

# Best Practices for Accessibility When Working in InDesign

## PHASE I: File Properties, Text, Graphics, and Color

### FILE PROPERTIES

Enter file metadata.

- Go to **File\*** → **File Info** and fill out the Document Title, Description, and Keywords fields.

### TEXT

Use paragraph styles for all text, and then link those styles to export tags.

- Linking styled text to [export tags](#) can be done in **Window** → **Styles** → **Paragraph Styles** → **Edit All Export Tags**.
- [Headings](#) and subheadings should not skip levels (for example, Heading 4 should follow Heading 3).

Avoid converting text to outlines. If you must do it, save a copy of the original live text somewhere hidden in the document.

- When necessary to convert text (such as a logo) to outlines, please keep a copy of the original editable text somewhere hidden in the document (on a hidden layer or on the pasteboard) in case it is needed later.

Avoid using blank character spaces or extra hard returns to create empty space.

- Empty character and return spaces get read as extra content in PDFs, creating [clutter](#). Embedding space with the Paragraph Formatting Controls is preferable.

Try to keep graphic frames from accidentally being turned into empty text frames.

- To help keep this from happening, turn *off* this setting in InDesign Preferences: **Type** → **Type Tool Converts Frames to Text Frames**.
- To convert an empty text frame back into a graphic frame, select it and go to **Object** → **Content** → **Graphic**.

Aim for high contrast between text and background colors.

- 14pt-size text (or smaller) that is not in bold should have high [contrast](#) against its background.
- A highly recommended free desktop tool for this purpose is [Colour Contrast Analyser](#).

### GRAPHICS

Image resolution at final output size should be sufficient throughout.

- If the document is intended only for screens, image resolution of 72 ppi at output size is the bare minimum.
- If the document is intended for screens and/or on-demand desktop printing, image resolution of 150-300 ppi at output size is the recommended range.
- To view an image's resolution at output size, check its **Effective PPI** in the **Links** window.
- Try to limit the output resolution to 600 ppi at output size to keep the InDesign file's size down.

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\* The instructions in this document are based on the Apple OS platform.

**Alt text should be applied to images wherever needed, and be concise.**

- It should not be a repeat of the caption.
- It should be one two three sentences in length.
- If the image isn't useful in some way, it can be treated as "decorative" by either [tagging it as an Artifact](#) or leaving it out of the [Articles](#) panel in Phase II.)

## COLOR

**The file's transparency blend space, swatch library, and linked images should all be rgb, not cmyk.**

## PHASE II: Tags, Layers, Articles, Bookmarks, and Hyperlinks

**Tags should be applied to text and image frames.**

- Using the Tags window (**Window → Utilities → Tags**), tag text frames as "Story" and any image frames that will have alt text as "Figure." ([More info.](#))

**Reading order should set up in Layers and Articles.**

- In the Layers window (**Window → Layers**), manually order all of the layers on every spread with the **first** item/layer at the **bottom** of the Layers window and the **last** item/layer at the **top**. This arranges the **visual** reading order.
- Open the Articles window (**Window → Articles**). Drag and drop each text or graphic frame (that is not an artifact or purely decorative) from each spread into the the Articles window in the order in which they should be read out loud by assistive software. Be sure to check both "Use for Reading Order in Tagged PDF" and "Use for Tagging Order in Tagged PDF." ([Tutorial](#))

**If the document is longer than four pages, it should have Bookmarks.**

- Bookmarks can be added in the Bookmarks window (**Window → Interactive → Bookmarks**).

**Hyperlinks should be checked and edited if necessary.**

- In the Hyperlinks window (**Window → Interactive → Hyperlinks**), red dots in the **status column** indicate URLs that need fixing. Use "https" rather than the default "http" for better security.

## PHASE III: Preflighting, Packaging, and Exporting

**The final folder package should be comprehensive and up-to-date.**

- Before packaging the final file, standard preflight tasks include cleaning up the file of any errors (such as overset text) or clutter (such as unneeded content on the pasteboard).
- When prompted about which items to include in the final package, check **all** boxes **except** for "Include PDF (Print)" so that you can export the PDF separately as an **Interactive PDF**.
- If you make changes to the InDesign file **after** packaging the folder, make sure the **Links** and **Document Fonts** subfolders are still up to date.

**The PDF should be exported as Interactive, not Print.**

- Recommended export settings are as follows:  
**General:** ✓ Include All Forms and Media/✓ Embed Page Thumbnails/✓ Create Tagged PDF/✓ Use Structure for Tab Order.  
**Compression:** Image Compression **Automatic**/JPEG Quality **Maximum**/Resolution (ppi) **150**.  
**Advanced:** Display Title: **Document Title**/Language: **English: USA**.

## PHASE IV: Finalizing the PDF in Acrobat Pro

### The PDF should pass Acrobat Pro's Accessibility Checker.

- If you are a beginner, go to **All tools** → **Use guided actions**.
  - » Click on **Make Accessible** and follow the prompts.
  - » Re-check and continue to fix flagged problems as well as you can. You may need to go back to the InDesign file and fix problems at their source, and then re-export the PDF.
- If you are not a beginner, use the **Accessibility Tool** menu (**All tools** → **Prepare for accessibility**).
  - » Click and run the “**Check for accessibility**” feature.
  - » Flagged errors should be fixed to the best of your ability. To this end, the most useful tools are the **Reading Order** window (choose the “Fix reading order” feature) and the **Accessibility Tags panel**
  - » Re-check and continue to fix flagged problems as well as you can.

## MORE RESOURCES

- Adobe: “[Creating Accessible PDFs](#)”
- Adobe: “[Create and verify PDF accessibility \(Acrobat Pro\)](#)”
- Creative Pro: “[Accessibility Features and Limitations in InDesign](#)”
- Creative Boost: “[9 InDesign Accessibility Mistakes Designers Make](#)”
- ContentGroup: “[9 Tips for Creating Accessible PDFs in InDesign](#)”
- University of Maryland, Baltimore: “[Color Contrast Checker](#)”