative artifacts you don’t want included) in the order you want them to be read, from top-to-bottom, left-to-right in your chosen reading order and drag-and-drop onto the pre-opened “*Window/Articles*” window.
- “New Article/Name:” window opens up for you to either name it or just leave named as Article 1. Always be sure the “Include When Exporting” is checked. Then press the “OK” button.
- Once saved, you’ll see your new article name and its contents listed below in the Articles window for each new article created. Click on the new article name and then click on the multi-horizontal line icon in upper right corner to be sure “Use for Tagging Order in Tagged PDF” is checked before continuing to create more page/spread articles sets.

STEP 9 – Exporting your InDesign document to an accessible PDF

To export to PDF in a way that retains accessible features...

- Go to “*File/Export*” and then name your file and save as “Type: Adobe PDF”

In the Options dialogue box, in the “**General**” category, you’ll want to make sure that the Adobe PDF Preset is set to the “Smallest File Size,” “Pages:All,” “View:Fit Page,” “Layout: Single Page,” “Export: Pages” (not Spreads), check the box next to “View PDF after Exporting” for your own convenience if desired, check the box next to “Create Tagged PDF,” choose “Optimize for Fast Web View,” Make sure you set the Export Layers to “Visible & Printable Layers,” “Include: Bookmarks” and “Hyperlinks.” Save all of these settings by choosing “Save Preset” and rename it so you can use it again and again. In the “**Advanced**” category, “Accessibility Options,” “Display Title: Document Title” and “Language: English.” Finally, hit the “Export” button.

The resulting PDF will have a tag tree with properly marked up headings, tables and lists. It should have a working table of contents and PDF bookmarks for navigation. If you check the properties on your images, you should see your alternative text in the image properties.