

MadeToTag

Making Content Accessible

Manual

MadeToTag
For Adobe InDesign

Manual

MadeToTag InDesign (CS6 – CC)

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Berlin, Germany

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axaio software gmbh

Schönhauser Allee 6-7

D-10119 Berlin

Tel +49.30.44342390

Fax +49.30.4416402

info@axaio.com

www.axaio.com



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MadeToTag for Adobe InDesign

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Introduction

MadeToTag

With MadeToTag you can properly prepare Adobe InDesign documents much more easier and faster for export as accessible, tagged PDF files. The plug-in defines the content and semantic structure of the InDesign document based on tags.

Tagged PDFs are essential for accessibility, so that screen reader devices for visually impaired people or reading software for users with learning disabilities can provide rich access to a PDF's content. Tagged PDFs also enable screen reader software programs to offer easy navigation and accessible presentation of content in PDF files

Overview

MadeToTag is available for Adobe InDesign CS 5.5 and higher. InDesign CS 5.5 and higher let you set PDF and EPUB export tags in paragraph styles.

MadeToTag is compatible with both Mac OS and Windows.

Features

MadeToTag is a powerful yet easy-to-use tool for providing Adobe InDesign documents with all of the structural information needed to produce accessible PDF files. It can also be used to eliminate errors which can get in the way of producing accessible PDFs.

- The tool takes the user step by step through the process of adding structural information to documents and exporting a tagged PDF.
- MadeToTag links text and paragraph styles to tags, structures the reading order by putting articles in sequence and helps the user to add descriptions to images and graphics.
- MadeToTag's keyboard shortcuts allow the user to process documents quickly.
- The tool's color scheme provides a comprehensive overview of which text areas, articles, graphics and pages have already been assigned structural information and lets you know if there are any elements missing.
- The Problem Locator quickly detects and fixes problems like incorrect hyphens, empty paragraphs, images that don't have alternative text or lists without list paragraph styles.

! Please send any questions or comments about MadeToTag to: support@axaio.com

- MadeToTag can incorporate metadata into documents so that they meet the requirements for accessible PDFs.
- MadeToTag lets you accurately assign languages to texts through to individual paragraphs or single words.
- The reading order for tables can also be set later.
- Accessible PDFs can be exported to individual pages or spreads at the push of a button. Exported files are prepared if needed so that they are in line with requirements.

Download and Installation

Choose the right download from our website, accordingly to your OS Version (Macintosh or Windows) and InDesign Version (e.g. InDesign CC or InDesign CC 2015). Run the installation program for MadeToTag and follow the instructions. You will need Administrator rights to set up the plug-in.

Macintosh Version

To run the installer, double-click on the .pkg file. It will install:

- The folder *axaio software* containing the MadeToTag plug-in is located in the Adobe InDesign *Plug-ins* folder.
- The MadeToTag *temp* folder for temporary export files, stored in the Users Directory under *<User name>/Library/Preferences/axaio software/Adobe InDesign*.
- The documentation for MadeToTag is stored in the Users Directory under *<User name>/Documents/axaio software documentation*.

Windows Version

To run the installer, unzip the downloaded package and run the contained .exe application. It will install:

- The folder *axaio software* containing the MadeToTag plug-in is located in the Adobe InDesign *Plug-ins* folder.
- The MadeToTag *temp* folder for temporary export files, stored in the Users Directory under *<User name>/Application Data/axaio software*.
- The documentation for MadeToTag can be found in the Start menu under *All Programs/axaio software documentation*.

Registration

After installing MadeToTag you need to activate the product. You received your key code with the belonging serial number to the e-mail address you filled in when you downloaded MadeToTag from the axaio website.

To register MadeToTag just call up the menu item “MadeToTag” on the Help menu in the area About Plug-Ins. Click on registration and type in your name, company, and the 24-digit keycode, you will receive after purchasing MadeTo-Print.

For the Windows version, you’ll need start InDesign via right-click on *InDesign.exe* and choose “Run as Administrator”. This does only apply for the registration process. After that, you can start InDesign the normal way.

! Keep your activation code in a safe place, and don’t forget to send a copy of your registration card to axaio software. Only registered customers are entitled to updates and technical support.

2

Use

How to use MadeToTag

MadeToTag's interface guides the user through all of the steps involved in using tags to structure InDesign files, with the ultimate aim of producing a standardized accessible PDF file.

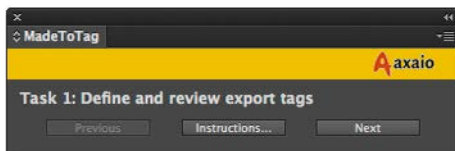
Using MadeToTag

MadeToTag has an easy to use function palette that covers all of the tasks involved in structuring an InDesign file. Keyboard shortcuts (see page 21 for details) speed up the process of structuring a document.

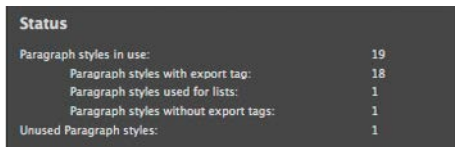
To open the plug-in's Control Center, choose *Window > MadeToTag*. There are six stages to the process.

The structure of the Control Center

The window is split into zones for most tasks. In the top section, the user can navigate through each task (“Next”, “Previous”) and bring up the “Instructions” for each step if needed.

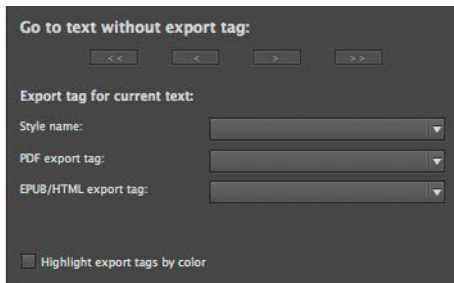


The second section provides a status overview showing which structural information has been assigned.

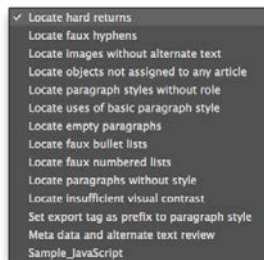


MadeToTag is opened from the “Window” menu.

The third section shows the functions that are available for the content that can be edited (paragraphs, articles, image/graphic frames).

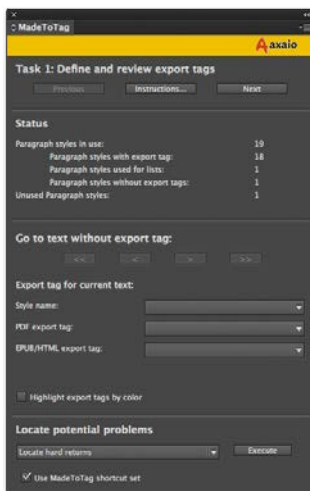


The bottom section provides a drop-down list that can be used to find and fix problems.



Step 1: Defining and reviewing export tags

The first two steps in MadeToTag provide options for filling the InDesign document with a structure; first using text tags, and second using articles. In Step 1 we are providing export tags. The tags are assigned on a paragraph by paragraph basis. MadeToTag does this by using the information under “Export Tagging” in the InDesign Paragraph Style Options.

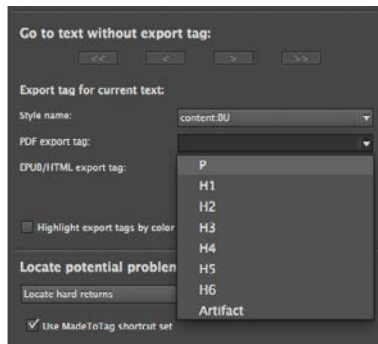


Status: The Status section shows how many paragraph styles currently have export tags.

It also shows the number of paragraph styles for lists. This section also displays the number of paragraph styles without export tags and unused paragraph styles.

Go to text without export tag: Users can use the arrows to jump to the next text without an export tag in order to assign export tags to the entire text.

MadeToTag indicates which paragraph style is linked to the selected paragraph. The value will be [Automatic] for unallocated PDF and EPUB/HTML export tags. The drop-down menu can be used to assign the appropriate export tag. “P” or “p” is used for continuous text, while “H1” to “H6” are used for headings. “Artifacts” include printing information outside the printed area, section headings, page numbers and everything that is no real content.



“Highlight export tags by color” is a useful option that provides the user with a clear overview of which export tags have been assigned and which ones are still missing.

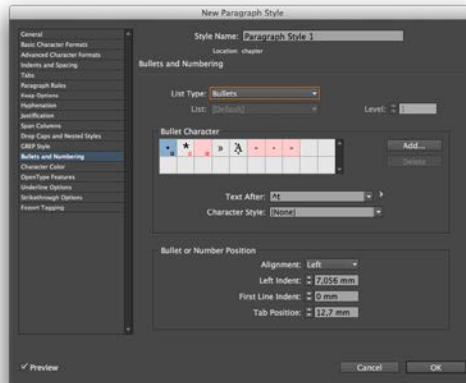


Locating potential problems

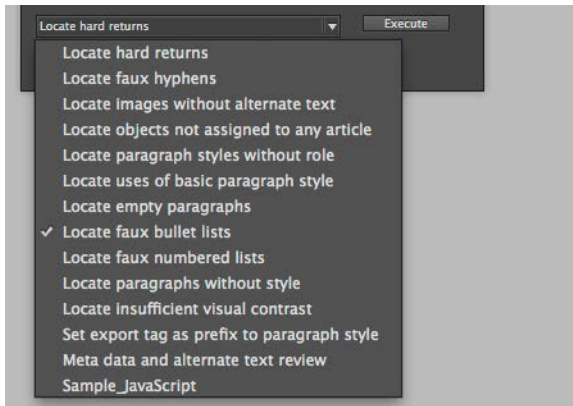
The file in this example uses manual bullet lists instead of lists that were created in the list style.

Key Features:

- Intuitive visual tools and practical keyboard short-cuts to:
 - Tag all text
 - Establish proper content sequence
 - Get content structure right
 - Enter alternate text for images
 - Use color coding to find issues



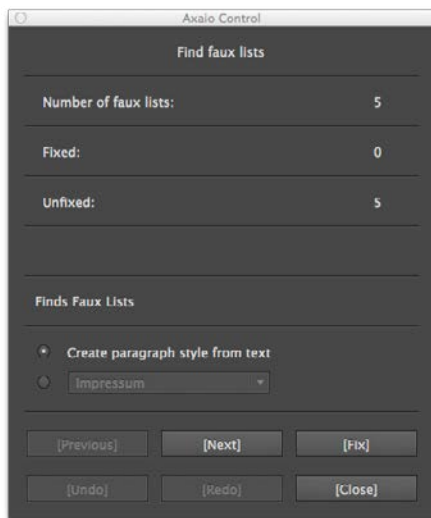
The “Locate potential problems” function is useful in these situations. This function detects artificial lists and converts them to genuine InDesign lists with corresponding paragraph styles.



! The lists in a document must be defined with list paragraph styles in order to create accessible PDF files. MadeToTag can convert lists that were created with manually placed tags to genuine lists.

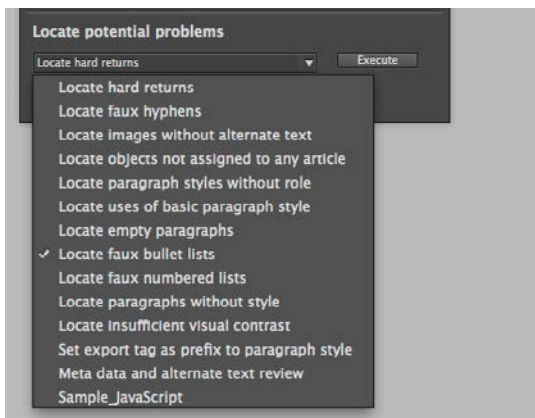
The “Locate potential problems” function has two stages: Select a potential source of an error and click the *Execute* button. MadeToTag can remove the incorrect tags and provide the affected paragraphs with InDesign bulleted lists in a single process.

The dialog box that opens will show the number of paragraphs with incorrectly structured lists which need to be repaired. The user can then convert these lists to InDesign lists step by step.



This can be done by either creating a new paragraph style from the text or assigning a previously created paragraph style from the drop-down list.

The “Locate potential problems” function is used to rectify frequent obstacles along the path to a accessible PDF file.



These include breaks that the user set incorrectly, empty paragraphs (multiple hard returns in a row), paragraphs without a style and images without alternative text.

Insufficient visual contrast (e.g. light-gray font on a white background) is another problem. MadeToTag can fix this problem as well.

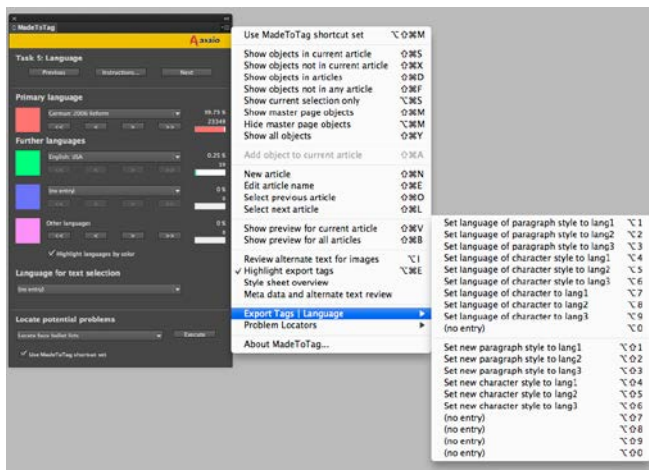
The “Locate potential problems” option uses JavaScripts. Users can create their own routines on the basis of existing requirements.

Using shortcut sets

MadeToTag users can use keyboard commands, the so-called shortcut sets, to speed up InDesign document processing. These shortcut sets are only available if the “Use MadeToTag shortcut set” checkbox is ticked in the bottom left of the main window. This checkbox is left unticked by default.

Opening the flyout menu will bring up an overview of the keyboard shortcuts that are available. The shortcuts are to the right of each available function.

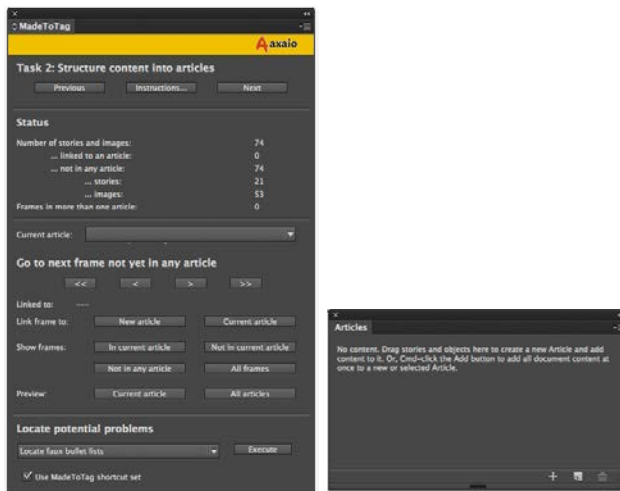
! Operators can also use the MadeToTag shortcut sets to prepare a large number of InDesign documents for export to accessible PDFs in a short amount of time.



Activating MadeToTag’s shortcut sets will temporarily deactivate any other InDesign shortcuts.

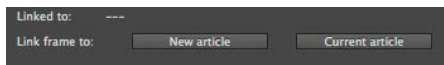
Step 2: Structuring the content into articles

In order for a document to have a cohesive structure, articles must be used to specify the reading order. It is not always immediately obvious what order a document should be read in, particularly when the layout includes multiple columns, freely positioned images and graphics and margins.



When configuring the article structure, it makes sense to bring up InDesign's Articles panel and dock it to the MadeToTag window.

The InDesign Articles panel will not show any articles when it is first brought up. Choose the frame which comes first in the logical sequence of the document.



Choose Link frame to > New article in the MadeToTag user interface to link the active frame to a newly created article.



The tool will automatically suggest the first words in the text frame as the name of the article, or “Article 1, 2 ...” for frames without any text. The name can be altered to anything the user wants.

The arrows under “Go to next frame not yet in any article” bring up the next frame that has not yet been linked to an article. Later in the process you can decide whether a frame belongs to a new article or an existing article.

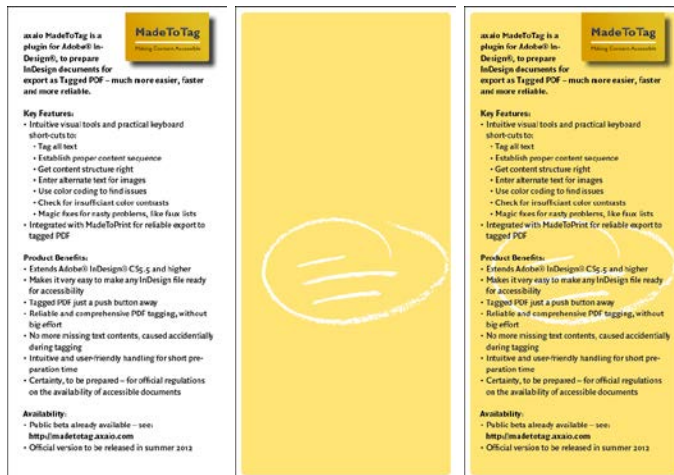
InDesign’s Articles panel shows which frames belong to an article and what the sequence is. Users can use this panel to make any necessary changes to the hierarchy or sequence.



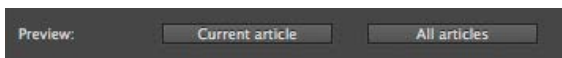
MadeToTag provides a number of ways to see how articles have been allocated. The buttons in the “Show frames” section can be used to make the tool show and hide certain frames.



Users can have the tool show: frames in the current article, frames that are not in the current frame, frames that are not in any article and all frames.



The “Preview” provides a detailed overview of the text and article structure.



Users can choose to preview the current article or all articles.

The gray bars on the left side show which elements are in the document, which elements are in the article, and which are in the section.

The structure shows the sequence of the texts and which element type they are allocated to, e.g. “H1...H6”, “P” and lists.

The lists also demonstrate whether the nesting is set up correctly.

Graphics that are embedded in the flow of the article are also displayed.



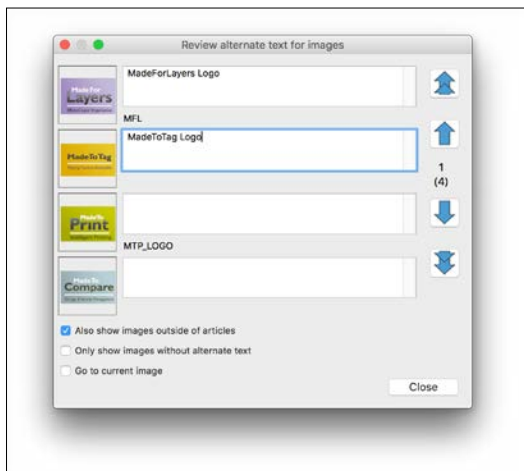
Step 3: Displaying and editing alternative text

In order to export an accessible PDF file, it is vital that explanatory text is provided for graphics and images placed in the document. This alternative text should provide the graphic as concisely as possible.



Step 3 of the MadeToTag process lets the user assign alternative text quickly. The arrows can be used to process image frames one after the other. Alternative text is entered into the text field and assigned to the image by clicking “Apply”.

A quicker and clearer way of assigning alternative text is using the Preview window, which shows a list of the document's images and graphics. Click the “Show overview” button to open the window.

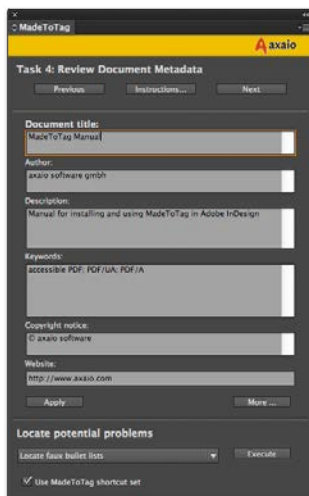


! You can use cmd key and up/down key to toggle between chosen alternate text and text from meta data of the image file.

You can tick a box to only show images with no alternative text. If the “Go to current image” checkbox is ticked, the image’s location on the InDesign page is shown. Use the arrow buttons on the right to go to next image page.

Step 4: Reviewing document metadata

A PDF document must meet certain document metadata requirements to be considered accessible. Step 4 provides a window which allows the user to enter the document's title and provide information about the author. Other metadata fields are provided for a description, keywords, the copyright notice and the website for further information.



The screenshot shows a dialog box titled "Task 4: Review Document Metadata" with the "axaio" logo in the top right corner. The dialog has three buttons at the top: "Previous", "Instructions...", and "Next". Below these are several text input fields with labels: "Document title:" (containing "MadeToTag Manual"), "Author:" (containing "axaio software gmbh"), "Description:" (containing "Manual for installing and using MadeToTag in Adobe InDesign"), "Keywords:" (containing "accessible PDF, PDF/UA, PDF/A"), "Copyright notice:" (containing "© axaio software"), and "Website:" (containing "http://www.axaio.com"). At the bottom of these fields are "Apply" and "More..." buttons. Below the input fields is a section titled "Locate potential problems" containing a dropdown menu labeled "Locate false bullet lists" and an "Execute" button. At the very bottom is a checked checkbox labeled "Use MadeToTag shortcut set".

Users requiring more metadata fields can click on “More...” to bring up the InDesign file information.

Step 5: Assigning the language settings

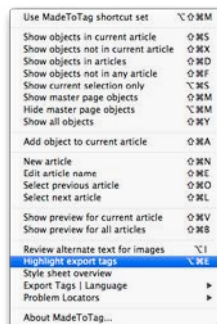
The “Language” function lets you check and modify language settings for paragraph and character styles, along with local formattings.



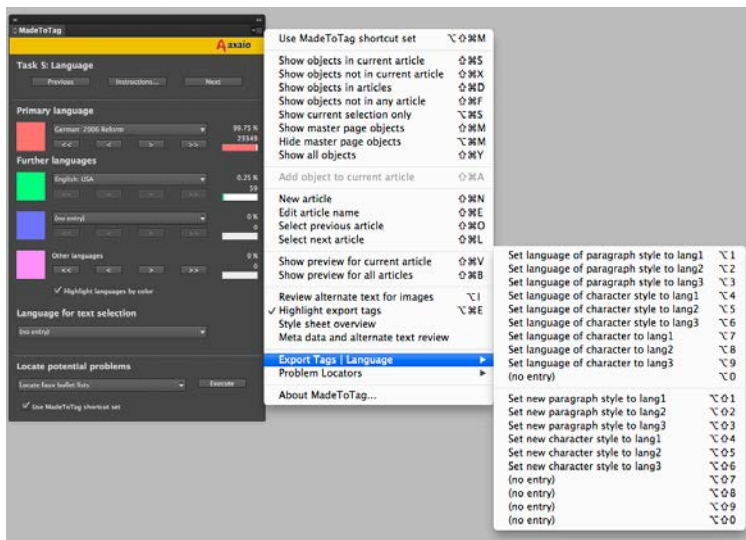
The “Language” window shows which languages are currently assigned in the document. The dialog also displays the percentage values in which the respective language settings are used.

You can highlight selected paragraphs or text passages and use the “Language for text selection” function, with the pull-down menu towards the bottom of the window.

The “Highlight languages by color” option, which you open using the flyout menu in the main window, highlights the texts in the document with the respective colors for the individual languages. This gives users an overview of the current language assignment status.



All language settings can also be assigned through keyboard shortcuts. To do so, you have to set the “Use MadeToTag shortcut set” checkbox at the bottom of the window.



The flyout menu shows the available shortcuts in the “Export Tags / Language” category. The shortcuts are only effective in this manner when the currently displayed panel view is the language view.

The keyboard shortcuts let you apply language settings to paragraphs and characters quickly.

In the process, you can modify existing paragraph and character styles or create copies of existing styles.

You can also define local styles without links to paragraph or character styles.

Step 6: Tagging tables

MadeToTag can enter tags for the table structure so that you can manage the reading order in tables. The main purpose of this function is to differentiate table headers from normal table cells.

The “Status” area provides information about the number of tables in articles, text sections and corresponding anchored frames. It also shows the number of tables that may be outside assigned articles.

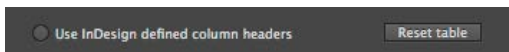
Users can use the arrow keys in the navigation area to navigate between available tables and edit every table in order.

The configuration menu can be used to set up table headings and headers. This can be done in three different ways.

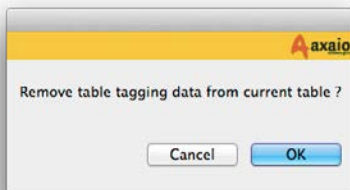


1. Use InDesign column headings

This involves using the headers of InDesign tables for tagging purposes. This method should be used if the table structure has already been set up correctly in the InDesign document.

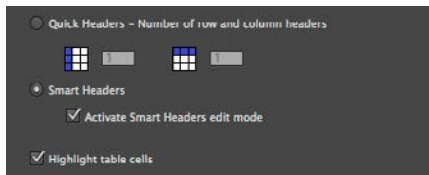


Any incorrect tags can be deleted with the “Reset table” button. A warning will appear and you will be asked to confirm the removal of the table tags.



2. Tagging with quick headers

Quick headers are based on the number of rows and columns. The user can enter the values into the corresponding fields.



The “Highlight table cells” option will help you to see which rows/columns the table headers have been created for. These rows/columns have a darker color.

	PDF/X	PDF/A	PDF/E	PDF	PDF/VT	PDF/UA
since	2001	2005	2008	1993/2008	2010	2012
ISO	ISO 15930	ISO 19005	ISO 24517	ISO 32000	ISO 14612	ISO 14289
Designation	„Progress digital data-exchange using PDF“	„PDF Archive“	„PDF Engineering“	„Portable Document Format“	„PDF for Variable Data and Transactional Printing“	„PDF for Universal Access“
Purpose	ISO Standard for the printing industry	Standardized long-term archiving with PDF	Construction documents with existing 10 models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally accessible PDF documents

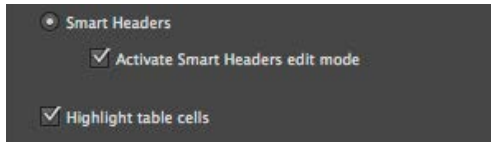
before

	PDF/X	PDF/A	PDF/E	PDF	PDF/VT	PDF/UA
since	2001	2005	2008	1993/2008	2010	2012
ISO	ISO 15930	ISO 19005	ISO 24517	ISO 32000	ISO 14612	ISO 14289
Designation	„Progress digital data-exchange using PDF“	„PDF Archive“	„PDF Engineering“	„Portable Document Format“	„PDF for Variable Data and Transactional Printing“	„PDF for Universal Access“
Purpose	ISO Standard for the printing industry	Standardized long-term archiving with PDF	Construction documents with existing 10 models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally accessible PDF documents

after

3. Smart headers

It is also possible to specify which cells should be tagged as header cells using the “Activate Smart Headers editing mode” button.



The cursor can be used to select table cells. These are then highlighted in green. The selected table cells can then be associated with other cells in the table to establish a parent child relationship, where each parent cell serves as a header cell for the associated child or children. These relationships can be nested – a cell can serve as a header cell for some other header cell, which serves as the header for some data cells. For this to function, the geometric position of the cells in the table grid is not relevant. Thus the Smart Header function can be used to set up even complex, possibly nested relationships between header cells and data cells.

The basic sequence of necessary steps is:

- Select a cell in a table (make sure that “Smart Headers editing mode” is activated)
- The cell will be highlighted in green with a dotted border around it
- Link a cell as a child cell to it by Command-clicking on that cell
- The now linked child cell will be filled with a blue colour

- When selecting a cell to become a header cell, or when Command-clicking to link a cell as a child cell, it is also possible to do a click-drag or Command-click-drag, to select several cells to become header cells, or to link several cells a child cells
- The linking of child cells to header cells can be nested, it is thus possible to make a cell the header cell of some other header cell, which in turn is the header for a date cell
- In order for Smart Header to function the position of cells in a table grid is irrelevant; nevertheless tables still need to be constructed in a fashion that can be understood and makes sense
- Starting from a selected cell it is also possible to link some other cell as a parent – just hold down the Shift key while doing Command-click.
- When the Shift key is pressed, Command-click-drag is not supported – only one parent cell at a time can be linked to one or more selected cells.

	since 2001	2005	2008	1999/2008	2010	2012
ISO	ISO 15926	ISO 19005	ISO 24517	ISO 32000	ISO 14612	ISO 14289
Designation	„Process digital data-exchange using PDX“	„PDX Archive“	„PDX Engineering“	„Portable Document Format“	„PDX for Variable Data and Transactional Printing“	„PDX for Universal Access“
Purpose	ISO-Standard for the printing industry	Standardized templates archiving with PDX	Construction diagrams with missing 3D models where required	The ISO standard corresponds with PDX version 1.7	Used for variable data printing	ISO standard for universally accessible PDX documents

	PDX/E	PDX/A	PDX/E	PDX	PDX/VT	PDX/UA
since	2001	2005	2008	1999/2008	2010	2012
ISO	ISO 15926	ISO 19005	ISO 24517	ISO 32000	ISO 14612	ISO 14289
Designation	„Process digital data-exchange using PDX“	„PDX Archive“	„PDX Engineering“	„Portable Document Format“	„PDX for Variable Data and Transactional Printing“	„PDX for Universal Access“
Purpose	ISO-Standard for the printing industry	Standardized templates archiving with PDX	Construction diagrams with missing 3D models where required	The ISO standard corresponds with PDX version 1.7	Used for variable data printing	ISO standard for universally accessible PDX documents

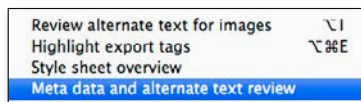
	PDX/E	PDX/A	PDX/E	PDX	PDX/VT	PDX/UA
since	2001	2005	2008	1999/2008	2010	2012
ISO	ISO 15926	ISO 19005	ISO 24517	ISO 32000	ISO 14612	ISO 14289
Designation	„Process digital data-exchange using PDX“	„PDX Archive“	„PDX Engineering“	„Portable Document Format“	„PDX for Variable Data and Transactional Printing“	„PDX for Universal Access“
Purpose	ISO-Standard for the printing industry	Standardized templates archiving with PDX	Construction diagrams with missing 3D models where required	The ISO standard corresponds with PDX version 1.7	Used for variable data printing	ISO standard for universally accessible PDX documents

	PDX/E	PDX/A	PDX/E	PDX	PDX/VT	PDX/UA
since	2001	2005	2008	1999/2008	2010	2012
ISO	ISO 15926	ISO 19005	ISO 24517	ISO 32000	ISO 14612	ISO 14289
Designation	„Process digital data-exchange using PDX“	„PDX Archive“	„PDX Engineering“	„Portable Document Format“	„PDX for Variable Data and Transactional Printing“	„PDX for Universal Access“
Purpose	ISO-Standard for the printing industry	Standardized templates archiving with PDX	Construction diagrams with missing 3D models where required	The ISO standard corresponds with PDX version 1.7	Used for variable data printing	ISO standard for universally accessible PDX documents

Overview of metadata and alternative text

MadeToTag provides the “Metadata and alternative text overview” function to simplify the process of communicating about tagged documents with other users. This overview can be used to approve and make changes.

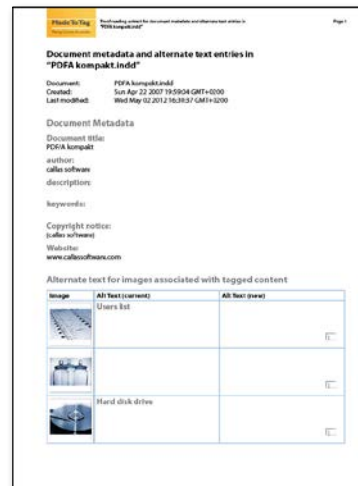
The option can be found in the MadeToTag flyout menu.



MadeToTag will prepare an overview of the metadata in the document and alternative text for images as a list in a new InDesign document.

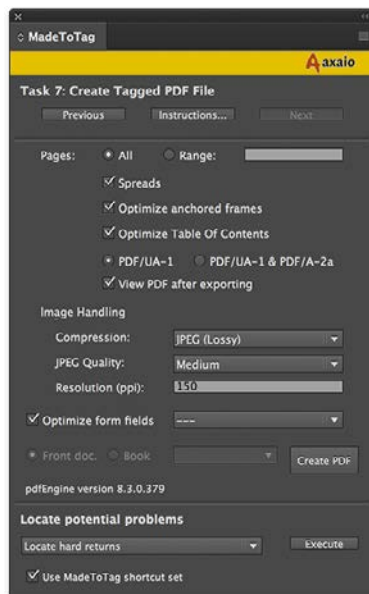
This document can be forwarded on as is, in PDF format or printed out.

Please note that this function only lists alternative text for images that are anchored in an article or allocated to it in some other way.



Step 7: Creating the tagged PDF file

In the next step, the accessible PDF file is exported. Here it is possible to print all pages or only a range and to print the document in “Spreads”.



With the “Optimize anchored frames” option, MadeToTag stops the texts in complex anchored frames being rasterized during export, as will happen with the standard settings activated. The text content and tag information is lost

during rasterizing. MadeToTag removes the anchoring during export and simultaneously places the frames in their original positions.

The “Optimize Table Of Contents” option improves the tag placement for the table of content created in InDesign.

For the export you can select whether the PDF should be created in the accessible standard PDF/UA-1 only or additional as PDF/A-2a for document archiving. PDF/A-2a files are simultaneously PDF/UA compatible.

Using a checkbox you can also determine whether the PDF is opened in a PDF viewer after its creation.

The “Image Handling” makes it possible to set the kind of compression, the JPEG quality and the image resolution.

The “Optimize Form Fields“ option can be used to adapt the PDF formulars. Using that option, a previously created template PDF (using form features in Adobe Acrobat) can be chosen. Using the dropdown option “Manage” will open a folder, where you can drop your template PDF. If such template is chosen, form settings from within that PDF – like font type, validation scripts, colors and interactive values – will be copied into the exported PDF.

Click the “Create PDF” button to start the export process. If only documents are open, MadeToTag will export the front document. If an InDesign book is open, you can select whether to export the front document of a specific book.

! If the “Optimize Table Of Contents” option is activated, table of content entries receive additional tags for the “Table of Content” during a MadeToTag export.

! MadeToTag can not only export individual documents, but also InDesign book documents.



axaio software gmbh

Schönhauser Allee 6-7

D-10119 Berlin

Tel +49.30.44342390

Fax +49.30.4416402

info@axaio.com

www.axaio.com

Please send any
questions or comments
about MadeToTag to:
support@axaio.com