

Lukas (00:00):

Okay, well thank you everyone for joining our webinar today. We're going to talk about how you can automate your accessible publishing with Typefi. So just quick introductions. The webinar that we'll get to in a few minutes will be hosted by Damian Gibbs, he's a Solutions Consultant with Typefi. And my name is Lukas Kaefer and I'm the Marketing Manager at Typefi. And I'll post our contact info in the chat as well. I'm sure you're all familiar with Zoom, mute buttons on the left. We ask that you do keep your audio muted during the presentation, but please feel free to unmute at the end. We'll have a Q and A. Feel free to speak up and ask questions. And we are going to record this and I will send that out within a day of this event. Quick background on Typefi. Founded in 2001 and based in Australia, but really all over the world.

(00:57):

I'm on the US East Coast, Damian is in South Africa. We have people in Sri Lanka, the UK, Netherlands, really spread out all over the world. And we have a few products. Today we're going to be talking about the automated publishing software for Adobe InDesign and that's what can enable you to automate your accessible publishing. We also have a few InDesign plugins, some cloud services for InDesign Server and a new product that is an XML editorial software for Microsoft Word called Typefi Orion. So this is actually what Typefi does, this is a screen recording of Typefi in action. So Damian is going to talk about that a little bit more in just a second. So Damian, over to you.

Damian (01:44):

Cool, thanks Lukas. Let me share my screen, right. You should be able to see a bright orange screen.

Lukas (01:54):

Yep.

Damian (01:55):

Okay, cool. So we going to talk about, well I'm going to talk about getting accessibility into your PDF and EPUB mostly through InDesign and obviously a little bit of help of Typefi workflows. And by the end of this webinar I hope that you get a kind of a practical understanding of how to create accessible PDFs using InDesign and without disrupting your current workflows. So before we jump in, I'll just provide some context on how and why adding accessibility really matters. So we are very acutely aware of the increasing legal requirements globally. These don't affect only your domestic publishing, but access to global markets who now have accessibility requirements such as the European Accessibility Act. Quality improvements for every accessible publication that you make, it doesn't only help those with disabilities, but it provides a better experience for everyone. So making your content easier to engage helps the reader and the underlying technology to better serve all readers. And of course the competitive advantage, one in four adults have some form of disability that affects reading. For publishers, this is a significant number and represents a large portion of readers and offers a competitive advantage.

(03:25):

So over the last little while, the perspective has shifted from accessibility as a nice to have add-on to accessibility being a basic and legal requirement for any digital product. The modern production workflows, they have the ability to provide accessibility without major overhauls to your workflows. And as you'll see shortly, we'll make some small changes to InDesign templates and these will have significant impacts for your accessibility. So what makes a PDF accessible? There are four key tenants listed in the WCAG standards for accessibility. And I hope to make these a little bit more tangible when creating accessible PDFs through InDesign by linking them directly to InDesign settings. So let's take for example the requirement Perceivable. Under accessibility, this can translate into adding alt text to images, which is

a very common one, to content or images that are significant in the content and images that are purely decorative—they don't need alt text and can be marked as artefacts. Another example is Operable. Addressing this could be something like adding some form of navigation to your content and this could be as simple as using InDesign's table of contents to generate the necessary bookmarks and some form of navigation.

[\(05:00\)](#):

So the production reality check is that accessibility starts with the editorial and design right in the beginning, not after the PDF has been created. InDesign already has most of the tools you need. It's about implementing them and using them consistently. And Typefi can automate much of this accessibility taking process. The earlier you build accessibility in the less manual work there is later. So some of the common barriers to accessibility in PDFs, images without descriptions, that's the alt text. Screen readers don't interpret visual content on the fly and they need some content to provide a meaningful description to the reader. But remember, some images don't need descriptions as they might be purely decorative and should be again marked as artefacts and then the screen reader will know to skip these or ignore them.

[\(05:56\)](#):

Documents with poor structure, and accessibility technologies rely on markup to navigate the content. With an unclear reading order and unclear tags, content jumps around and is very confusing for the reader. Great designs don't necessarily translate into great accessible documents. So for fully sighted readers, pretty designs are great, but for people who are perhaps colorblind that makes some of the content virtually indistinguishable. So there are remediations and solutions to this using InDesign. So for semantic structure you can use your InDesign template style sheets, update them with the appropriate tags and I'll show you where those happen shortly. And every publication, this is a one sort of task that you do in your template and every publication that's using that template from then on will have this requirement checked off. Alternative text, we know about that, add that to your source content in some form. And with modern workflows such as Typefi, this alt text will automatically be applied to the relative image, or the required image.

[\(07:13\)](#):

Yeah, so logical reading orders is sometimes a bit of a tricky thing, but using InDesign's layers you can set up the correct reading order. And also adding the correct tags to paragraph and character styles, that also helps navigate. Using InDesign's list features or native lists is just like good editorial structure that aids in assistive technologies to recognise the type of content that it's trying to read. So all of these things, or most of these things that I've mentioned are adjustments that don't require any reworking of InDesign templates. They don't have to be recreated, they just are things that you can add to your template and we'll get to some of these in the next slide or two.

[\(08:11\)](#):

So let's take another look at how we can accomplish some of these accessibility requirements in InDesign. So using some of these features will integrate naturally with your editorial workflows that you're already using. And these updates don't require any adjustments to your editorial workflow other than potentially adding alt text in your source content. Paragraph and character styles are your foundation for proper structure in accessibility or PDF accessible documents. Use InDesign's native lists and map your styles to PDF and EPUB accessibility tags, and I'll show you what those mean in a minute. Alt text, look for methods of including alt text. Typically this is done in your main content, alternatively, excuse me, could be captured in a separate document and integrated seamlessly during composition using Typefi. Reading order. Adjusting the reading order in complex layouts can be done in two ways: manually using the articles panel or setting the order of your layers, which is probably or is a more convenient way for automated workflows such as Typefi using InDesign. Language identification can be set in your templates, in your paragraph and character styles and also in your export when you're exporting your PDF. And for some exemptions, like when you have extracts or foreign language words that are in a

language other than the main content, they can be tagged separately or automatically as well using your style sheets. Metadata can be captured from the source content and workflows such as Typefi workflows will extract that metadata and apply it to the EPUB or PDF on the fly when they're generated. Again, this is a one time setup in your workflows or templates and will be consistently applied.

(10:17):

Table of contents, this is a very straightforward feature in InDesign. Using your paragraph styles and applying the correct PDF export profile when you export your PDFs, the table of contents will appear in your PDF and aid navigation. Alright, I'm going to go through, sorry. Okay, so we're going to go through a couple of PDFs that I've made. So I'm going to be swapping between screens, I'll be showing you a PDF and then I'll revert back to the InDesign document as well. So I've run some workflows through Typefi and I've just outputted the EPUB, I thought it'd be more use of our time having a look at the actual outputs rather than watching wheels go round. So the first one that I'm going to show you is a PDF that's been generated with little or no accessibility applied. So I'm going to open this in Acrobat. You can see there are no bookmarks. And while it looks fine visually, it's got lots of pictures, captions, and text and headings, let's have a look what happens when we run it through the accessibility checker.

(11:45):

Alright, we can see that there are just plenty of issues that have come up. The headings don't have appropriate nesting, it can't identify lists. Tables are not tagged properly. It's got, there's alt text missing for a whole bunch of images. There's something about the tagged content or almost everything, and the document says it's not tagged and there's no bookmarks. So while this looks great on screen, an assistive technology or a screen reader or the PDF readers would be completely lost trying to navigate this document. All right, so let's open another document. So this document, this PDF is one where I have added accessibility. So it's exactly, I've used exactly the same source document other than adding alt text to the images, the exact same InDesign template, but I've just added some of the accessibility features that I've just discussed or just showed you. And immediately we can see that we've already got bookmarks. So that's giving us some navigation. It's the same, sorry, it's the same looking document. It's in fact the styling and the layout is still exactly the same. Visually it looks perfect, but let's see what happens when we now run our accessibility checker.

(13:20):

Yep, that's the one. And immediately we can see that all those other areas that we had from the previous one have now all gone away. So from an accessibility point of view, this document would work for a lot more people, visual readers and assistive technology users. And all our requirements have disappeared except for one or two, which would require human intervention anyway. So if we look at the logical reading order and we go to our reading order tab, we can view it and these little grey boxes show the reading order. So you can see it starts with 1, goes up to 2, 3, 4, the image is 5 with its alt text, and 6 is the caption, which is great, that's the reading order that is expected and follows a logical reading order. If we have a look at our other document, we can see that there is no reading order and hence the assistive technology would be completely lost.

(14:35):

So while that works for most of our readers, if you want to take it one step further, I have created another PDF using, we'll just go back to the beginning. And this one again is exactly the same content that we used to create the other PDF. And I've taken that InDesign template, the exact same template and altered the design of the template. I haven't changed the styles, I haven't changed the page styles or anything like that. I've just changed the styles. And this PDF looks quite different in that it is designed for partially sighted readers. So we can see that it's got a much larger font, which is optimised for readability. It's a much higher contrast between the black and white. So there's a strategic use of colour which aids in legibility, and the layout is much simpler and that we have clear hierarchy as well.

(15:43):

So if we compare, for example, features like this boxed text in our other documents, the boxed text, this mode, this boxed text now appears as that boxed text. It's exactly the same content tagged with the exact same input content just with the different output template. And I think this is where automated workflows such as Typefi really shine because we can get multiple outputs for accessible content using a single source and one or two InDesign templates, all with your accessibility built in. So for real and truly accessible content, let's have a look at an EPUB.

(16:41):

I'm going to open up with iBooks. This is what I have on my machine and we go back to the beginning. Alright, so this EPUB is generated again from exactly the same source content and was not generated through InDesign. This was run through, sorry, through our CXML to EPUB action that we are developing. It's still in beta version, but it is a lot quicker and less complex than having to go through InDesign, and customizations can be added without InDesign's limitations when exporting or having to do any post-processing. So from an accessible point of view, this is really a great option and I'll elaborate a little bit later on exactly why. But you can just see that within the document you can change the contrast and you can change the font size on the fly.

(17:47):

Okay, so let me go through a couple of changes that I made in the InDesign template so you can actually see how these originated and what the effect was. So I've got this InDesign document open, just find it. Here we go. So this is the output of the accessible InDesign document and the template that you use to create this would have, is exactly the same. So let's have a look at adding, what was our first item? We'll just pop back to our slide. We'll say paragraphs and character styles. So if we go to InDesign, we can have a look at our paragraph styles and we say that we are adding export tagging and we are adding the appropriate tags. So for PDF, we're adding the H1 tag. And for EPUB and HTML we're adding the H1 tag again. And this is for heading one. And so you do the same for 2, 3, 4, 5, and 6 and updating your template.

(19:00):

So adding this adds a little bit of structure and also allows the assistive reader or assistive device to know what the structure of your content is. Alright, alternative text. This would've been added in our input content. So in this case I used Typefi's plugin for Word called Typefi Writer. And in our case, or in this case it's added as a comment on the image. And that's because, as part of a Typefi workflow, it will just automatically get added to the image that has been captured in the source content. So that's that one done. Reading order. So if we go back to our InDesign document, I mentioned layers earlier. For all the different kinds of pages that are being created, we've optimised the layers to create the right reading order in the content and we've set up the documents so that it creates the right reading order.

(20:07):

So when you have a frame of two columns, InDesign automatically sets the correct reading order based on the flow of the content. So that one is great. Language identification. So when exporting a PDF, you need to make sure that you're using a PDF preset that has been set with the right settings and that will then allow for tagged and structured content. And we have an extra action that allows you to update metadata as well as the language based on, it could be metadata in your input or metadata that's in your content. And we can update the language there with, in this case en. I mentioned earlier that if you had content within the text that's different from the main content. So the main content is English and perhaps there's some content that's got French, you can tag it and the tag, the style we can then set to French or whatever the language is, and then that will come through in your content as the language identification.

(21:20):

So we've done language, we've done the metadata. Just to recap, the metadata is set here in our action that allows you to export the document to PDF. And the last one is table of contents. So in our InDesign template we set up a layout table of contents style. In this case it's called magazine because it's a magazine layout. So we set up the table of contents to be generated and in this case just the heading one and heading two tags. Make sure that the create PDF bookmarks was ticked. And so the table of contents was created right up front, but it doesn't have to be in the document. If you want to create a document without a table, a visual table of contents, but just as navigation, you follow the same method and then that provides navigation for the PDF. So we can tick that one off.

[\(22:22\)](#):

All right, so just to recap, make sure there's structure in your document, heading hierarchy makes sense, and add tags to InDesign template and use consistently. So heading one, H1, heading two, H2. Make adding alt text a habit. It's in your main content, just add it. Create logical reading order by using the layers as I showed you, that's a one off that you set up in your template. Create a table of contents, we've seen how to do that. Export to PDF using a PDF preset that's geared towards accessibility. So InDesign has a whole bunch built in and you can tweak those and change those however suits. And if you are using something like a Typefi workflow, we would then use that PDF preset in your workflow to always export your accessible PDFs in that way.

[\(23:23\)](#):

And of course, test early and test regularly. Don't wait until you have your final PDF to check the accessibility. And seeing that we are Typefi and we are talking about automation, automation does offer a bunch of advantages and that's when your content will always be styled. If your content's always styled in the same way, your style, your tagging styles will always automatically be mapped for accessibility tags because you're using templates. Consistent inputs, consistent output, will give you accessibility standards across all your documents that are using those templates. And you can output multiple templates in multiple formats from the same source. As we've seen, you've got an accessible PDF, we've got print PDF that doesn't require accessibility, and we've got a PDF for partial sighted people and we have accessible friendly EPUB.

[\(24:21\)](#):

I would just like to touch on EPUBs even though we're talking mostly about PDFs because EPUBs do hold a significant advantage over PDFs for accessibility. So EPUB's underlying semantic HTML structure aligns very well for automated publishing systems and the accessibility devices are geared very closely to leveraging that. Of course you've got TOCs and images for alt text, but I think possibly the most important thing is that EPUB has the ability of having a responsive design, which is a great advantage for improved user experience, particularly those using assistive technologies. You can automatically adjust text size like I just showed, and the colour contrast. And they also have, many of them have support for text to speech or synchronising audio and text capabilities and interactive elements. However, I think the most important two parts, two advantages are that EPUB is easier to meet more accessible standards, accessibility standards, especially across larger content volumes. And also EPUBs can be produced without needing post-production remediation.

[\(25:47\)](#):

Alright, so wrapping up from our side, accessibility compliance and legal requirements are achievable. It isn't simply an add-on at the end, it's good editorial practise which is made visible to technology. Improved quality for all by using tools already in InDesign. It's about using them systematically. Typefi workflows can automate the technical complexity while you focus on the quality of your content. You future proof your accessibility in your production workflows by setting your accessibility up in InDesign templates and then automate. And starting with accessibility in mind saves time and shows better results than retrofitting. Alright, some tasks to get you going. I would suggest audit your current templates. What accessibility features are already in place and what more do you still need to add, or can you add in your

existing templates? Update your style guides, include accessibility requirements in editorial and design standards. Training, who needs to know what and when. Testing, build accessibility checking into your review process and the feedback loop back to the team. Investigate how and what can be automated. And lastly, your editorial skills and processes translate directly into accessibility standards. And that's all for me. Thanks Lukas.

Lukas ([27:21](#)):

All right, thanks Damian. So we have a couple minutes left. Feel free if anyone has a question we can hang out for a few minutes after time. So yeah, we'll open the floor up if anybody has anything they'd like to ask Damian about accessibility or automation. Yes, Adriana, go ahead.

Audience ([27:47](#)):

Hi guys. Sorry for, I don't have a camera right now, so

Lukas ([27:51](#)):

No worries.

Audience ([27:53](#)):

My question is, do you have any tips on how to automatically tag complex tables so it can be easier? Because sometimes I tag the tables in InDesign and then when I export the PDF I have to manually go to the edit table and edit sale and add an ID to the header and match the cell to the header. So I don't have to do this with normal tables, but with complex tables, I don't know if there's an easier way to do it.

Damian ([28:32](#)):

No, so there are two parts, there are two parts to that. So how you set up your table in InDesign does have a certain effect on the structure of the table in the PDF. And for very complex tables and for accessibility, it is often recommended that you reassess what the purpose of the table is and if it's appropriate for an accessible reader. So if you are looking at a table visually, you can see data very quickly. But for the visually impaired reader, perhaps a table format is not the best answer. And to assess it like that, I know there are some limitations around complex tables in InDesign, but as you can see with the ones that we did export, the table header was there, the table data was there and I know that I think one of the missing features is that sometimes the accessibility platforms like to have a table description, which is not natively built into InDesign but can be worked on.

Audience ([29:38](#)):

Yeah, thank you.

Damian ([29:41](#)):

Okay.

Lukas ([29:48](#)):

We don't have any more questions then I guess we will wrap it up. I will send out the recording within a day. And yeah, thank you again Damian for presenting and thanks everybody for sticking around. Appreciate it.

Damian ([30:06](#)):

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Great. Thanks Lucas. Thanks everyone.

Lukas ([30:08](#)):

Alright, have a good one everyone. Bye-Bye

Damian ([30:10](#)):

Bye.