InDesign

# Intro

When creating an InDesign document, there are steps that you can take to make the document more accessible.

# Page Layout

In this section, we will cover some page layout accessibility principles.

Master pages include common graphics and text for every page of your document. Use the master options to change master page properties, like master title. You can have multiple master pages. To find master pages, open the Pages panel and double-click on Master page. The page you have selected appears in the bottom left corner of the window.

To create a new master page, open the Pages panel. Click on Menu, then New Master. At this point, you can choose to make a master from scratch or to base it on another master page. To apply a Master to a page, click and drag the master onto the page to which it should be applied.

All of the settings, including the layout, for your final document should be in place prior to building the document or importing text. Prepare a few styles in advance of importing text, and prepare master pages to determine your layouts. Objects will not automatically reflow after you change the layout, so it is important to initially set up your document how you’d like the final document to look. Changing document or page settings will not reflow your document.

As you create objects in an InDesign document, they stack from bottom to top, similar to how objects stack in PowerPoint. This means that a screen reader will also interpret the reading order from bottom to top. To change object order, click on Object and select Arrange. Expanding layers in the Layers panel also allows you to see all objects in a page.

# Text

In this section, we will cover some text-oriented accessibility principles.

Threaded text allows you to place text overflowing the initial frame into another frame while preserving its connection throughout your document. If text is overflowing a frame, click the red plus symbol at the bottom right corner of the frame. This loads text into the cursor, so you can put the overflow text into another frame. Click and drag to create a text box for the threaded text or place in a text frame. This is useful for stories, when you may want to continue on a later page. A small blue arrow in the In Port frame shows the continuation of threaded frames. Empty or hollow boxes start and end the story.

Text threads are blue lines that show connected frames. To view story threads, click View and click on Extras.

Threading helps reading order to be correct when exporting an InDesign document to PDF.

Articles help with a document’s tagging when that document is exported to PDF by taking all the pieces of a story and putting one section tag around them. They also define the document’s reading order. Articles are meant for one threaded story or one complex page and do not work well when they roll over into a second page.

To use Articles, click on one piece of the article, for example, the article’s title, and drag it into the Articles window. This will show a dialog box to create new article. Check off “include when exporting” to PDF.

To break the document into different sections, open the Pages panel and right click on the page that starts the new section. Click on Numbering and Section Options, then Start from page… or Continue from previous…. To view a section, open the Pages panel and click the down arrow over the page thumbnail. An example of when you might use different sections is numbering an introduction as one to twelve, using Roman numerals.

To insert a break character, select the Type tool and choose Insert Break Character. This is similar to a page or column break in Microsoft Word. To create a soft return, similar to a line break in Microsoft Word, use Forced Line Break. Avoid hitting the return or enter key to create a visual break, as this causes a screen readers to read out the spaces instead of immediately moving to the next object.

# Styles

Use styles to keep formatting consistent and to programmatically signal a screen reader about what text is selected. For example, a screen reader that sees text programmatically identified as Heading level 1 will report that information to the user. To set styles, click on Window and select Styles, then Paragraph Styles (or any other style you would like to set). Click on Menu and New paragraph style to open a dialog box for the new paragraph style. Changing a style updates any text where the style is used.

Use character styles to change the look and feel of a character. Examples of character styles include making text bold or italicized, or changing text color. Object styles are very similar to paragraph and character styles. To set object styles, select Window, then Styles, and choose Object. When creating a new style, or updating a style, be sure to check off Apply Style to Selection for any style changes. Click on each element to see what style is applied to it.

To update paragraph or character styles, right click on a style and select edit paragraph style. After making changes, select Apply changes to text and hit ok. Use this when changing all fonts, as this will change the style and all text that uses the updated style. To find all text using a particular style, use the Find and Change dialog box. Select Edit, then Find/Change. You can use this to find and replace formats. Keep in mind that this relies on defining styles ahead of time.

If you have InDesign documents that are already styled, you can load these styles into your current document by opening the Paragraph styles panel. Click on the hamburger menu and select Load Paragraph Styles. InDesign will ask where the styles are located, and you can choose the document from which you want the styles and select the styles you want.

To bring text into the document, click on File and choose Place. In the dialog box that opens, select Show import options. Then select Customize style import and choose Style mapping. This allows you to assign Microsoft Word styles to specific InDesign styles. It can also be used with your custom InDesign template. If you choose New paragraph style or New character style, not much of the styling is in your control and InDesign will just import all Word styles as best as it can. Users do not have much control over properties in brackets.

To define styles, click on the drop down and click New character or New paragraph style. You only need to customize styles when you know you’ve used it in the Word document; all other styles can be mapped to New paragraph style. You must always define list styles (bullets and numbering), otherwise, their tags will not be correct when exporting to PDF. Be aware that the only time you can do style mapping is prior to placing text. If you do not do style mapping then, you have to start over or manually fix style issues.

To ensure that a style exports with the correct tag, right click on the style in the Paragraph styles panel. Select Edit style and choose Export tagging. Set the appropriate tag in the drop down. The only automatic tagging you should use is for lists (bullets and numbering).

# Tables

To draw tables, use the Type tool to draw a box. The Table tool can be used after drawing the frame. Click on Table and Insert Table to set up your table. Use Table, then Table Options and choose Table Setup to set header and footer rows. Setting header and footer rows programmatically signals to a screen reader that the content in that selected row is header or footer information. To set table headers and footers from existing rows, select a row. Then click Table and choose Convert Rows.

# Interactive Elements

Setting up interactive elements like a Table of Contents, bookmarks, and hyperlinks can help users navigate documents.

To set up a table of contents, Select Layout and click Table of Contents. InDesign bases the table of contents on headings defined in Paragraph styles. To include different paragraph styles in your table of contents, select them from the box and add them to Table of Contents styles. Be sure to include all book documents in your Table of Contents. You will need to manually set page number styles for any paragraph styles included in the table of contents.

You can also automatically create bookmarks in your PDF from the Table of Contents. You can automatically create text anchors in the source paragraph, which allows you to click and jump directly to that point.

To create bookmarks manually, select Window and choose Interactive and Bookmarks. Select the text you would like to be your bookmark and click Create new bookmarks. Then, when exporting to PDF, check off Include bookmarks. Add bookmarks to any document where you want users to know information, especially if that information is not on the first page.

To add hyperlinks, select Window and choose Interactive and Hyperlinks. Select the text you would like to be your hyperlink and input the URL. You can also set links to send to file, email, etc. Create a new hyperlink from the hamburger menu. When you create a hyperlink, InDesign automatically creates a character style called Hyperlink, which you can subsequently edit.

# Miscellaneous

To add alternate text to images, select the graphic and then click Object. Under Object, select Object export options. In Object export options, select Alternate text source and choose Custom. Then input your text in the field.

To add captions to your images, select the graphic and click Object. Choose captions and caption setup. Change the metadata type to Description, and check the box that groups captions with images. Fill out the description field for each image with text; this will act as your caption.

When working with layers in InDesign, stick to a single layer to streamline the accessibility process. Window and Layers will open the layers panel, allowing you to see how many layers you have in your document. Expand the layer to see objects. You can also click and drag objects in the Layers window to reorder to change the PDF’s reading order. Adding additional layers in InDesign changes the reading order of the exported PDF dramatically. If you must use multiple layers, flatten before exporting to PDF. You will have to manually check the reading order, because it will be changed in the PDF.

To export your PDF in the most accessible way, match styles to appropriate tags by selecting Paragraph styles and Edit all export tags. Then pick the appropriate PDF tag for the style. Do a 1:1 match: Leave lists, footnotes, and endnotes as is, but check the mapping of other styles.

Before exporting, under Security, enable text access of screen reader devices by checking the box. This may be checked by default.

Always save before sending to PDF. To create a PDF, choose File, Export, and Save as type. Choose PDF Interactive from the drop down. In the export dialog box, export as pages, not spreads, and be sure to check the boxes for Create tagged PDF and Use structure for tab order. This will export your PDF with the accessibility features you have built into your InDesign document.

Following these steps helps make your InDesign document as accessible as possible for individuals with disabilities.