

Designing for Accessibility

*Creating Instructional
Documents in Adobe
InDesign*

User Guide

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Creating Accessible Documents in InDesign Overview

An accessible document is one that is optimized for screen readers and other assistive technology devices used by persons with disabilities. Achieving this kind of accessibility requires:

- ▶ Tagging all document content based on its hierarchical structure (i.e., headings, paragraphs, lists, tables, etc.).
- ▶ Ordering content in a linear path from start to finish.
- ▶ Adding alt text for all non-text content, such as images and graphics.

Adobe InDesign offers a direct workflow (listed below) that dramatically reduces the time and effort required to produce accessible PDF documents.

The remainder of this document breaks down each of these steps. To quickly navigate the document,

- ▶ Select the steps below to go directly to more information about that step.
- ▶ Scan or select the QR code to watch a video about that step.
- ▶ Use bookmarks to navigate between sections of the document.

Steps For Creating an Accessible PDF

1 Use paragraph styles consistently throughout your document.



2 Establish export tag relationships between InDesign styles and PDF tags.



3 Add alt text for meaningful images and graphics.



4 Incorporate internal navigation mechanisms, such as hyperlinks and bookmarks.



5 Establish content order in the Articles panel.



6 Add a document title as metadata.



7 Export the document as a PDF with settings optimized for accessibility.



8 Finalize the document in Adobe Acrobat Pro.



Step 1: Use Styles Consistently

Consistent use of InDesign styles through a document is critical for efficiently and successfully exporting the content to an accessible PDF.

What Are Styles?

In InDesign, there are five different types of styles you can use when creating documents. These include:

- **Paragraph Styles:** Sets both character and paragraph formatting.
- **Character Styles:** Applies formatting to words and individual characters.
- **Object Styles:** Standardized formatting across shapes and frames, such as strokes and drop shadows.
- **Table Styles:** Standardized table formatting throughout your document.
- **Cell Styles:** Works within Table Styles to standardize cell text, fills, and strokes.

The Instructional Design team has set up each type of style in your InDesign templates. Using these styles keeps your formatting clean, consistent, and easy to update.

Paragraph Styles vs. Character Styles

Paragraph styles and character styles serve different but complementary purposes when formatting text.

You'll use **paragraph styles** when:

- You want to apply formatting to an entire paragraph, including:
 - Text font, size, and color.
 - Alignment and spacing.
 - Indents and tabs.
 - Hyphenation.
- You're working with structured content, like headings, body text, or lists.
- You want to maintain a consistent layout and hierarchy across a document.

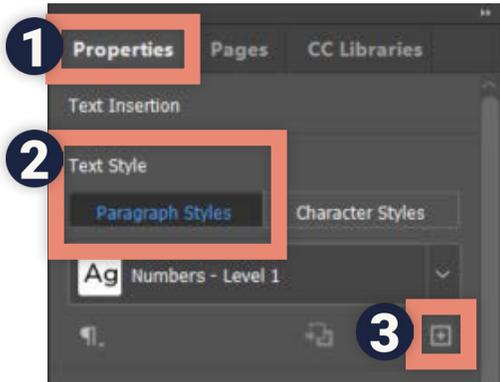
You'll use **character styles** when:

- You want to format specific words or phrases within a paragraph.
- You need to apply emphasis (i.e., bold, italic, color) without changing the paragraph's overall style.

Think of paragraph styles as your document's foundation, and character styles are used for emphasis.

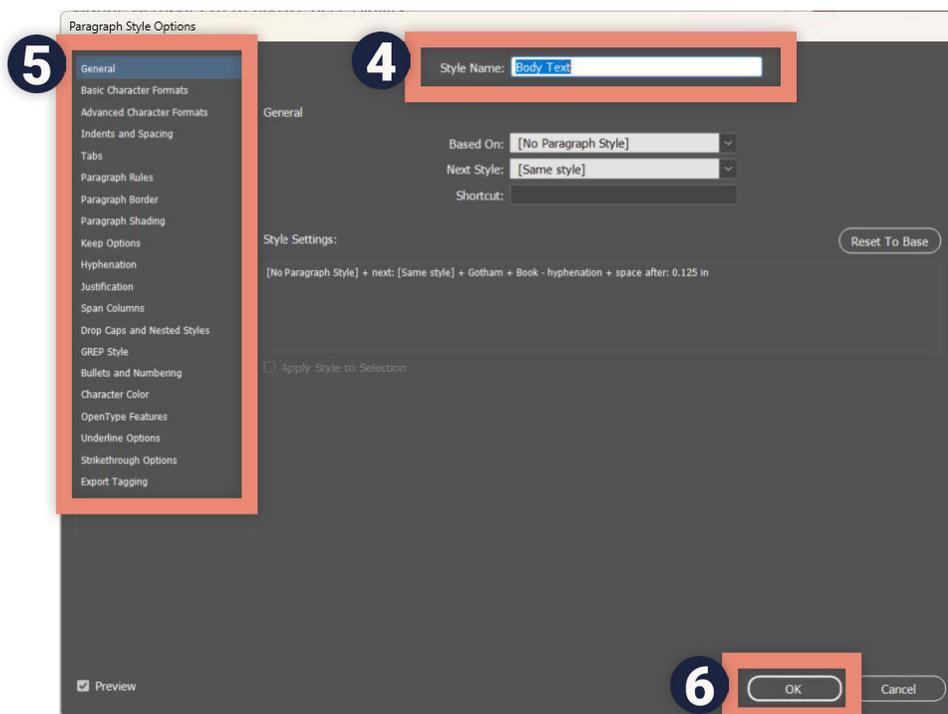
Setting Up & Editing Paragraph Styles

While paragraph styles have been set up for you in your template, you may need to adjust styles or add new ones. To create new paragraph styles (instructions for the Essentials Classic Workspace):



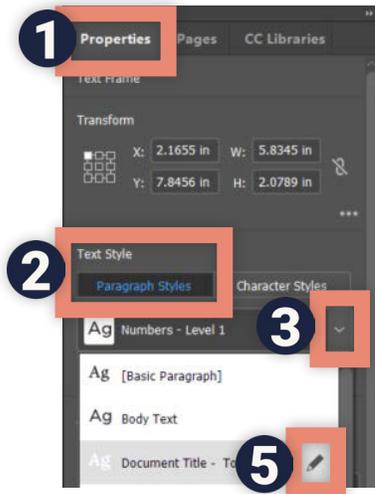
1. Go to the **Properties Panel** on the right side of your workspace.
2. Make sure **Paragraph Styles** is selected under Text Style.
3. Click on the **+** icon.

4. Name the paragraph style.
5. Set the basic formatting options, including:
 - a. **Basic Character Formats:** Set the font, font style, size, and case.
 - b. **Indents and Spacing:** Set the text alignment, left and right indents, and the space before and after a paragraph.
 - c. **Hyphenation:** Turn off hyphenation by deselecting the check box.
 - d. **Bullets and Numbering:** Define bulleted and numbered lists, select bullets, and set list hierarchy.
 - e. **Character Color:** Set the text color.
 - f. **Export Tagging:** Set export tags as needed ([export tagging explained more in step 2](#)).
6. Select **OK** to create the new paragraph style.



When you edit a paragraph style, InDesign will apply those changes everywhere that style is used. This makes it quick and easy to make formatting changes to your document.

To edit paragraph styles:



1. Go to the **Properties Panel** on the right side of your workspace.
2. Make sure **Paragraph Styles** is selected under Text Style.
3. Click on the **down arrow icon** next to the paragraph styles name.
4. Hover over the paragraph style you want to edit.
5. Select the **pen (edit) icon**.
6. Update the desired formatting options.
7. Select **OK** to save changes to the paragraph style.

Step 3: Add Alt Text

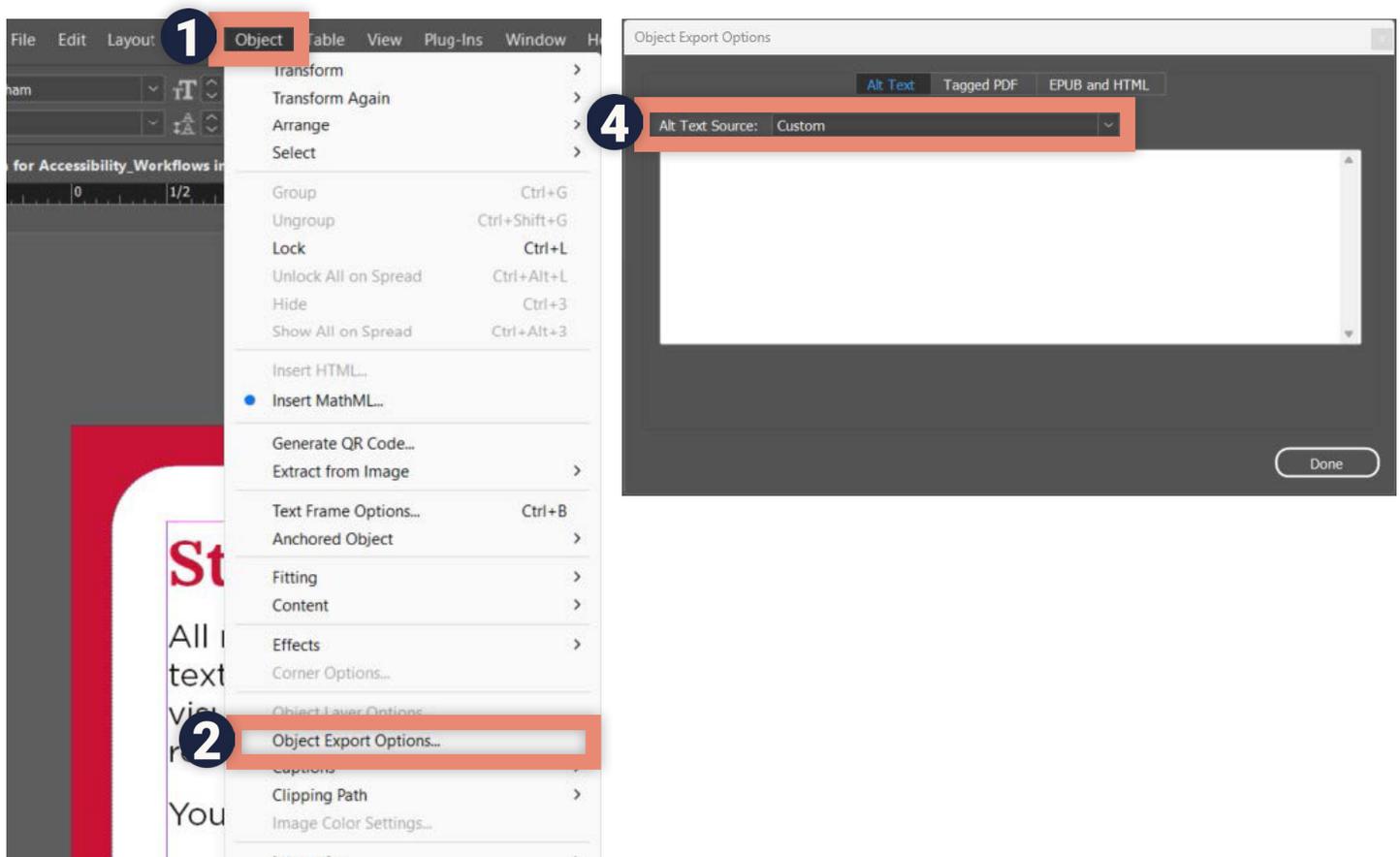
All meaningful images and graphics in an accessible instructional document require alt text. Decorative images, or images that provide no important information and are for visual purposes only, should not have alt text and should be either removed from the reading order or marked as an artifact.

Note: If the text adjacent to the image or graphic describes the graphic, you do not need to add alt text.

You can add alt text in InDesign using **Object Export Options**:

1. Select **Object** from the top menu bar.
2. Select **Object Export Options**.
3. Select the graphic or image to which you want to add alt text.
4. Next to Alt Text Source, select **Custom**.
5. Enter the alt text.

When added correctly, alt text will appear as a tool-tip when the user hovers over an image in the final PDF.



Tips & Tricks For Adding Alt Text in InDesign

- You can leave the Object Export Options dialog box open while you work, eliminating the need to repeatedly close and reopen it for each image.
- Group graphics together (like the screenshot with the call-out box and numbers). Then, add alt text to the group instead of to each image individually. This will make it easier to add the images to the reading order in step 5.
- If you have a repeated graphic that will all have the same alt text, you can create an object style for that graphic. Add the alt text to the object style and it will apply each time you apply that object style.
- Add alt text to images after you have finished typing and arranging your document in InDesign.

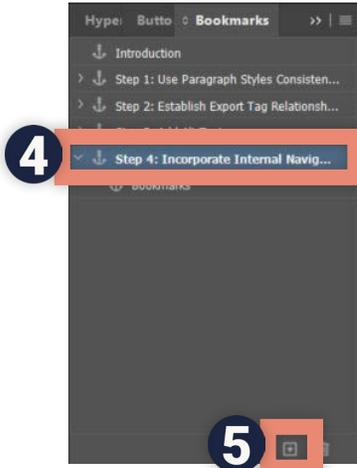
Step 4: Incorporate Internal Navigation

Bookmarks and hyperlinks are conveniences to sighted users but are also essential navigation tools for the visually impaired. These navigation mechanisms are the means by which users with disabilities move through a document and get an overview of its content and organization.

Bookmarks

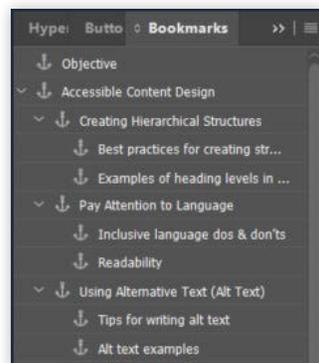
You can arrange bookmarks hierarchically in the Bookmarks panel and nest specific bookmarks under broader categorical bookmarks for a clearer indication of a document's distinct sections.

To add bookmarks:

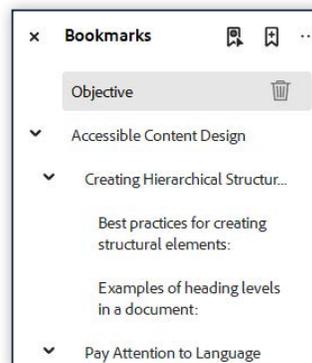


1. Select **Window** from the navigation bar at the top of the screen.
2. Hover over **Interactive**. Then, select **Bookmarks**.
3. Highlight the text you want to bookmark. These are typically the major headings in your document (heading levels 1-4).
4. **To nest bookmarks based on the document hierarchy:** Select the heading that the next bookmark should be nested within.
5. Select the **+ icon** at the bottom of the window to create a bookmark.

When exported to PDF with the proper settings, the InDesign bookmarks and their organization structure are matched exactly in the Acrobat Bookmarks pane and work as clickable links to the appropriate content.



*Bookmarks in
InDesign*



*Bookmarks in
Acrobat*

Hyperlinks

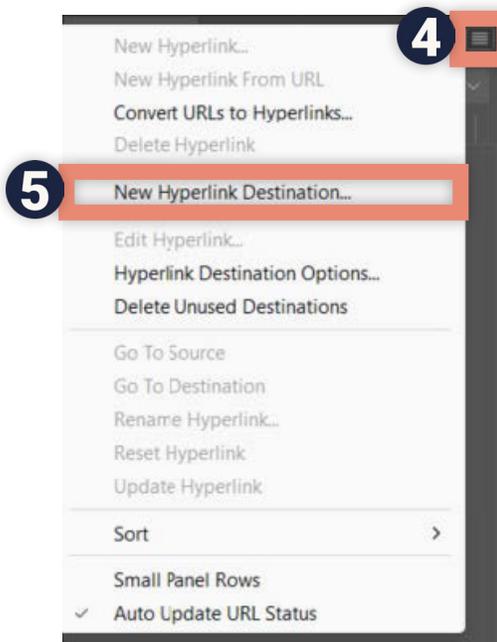
Hyperlinks, either to external locations like websites or to in-document locations like text anchors, provide additional navigation points on a more micro level. PDF links are created upon export for links created in the Hyperlinks panel.

Creating hyperlinks with text anchors:

You can create hyperlinks to in-document locations using text anchors. This is especially helpful for creating internal navigation, like a clickable table of contents.

Creating text anchors allows you to link to a specific point in the document, such as a heading, paragraph, or even a word, so that when someone clicks the hyperlink, they're taken directly to that spot.

To create text anchors for hyperlinks:

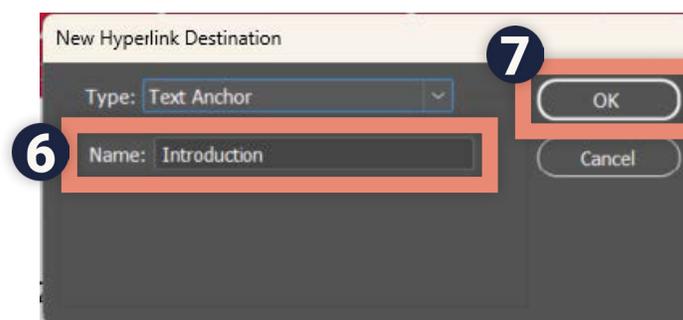


1. Select **Window** from the navigation bar at the top of the screen.
2. Hover over **Interactive**. Then, select **Hyperlinks**.
3. Highlight the text you want to anchor. Those are typically the major headings in your document.
4. Select the **menu icon** in the top right corner of the Hyperlinks panel.
5. Select **New Hyperlink Destination**.

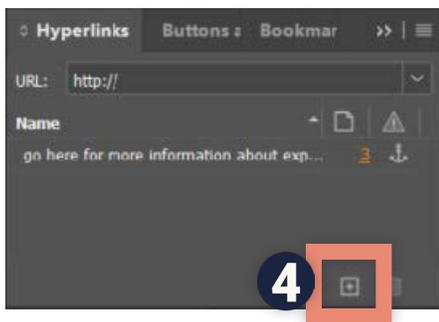
6. Name the text anchor.

- If you will have a lot of text anchors, we recommend naming them so they can be easily grouped within their hierarchy. For example, in this document, you could name them: "00 Introduction," "01 Step 1," "01 What are Styles," etc.

7. Select **OK** to save the text anchor.

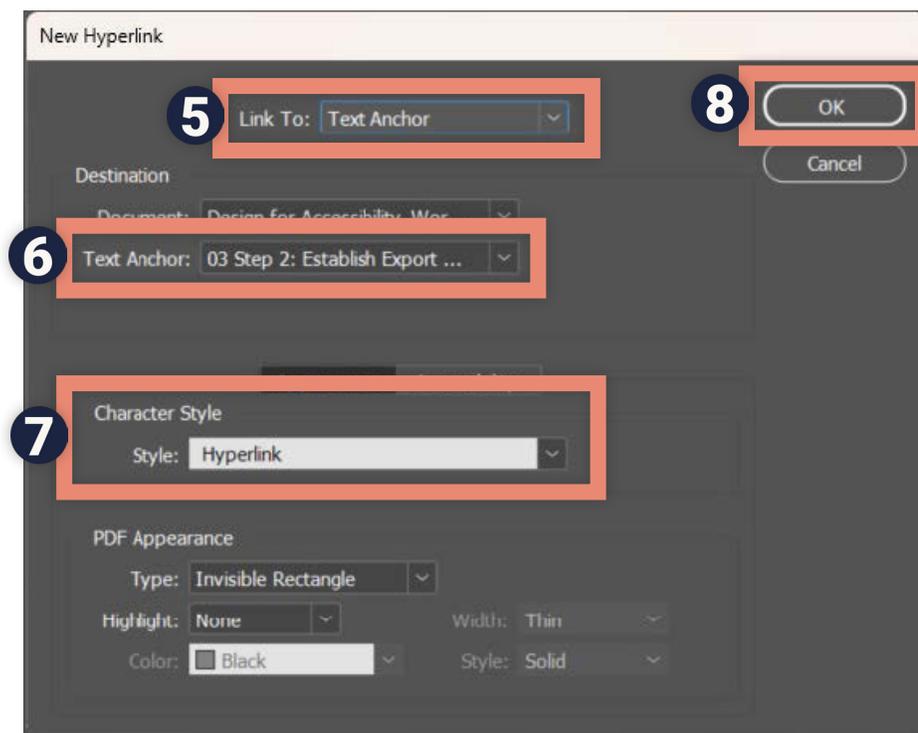


To create the hyperlink:



1. Select **Window** from the navigation bar at the top of the screen.
2. Hover over **Interactive**. Then, select **Hyperlinks**.
3. Highlight the text you want to make a link.
4. Select the **+ icon** at the bottom of the hyperlinks panel.

5. Select **Text Anchor** from the drop down menu next to Link To.
6. Under Destination, select the desired text anchor from your document.
7. Set the desired character style.
 - Use **Hyperlink** for in-line links.
 - Use **Same Style** for any links in a table of contents.
8. Select **OK**.



Best practices for using hyperlinks:

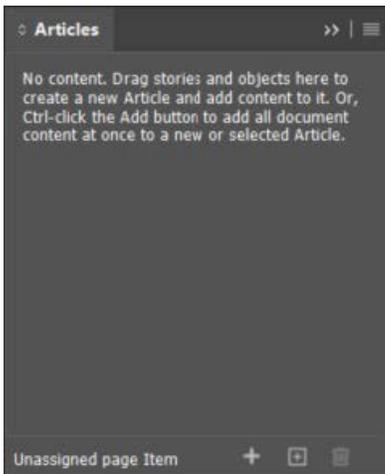
- **Use descriptive link text.** Avoid vague phrases like “click here” or “read more.” Instead, use more meaningful descriptive text that clearly indicates the link’s destination.
- **Avoid using URLs as link text.** Screen readers often read out each character in a URL, which can be confusing and time-consuming. Instead, embed the URL behind descriptive text.
- **Maintain proper contrast ratios.** Hyperlinks should have a color contrast ratio of at least 4.5:1 against the background color and should not rely on color alone to indicate interactivity. Underlining links is a common visual cue.

Step 5: Establish Content Order in the Articles Panel

The tagging order of a PDF document is essential to its readability. The Articles panel in InDesign enables you to precisely define which content in your document gets tagged and in what order.

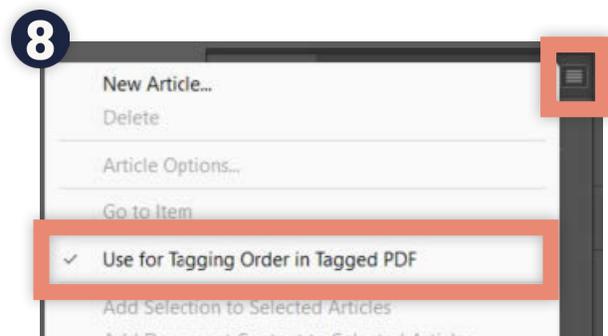
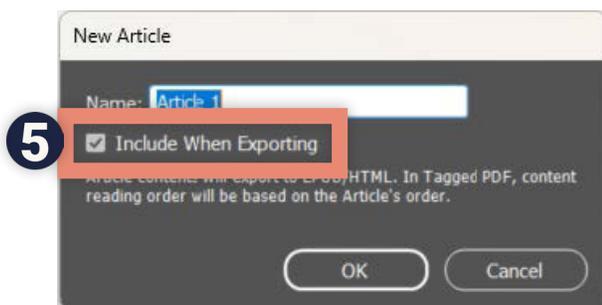
Note: Complete this step only after finalizing all content and edits in your document.

To add content to the Articles panel:



1. Select **Window** from the navigation bar at the top of the screen.
2. Select **Articles**.
3. Add content (including all text frames and any graphics or images with alt text) to the Articles panel by either:
 - Dragging and dropping content into the Articles panel.
 - Selecting multiple items (in the order you want them to be read), then selecting the + icon.
 - Note: Any images that are purely decorative can be left out of the Articles panel.

4. When prompted, give your article a name or keep the default.
5. Make sure **Include When Exporting** is checked (this is usually checked by default).
 - This setting ensures the article is tagged and ordered correctly when exported to a PDF.
6. If needed: Reorder items in the Articles panel by dragging items up or down within the articles panel to set the reading order (top to bottom).
7. For more complex or long documents, use multiple articles.
8. Select the menu at the top of the Articles panel. Make sure **Use for Tagging Order in Tagged PDF** is selected.

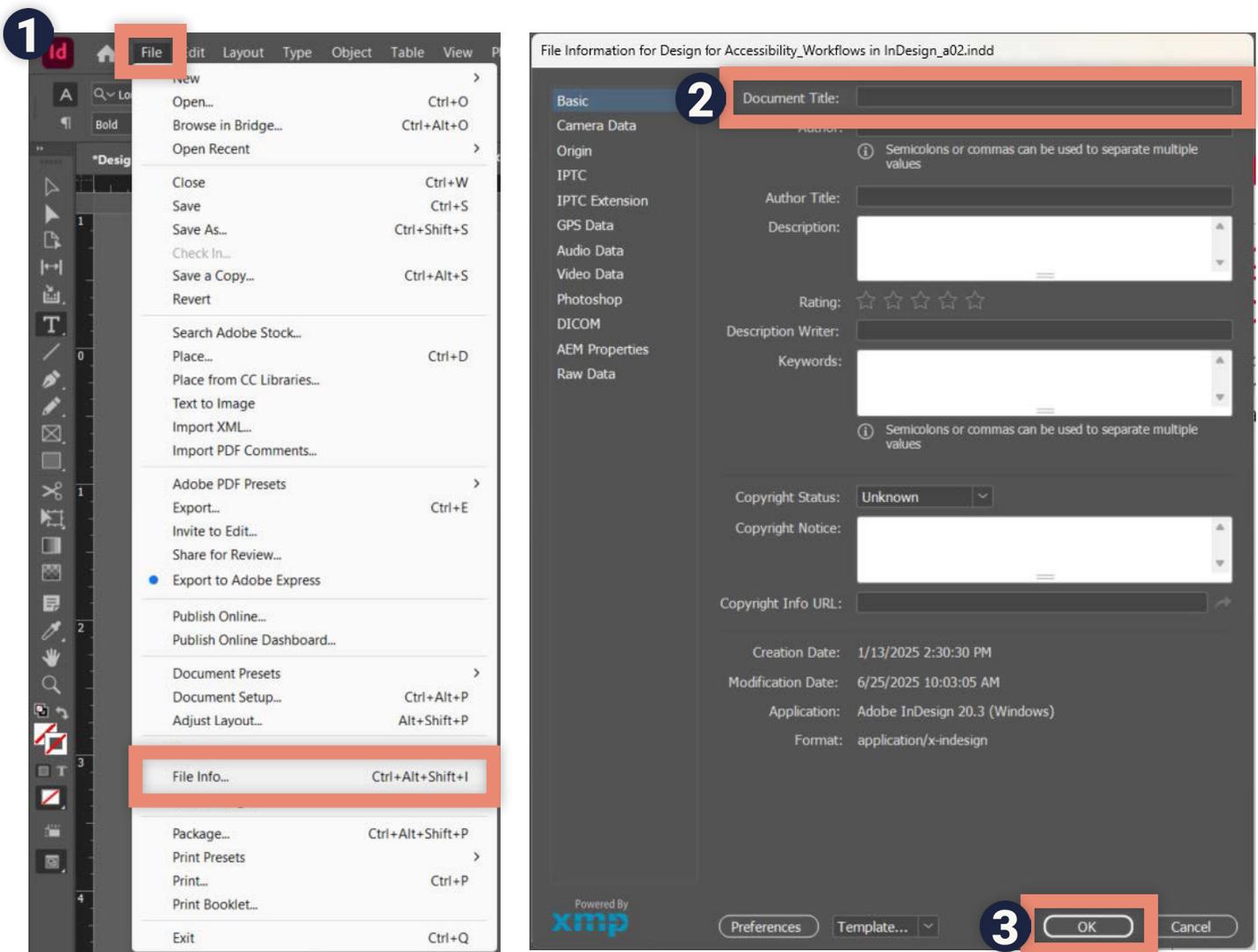


Step 6: Specify the Document Title as Metadata

For accessibility, a PDF title requires a document title. When you save this information in the file information in InDesign, it is automatically transferred to Acrobat as required metadata.

To add a title to the document file:

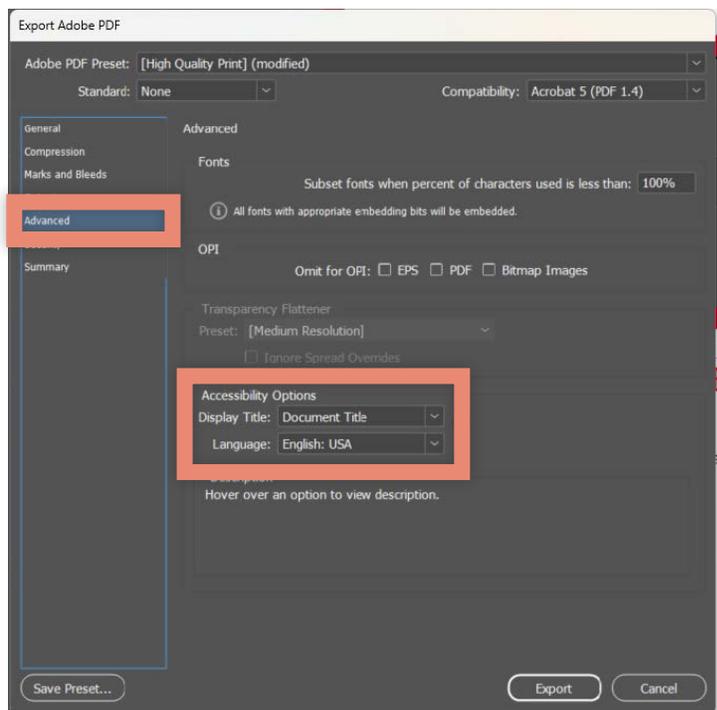
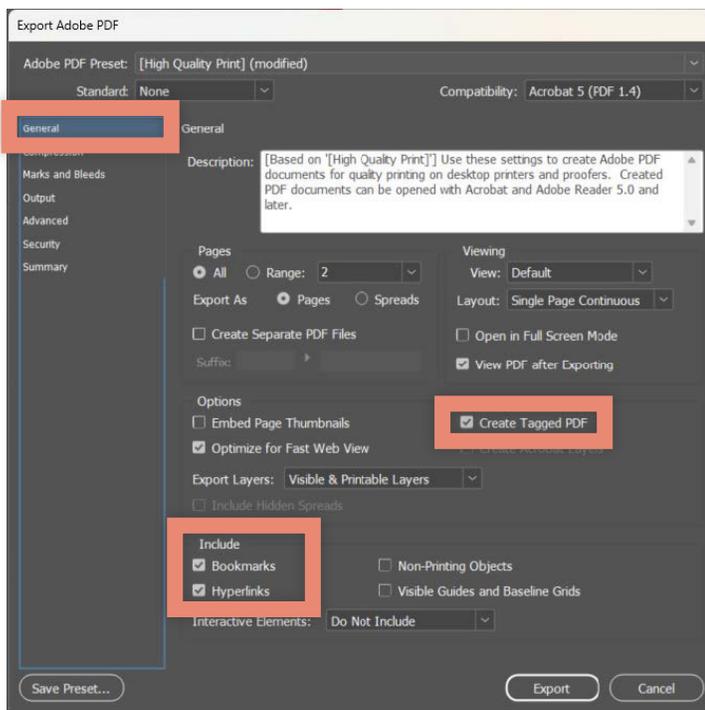
1. Select **File** from the navigation bar at the top of the screen. Then, select **File Info**.
2. Add the title of the document.
3. Select **OK**.



Step 7: Optimize the Export Settings For Accessibility

When you are exporting your document as a PDF, make sure you have selected the following:

- ▶ Under the **General** settings:
 - Under Options, select **Create Tagged PDF**.
 - Under Include, select **Bookmarks** and **Hyperlinks**.
- ▶ Under **Advanced** settings, go to the Accessibility Options:
 - Set the Display Title to **Document Title**.
 - Select the language for the document.



Step 8: Finalize the Document in Acrobat Pro

The tags created in InDesign carry over to the PDF, but you need to explicitly tell Acrobat to use these tags for the reading order and accessibility.

To use the order specified by the InDesign's document structure:

1. Select all the pages in the Acrobat's Page Thumbnail pane.
2. Select **Page Properties** from the Options menu.
3. Select **Use Document Structure** for the tab order.
4. Select **OK**.
5. Save the PDF document so the changes apply.

