

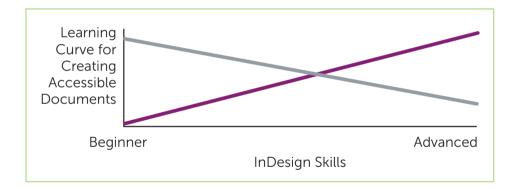
Using Adobe InDesign to Create Accessible PDF Documents



"Automation: grid layout " image used on page 1 copyright luxuryluke licensed under Creative Commons CC BY-NC-ND 2.0.

ACCESSIBILITY IN INDESIGN

Understanding InDesign and taking advantage of best practices will do the heavy lifting when it comes to creating accessible documents.





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Control everything with a style-no formatting from the toolbar! TC 100% ≣|+ C 0 in ✓ TT 2 14 pt Т Α. O_ Museo Sans Metrics ~ [None] V TT T, Ŧ 15 ✓ tA ℃ 19 pt MA C 0 ✓ Aª 2 0 pt ≣, 🗘 0 in 41 300 English: USA -0.25 in

Some accessibility tasks may have more than one approach. Others may require some creative thinking.



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PARAGRAPH STYLES

With no documents open (so these become your default styles), create paragraph styles and assign export tags.

[Basic Paragraph] [Basic Paragraph] P 1st	[+]	4		
			General	Style Name: [Basic Paragraph]
P 1st			Basic Character Formats Advanced Character Formats	Location: Export Tagging
			Indents and Spacing	EPUB and HTML
H1			Tabs Paragraph Rules	Tag: [Automatic]
H2			Paragraph Border	Include Classes in HTML
H3			Paragraph Shading Keep Options	Class:
LI bullets			Hyphenation	Emit CSS
LI numbers			Justification	
Blockquote			Span Columns	Export Details:
Note (for footnotes, tag	ig as Note in PDF)		Drop Caps and Nested Styles GREP Style	Tag: p Class: [Basic Paragraph]
TOC 1			Bullets and Numbering	font-weight : normal font-style : normal
TOC 2			Character Color	font-size : 14px text-decoration : none
			OpenType Features Underline Options	Split Document (EPUB only)
			Strikethrough Options	
			Export Tagging	PDF
				Tag: P
			2	



- Basic paragraph (or custom body text style): set to P;
- Headings (6 possible levels): set to H1...H6, respectively;
- Bulleted list: set to Automatic;
- Numbered list: set to Automatic;
- Blockquote: set to Automatic;
- Table of contents: set to Automatic.

Export tags define how the text should be tagged when exported to PDF. It's helpful to name them with their corresponding HTML tags. Paragraph Styles Charact Object 5
[Basic Paragraph]
P indent
P next page
P after list
P Note
H1
H2
H3
H3 span 1col
H3 span 1col
H3 span 1col next col
H3 next page
U checkmark

Styles set to Automatic may need to be manually changed in Acrobat.



Make use of the Based On feature to make styling more efficient:

- **1.** Duplicate an existing style.
- 2. Rename the style.

3. Changed the Based On settings.

• 6

4. Style as desired.

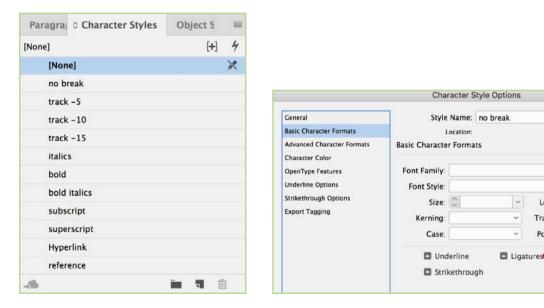
Basic Paragraph]	W 4	Charact Object 1 ==	Ceneral	Style Name: P drop cap	1			
[Rasic Paragraph] H1 H2 H3 U bullets	(*) 7 Basic Paragraph cooy (Basic Paragraph) Basic Paragraph H1 H2 H3		Baic Character Formats Advanced Character Formats Indents and Spacing Tabs Paragraph Rules Paragraph Rober	Ceneral Locase: Very Mark P Polyc Loc Based On: [Basic Paragraph] v Shorts Style: [Basic Paragraph] v Shorts I	General Basic Character Formats Advanced Character Formats Indents and Spacing Tabs Paragraph Rules	Drop Caps an Drop Caps Lines	d Nested Styles	Style Name: P drop cap Location: Character Style
Li numbers Biockquote Note (for footnotes, tag al Note in PC TOC 2 Running header	U bullets U numbers Blockquote	es, tag as Note in PDP)	Paragraph Shading Keep Options Hyphenation Justification Spain Columns Orap Caps and Nested Styles CREP Style	Style Settings:]Basic Penyaph) + next: [Basic Penyaph) + drop cap lines: 3 + drop cap characters: 1 + first indext; 0 in	Paragraph Invies Paragraph Bhading Rangraph Shading Keep Options Hyphenation Justification Span Columns	C 3	les	[None] Cale for Descenders to create a nested style.
Queries	Running header Queries	क १८ में हे	Bullets and Numbering Character Color OpenType Features Lindertine Options Teentmuch Options 1 Tragging	C Apply Style to Selection	Drop Caps and Nested Styles GREP Style Bullets and Numbering Paracter Color 4 Type Features	New Nest	ed Style	clete



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CHARACTER STYLES

Create your default character styles.





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No Break

• 7

Leading:

Tracking:

Position:

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v

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TABLE & CELL STYLES

Create cell and table styles to set your default styles.

		and the second	
General	New Cell Style Style Name: Header	General Table Setup Row Strokes	Style Name: [Basic Table] Location: General
Text Graphic Strokes and Fills	Location: General	Column Strokes Fills	Style Info Based On: [No Table Style]
Diagonal Lines	Style Info Based On: [None] Shortcut:		Shortcut: Style Settings: [No Table Style] + Body Region Cell Style: Body + Header Region Cell Style: Header
	Style Settings: [None] + Paragraph Style: H2		Cell Styles
	Paragraph Styles		Header Rows: Header Left Column: [Same as Body Footer Rows: [Same as Body Right Column: [Same as Body
	Paragraph Style: H2 V		Body Rows: Body v



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Table Style Ontions

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OBJECT STYLES

Create object styles to set your default object styles.

Paragrapł	Character	Object Styles	≡
[None]			4
[None]	l l	Ē	XE
[Basic (Graphics Fran	ne]	
[Basic	Text Frame]		
text 2	col		
text 3	col		
sideba	r		
rules			
runnin	g heads/feet		
artifact	:		



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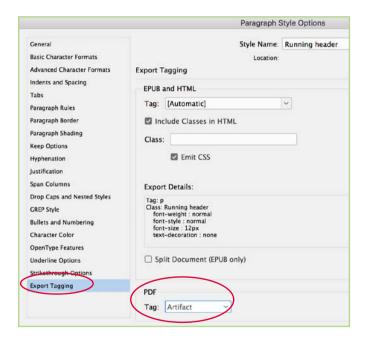
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ARTIFACTING: TEXT

Artifacts are elements that are ignored by screen reading devices and other assistive technologies. Any elements that don't convey information or aren't essential should be artifacted.

Apply artifacting to paragraph styles for any text elements that should be artifacted:

- Page numbers and
- Running headers and footers.





ARTIFACTING: OBJECTS

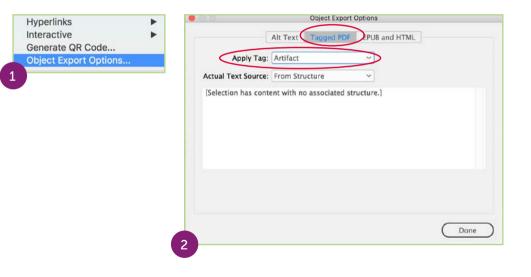
Apply artifacting to object styles for any elements that should be artifacted:

- Decorative blocks of color,
- Decorative elements such as rules,
- Decorative background graphics.

	New Object Style	1
Style Name: Location:	artifact	
Basic Attributes	Tagged PDF	
General Fill Stroke	Apply Tag:	Artifact ~
Stroke & Corner Options	Actual Text Source:	From Structure ~
Size and Position Options	Property:	
 Text Frame General Options Text Frame Baseline Options Text Frame Auto Size Options Text Frame Footnote Options Story Options 		
Effects for: Object ~		
Transparency Drop Shadow Inner Shadow Outer Glow Inner Glow Bevel and Emboss		
Export Options		
Alt Text		
Tagged PDF		
EPUB and HTML		



You can also artifact an element by right-clicking (Mac) or controlclicking (PC) and selecting Object Export Options and selecting Tagged PDF > Artifact.





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Do not convey information by color alone. Distinguish with tags and differences in size, font weight, styling, etc.

Heading 1 Heading 2

Can you tell the difference between the two headings? Can you tell this is a link?

Heading 1 Heading 2

Can you tell the difference between the two headings? Can you tell this is a link?



Check contrast with a color contrast checker such as <u>WebAIM</u>.

WCAG Level AA requires a contrast ratio of at least:

- 4.5:1 for normal text,
- 3:1 for large text.

WCAG Level AAA:

7:1 for normal text and4.5:1 for large text.

Large text is defined as 14 point and bold or larger, or 18 point or larger.

WebAIN web accessibility in m		services	articles	resources	commi
Search: Introduction to Web A WebAIM Training	P				
Color Contras Home > Resources > 0 Foreground Color FOREGROUPF Lightness	St Checker Color Contrast Checker Background Color #FFFFF Lightness	Contrast R 8.59: permalin	1	 Relate Contrast al Accessibili Ouick Refe Web Conte Accessibili Web Accessibili Web Accessibili Web Accessibili Unk Contra 	y rence: Test ent for y sibility for
WCAG AA: Pass WCAG AAA: Pass	The five boxing wiza	rds jump quickly.			
Large Text WCAG AA: Pass WCAG AAA: Pass	The five boxing wiza	rds jump quickly.	,		
	and User Interface Co	omponents			
WCAG AA: Pass	Text Input				

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DOCUMENT SETUP

Create a new document with a Primary Text Frame to automatically create threaded stories.

You can also:

- create one frame per column of text.
- use a single frame per page with multiple columns.
- thread frames together.

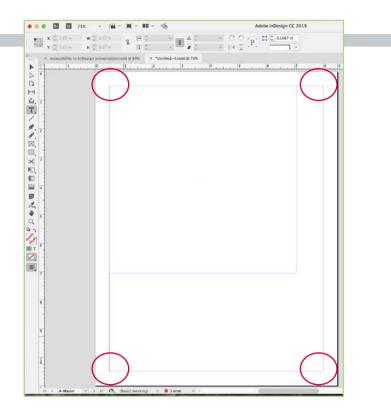
	New [ocument	
Document Preset:	[Custom]		- 🕹 📋
Intent:	Print	~	
Number of Pages:	1	🗆 Fa	cing Pages
Start Page #:	1	Pr	imary Text Frame
Page Size: Lette	r		~
Width: 🗘 8.5	in	Orien	tation: 📳 🖬
Height: 🗘 11	in		
Columns			
Number: 🗘 1		Gutter:	
Margins			
Тор: 🗘 (0.5 in	Lef	t: 🗘 0.5 in
Bottom: 🗘 (0.5 in	Righ	t: 🗘 0.5 in
> Bleed and Slug			
Preview		Cancel	ОК



MASTER PAGES

Create master pages with text frame(s).

 Text frames should reach to pink and purple guides, not aligned to added guides.



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- Do not override master page items. Create new nested master pages instead:
 - 1. Duplicate the master page.
 - 2. Drag and drop a master over the duplicated one.
 - **3.** Select All and delete the items on the newly created master page and modify as needed.
- Artifact running headers/footers (paragraph style or on text frame with object style), rules and design elements.









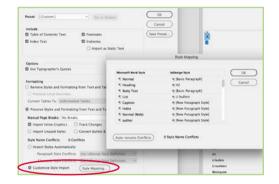


Typefaces and Characters

Choose OpenType fonts and use Unicode characters for such symbols as a copyright symbol or fractions.

Importing

Mapping styles or stripping out all formatting (importing text with Show Import Options checked) prevents Word code from getting into the layout and causing problems when the PDF is created.







Threading

- Thread all text frames, or only individual sections or chapters.
- Leave the table of contents unthreaded from the rest of the document's content.

2018 Annual Report

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Cleaning Up

- Remove multiple spaces and paragraph marks.
- Remove any forced breaks.
 Use a "no break" style instead.
- Remove tabs.
- Rekey anything in all caps unless an acronym. OK to style as all caps.

- Change hyphens that should be en or em dashes (no double hyphens).
- Check that symbols such as copyright and fractions conveyed. Rekey with Unicode characters.
- Remove blank rows and columns in tables; merge cells where needed.



Formatting Text

Control *everything* with a style—**no formatting from the toolbar!** Formatting from the toolbar results in style overrides, which may prevent some AT from presenting the info to their users.

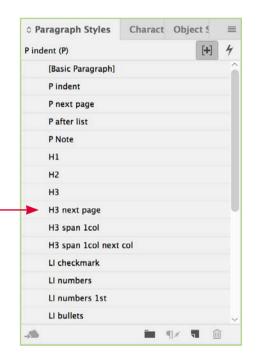




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Instead, create new paragraph or character styles <u>based on other styles</u> to make adjustments, including tracking, so you have no overrides anywhere.

Example: To have a heading start on the next page, instead of inserting several paragraph marks or a page break, create a style called "H3 next page" based on the original and set the Keep option to Start on Next Page.





- Set the export tag of the paragraph style of the document title as H1. Style chapter or section titles as H1 or H2.
- Use the correct sequential order for headings and do not skip any, such as do not go from an H2 to an H4.
- Take advantage of paragraph styling options such as Span Columns, Paragraph Shading and Paragraph Rule, etc.

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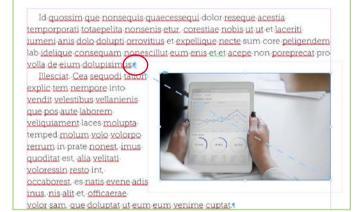
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GRAPHICS

- Anchor images in the text at the end of the paragraph in which they are mentioned.
- Apply object style.
- Rewrite any text referencing relative positioning ("below" or "above").
 Instead, use an absolute reference such as "See Figure 1."



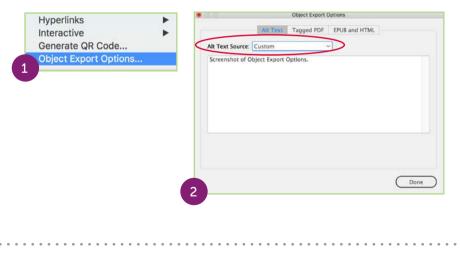
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Alt-Text

Images and images of text cannot be read by screen readers.

Add Alt-text, which does get read, to non-decorative images. Rightclick (Mac) or control-click (PC) and select Object Export Options.





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- Alt-text should say what the image contains, key visual elements. Do not give more info than a sighted reader will get.
- Do not repeat the same info as in the caption.
- For infographics, explain what they represent and provide the data (if short) or link to a matching data table (after the chart graphic, in an appendix or on a website) where that data might be provided.



Graphs, Charts and Maps

They may require more attention to ensure readability and sufficient contrast between colors and against backgrounds.

Check contrast with a color-blindness simulator such as <u>Coblis – Color</u> <u>Blindness Simulator</u>.





You cannot convey information by color alone, so if contrast is not sufficient to distinguish the various elements by color, use other means:

- Use lines with shapes in a line graph.
- Use differing patterns in the pieces of a pie chart or bar graph.
- With maps, put text that appears on top of the map in a contrasty color or bold, add a slight drop shadow or move the text outside the map.





TABLES

- Anchor the table in the text.
- Place the title above/outside of the table.
- Style table headers.
- Style table cells with paragraph styles that have Export Tagging set to Automatic.

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uaesti non perume pre no nagnamenia aut ea cores o / /ABLE 1: Financial Data Category Advertising and consumer	s. <u>moluptat</u> 2017 Actuals	Projections	2019 Budget \$2,535,494	2020 Forecast \$2,908,243
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uaesti non perume pre no nagnamenia aut ea cores e	s. el <u>moluptat</u> 2017 Actuals \$1,289,505 \$96,476 \$11,173	Projections \$2,209,553	Budget \$2,535,494 \$99,67 \$109,015	52,908,243 \$102,667 \$51,515



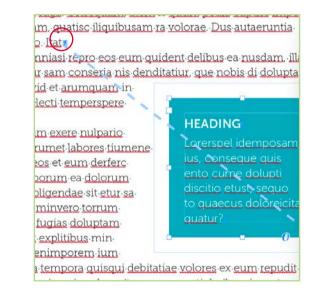
- Add/convert top row(s) to proper header row(s).
- Remove blank rows or columns.
- Place footnotes after the table. CC 2019 places footnotes at the bottom of the frame that holds the table (which should be in its own frame).
- Do not span across 2 pages unless using columns.
- OK to place table in its own frame anchored in the text.
- OK to use View > Rotate Spread for pages to accommodate wide tables.







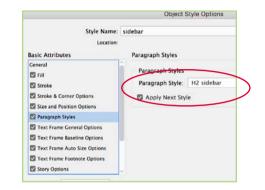
- Create sidebars and anchor them in the text at the end of the paragraph in which they're mentioned.
- Style sidebar titles as H2 or another level of heading based on the logical order in which they fall in the section.





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- Use Apply Next Style under an object's paragraph styles to style multiple paragraphs at a time when the next style has been set in that paragraph style.
- A sidebar of only one paragraph could be styled within the same text frame simply using Paragraph Shading.



Style Name:	H2 sidebar	
Location:		
Based On:	H2	
Based On: Next Style:	100 Marca Marca	>



HYPERLINKS

Make all links (hyperlinks, e-mails, footnotes, etc.) clickable.

 Convert URLs to hyperlinks and manually hyperlink other links: Type > Hyperlinks & Cross-References > Convert URLs to Hyperlinks.

Hyperlinks & Cross-References		New Hyperlink
Text Variables	•	New Hyperlink From URL
Bulleted & Numbered Lists	•	Convert URLs to Hyperlinks. Edit Hyperlink
Insert Special Character Insert White Space Insert Break Character Fill with Placeholder Text	* * *	Insert Cross-Reference Cross-Reference Options Update Cross-Reference

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- Create Hyperlink Destinations for crossreferences. Then go to their respective references in the text, highlight them and link to them.
- Manually link superscripted mentions and footnotes.

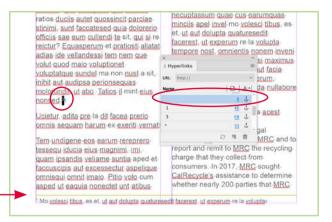




TABLE OF CONTENTS

- Create TOC paragraph styles:
 - Set Export Tagging of TOC title as H2 and regular TOC text as Automatic.
- Create TOC using the built-in feature, which will create a clickable TOC.
- In Layout > Table of Contents, set up the TOC styles based on heading styles.
- Add bookmarks for all covers, chapters and sections easily by selecting Create PDF Bookmarks.

	Edit Table of	Contents Style		
TOC Style: [Default]				ОК
Title: Contents	Style:	[No Paragraph Style]	~	Cancel
Styles in Table of Contents				Cancer
Include Paragraph Styles:		Other Styles:		(More Options
H1		[No Paragraph Style]	2	
HZ	<< Add	LI bullets		
НЗ	CC AGO	Li bullets 2		
H3 next page	(Remove >>)	LI checkbox		
Style: H1				
Entry Style: TOC he	eading			
Entry Style: TOC he	eading 🔍			
Entry Style: TOC he Options Create PDF Bookmarks	>			
Entry Style: TOC he Options Create PDF Bookmarks Replace Existing Table o	f Contents			
Entry Style: TOC he Options Create PDF Bookmarks Replace Existing Table o	f Contents			
Entry Style: TOC he Options Create PDF Bookmarks Replace Existing Table o Include Book Documents	f Contents rce paragraph			

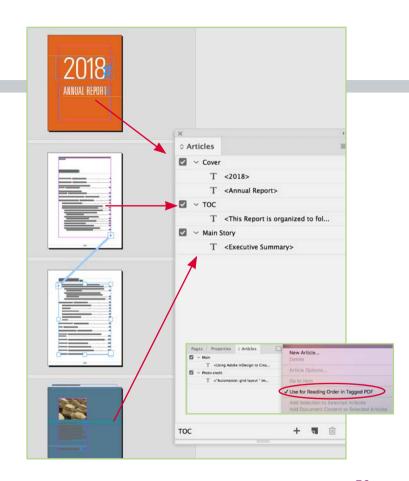


READING ORDER

Text must have a logical reading order. What you see in InDesign is not necessarily the order in which it will be read in the PDF.

Articles Panel

- Drag and drop the TOC and the main content (or multiple unthreaded sections) into the Articles panel.
- Check the option to Use for Reading Order in Tagged PDF.

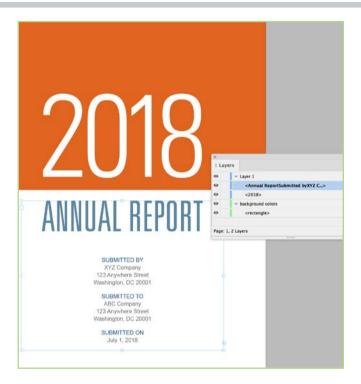




Layers

Reorder items within the same layer (drag and drop) as opposed to creating new layers.

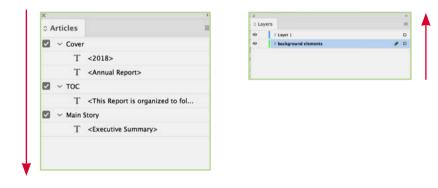
This text frame containing "2018" visually appears above the text frame containing "Annual Report..." and gets read in that order by a screen reader because the text frame with "2018" is below the text frame with "Annual Report..." in the Layers panel (which is read bottom to top).



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- Article panel is read from top down.
- Layers panel is read from bottom to top.





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METADATA

Add metadata at any time in the process in InDesign: File > File Info.

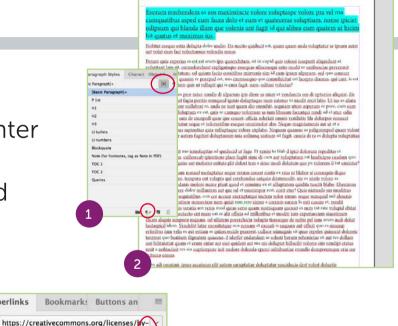
- Fill out at least the Title, Author, Description and Keywords fields.
- The Description field will get read by search engines, so the first 150 to 200 words are most important.
- Add as many keywords as you want.
- Don't use "&" if title has "and." Limit use of ampersands.

Basic	Document Title:	
Camera Data	Author:	
Origin		 Semicolons or commas can be used to separate multiple values
IPTC IPTC Extension	Author Title:	
GPS Data	Description:	
Audio Data		
Video Data		
Photoshop	Rating:	4444
DICOM	Description Writer:	
AEM Properties	Keywords:	
Raw Data		
		 Semicolons or commas can be used to separate multiple values
	Copyright Status:	Unknown ~
	Copyright Notice:	
	Copyright Info URL:	1



PREFLIGHT & CHECKS

- Preflight as usual.
- Turn on the Style Override Highlighter and check for any style overrides highlighted in the text and denoted with a "+" sign in the style palette.
- Check status of hyperlinks and replace any broken links.





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D

O Hyperlinks

CC BY-NC-ND 2.0 Check contrasts color-blindness simulator

luxurvluke

URL:

Name

 Check tags: Paragraph Styles palette > Edit All Export Tags. Modify if needed.

© Paragraph Styles Charact Object 5	THE REAL PROPERTY AND A DESCRIPTION OF THE REAL PROPERTY		Edit All Export Tags		
[Basic Paragraph] [+]	4 New Paragraph Style 9 Duplicate Style	Show: O EPUB and HTML O PDF			
[Basic Paragraph]	Delete Style	Style	Tag		
P Table	Redefine Style	¶ [Basic Paragraph]	p		
P indent		¶ P Table	[Automatic]		
P next page	Style Options	¶ P indent	P		
P after list	Clear Overrides	¶ P next page	P		
P Note	Toggle Style Override H	¶ P after list	P		
Н1	Convert "[Basic Paragra	¶ P Note	[Automatic]		
H2	Break Link to Style	¶ H1	H1		
НЗ	Load Paragraph Styles	¶ H2	H2		
H3 next page	 Load All Text Styles 	¶ нз	НЗ		
-\$ 17 1	Select All Unused	¶ H3 next page	НЗ		
© Swatches Stroke Effects	Edit All Export Tags	¶ LI checkbox	[Automatic]		
		¶ LI bullets	[Automatic]		
		¶ LI bullets 2	[Automatic]		
		¶ LI numbers	[Automatic]		



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Export as PDF (Interactive).

General Settings

- Export as Pages, not Spreads, so the reading order in the PDF is not affected.
- Layout: Single Page.
- Check Create Tagged PDF.
- Check Use Structure for Tab Order.
- Forms and Media: Include All.

	Export to Interactive PDF
General	General
Compression Advanced Security	Pages All Range: 1 Export As Pages Spreads Create Separate PDF Files Suffix: Files
	Viewing View: Default
	Layout: Single Page ~
	Presentation: Open in Full Screen Mode Flip Pages Every: 5 seconds
	🖾 View After Exporting
	Page Transitions: From Document
	Options
	Forms and Media: Include All O Appearance Only
	Embed Page Thumbnails Create Tagged PDF
	Create Acrobat Layers
	Cancel



Compression

Set the resolution.

- Set the downsampling to 144 PPI, 200 PPI or 300 PPI, depending on the type of images.
- Optionally increase the Image Quality setting to High or Maximum.

The higher the resolution, the greater the file size of the PDF.

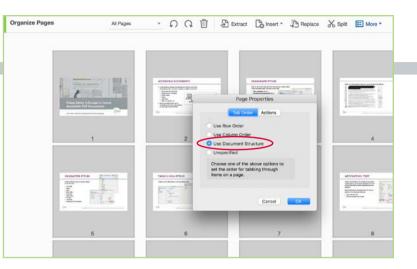
Export a separate PDF file for printing with Export (Print).

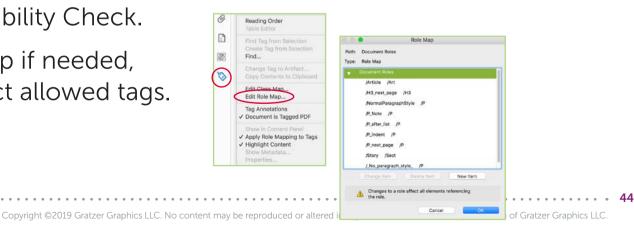
	Export to Interactive PDF
General	Compression
Compression Advanced Security	Image Compression Compression: JPEC (Lossy) JPEC Quality: Medium Resolution (ppi): 150



ACROBAT

- 1. If you didn't check Use Structure for Tab Order: Organize Pages > Select All > More > Page Properties > Use Document Structure.
- 2. Run Full Accessibility Check.
- **3.** Edit the role map if needed, using the correct allowed tags.







- **4.** Troubleshoot and go back and fix issues in InDesign if needed (you may need to check the Layers and Articles panels). Then re-export and redo steps 1 and 2.
- **5.** Check metadata and remove leading semicolon in keywords.
- 6. In File > Properties, set Initial View to Bookmarks Panel to open when file is opened.
- 7. Set page view as two-up if desired.

8. Save the PDF.

		(Documen	t Properties		
De	scription	Security	Fonts	Initial View	Custom	Advanced
Layout and Magn	fication		-			
Navigation tab:	: Bookmarks Panel and Page					
Page layout:	✓ Defaul	t				
Magnification:		Single Page Single Page Continuous				
Open to page:	Two-L	Ip (Facing)				
		lp Continuou lp (Cover Pa				
Window Options	Two-U	p Continuou		0000)		
Resize window		March 1				
Center windo	w on scree	en				
Open in Full S	creen mo	de				
Show: File Na	me	0				
User Interface Op	otions					
Hide menu ba	r					
Hide tool bars	6					
Hide window	controls					

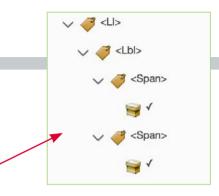


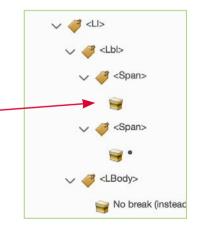
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INDESIGN BUG

Using a *custom* Unicode character for bulleted lists, rather than the default bullet, results in:

- a double tag in the tagged PDF's
 <Lbl> tag, causing the bullet character to be voiced twice.
- the space between the bullet and text appear first, instead of the bullet first.







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Solution

- Use the default bullets.
- If using a custom bullet, either artifact the space's in Acrobat or allow the double voicing of the bullet. It's not a barrier, but a nuisance.

You can vote for these and other bugs to be fixed at InDesign. uservoice.com. Visit PubCom's webpage to learn which items to vote for.



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