Introduction to
InDesign
and
Accessible PDF Export

Tutorial

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Objectives

InDesign is a professional page-layout software that enables developers to create printed collaterals from flyers to publications. It also has the capability to export the collaterals as PDF files for repurposing on the Internet, such as dissemination for mobile devices, web sites, or simply as email attachments. PDF documents will contain all the layout formats as well as fonts from the InDesign source file. In addition, the Acrobat Reader, a free plug-in to read PDF documents from Adobe, also has a text-to-speech screen reader that reads the content.

To achieve this goal of repurposing your InDesign digitally, your ultimate goal is to prepare an InDesign file is accessible that will also export as an accessible tagged PDF. Here are some major reminders on creating an accessible file effectively:
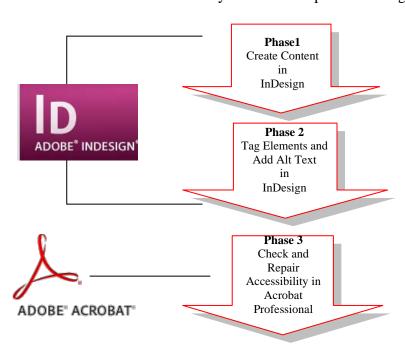
1. **In InDesign – create content**
   a. Specify a language
   b. Create a Tag list corresponding to Acrobat Professional's tagging convention
   c. Use Styles for formatting Character and Paragraph assets.
   d. Create content elements according to the reading order if possible.
   e. Avoid using outlined type or outlined drop caps or stick-up caps because they are images.
2. **In InDesign – tag content assets**
   a. Tag content elements to create a content structure tree.
   b. Add Alt text to images.
3. **In Acrobat Professional – validate and repair accessibility**
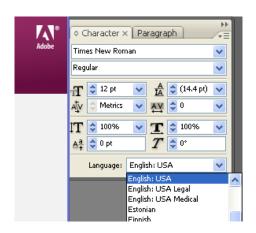   a. Check language specification.
   b. Run screen reader Read Out Loud on the reading order and Alt text.
   c. Run Full Accessibility Check and repair according to the generated Accessibility Report.

Phase1
Create Content
in
InDesign

Phase 2
Tag Elements and
Add Alt Text
in
InDesign

Phase 3
Check and
Repair
Accessibility in
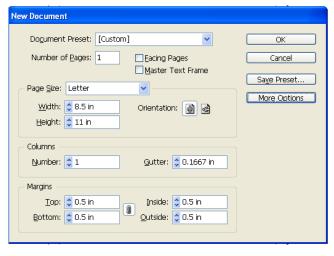Acrobat
Professional

A. *Create Content*

1. Select A language
    1. After launching InDesign and BEFORE you create a new document, go to the **Type** menu and select **Character**. The Character panel appears on the right.
    2. In the **Character** panel navigate to the **Language** field. Select the appropriate language by opening the drop down menu of the Language field.
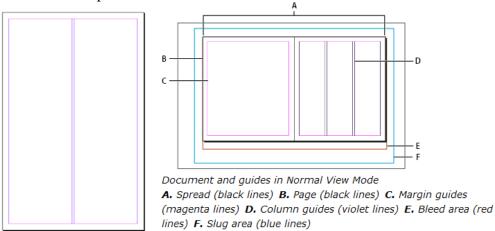
2. Create a new document
    1. In the **New Document** window, select your document preferences such as number of pages, any facing spreads, folded size of your document, orientation, etc.
    2. By default, the preference for number of column is 1 and .5 in for margins. You can select the preferences for number of columns and margins measurement here, however you can change them later.
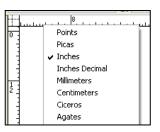   3. Click **OK** when done.

3. Understand your pasteboard
    1. **Pasteboard** is where you will place, create, and edit all your assets visible to printing. Here are some examples of documents in the Pasteboard.

Document and guides in Normal View Mode
A. Spread (black lines) **B.** Page (black lines) **C.** Margin guides (magenta lines) **D.** Column guides (violet lines) **E.** Bleed area (red lines) **F.** Slug area (blue lines)
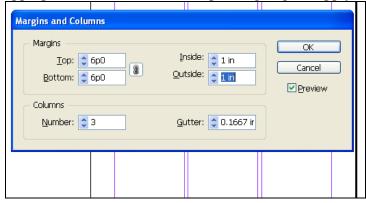
4. Change the measurement unit
    1. Go to the **View** menu and select **Show Rulers**.
    2. Right click on the **Rulers** above your Pasteboard. The drop down menu appears. Select your preference.
    3. Do this step for BOTH of the horizontal and vertical rulers. The units change on the rulers accordingly.
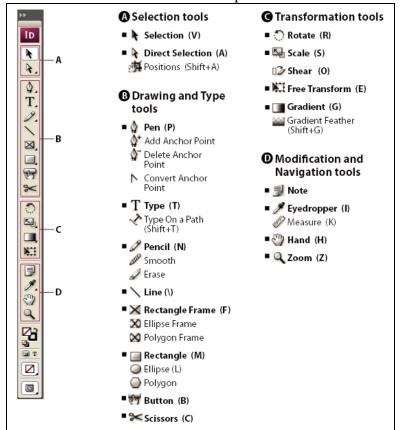
5. Create your grid system of margins and columns

1. Go to the **Layout** menu and select **Margins and Column**. The Margins and Columns window appears.
2. Select the increments according to your layout requirements/sketch.
3. Click the **Chain icon** if you want the top and bottom margins locked to the same increment. Select the number of columns in your grid. Select the **Preview** check box to preview results in Pasteboard.
4. Note: If you are doing multiple pages with the same grid, you should prepare the margins and columns in a **Master**. You can find the **Master** in the **Pages panel**. Click and drag the appropriate Master to the corresponding Page to apply the elements of your Master.

6. Frequently used tools in the Toolbox

1. Notice the tools are in groups. Tool icons that have a black triangle at the lower right corners have more than one tool. Click and pause for a second to see the group of tools window appear.

7. Create Layers

1. Go to the **Window** menu to find all your **Panels**. Each Panel will appear as a floating window. You can dock all the Panels on the right-hand side.
2. Open the **Layers** panel.
3. Create three layers: **background**; **image**; **text**

8. Create and manipulate text assets

1. Select the **Type** tool in the **Toolbox** to create a **text frame**.
2. Click and drag a text frame with your cursor, align your text frame with your column if necessary.
3. Input the headline or body text in the text frame.
4. When you select the **Type** tool in the **Toolbox**, the **Character/Paragraph Formatting Controls Panel** appears on top of the pasteboard.
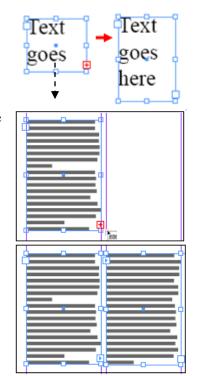5. To change the attributes of your text, highlight the text to be changed, go to the **Controls Panel** as shown in the above figure. You will find similar features between the **Character Formatting Controls** A that is the top layer, and the **Paragraph Formatting Controls** ¶ that is the bottom layer. Activate the layers by clicking on the two icons of **Character** A or **Paragraph** ¶ .

9. Flow text manually

1. For headline or quote
   a. If you see the **red box with a plus sign** appear at the end of your **text frame** that means you have hidden overflowing text.
   b. Click on the lower right or lower middle anchor point of the text frame and extend the frame to show all the text until the red box turns into a **blue empty box**.

2. For Body copy
   a. If you are flowing text for body copy in a multi-column layout, you should click on the red box and load the hidden text to your cursor , and then click and unload to reflow the text in the next column. If you have created columns with the Margins and Columns feature, the reflowed text will fill up the next column automatically.
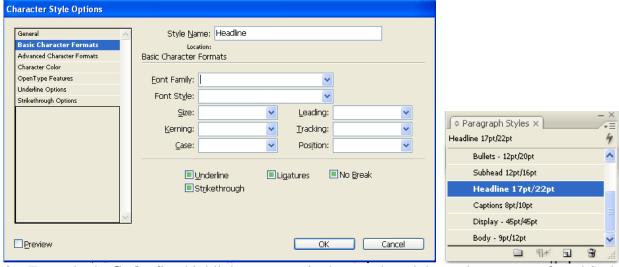
10. Create Styles for text

1. Open the **Character Styles** panel under **Types and Tables**. The Character and Paragraph Styles window appears.

2. Click on the **Create New Style icon** to set your font attributes. The Character Style Options window appears. To start, select the layer of **Basic Character Formats** to enter your preferences for font attributes. Click **OK** when done with defining your options.

3. To apply the **Style**, first highlight your text in the pasteboard then select your preferred Style in the Character/Paragraph panel. Change of the Style appears in your text frame.
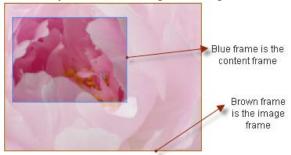
11.   Place and manipulate image assets

1. Select the **Image** layer in the **Layer** panel under the **Window** menu.
2. Go to the **File** menu and select **Place**. The file directory window appears. Locate your image file and click **Open**.

3. Your cursor will change to a **paint brush** indicating it has been loaded with your selected image. Click to place your image in your pasteboard. Your image appears in full size.

4. If you need to fit a certain part of the image to a pre-determined content frame size that is smaller than your image, first create the content frame with the **Frame** tool in the **Toolbox**. Place the image.

5. Use the **Directional Selection Tool** in the **Toolbox** to select the entire image that might extend beyond the blue content frame. Your selected image appears in the brown outlined image frame but only the part appears within the blue outlined content frame will be visible therefore you need to drag the image around to determine your visible area of the image.
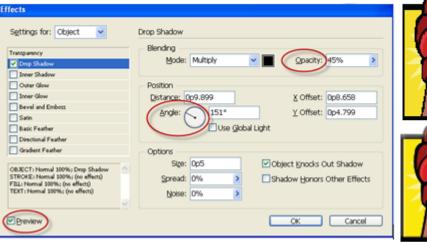

Blue frame is the content frame

Brown frame is the image frame

6. To **scale the size** of image: First select the blue content frame with the image with your **Selection Tool** . Then select the **Scale** tool in the Toolbox and click on the image to resize.

7. You can also use the **Free Transform** tool to resize or rotate your assets. Press the **Shift** key at the same time if the resizing needs to be proportional with this tool.

12. Apply effects to assets of image or text

1. Select the frame of your asset, such as the text frame of your headline.
2. Right click on the frame and the **Options menu** appears. Navigate to **Effects**.. and select from the list of options in Effects. The Effects window appears and you can access all effects here.
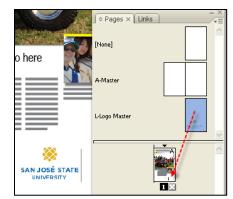

13. Create background graphics or Master

1. Select the **Background** layer.
2. Place the **logo lockup** PS file from PA.
3. Position it according to your layout. Resize if necessary with the **Scale** tool from the **Toolbox**.
4. NOTE: If you have more than one page that requires the logo, or any other assets, to appear consistently in the pages, you should create a new **Master** in the **Pages panel** for these assets.
5. **To create the Master**, right click on the **None Master** icon and select **New Master** in the pop-up options window.

6. Name your Master with **Prefix** and **Name**, such as **L** for prefix and **Logo Master** for the name. A new pasteboard for the Master appears with the same dimension as your page.
7. Place the logo, or any assets in this pasteboard. You have to apply your Master to the desired page in order to make the content visible in printing.
8. **To apply the Master**, drag the icon of your new Master and drop it over your desired page in the Page section of your panel. The Master's content will appear in your selected page. Repeat this drag and drop step for the pages that need this Master.
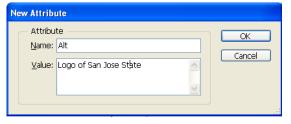
B.   Tag Assets

14.   Create and apply Tags
1. In order to export your document successfully in an accessible format you will need to create a **structure tree** for your content.
2. Go to the **Window** menu and select **Tags**. The Tags panel appears.
3. Select **New Tag** from the **Tags** panel.
4. Click on the **New Tag** icon and enter a name for that tag. **Use lower cases and no more than one word**.
5. Click on the **color swatch** on the left to select a color for this tag.
6. To apply a tag, drag and drop the tag to your asset and the frame of the asset will assume a tint of the same tag color.
   For example drag and drop the dark blue heading1 tag to your text frame of your headline, the background of your text frame will have a tint of dark blue.
7. **Make sure all assets are tagged.**
8. NOTE: If you want to create a tag list for **PDF** exporting purpose, then you would want to create tags with the same names as they are in Acrobat Professional.

15.   Add Alt text to tags of image assets
1. In order to export successfully as an accessible document you need to add descriptions to your image assets because this will benefit readers using a text-to-speech software, a screen reader, to understand your content since images are not text.
2. Make sure you already have tagged all your assets, especially the image assets.
3. Go to the **View** menu and navigate to **Structure** and select **Show structure** if not already selected.
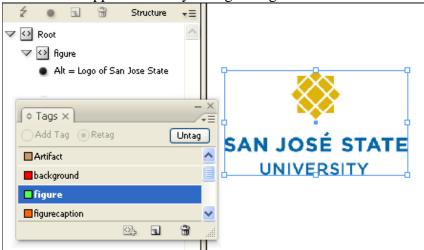4. In the **Structure** window all the tagged items that you created earlier appear in an ordered list. Select and right click on the **figure tag** of your asset and select **New attribute…** The New Attribute window appears.
5. In the **New Attribute** window enter **Alt** for **name** (case sensitive) and provide a text equivalent description of your image in the **Value text box**. Click **OK** when done.
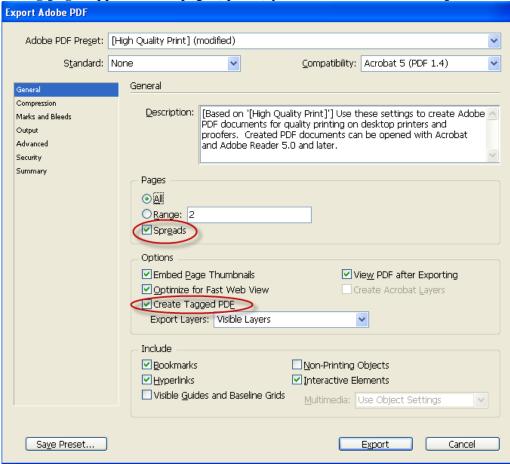
6. The **Alt text** appears below your figure tag.

16. Export to PDF

1. Save document.
2. Go to the **File** menu and select **Export**.
3. In the **Export PDF** window, check the selection of **Create Tagged PDF**. If you prefer your **facing pages** appear as one page (spread) you would want to select **Spreads**.

C. Validate and Repair Accessibility

17. Manual checks before Full Accessibility check
1. Running these checks manually will expedite your Full Accessibility check later.
2. **Language**
   a. Go to the **File** menu and select **Properties** or **Document Properties**. The Properties window appears.
   b. Select the **Advanced** tab and navigate to the bottom **Reading Options** and select **English**, or other preferred language as your language specification in the pop down menu.
3. **Tags**
   a. Go to the **Advanced** menu and navigate to **Accessibility** and select **Add Tags to Document** if it is highlighted.
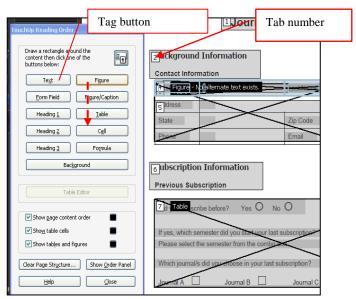4. **Alt text**
   a. Move your cursor over an image to check if the **Alt text** that you entered is popping up in a tooltip like text box above the image.

18. Run the Full Accessibility check
1. Go to the **Advanced** menu and navigate to **Accessibility** and select **Full check**. The **Accessibility Full Check** window appears.
2. In the **Checking Options** select **Adobe PDF** as the name and select all the check boxes for general requirements and click the **Start Checking** button.
3. If Adobe Acrobat found any possible problems, a message dialog box would appear to ask you to view a report. Click **OK.** The **Accessibility Report** appears on your left. (If you pass the Accessibility check, a message of congratulations will appear.)
4. In the **Accessibility Report** you are likely to encounter the following kinds of problem solving.
5. IMPORTANT: There is **no Undo or Save** in this the **Touchup Reading Order process**. Remember to close the Touchup Reading Order window and save your steps.

19. Fix wrong tags
1. Sometimes assets are wrongly tagged or recognized (during the conversion from InDesign to Acrobat) such as a figure recognized as text, or vice versa, etc.
2. Go to the **Advanced** menu and navigate to **Accessibility**.
3. Select the **Touchup Reading Order** option. The Touchup Reading Order window appears on the left.
4. Click and drag a blue rectangle with your **cross-hair** cursor to select the object/s with the wrong Tag. The **Tag buttons** in the **Touchup Reading Order** window become active.
5. Click on an appropriate **Tag button** and the Tag of the selected object/s will change accordingly.

6. If you do not want an object to be recognized, you can select the **Background** tag for that object. As a result the object will no longer be highlighted.
7. Close the **Touchup Reading Order window** and **save**. Run the **Accessibility Full Check** again.

20. Add missing alternative text

1. Examples for this problem could be multiple: an image in your document did not have alternative text embedded in the authoring application or certain text assets were mistakenly recognized as a figure/image during the conversion process.
2. Go to the **Advanced** menu and navigate to **Accessibility**. Select the **Touchup Reading Order** option in the options list. The Touchup Reading Order window appears on the left. Elements of your documents appear highlighted with tags and reading order number.
3. If you see a figure tag says "**Figure – No alternate text exists.**" right click on the **Figure** object and select **Edit Alternative Text**…Enter the description in the text box and click **OK**.
8. Close the **Touchup Reading Order window** and save. Run the **Accessibility Full Check** again.

21. Fix wrong tab (reading) order

1. Go to the **View** menu and navigate to **Navigation Panels** and select **Order** in the expanded list. The floating **Order panel** appears.
2. In the **Order** panel, click on the **Plus sign** next to a label to collapse the list of reading order. The Plus sign now is a **Minus sign**.
3. Click and drag the **Box icon** up or down to correct the reading order. While dragging, you will see a black arrow followed by a horizontal line adhered to your cursor, indicating a possible location for insertion. Release and drop your dragged icon at that location. The reading order number of that object will change accordingly.
4. Close the **Touchup Reading Order window** and save. Run the **Accessibility Full Check** again.