
Creating Accessible PDFs Using Adobe InDesign CS3 & Adobe Acrobat 9

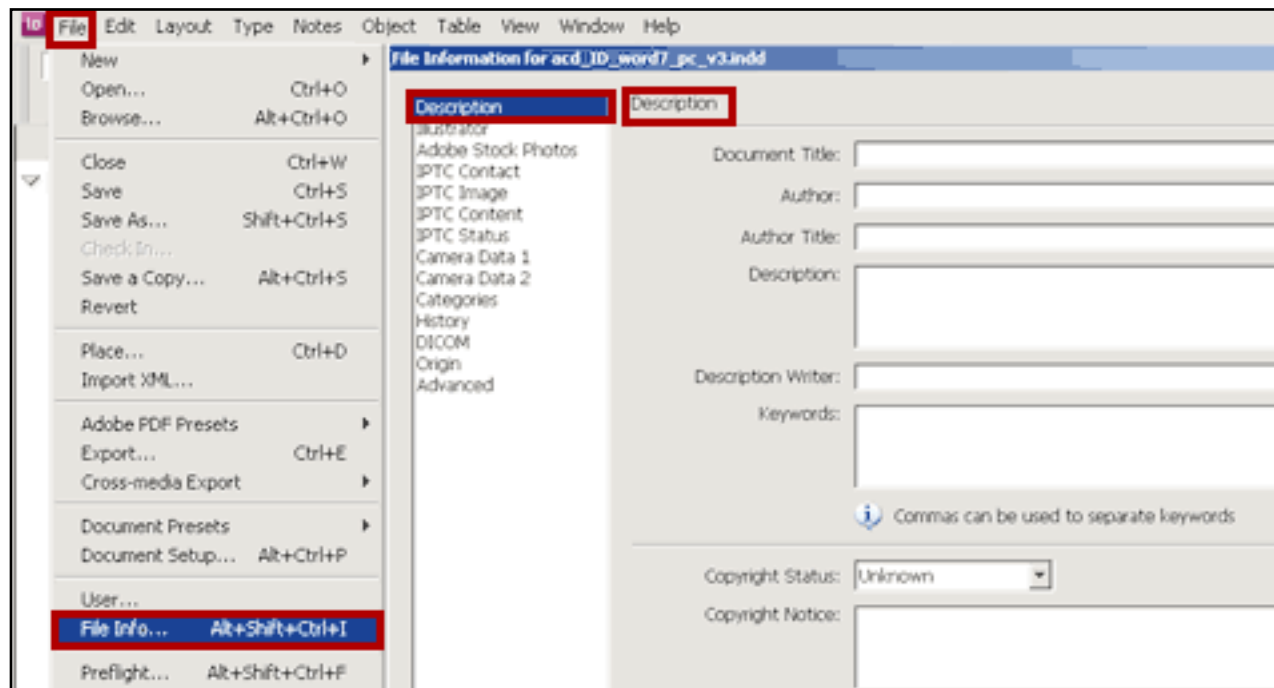
This manual was developed as a joint project of the [Disability Programs and Resource Center](#) (DPRC) and [ACCESS](#), the CSU Accessibility Initiative at San Francisco State University. It was designed by Angela Dowd and supervised by Nora Scully, Accessible Technology Training Consultant at DPRC. This manual is a guide for designers and instructors to use when working independently, creating accessible PDFs from InDesign CS3 files. We developed an online tutorial to walk you through the steps of this process. We are providing this manual, that is aligned with the steps of the tutorial, to help with transferring some of the skills you have learned to your own work.



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Filling Out Document Information

When creating an accessible document, the first thing to do is fill out your document description. Select **File > File Info > Description** and put in all of the information you want to identify your file.

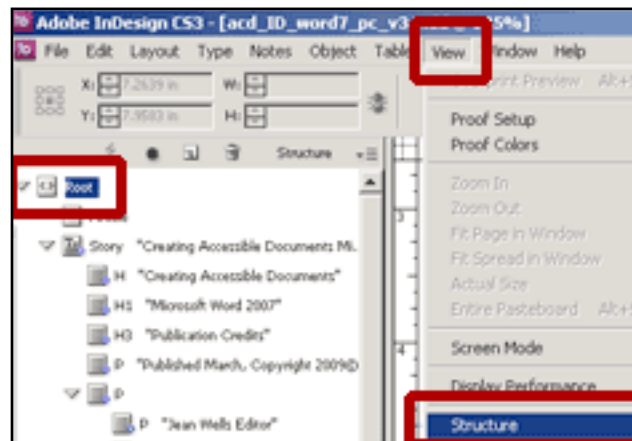


TIP: File Information can be saved and exported to different documents. You can put in metadata to provide information on the accessibility features of a particular resource. Metadata also improves search engine optimization.

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Identifying the Workspace: Working with the Structure Pane

1. Study the InDesign Structure Icons that are included in the Appendix of this document. InDesign's structure icons are very similar to XML tags. They are used to define the semantic structure of the document.
2. Select **View > Structure > Show Structure** to open the Structure Pane.
3. Click on the arrow to the left of the **Root Element** symbol < >

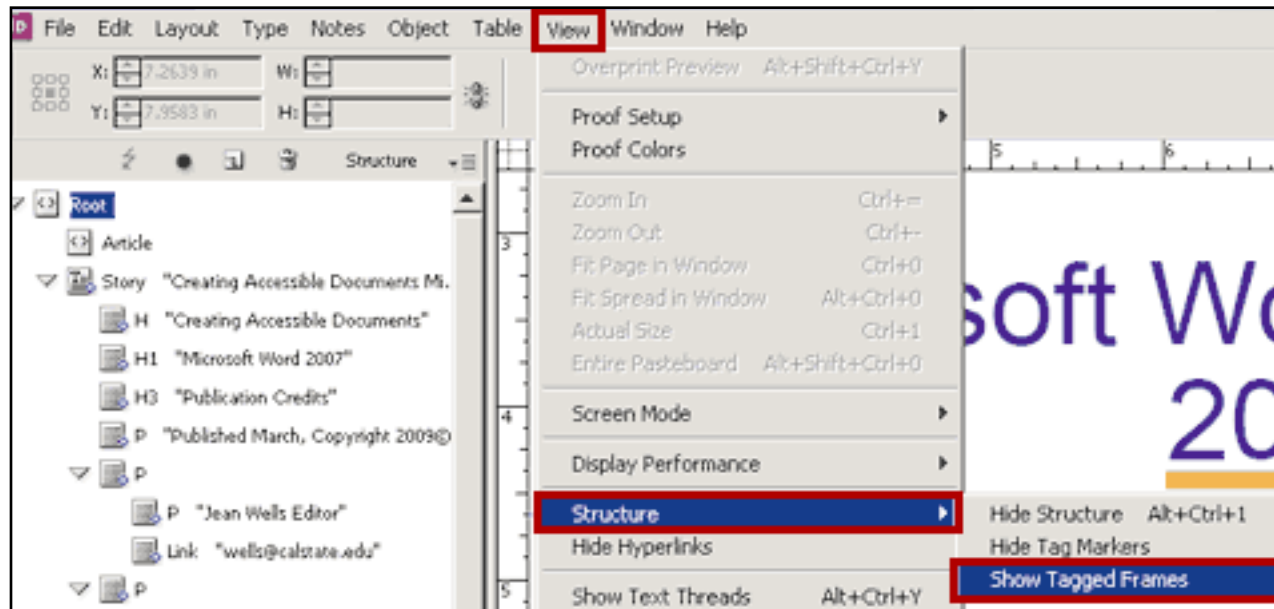


The Root Element is always the first icon in the Structure Pane. The Structure Pane displays the semantic structure of your document.

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Identifying the Workspace: Working with the Structure Pane

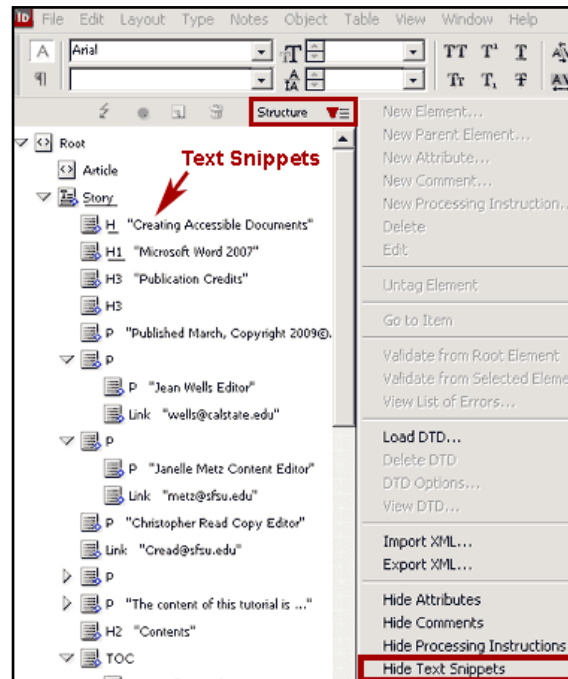
4. Select **View > Structure > Show Tagged Frames.**
5. Select **View > Structure > Show Tagged Markers.**



TIP: You will not be able to see tagged items if either Show Tagged Frames or Show Tagged Markers is not turned on. Show Tagged Markers is helpful to turn on to see your tags. If an item is not tagged it will not be read by a screen reader.

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Identifying the Workspace: Working with the Structure Pane



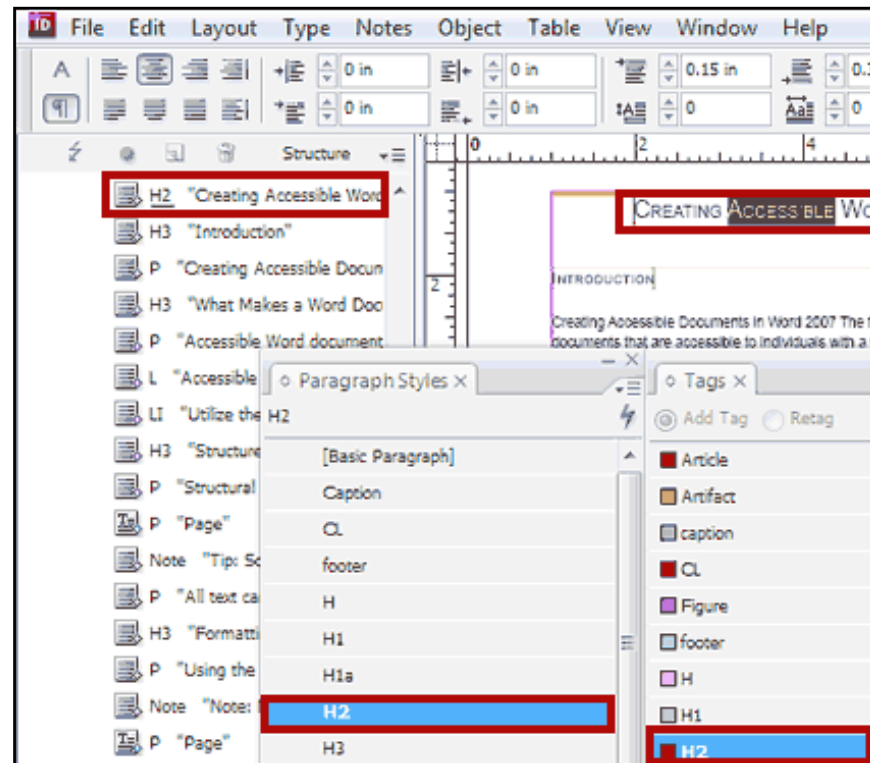
6. In the top right corner of the **Structure Pane**, click on the fly-out menu arrow.
7. Scroll down and select **Hide Text Snippets** and then **Show Text Snippets**.

TIP: Text Snippets help identify the contents of each element. This becomes very important when you must move tags that are out of place.

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Identifying the Workspace: Working with the Tags Panel

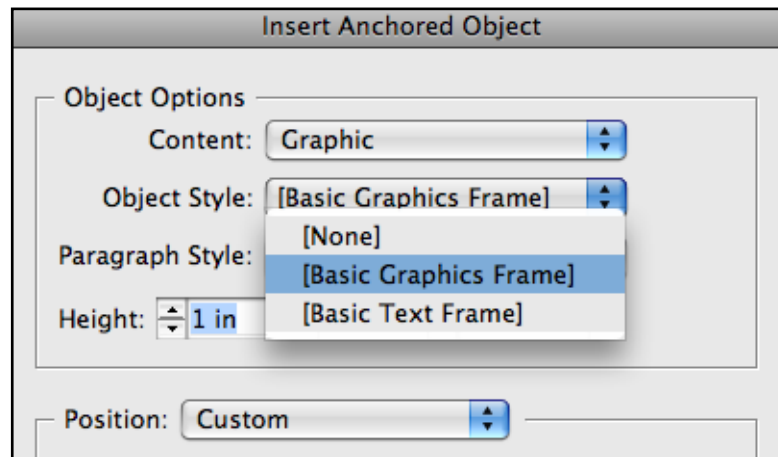
- Select **Window > Tags** to access the **Tags Panel**.



When you select a tagged item in your document it is underlined in the Structure Pane and the tag is highlighted in the Tags Panel.

Applying Alternative Text: Inserting Anchored Objects

1. Place the text cursor in the location you want your image to be inserted.
2. Select **Objects > Anchored Objects > Insert**.
3. Select **Graphic** for Content and **Basic Graphics Frame** for Object Style in the drop down menu. You can also create your own customized Object Style.
4. Select **File > Place** to place your linked image (from the images folder within project).

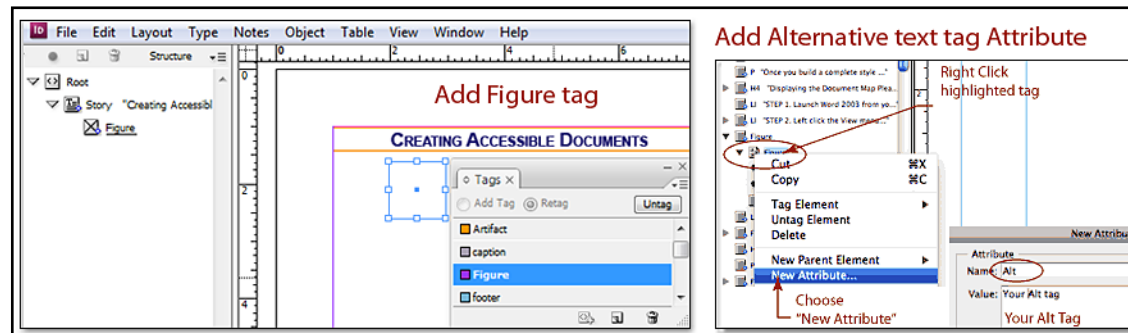


TIP: Once your image is anchored it can be tagged and will remain in place if any changes in the copy are made. Images must stay in place so their context will be correct. Otherwise screen readers will read them incorrectly. Be sure your image files are linked and not embedded.

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Applying Alternative Text: Assigning Attributes

5. Tag your images (Refer to page 13 to tag all images automatically with the **Figure Tag**).
6. When you select a tagged image, the **Figure Icon** for that image will be underlined in the **Structure Pane**.

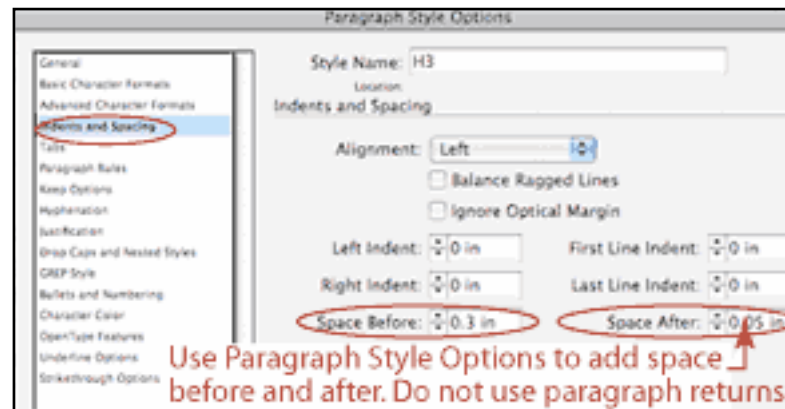


7. In the **Structure Pane**, right click the highlighted underlined **Figure Icon**.
8. Select **New Attribute**.
9. Type **Alt** in the **Name** area and your **Description** (Alt Tag) in the **Values** area.

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Applying Styles: Using Paragraph Styles.

1. Select **Type > Paragraph Styles** to access the **Paragraph Styles Panel**.
2. In the **Paragraph Styles Panel**, click the fly-out menu at the top right to open the **Paragraph Style Options** box.
3. In the menu to the left, click on **Indents and Spacing**.
4. Specify paragraph spacing by entering amounts in **Space After** and/or **Space Before**.

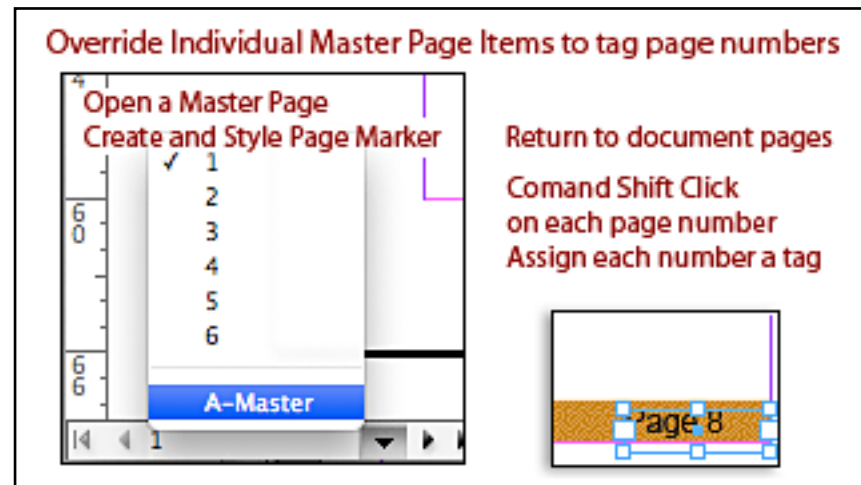


TIP: Name your styles using the Heading “H”, Paragraph “P”, List “L” to simplify the tagging process. They are standard Adobe element tag names. Please see Appendix for more clarification.

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Tagging Page Numbers: Styling and Overriding Master Page Items

1. Locate and open your **Master Page** by selecting **A-Master**.
2. Insert and style your **Special Character Marker** for your page numbering.



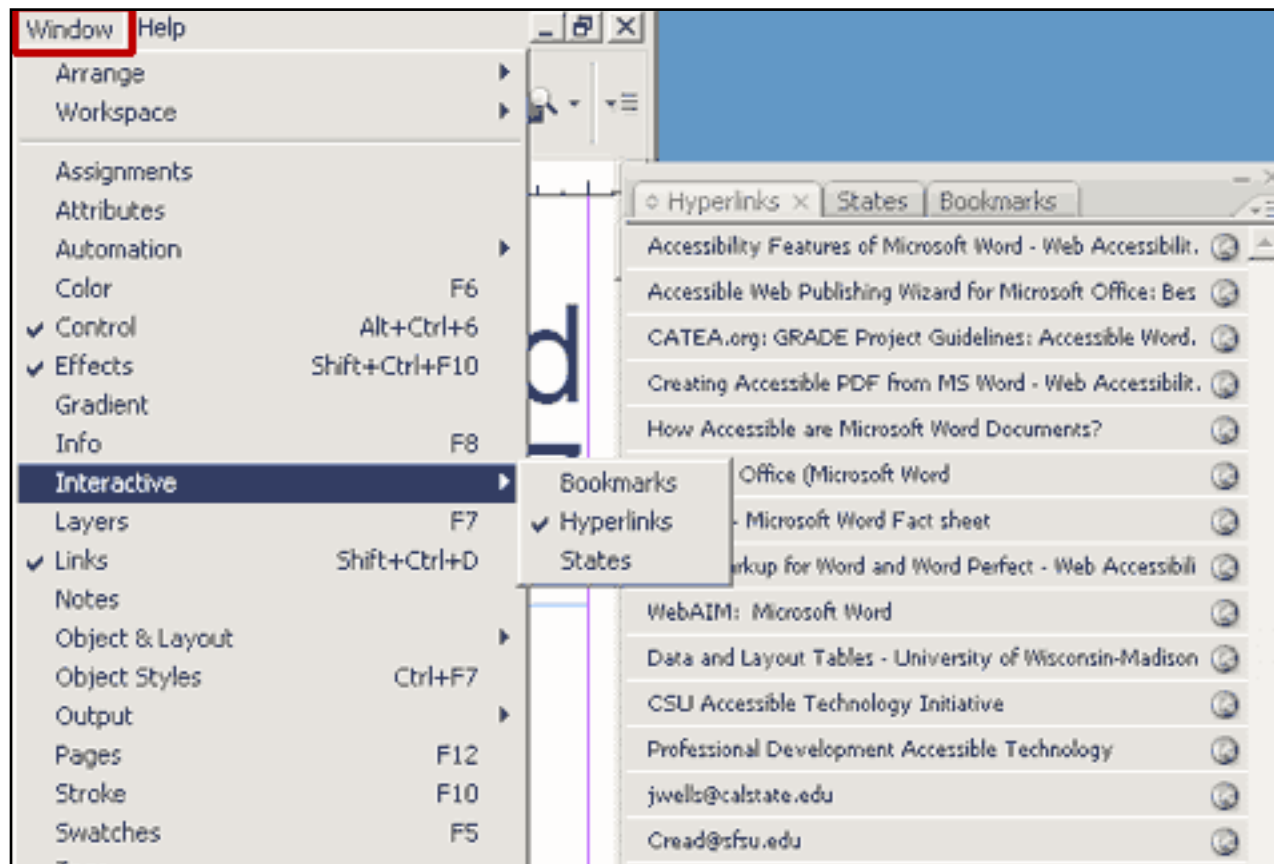
3. Leave the Master Page and return to your document pages.
4. Using your selection arrow, **Command Shift Click** on each page number to **Override** these specific **Master Page Items**. You will later tag each page number.

NOTE: Master Page Items show up on every page. They are dotted around the edges. It is recommended that Master Page Items **NOT** be tagged. A Master Page Item will only read out one time. Page numbers have to be tagged separately and relocated in the Structure Panel.

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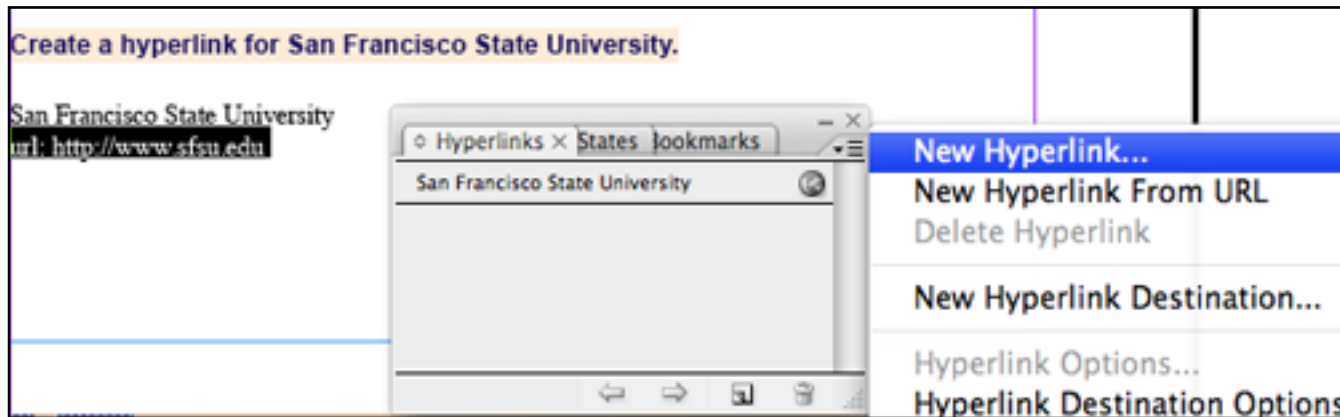
Creating Hyper Links: Displaying the Hyperlinks Panel

1. Select **Window > Interactive > Hyperlinks** to display the **Hyperlinks Panel**.



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Creating Hyper Links: Accessing the Hyperlinks Options Box

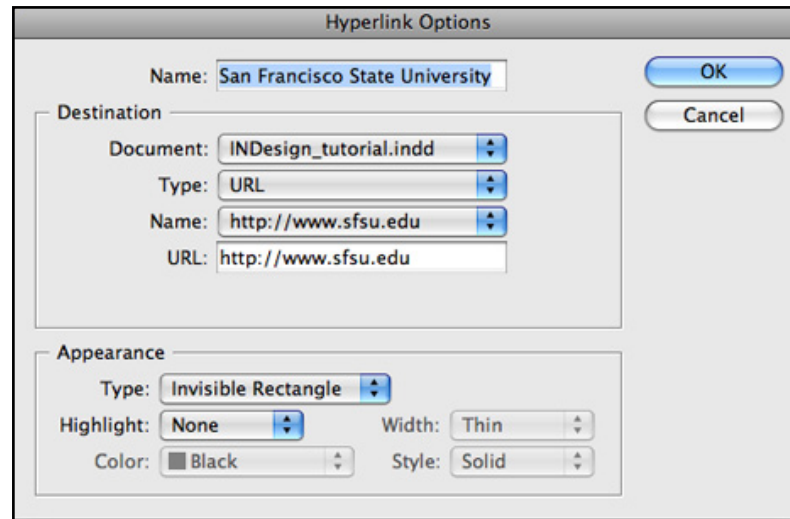


2. Choose a **name** with **descriptive text** for your URL.
3. Select the name and/or URL you want to create a hyper link to.
4. **Select New Hyperlink** in the **Hyperlinks Panel** fly-out menu at the top right to access the **Hyperlink Options Box**.

Using a descriptive name makes the link more accessible. The name should identify the target so the user will know the exact location they are being taken to. Click Here does not identify the target. Labeling links appropriately also adds context when a screen reader is reading links out.

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Creating Hyperlinks: Filling in the Hyperlink Options Box



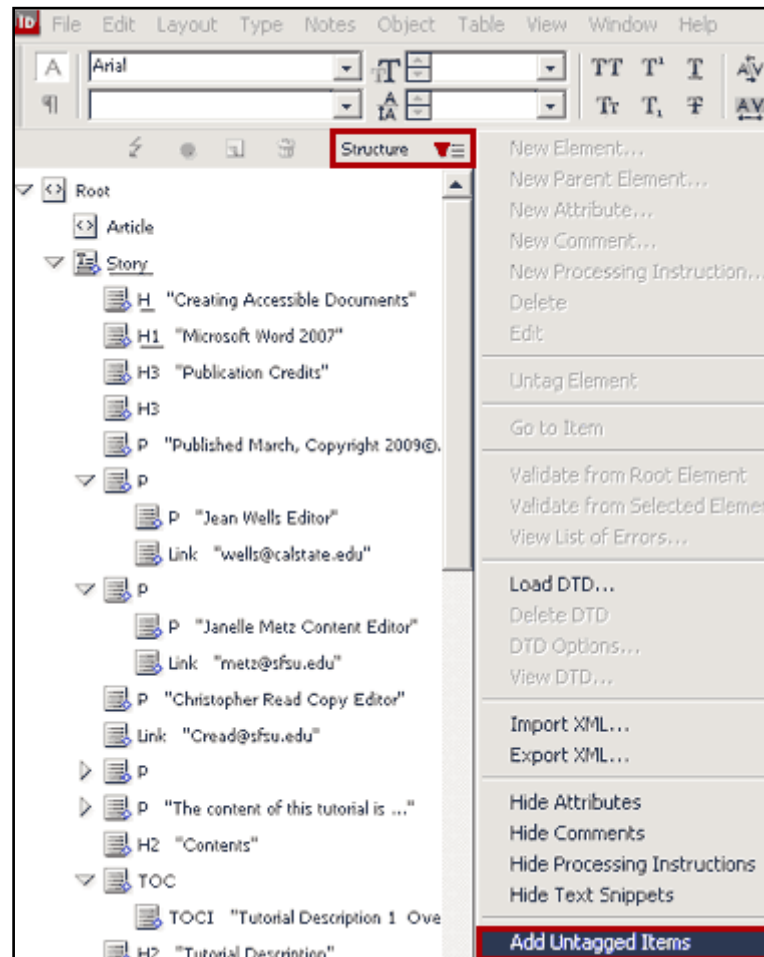
5. For **Destination/Name**, type the **name of the hyperlink**. The name you type will appear in the **Hyperlinks Panel**.
6. For **Destination/Type**, select **Page**, **Text Anchor**, or **URL** and choose destinations.
7. For **Appearance/Type**, select **Visible Rectangle**. This will create a box around the link.
8. For **Appearance/Highlight**, select **None**.

If you choose **Invisible Rectangle**, create an **underlined paragraph style** to make text look like a link.

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Adding Tags: Add Untagged Items Automatically

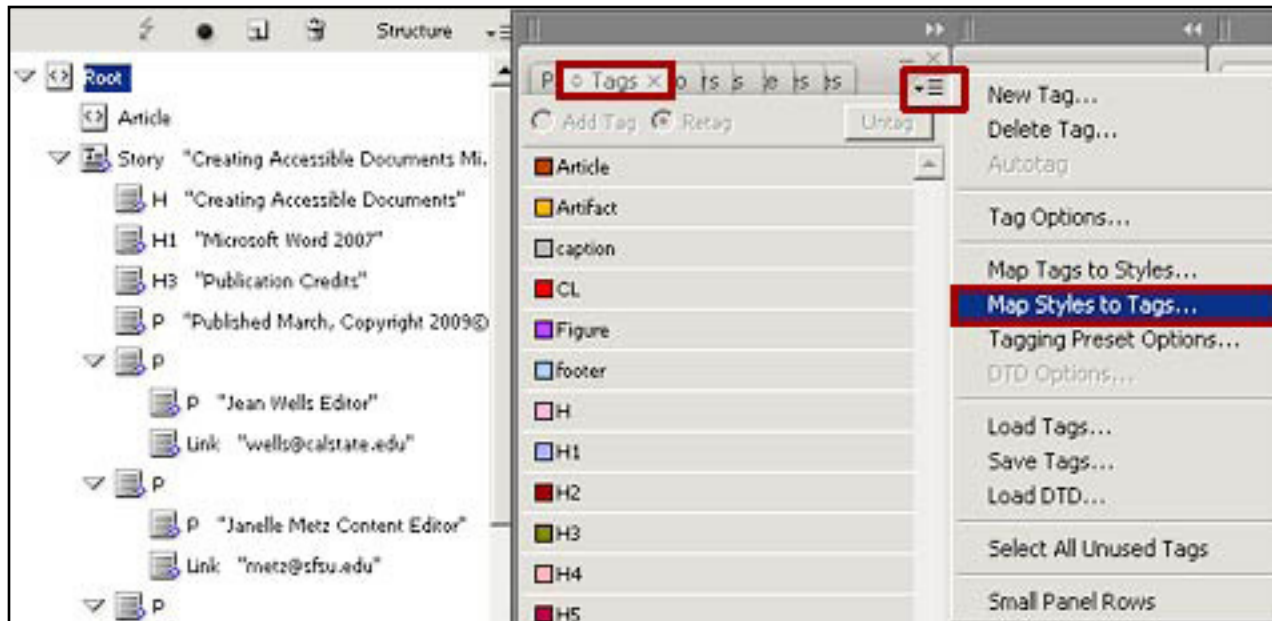
- Select **Structure Pane > Structure Options > Add Untagged Items**.



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Adding Tags: Mapping Styles to Tags Automatically

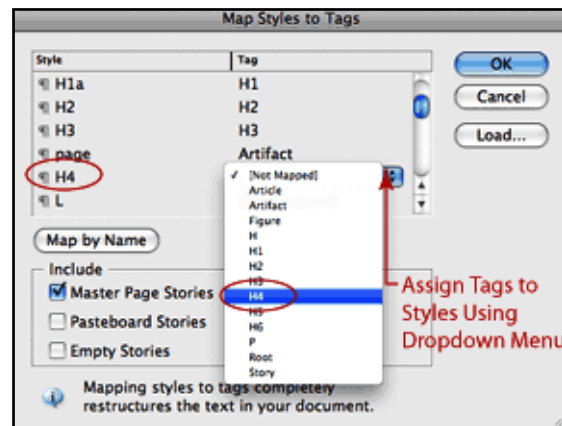
1. Go to **Window > Tags**.
2. Click on the **Options Arrow** in the upper right of the **Tags Panel**.
3. Select **Map Styles to Tags**.



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Adding Tags: Mapping Styles to Tags Automatically

4. In the diagram below, use the Pop-up Menu in the right column to assign **Tags to Styles**.
5. Notice that each **Tag** is assigned a **Style**.

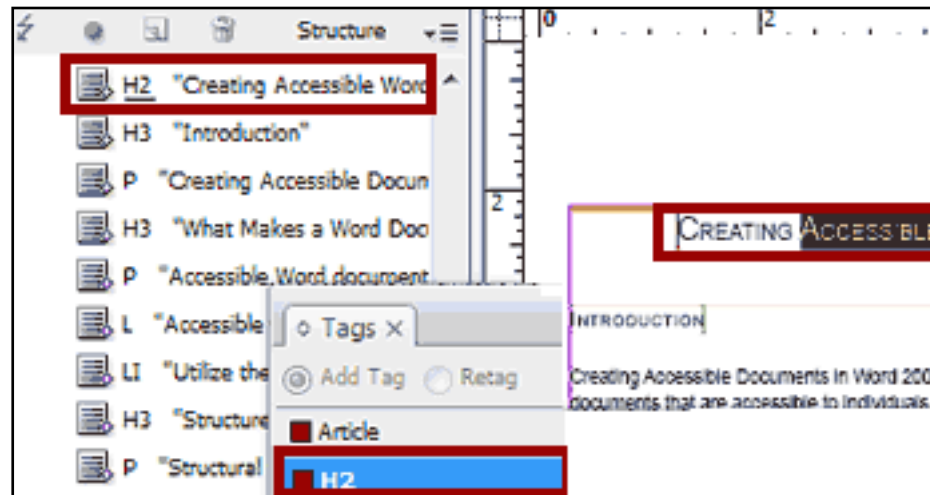


You can use both automatic and manual tagging. Automatic tagging is good to use because it saves time. Using the Adding Untagged Items option applies the Story Tag to everything in the document (if it is contained within the threaded text box). It also tags images with the Figure Tag. If items are not tagged, they will not read out loud in a screen reader. This is a way to assure that your content gets tagged. You can remove tags, change tags and add additional tags later.

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Adding Tags: Manual Tagging

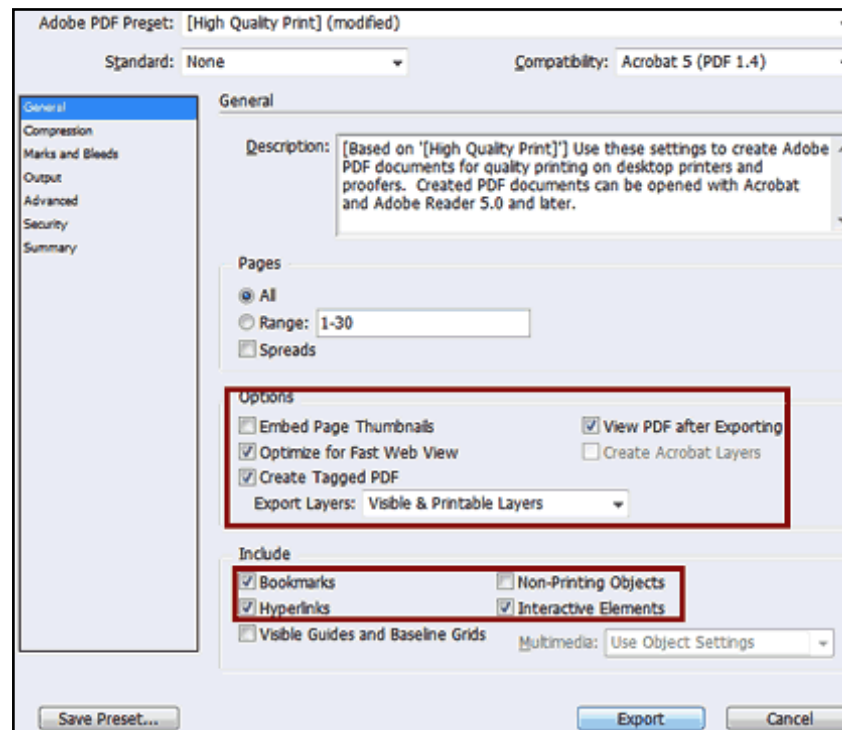
1. Select **View > Structure > Show Tagged Frames** to see if everything is tagged.
2. Check to be sure **Icons** in the **Structure Pane** and **Tags** in the **Tags Panel** match.
3. Tag text manually by selecting the item and choosing the correct tag from **Tags Panel**.



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Exporting InDesign File to PDF format:

1. Select **File > Export > Adobe PDF** and check appropriate boxes.
2. Choose compatibility and print quality based on the printing facilities available.

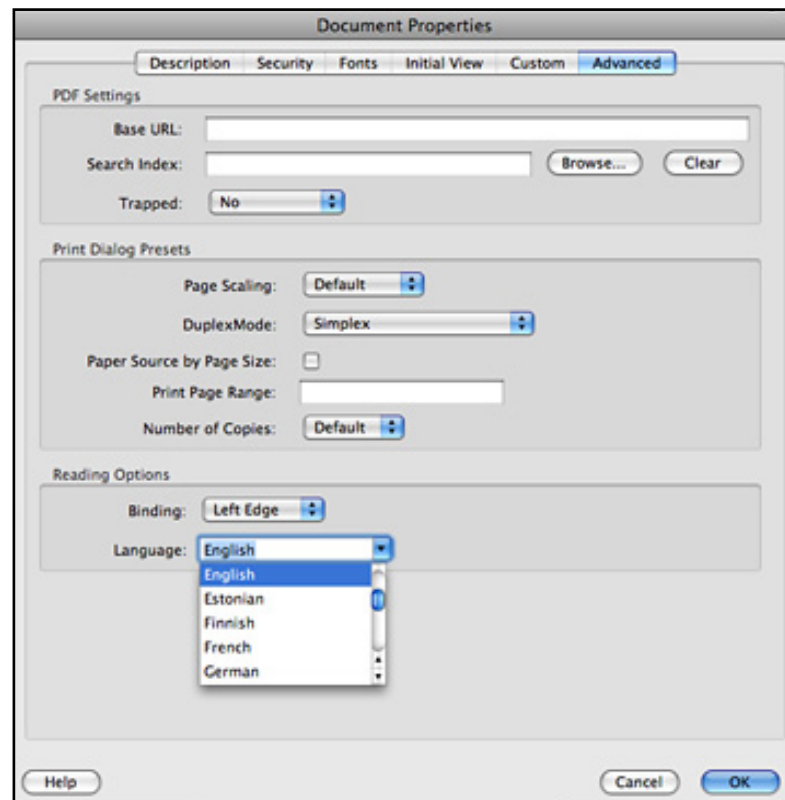


Note: Remember that you must check off Bookmarks, Hyper links, and Interactive Elements to make them available in your PDF.

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Working with the PDF in Acrobat: Setting the Document Language

- Select **File > Properties > Advanced > Drop down Menu > Choose Language**

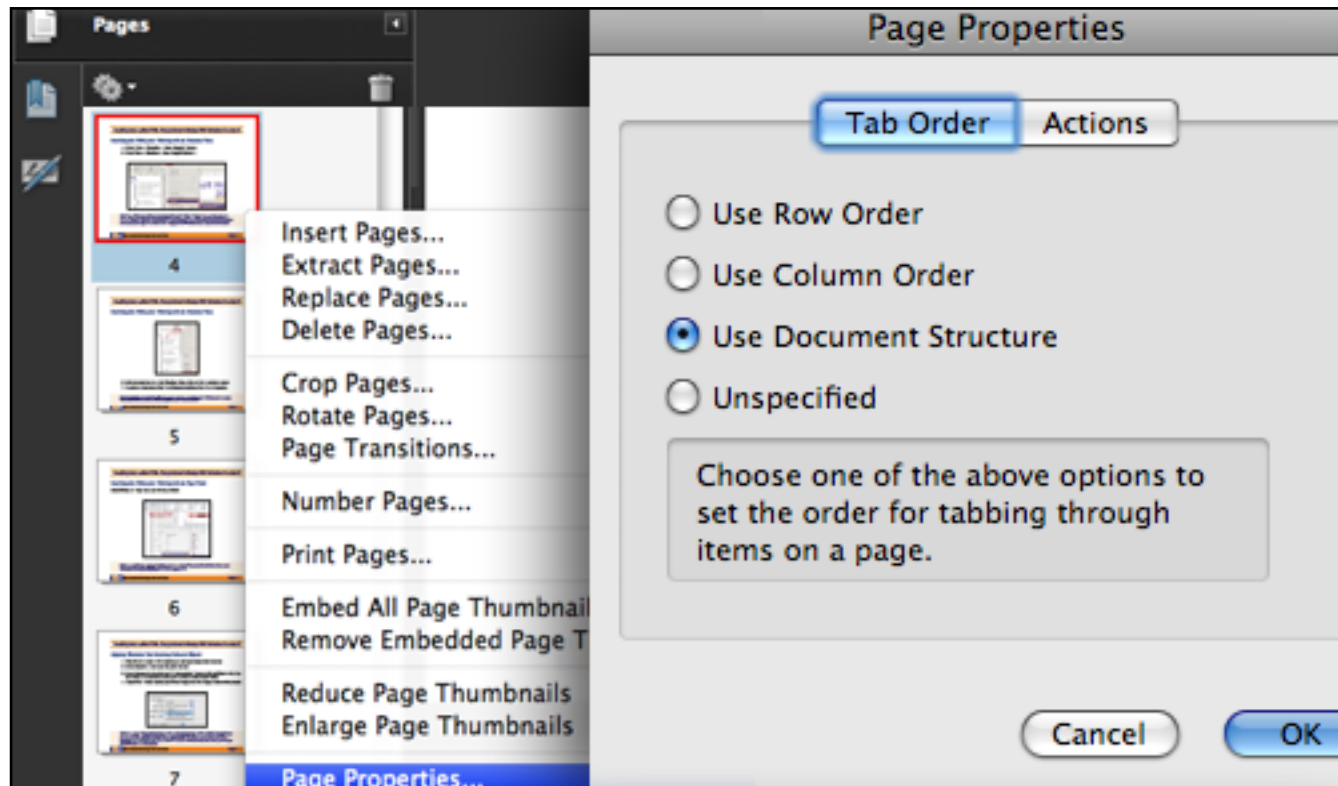


TIP: You must assign a language for the document to be accessible.

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Working with the PDF in Acrobat: Check the Page Properties Dialog Box

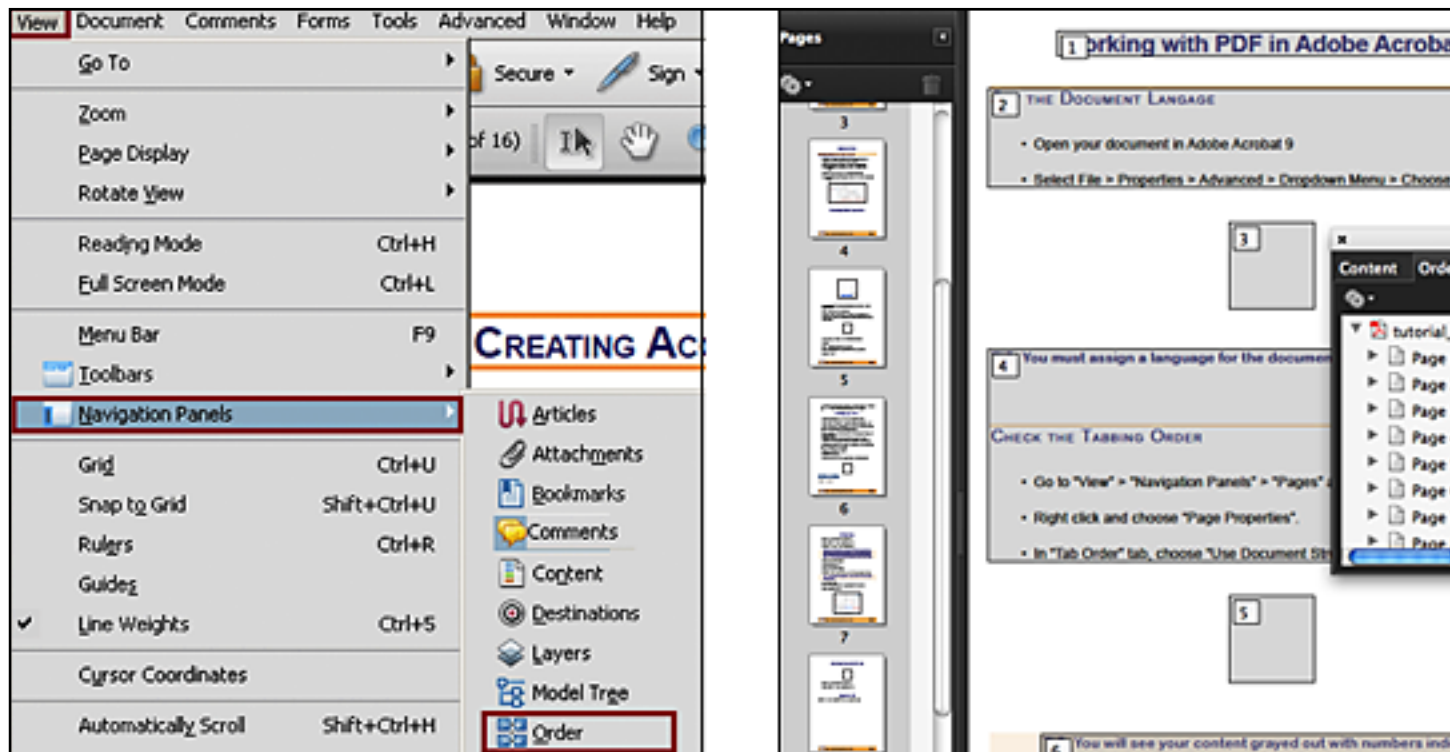
- Go to **View > Navigation Panels > Pages** and select all pages in document.
- Right click and choose **Page Properties**.
- In **Tab Order** choose **Use Document Structure** and click OK.



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Working with the PDF in Acrobat: Check the Tabbing Order

- Select **View > Navigation Panels > Order** to view reading order

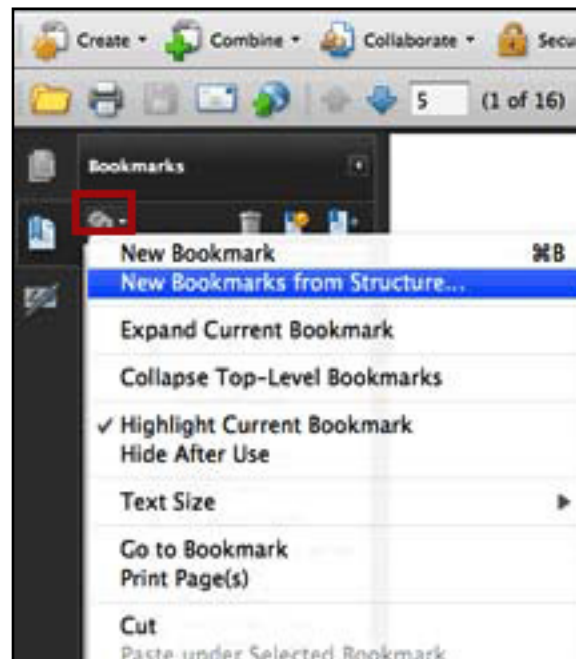


TIP: You will see your content grayed out with numbers indicating the reading order for each page. To correct the order you will have to open your Tags Panel Options and access the Touch Up Properties Dialog Box. If you find a number with an empty grayed box it means you have an empty tag that should be deleted.

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Working with the PDF in Acrobat: Setting up Linking Bookmarks

1. Select **Bookmark Options** (at the top left corner) > **New Bookmarks from Structure**
2. Choose **Headings and Subheadings** (these are the items you will want to bookmark).

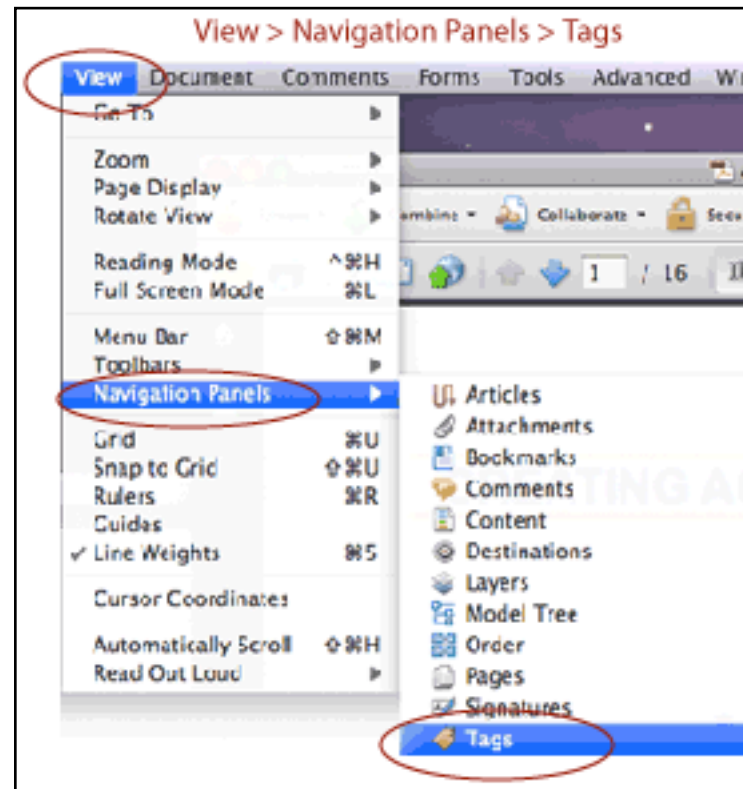


Creating a semantic structure from the start with Paragraph Styles and Tags creates anchor links for your bookmarks. These links take readers to the headings and subheadings you specified previously in your hierarchy.

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Working with the PDF in Acrobat: Checking Details

- Select **View > Navigation Panels > Tags**



You can work with tags in Acrobat, but it is best to do as much as possible in InDesign. You cannot undo mistakes when using Acrobat. InDesign allows you to edit tags if your document is revised.

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Accessibility Full-Check (from the Acrobat Help Pages)

Select **Advanced > Accessibility > Full Check**

For the Section 508 and W3C guidelines, the options area includes a Browse button that links to the website for the respective guidelines.














Select Adobe PDF to choose from options for the Adobe PDF accessibility standard:

- **Alternative Descriptions Are Provided:**
Checks for tagged figures that are missing alternate text.
- **Text Language Is Specified:**
Checks for paragraphs that don't have a language specified for them. Setting the language for an entire document in the Document Properties dialog box corrects all errors related to this option.
- **Reliable Character Encoding Is Provided:**
Checks for fonts that are inaccessible to screen readers and other assistive software. Fonts must contain enough information for Acrobat to correctly extract all the characters to text. If one or more fonts don't allow for the correct extraction of all the characters, the PDF is inaccessible.
- **All Content Is Contained In The Document Structure:**
Checks for page elements that have been overlooked during tagging. Adding these elements to the tag tree (if necessary) ensures that a screen reader can present the content to a user.

Accessibility Full-Check (continued)

- **All Form Fields Have Descriptions:**
Checks for form fields that are missing descriptions.
- **Tab Order Is Consistent With The Structure Order:**
Checks whether tags properly reflect the document structure.
- **List And Table Structure Is Correct:**
Checks whether tags that have been generated for lists and tables meet the requirements of tagged PDF.

Appendix: [Structure Pane Icons from Adobe InDesign CS3 Help Pages](#)

Icon	Name	Use
	Root element	Each document includes one root element at the top, which can be renamed but cannot be moved or deleted.
	Story element	Represents tagged stories (one or more linked frames).
	Text element	Represents tagged text within a frame.
	Graphic element	Represents a tagged frame that includes a placed image. Each graphic element includes an href attribute that defines the path or URL to the linked file.
	Unplaced text element	Unplaced text element not yet associated with a page item.
	Unplaced graphic element	Unplaced graphic element not yet associated with a page item.
	Table element	Represents a table.
	Header cell element	Represents a cell in the header row of a table.
	Body cell element	Represents a cell within the body of a table.
	Footer cell element	Represents a cell in the footer row of a table.
	Empty element	An empty frame is associated with this element.
•	Attribute	Includes metadata, such as keywords or location of a linked image (HREF attribute).
	Comment	Includes comments that appear in the XML file, but not the InDesign document.
	Processing instruction	Includes an instruction that triggers an action in applications that can read processing instructions.