Creating Accessible PDF documents from InDesign

Key points and features in InDesign

Considerations for your InDesign layout
1. Think about ADA in design stage.
2. Link your text frames so your page order follows through.
3. Order defined from top left, moving down and then across. If the top left item is a little below and to the left, it will "claim" that item as the first reading item. ***Layers affect reading order and will be used first to determine order!!
4. Use paragraph rules – above and below - rather than the line tool under a heading
5. Use paragraph rules for text inside a filled rectangle.
6. Items on your master page automatically get artifacted – such as footers.

Metadata
1. File/File Info. Only one that is required is the Document Title.
2. All of the metadata recorded in InDesign is passed on even if you type in the other information. The document title does not "show" under Initial View and the language does not get passed on when you export the PDF. It will need to be mediated in Acrobat.

Styles – Export tagging
Important in formatting structure of a document and then remediating a PDF document.
1. If you use paragraph styles and you mark them to be exported in the style sheet, they can help to determine the order of your content in the PDF. This would be helpful in an ordered and structure styled document. When you use styles and your document is exported as a PDF, the style sheet name become the tag names. Then you open the Role Map and you can see how the style sheet names are mapped to the appropriate tags. Back in InDesign, you can choose the appropriate tag for the style sheet in the Style Sheet dialog box under the Export Tagging category. You can also go into the flyout menu of the paragraph style palette under Edit All Export Tags. Click the radio button PDF. All styles are automatically tagged as a <p> tag. Click on the Automatic tag and change the tag to the appropriate tag to set the structure. Click OK. Then export your document as PDF.

Controlling tag order using the Articles panel
2. You can "manually" order a non-flowing InDesign document by using the Articles panel (Window/Articles). Select elements with direct selection tool and put them in order in the articles panel. What you don't put in the panel won't get exported. Everything else will get artifacted. Then in the Flyout menu, check "Use for reading order in tagged PDF."
3. Export the document to PDF. Using the tags panel, you can tab through the tags and see that the content appears in the order that you placed it in the Articles panel.

Layers Palette: Controlling reflow order
1. The flow order of the PDF is controlled in the layers panel in InDesign.
2. The Content pane in Acrobat reads order from bottom to top.
3. Knowing this, within your layers panel, you can move elements in that order. Keep like elements on the same layer if you can, such as text, photos, graphics. That might be easier. You will have to plan.

Tables
1. Need to use Table styles.
2. Manually correcting tags in Acrobat is labor intensive and difficult.
3. Minimal identification in InDesign is a table header row.

Hyperlinks: email address and URLs
1. New updates will automatically add hyperlinks if they are in the correct format and not broken into two lines.
2. If the url or email address is not typed out, you can open the Hyperlinks panel. Either click on a graphic or highlight text for a url or email address. Click on the new hyperlink button in the panel. In the dialog box enter the information for the appropriate type of link. If you click Shared Hyperlink Destination, it will keep a running list of all your links and that can get very long if you have a lot of links. You can choose to attach a character style to the link. You can also style the PDF appearance for the link. It will validate url links with a green light.

Cross References
1. Only works with paragraph styles.
2. Your cross references become active links in your PDF. The link jumps to the section of text the cross reference refers to. It is a way to improve navigation in your document.

Creating and tagging a table of contents
1. Only works if you use Styles in the document.
2. TOC must be in a separate text thread.
3. Go to Layout menu/Table of Contents – Identify the styles you used in your document that you will use to create entries in your table of contents.
4. Then identify those Paragraph Styles by selecting them and give them a Section Header style for your TOC style sheet. (The paragraph styles you are selecting here are ones you have already used to style your document.)
5. Turn on Create PDF Bookmarks checkbox.
6. Click Save Style button – Name it TOC Accessibility.
7. When you click OK, you will get a loaded place gun with the loaded table of contents in it and it places the entire table of contents inside that text thread.
8. If you change any of your headers, subheads, etc., you will need to go to Layout/Update Table of Contents.
9. When you save the PDF, you now have an interactive linked Table of Contents.

Adding alternative text to images and graphics
1. All graphics need to contain alternative text to provide a description of the image or graphic in context.
2. Click on your graphic, right click, choose Object Export Options. Then click on the Alt Text tab. Click on the drop down menu and choose Custom.
3. Add your ALT text, click OK.
4. You can also take advantage of the metadata in the document. Prior to placing the image in InDesign, you can go to the File Info menu from Photoshop or Bridge and enter the description there.
5. In InDesign – Object Export Options – dropdown menu, locate the description using the XMP field and the content will be there.
6. When you export your InDesign file to PDF, the content transfers over.

Artifacting objects
1. Elements that are strictly for design purposes and don't contain and contextual value need to be artifacted.
2. Select the object – Object Export Option – Choose Artifact. Click Done
3. Once an object has been established – its purpose for the document has been identified, such as a logo, then if that element is repeated, it can be artifacted.

Adding bookmarks
1. Convenient method of navigation
2. Window/Interactive/Bookmarks
3. Layout/Table of Contents
4. Automatically generated bookmarks in the panel – bookmarks checked to add to pdf in the TOC style sheet.
5. Can also add manual bookmarks to the panel by navigating to the page and clicking add new bookmark from the panel.

Anchoring images
1. Images need to be anchored with text or they will appear at the end of the tag structure requiring manual remediation. (They will be out of the reading order.)
2. Click on the blue square in the top right of the image and anchor to the headline or next structural element. Be careful to watch that the text wrap is not disturbed.
3. When you export your document, verify the order in the tag panel.

Generating the PDF file
1. File/Export/Interactive: screen or forms. Check Create tagged PDF and Use structure for tab order.
2. File/Export/Print: this is the one generally used.
    a. Check Create tagged PDF
    b. Bookmarks, if you used them
    c. Hyperlinks
    d. Open PDF after Saving
3. Save an Accessibility profile so you don't have to turn on the settings each time. (click Save Preset and name it Accessibility, for example)

Remediating the PDF Document

Finishing touches in the PDF after export using Adobe Acrobat DC
1. Run Full check using Accessibility tool.
2. Primary language – fail. Right click. Fix.
3. Primary title – fail. Right click. Fix.
4. Tab order – fail. Right click. Fix. (Based on structure)
5. Manual fix – Color contrast and Page order
6. Best practice would be to check the accuracy by using the Read Out Loud feature (View/Read Out Loud) and/or Checking Reflow by going to View/Zoom/Reflow.

Panes you need open
1. View/Show Hide menu.
    a. Order
    b. Tags
    c. Content
2. You can also right click on the left navigation pane.
3. View the page display and page navigation tools. If they are in the "heads-up" display at the bottom of the page, click the small page up arrow in the far right of the display bar and the tools will move up into the properties menu bar. If you want the display to return to the heads-up style, click that button again.
4. In the far right tool bar, type "full" and the Accessibility tool will appear. Right click and add a short cut so the tool stays in the right side of your screen. With the tool available, all the accessibility options are available in this category.

Determining if a PDF file meets accessibility requirements

1. Run Full check on a PDF.
2. Primary language – fail. Right click. Fix.
3. Tab order – fail. Right click. Fix. (Based on structure)
4. Manual fix – Color contrast and Logical reading order
5. Check order panel. Passes, but not as accurate as it should be.
6. Check tag panel. Passes, but not as accurate as it should be.
7. **Differences in how documents are created depend on how documents are read.
8. **Issues can be resolved by using the Read Out Loud feature (View/Read Out Loud) and/or Checking Reflow by going to View/Zoom/Reflow. Then manually remediate the document using the tags and content panel.