

MadeToTag Manual



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Installation, registration, updates and support





MadeToTag - Introduction

MadeToTag from axaio lets you quickly and easily prepare Adobe InDesign documents for export as accessible tagged PDFs. The plug-in uses tags to define the InDesign document according to its content and semantic structure.

Tagged PDFs are used to provide devices such as screen readers (for users with visual impairments) or reading software (for users with learning difficulties) with the appropriate information to enable comprehensive, logical access to the content of a PDF file. This is why tagged PDFs are a prerequisite for PDF accessibility.

A tagged PDF created with MadeToTag fulfills the criteria of the PDF/UA standard, the international standard for accessible PDF.

Overview

MadeToTag is available for Adobe InDesign CC 2017 and higher. 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 generate accessible (PDF/UA-compliant) 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 <u>links text and paragraph styles to tags</u>, structures the reading order by <u>putting articles in a sequence</u> and helps the user to add <u>descriptions to images and graphics</u>.
- MadeToTag's <u>keyboard shortcuts</u> allow the user to quickly process documents.



- 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 <u>Problem Locator</u> quickly detects and fixes problems like incorrect hyphens, empty paragraphs, images that do not have alternative text or lists without list paragraph styles.
- MadeToTag can incorporate <u>metadata</u> into documents so that they meet the requirements for accessible PDFs.
- MadeToTag lets you accurately <u>assign languages to text</u> within the document down to the level of individual paragraphs or single words.
- The <u>reading order for tables</u>, including those with very complex structures, 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, installation, registration and activation

Choose the right download from the <u>axaio software website</u> according to your OS version (Macintosh or Windows) and In-Design version (e.g. Adobe InDesign 2022).

Run the **installation program** for MadeToTag and follow the instructions.

Macintosh version

Double-click on the *.pkg* file to start the installation. Follow the instructions of the installer program.

- The folder axaio software containing the MadeToTag plugin is located in the Adobe InDesign Plug-Ins folder.
- MadeToTag's temporary files are located under <User name>/Library/Preferences/axaio software/Adobe InDesign 17/MadeToTag/temp.
- The documentation for MadeToTag is stored in the Users
 Directory under <User name>/Documents/axaio software
 documentation/MadeToTag InDesign/English.

Windows version

Unzip the downloaded package and run the contained *.exe* application. Follow the instructions of the installer program.

- The folder axaio software containing the MadeToTag plugin is located in the program directory, for example C:\Program Files\Adobe InDesign 2022\Plug-Ins.
- Temporary files generated by MadeToTag are located in %APPDATA%\axaio software\Adobe InDesign 17\MadeTo-Tag\temp.
- The documentation for MadeToTag can be found in Documents\axaio software documentation\MadeToTag InDesign\English.



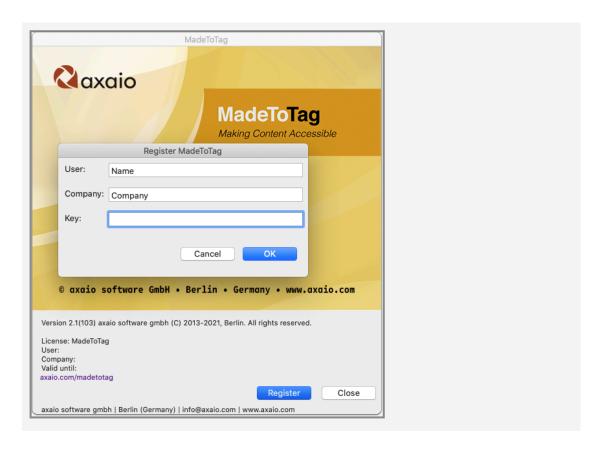
Registration / activation

You can **test the full version of MadeToTag for 30 days** after registration.

If you have purchased a license for MadeToTag, you will receive a registration card featuring a **serial number** and a **keycode**.

To activate the product, enter your name, company and the 24-digit keycode in the registration dialog.

You can access information about the registration, license and version of MadeToTag in the *Help menu* by clicking *About Plug-Ins*.



Keep your activation code in a safe place, and do not forget to e-mail or fax a copy of your completed registration card to axaio software. Only registered customers are entitled to updates and technical support.



Uninstall MadeToTag

on Macintosh:

To uninstall MadeToTag from your Mac, you need to remove *MadeToTag.InDesignPlugin* and *pdfToolboxSDK* from the *axaio software* folder. If you do not have any other axaio products installed, you can delete the entire *axaio software* folder. The *axaio software* folder is located in the programs directory, for example under */Applications/Adobe InDesign 2022/Plug-Ins*.

on Windows:

To uninstall MadeToTag from your PC, you need to remove *MadeToTag.InDesignPlugin*, *pdfToolboxSDK* and *(MadeToTag Resources)* from the *axaio software* folder. If you do not have any other axaio products installed, you can delete the entire *axaio software* folder. The *axaio software* folder is located in the program directory, for example under *C:\Program Files\ Adobe\Adobe InDesign 2022\Plug-Ins*.



Updates and support

Updates

Updates to MadeToTag, including the latest version of the software, can be found on the axaio software website under the download menu button.

To stay informed about **news and updates**, we recommend subscribing to our **newsletter**. You can register on the axaio software website in the <u>News</u> section or simply click on this link.

Support

All registered MadeToTag users have the right to support. Your starting point should be the <u>Support section on axaio.com</u>. Here, you will find a regularly updated series of <u>MadeToTag tutorials</u> and <u>webinars</u> as well as <u>release</u> notes for each version of the software.

You can also **email** axaio support with any questions and comments at support@axaio.com.



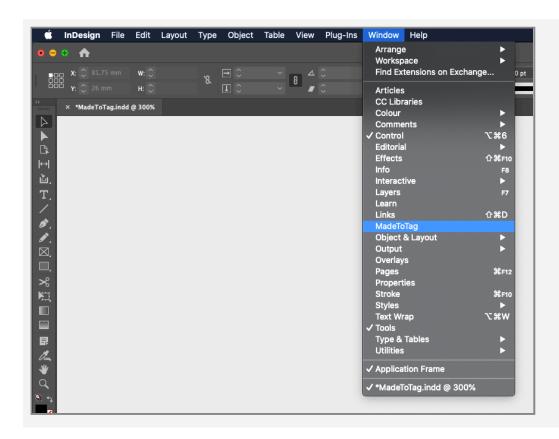
MadeToTag - Step by step





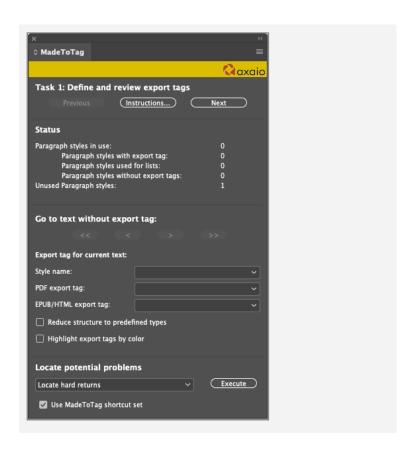
Where do I find MadeToTag in the Adobe InDesign menu?

The Adobe InDesign plug-in can be found under menu; Window; MadeToTag.



The primary MadeToTag window will appear.

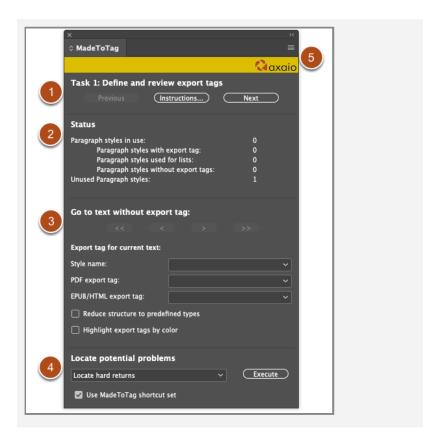






How is the MadeToTag window structured?

For most purposes, the window is divided into a number of zones:



- The upper section allows the user to move from Tasks 1 to 7 (*Previous, Next*) and can access the *Instructions* at the touch of a button to get help with individual steps whenever they need it.
- 2. Depending on the currently selected Task, the second section shows a **Status** overview of the assigned tags.
- The third section shows the functions for the currently active Task. For more on this, see <u>Task 1 Define and review</u> export tags).
- Under Locate potential problems, the user can access a list of functions for finding and resolving potential problems. For more on this, see <u>"Resolve problems" for acces-</u> <u>sible PDFs</u>).



- The flyout menu opens a list of all important functions which can also be executed using keyboard commands.
 For more on this, see <u>Work faster with keyboard commands/the flyout menu</u>.
- 6.



Task 1: Define and review export tags

Task 1 is to add export tags to text within the Adobe InDesign document.

A basic prerequisite for correct semantic structure is the consistent usage of paragraph formats. **Export tags** (semantic labels) are assigned to paragraph formats in order to identify the type of the content in question. For example, this could be a **paragraph** or a **header**.

Adobe InDesign automatically adds the correct export tags for **lists**, **tables** and **tables of content**, but only when these text elements have been identified as such using the corresponding InDesign functions.

Overview of the window for "Task 1: Define and review export tags"



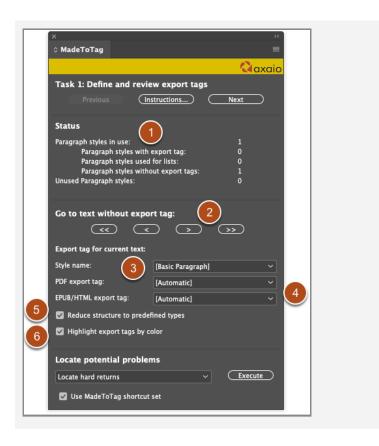


The MadeToTag window contains sections used for each of the seven MadeToTag tasks.

- At the top is the Navigation section.
 Use *Previous* and *Next* to move to the previous or the next task.
 - The *instructions* opens an extensive help text and contains a link to this online documentation.
- 2. The *flyout menu* (upper right) leads to a range of functions which can usually also be executed using keyboard commands.
- 3. The bottom of the window contains important functions used to *Locate potential problems*. You can also use keyboard commands here.

Items 2 and 3 are described in dedicated chapters.

Options for export tags



1. **Status:** Here the user will see an overview of how many paragraph styles currently feature export tags. This sec-

- tion also shows the number of paragraph styles used for lists, the number of paragraph styles without export tags, and the number of unused paragraph styles.
- 2. **Go to text without export tag:** Here you can place export tags that are missing from InDesign and need to be added or changed. Use the *arrows* to move to the first, last, previous or next paragraph without any export tags.
- 3. If a paragraph without an export tag is selected, MadeTo-Tag will show all paragraph styles available in the Adobe InDesign document in the *Export tag for current text* section under *Style name*.
- 4. You can now use two drop-down menus to select the right PDF and EPUB/HTML export tag (P for body text; H1-H6 for headers and Artifact for non-text elements). From MadeToTag Version 1.9(092) you have the possibility to also select additional export tags for Caption, Index and Blockquote. See section "Assign export tags: Caption, Index, Blockquote" for more details.
- 5. Reduce structure to predefined types: This option makes it so that the tags in the PDF file are no longer named based on the user-defined paragraph styles (and then mapped to P, H1 etc. using the role map) but instead exclusively use the pre-defined types, i.e. P, H1 and so on.
- 6. Highlight export tags by color: If this checkbox is enabled, MadeToTag will display different paragraph styles in specific colors. (Headings will be colored in orange tones depending on their level, text paragraphs will be blue, lists will be green and paragraphs marked as artifacts will be colored purple.

This option is very useful for checking whether all paragraphs have been tagged and whether the order makes sense (H1 ahead of H2, etc.)

Assign export tags: Caption, Index, Blockquote

From MadeToTag Version 1.9(093) onwards, you can not only use InDesign's predefined export tags, but also the following additional tags provided by MadeToTag.

- Caption
 - This will clearly mark the paragraph as a <Caption> in the PDF/UA



Caption (List, at top)

- This will make the paragraph the first child of the list structure and mark it as <Caption> in the PDF/UA
- (only if a list structure immediately follows the paragraph tagged as caption)

Caption (Table, at top)

- This will make the paragraph the first child of the table structure and mark it as <Caption> in the PDF/ UA
- (only if a table structure immediately *follows* the paragraph tagged as caption)
- This should be used if the <Caption> paragraph is above (at top of) the table

Caption (Table, at bottom)

- This will make the paragraph the last child of the table structure and mark it as <Caption> in the PDF/UA
- (only if a table structure immediately *precedes* the paragraph tagged as caption)
- This should be used if the <Caption> paragraph is below (at bottom of) the table

BlockQuote

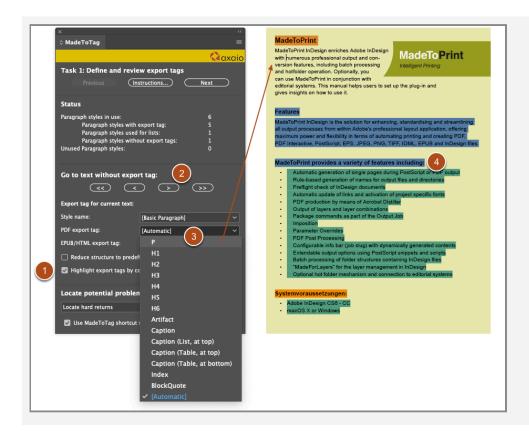
- This will clearly mark the paragraph as a <Block-Quote> in the PDF/UA
- Where two or more consecutive paragraphs have this export tag, a single BlockQuote tag will be assigned

Index

- This will clearly mark the paragraph as a <Index> in the PDF/UA
- Where two or more consecutive paragraphs have this export tag, a single Index tag will be assigned



Assign export tags: Example



In the example document, paragraphs have not yet been given export tags and headings have been incorrectly tagged as text (P).

- Using the Highlight export tags by color setting, you can clearly see which paragraphs have been tagged and how: Headings are orange; text paragraphs are blue, lists are green. The user now also sees that some paragraphs have not been tagged.
- 2. Using the *right arrow* in the MadeToTag window, the program moves to the next paragraph without an export tag.
- 3. From the *PDF export tag* drop-down menu, you assign the currently selected paragraph (here: [Basic Paragraph]) the "*P*" tag.
- 4. Finally, the user needs to assign the appropriate export tags to the two paragraphs that are actually headers and not text.

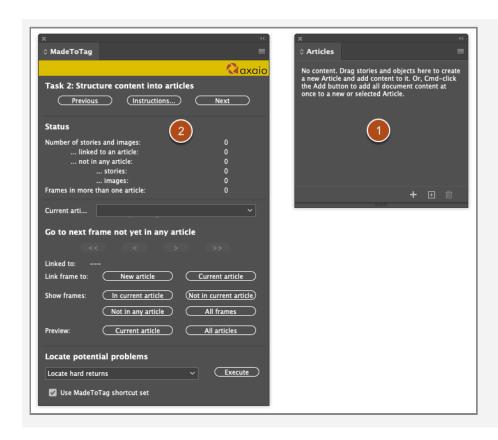


Task 2: Structure content into articles

Particularly in layouts using multiple columns, freely placed images and graphics, and margin columns, it is not always possible to automatically assign a sensible reading order.

A coherent document structure is necessary to provide the correct reading order. This can be achieved in Adobe InDesign by assigning articles.

Assign articles in Adobe InDesign



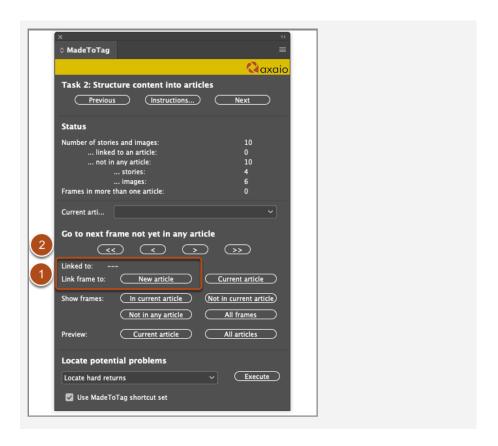
When setting up the article structure, it makes sense to show the **AdobeInDesign article list** and attach it to the MadeToTag window.

Initially, no articles are shown in the InDesign article interface.



2. The **Status** section also shows a value of 0 for all fields (*Number of stories and images* with sub-categories; *Frames in more than one article*).

First, the user selects the frame which logically comes first.



The active frame can be assigned to a newly created article using the Link frame to: *New article* option in MadeToTag.





For the name of the article, the tool will automatically provide the first few words within the frame or "Article 1/2/etc." for frames without text. You can also specify a custom name.

Using the arrow under **Go to next frame not yet in any article** in MadeToTag, you can find the next frame which has not yet been linked with an article.

When further processing the document, you can decide whether a frame belongs to a *New article* or a *Current article*.

The InDesign article interface displays a parallel view of which frames belong to an article and how they are ordered. Here, you can rearrange the hierarchy and order as desired.

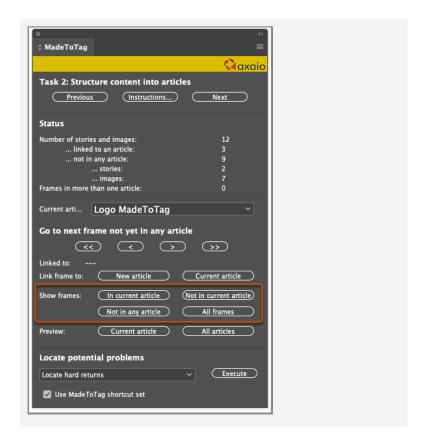


View article assignments

MadeToTag offers a range of options for viewing current article assignments.

The tool can show or hide corresponding frames using the **Show frames** options.





The user can display the following variants:

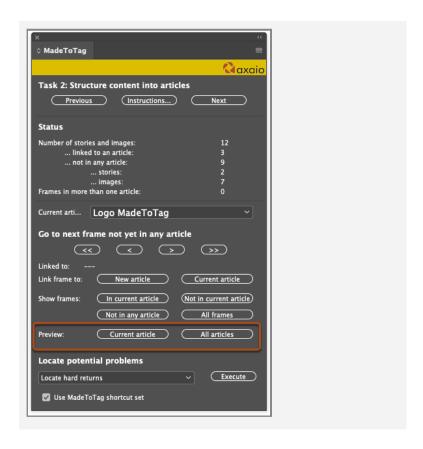
- 1. frames in the current article; 2. frames not assigned to the current article; 3. frames not assigned to any article as well as 4. all frames.
- Made To Tay

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Article preview

The **Preview** option provides a detailed overview of the text and article structure.



The preview allows you to view the **Current article** or **All articles**.





- 1. The gray bars on the left show which elements belong to the document, the current article and the current section.
- 2. The structure displays the text order and how each text element is assigned to individual structural elements such as "H1-H6", "P" and lists.
- 3. You can clearly see whether individual items in lists have been correctly nested.
- 4. **Embedded graphics** are also shown in their properly ordered place within the article.

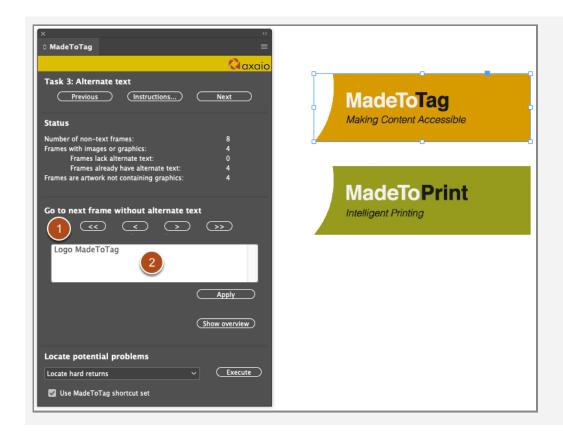
Many tasks associated with assigning articles can also be executed using keyboard shortcuts. For more on this, see <u>Work faster with keyboard commands/the flyout menu</u>.



Task 3: Alternate text

In order to make PDF content accessible for users with certain impairments (such as users with impaired vision or learning difficulties such as dyslexia), it is important to provide alternate text ("alt text") for any content which is not itself text, such as images, graphics and so on.

The alternate text should describe such images as concisely as possible.



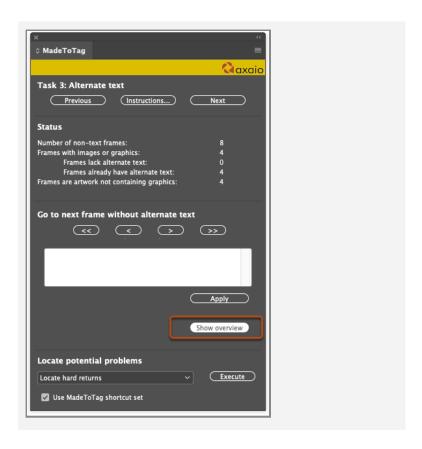
Task 3 in MadeToTag allows you to quickly assign alternate text.

- 1. You can use the **arrows** to process image frames one after another.
- 2. Enter the alternate text into the **text box**, MadeToTag will automatically assign it to the selected image.



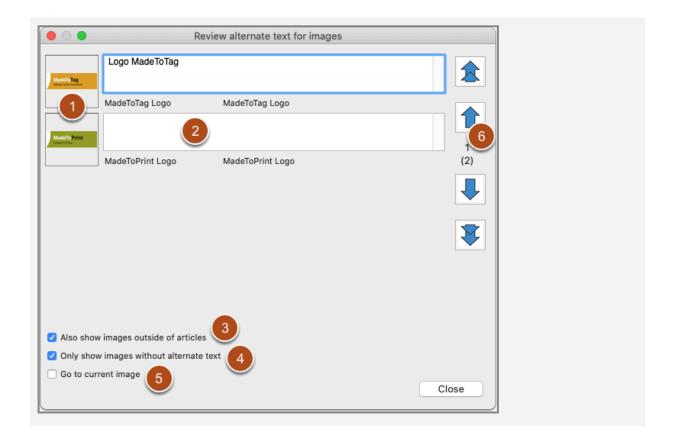
Work with the "Overview"

Alternate text can be more quickly and clearly assigned using the preview window which shows the document's images and graphics in a list.



The Review alternate text for images window can be opened using the Show overview button.





- 1. MadeToTag displays *image previews* based on the settings selected at the bottom of the window.
- 2. Use the **text box** to enter the most concise image descriptions possible.
- 3. You can also display images located *outside of articles*.
- 4. You can restrict the number of images displayed using *Only show images without alternate text.*
- 5. If the *Go to current image* checkbox is enabled, the position within the Adobe InDesign page will be shown.
- 6. The *arrow buttons* on the right let you move to the next view page.

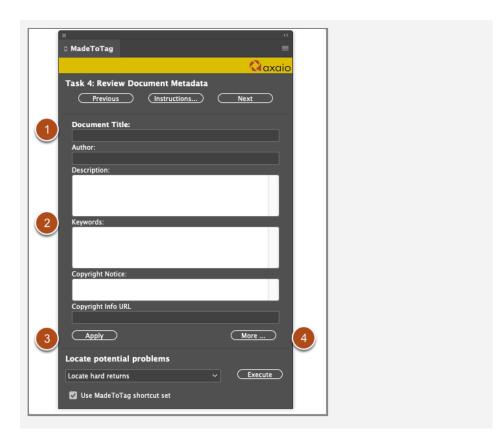
This lets you insert any missing alternate text for one image at a time and optimize it as necessary.



Task 4: Review document meta data

This MadeToTag window displays the most important meta data fields in the document.

To display a dialog with all meta data fields, you can use the **File information...** function in InDesign.



Task 4 provides a window that allows you to input information such as the document title and author.

- 1. A key requirement for an accessible PDF is to provide at least a meaningful *document title*.
- 2. Other meta data relates to the *author*, the *description*, *keywords*, the *copyright notice* and the *website* where more information can be found.
- 3. Click *Apply* to save the information provided in the document.
- 4. If you need more meta data fields, click *More...* to open the file information window in Adobe InDesign.

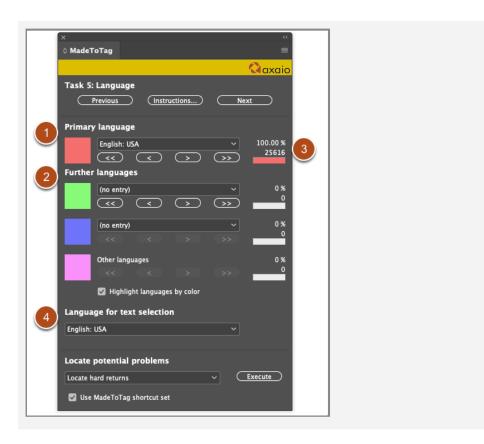


Task 5: Language

In order for speech synthesis to work properly in order to read out a PDF using a screen reader program, for example, or to convert a PDF's content into audio files or audio streams it is important to specify the correct language for all text in a PDF. Correct language settings also support syllable separation and spelling checks.

In Adobe InDesign, you can achieve this using Language settings for paragraph or character styles.

In Task 5: Language, MadeToTag lets you easily check and adjust language settings for paragraph and character styles as well as local formatting.



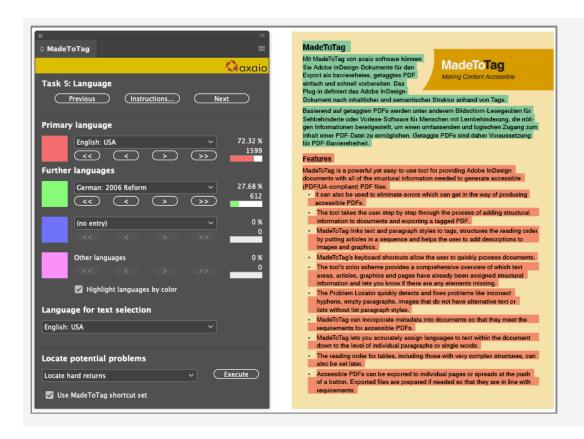
The Language window indicates which languages are currently assigned in the document and allows you to change highlighted text regions.

1. The *Primary language* is the document's main language.



- 2. *Further languages* is used for individual passages in languages that are not the primary language.
- 3. The dialog also shows the *percentage value* for the portions of the document for which each language has been configured.
- 4. You can also highlight selected paragraphs or text passages and use the **Language for text selection** drop-down menu at the bottom to assign languages.

Highlight languages by color

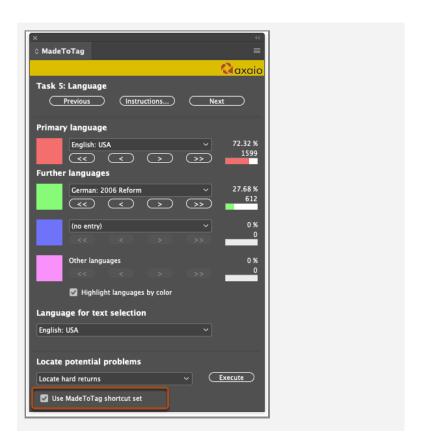


The *Highlight languages by color* option, activated using a checkbox, highlights text within a document using the corresponding color for each language. This provides the user with an overview of how languages are currently assigned.

Keyboard commands

You can also use keyboard commands to assign language settings.





To do so, you must first check **Use MadeToTag shortcut set** at the bottom of the window.



Set language of paragraph style to lang1	₹1
Set language of paragraph style to lang2	₹2
Set language of paragraph style to lang3	7.3
Set language of character style to lang1	₹4
Set language of character style to lang2	₹5
Set language of character style to lang3	7.6
Set language of character to lang1	~7
Set language of character to lang2	8.7
Set language of character to lang3	7.9
(no entry)	7.0
Set new paragraph style to lang1	℃企1
Set new paragraph style to lang2	℃企2
Set new paragraph style to lang3	℃公3
Set new character style to lang1	℃企4
Set new character style to lang2	℃介5
Set new character style to lang3	6位℃
(no entry)	℃企7
(no entry)	8位了
(no entry)	℃企9
(no entry)	0位了

The flyout menu shows the available keyboard commands under the "Export Tags | Language" category. These will only function when the currently displayed window is the language view.

You can use keyboard commands to quickly apply language settings to paragraphs and characters. You can change existing paragraph and character styles or create copies of styles. You can also format text locally without linking it to paragraph or character styles.

For more on this, see the **chapter on keyboard commands**.



Task 6: Table structure

To support navigation through tables, MadeToTag allows you to assign table structure tags. This function primarily lets you distinguish header cells column or row headings from normal cells.

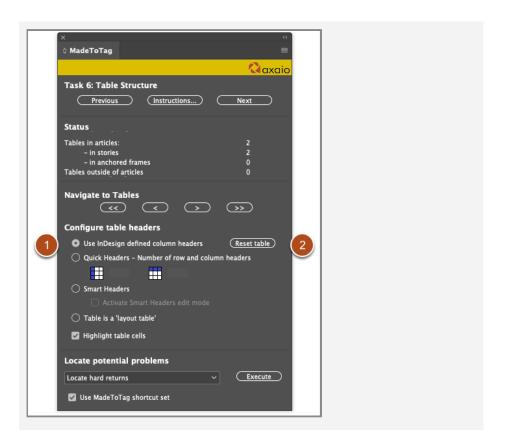


- The Status section tells you the number of tables in articles and stories as well as those in any associated anchored frames.
- 2. The number of tables which may be *outside of assigned articles* is also shown.
- 3. The *Navigate to tables* section lets you navigate between available tables using the arrow buttons so that you can work on each table one after another.
- 4. The *Configure table headers* menu lets you set up table headers and row or column headers.

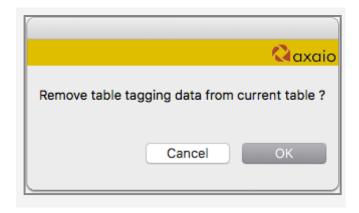
Four options are available.



Use InDesign defined column headers



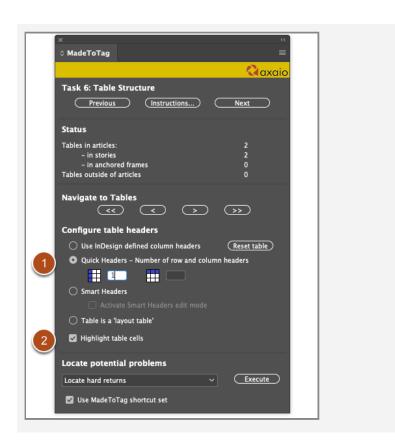
- 1. The *Use Adobe InDesign defined column headers* process uses InDesign table headers for tagging purposes. This procedure is advisable if the table structure is already correctly configured within the InDesign document.
- 2. If the existing tags are not immediately usable in InDesign, you can use **Reset table** to delete them.





A warning box will ask you whether you really want to remove the table tags.

Tag using Quick Headers



- 1. **Quick Headers** are defined using the number of row and column headers. You can enter the values in the corresponding fields.
- 2. It can be helpful to enable the *Highlight table cells* option to see the rows and columns for which the table headers have been specified. These will be shown in a darker color tone.



	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 16612	ISO 14289
Designation	"Prepress digital data-exchange us- ing PDF"	"PDF Archive"	"PDF Engineering"	"Portable Docu- ment Format"	"PDF for Variable Data and Transac- tional Printing"	"PDF for Universal Access"
Purpose	ISO-Standard for the printing indus- try	Standardized long- term archiving with PDF	Construction dia- grams with mov- ing 3D models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally acces- sible PDF docu- ments

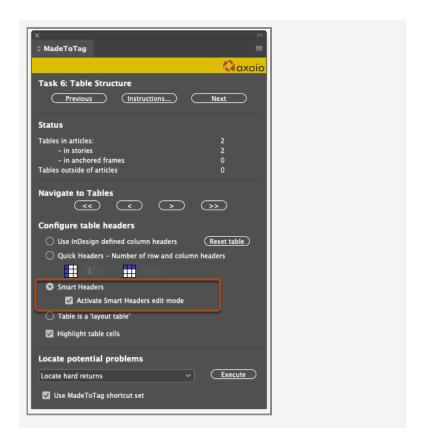
Table with *Highlight table cells* activated **without** tagged headers.

	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 16612	ISO 14289
Designation	"Prepress digital data-exchange us- ing PDF"	"PDF Archive"	"PDF Engineering"	"Portable Docu- ment Format"	"PDF for Variable Data and Transac- tional Printing"	"PDF for Universal Access"
Purpose	ISO-Standard for the printing indus- try	Standardized long- term archiving with PDF	Construction dia- grams with mov- ing 3D models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally acces- sible PDF docu- ments

Table with *Highlight table cells* activated with tagged headers.



Smart-Headers



The Smart Headers option lets you *Activate Smart Headers edit mode* to freely define which cells should be identified as header cells.

The Smart Header process lets you mark any cells within a table using your cursor. These will be highlighted in green during this process. Starting with a previously selected table cell, you can even define very complex cell assignments.

To do so, follow these steps:

since	2001	2005	2008	1993/2008	2010	2012
ISO	ISO 15930	ISO 19005	ISO 24517	ISO 32000	ISO 16612	ISO 14289
Designation	"Prepress digital data-exchange us- ing PDF"	"PDF Archive"	"PDF Engineering"	"Portable Docu- ment Format"	"PDF for Variable Data and Transac- tional Printing"	"PDF for Universa Access"
Purpose	ISO-Standard for the printing indus- try	Standardized long- term archiving with PDF	Construction dia- grams with mov- ing 3D models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally acces sible PDF docu-

• Click on the desired cells to select them (Important: "Smart Header edit mode" must be enabled.)

	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 16612	ISO 14289
Designation	"Prepress digital data-exchange us- ing PDF"	"PDF Archive"	"PDF Engineering"	"Portable Docu- ment Format"	"PDF for Variable Data and Transac- tional Printing"	"PDF for Universal Access"
Purpose	ISO-Standard for the printing indus- try	Standardized long- term archiving with PDF	Construction dia- grams with mov- ing 3D models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally acces- sible PDF docu- ments

• The selected cells will be highlighted in green with a dotted border.

	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 16612	ISO 14289
Designation	"Prepress digital data-exchange us- ing PDF"	"PDF Archive"	"PDF Engineering"	"Portable Docu- ment Format"	"PDF for Variable Data and Transac- tional Printing"	"PDF for Universal Access"
Purpose	ISO-Standard for the printing indus- try	Standardized long- term archiving with PDF	Construction dia- grams with mov- ing 3D models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally acces- sible PDF docu- ments

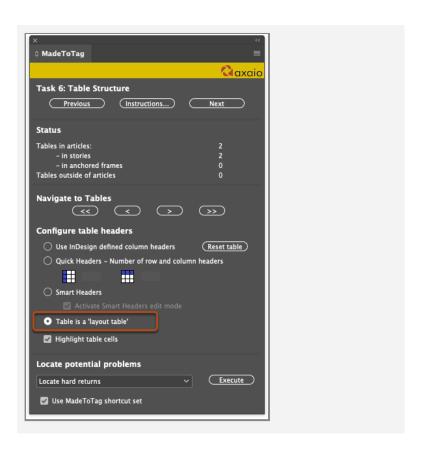
- You can then use *Command+Click* to mark cells as **child elements**. Child cells will be marked in **blue**.
- This assignment will identify the originally selected cell as a header cell and assign the child cell to this header.
- You can also *click and drag* or *Command+Click and drag* to select or assign multiple cells at once.
- You can also nest child cell assignments, creating tiered header cell relationships.
- The position of header cells and child elements within a table is irrelevant for Smart Header functionality; however, the table should be structured clearly and comprehensibly.

	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 16612	ISO 14289
Designation	"Prepress digital data-exchange us- ing PDF"	"PDF Archive"	"PDF Engineering"	"Portable Docu- ment Format"	"PDF for Variable Data and Transac- tional Printing"	"PDF for Universal Access"
Purpose	ISO-Standard for the printing indus- try	Standardized long- term archiving with PDF	Construction dia- grams with mov- ing 3D models where required	The ISO standard corresponds with PDF version 1.7	Used for variable data printing	ISO standard for universally acces- sible PDF docu- ments



 Hold the Shift key while assigning cells to turn the highlighted cell into a parent cell instead of a child cell, making the parent cell into a header for the originally selected cell(s). It is not possible to mark multiple cells as parents by keeping the Switch key pressed down. In other words, you can only ever assign one parent cell at a time.

Table is a "layout table"



In some cases, the InDesign table function is used purely for design reasons rather than to create an actual data table. In this case, it is important to clear the table tagging structure to prevent confusion in the accessible PDF. This cleanup can be performed using the *Table is a "layout table"* option.



Task 7: Create tagged PDF file

Although Adobe InDesign features a number of built-in options for exporting a tagged PDF, MadeToTag offers its own functionality along the same lines.

As part of this process, MadeToTag performs a series of unique processing steps which are not available in Adobe In-Design in the same form:

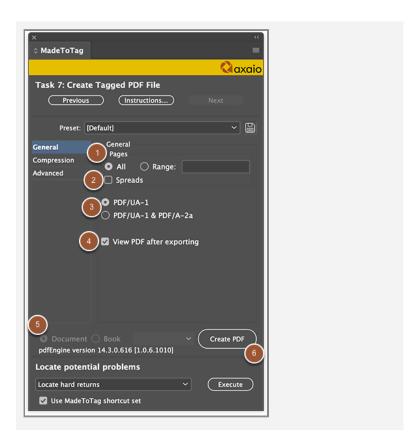
Among other things, it resolves certain errors in InDesign's export function for tagged PDFs and optimizes the exported tagged PDF, for example, by removing empty paragraphs from the content structure, marking all objects not contained within the content structure as artifacts, and setting the PDF/UA identifier.

Export presets

Similar to the Adobe PDF presets in InDesign, MadeToTag offers its own export presets for PDF creation. Presets can be created in Task 7, which can then be accessed before each output. Customised presets for different projects provide more control and flexibility when creating PDFs. For example, a special preset can be created for regular PDF outputs of a specific publication. The preset option is also interesting for regular outputs with different image resolutions.



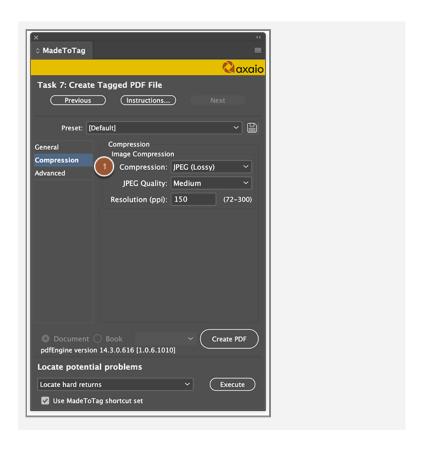
"General" Options



- 1. Select the *Page range* to be exported.
- 2. Export the document as *Spreads* (rather than *as pages*).
- 3. You can specify whether to export the PDF in line with the accessible *PDF/UA* standard only or also as a *PDF/A-2a* for document archiving. *PDF/A-2a* files are also *PDF/UA* compliant.
- 4. *View PDF after export* lets you specify whether to *open* the file in a PDF viewer after export.
- 5. Here you can specify whether MadeToTag should output a single file (*Document*) or a selectable InDesign *Book*. This option is only visible when at least one book file is open. Else, MadeTag just exports the front document.
- 6. Click *Create PDF* to export the tagged PDF as a PDF/UA or PDF/A-2a file in line with your chosen settings.



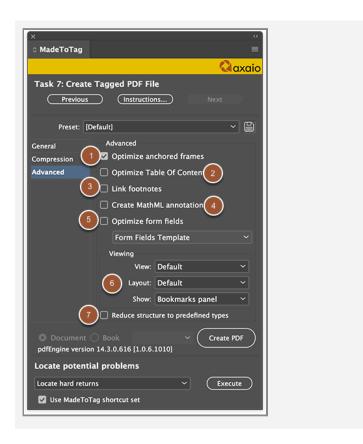
"Compression" Options



1. *Image compression* lets you specify a range of image data settings (target resolution, type and quality of compression.)



"Advanced" Options

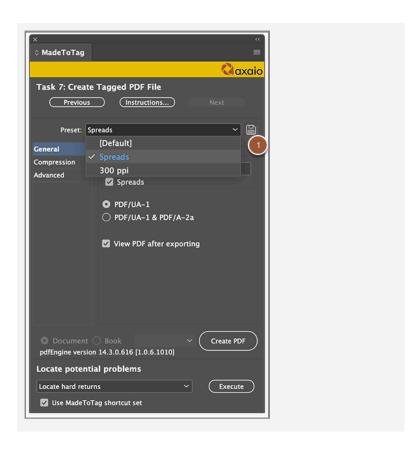


- 1. With the *Optimize anchored frames* option, MadeToTag prevents rastering of text in complex anchored frames during export, as will happen with the standard settings activated. Rastering results in the loss of text content and tag information. MadeToTag removes the anchoring during export and simultaneously places the frames in their original positions.
- 2. *Optimize table of contents*. This option improves tagging for the table of contents generated by Adobe InDesign.
- 3. Link footnotes will create a link on the footnote reference to the actual footnotes for easier "navigation".
- 4. When working with MathTools, you can opt in to <u>create</u> <u>MathML annotations</u>.
- 5. *Optimize form fields* lets you select a specific form field template PDF file (<u>for more on this, see the next chapter</u>).
- 6. Since version 2.6.118, MadeToTag lets you choose the *initial view* settings for the PDF. You can set the default view (e.g. "Fit Page", "Fit Width") and the layout (e.g. "Two-



- Up"). Additionally, you can choose if the Booksmarks panel should be shown in the PDF viewer.
- 7. Struktur auf vordefinierte Typen reduzieren: Diese Option bewirkt, dass die Tags im PDF nicht mehr so benannt sind wie die benutzerdefinierten Absatzformate (und dann per Rolemap auf P, H1, gemappt werden), sondern ausschließlich die vordefinierten Typen verwendet werden, also P, H1 und weitere.

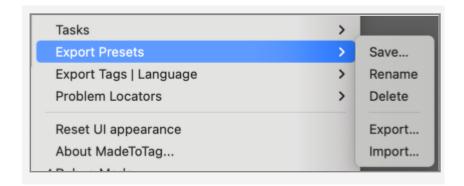
Edit list of export presets



1. To create an export preset, all settings are first made and then saved using the "Save" button. In the next step, a unique default name is assigned to add the preset to the selection list.

The presets list can be edited under the "Export presets" entry in the flyout menu. Presets can be saved, renamed and deleted here. It is also possible to export and import presets.





The presets created are saved in the "presets.json" file in the user library. To remove all presets from MadeToTag, this file can be deleted under the following path:

Mac version

/Users/<username>/Library/Preferences/axaio software/ Adobe InDesign 19/MadeToTag

Windows version

%APPDATA%\axaio software\Adobe InDesign 19\MadeToTag

Optimize form fields

The *Optimize form fields* option can be selected if a user already has its own form field template PDFs in use or wants to create them beforehand. If *Optimize form fields* is enabled, a dedicated form field template PDF must be selected accordingly, to be used by MadeToTag.

For each form field in this template PDF with the same name as a form field in the InDesign document, the properties of this template PDF form field will be copied over to the corresponding form field for the InDesign PDF file to be exported.

To create a template PDF, it is advisable to export it once from the InDesign document together with the required form fields.

Next, open the exported PDF in Adobe Acrobat Pro and apply the form field tool with the desired settings. The **optimized PDF document** can then be saved as a PDF template.





To find the template PDF folder, click on the drop-down menu next to the *Optimize form fields* option and select Manage. This will open the folder containing the template PDFs.

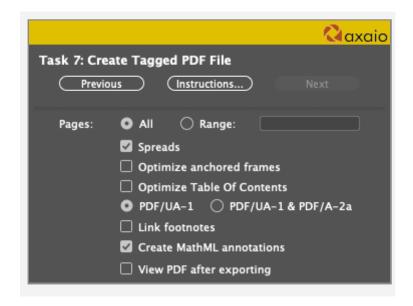
When adding form fields to a PDF file with the goal of using the PDF as a template, you can use all available settings within Adobe Acrobat Pro (from text design to text field design options such as the maximum number of characters, actions, formatting options, validation or formulae).

The only properties that will never be overwritten by MadeTo-Tag are the form field name and its position on the page. All other properties will be derived from the template PDF.

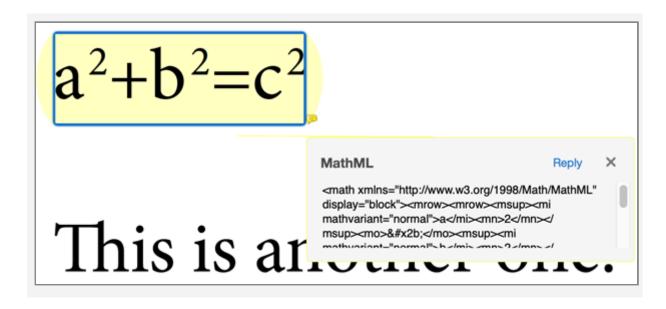
After exporting a tagged PDF, it is advisable to check the content structure of the file one more time using the free callas pdfGoHTML plug-in. callas pdfGoHTML requires Acrobat 9, X or XI on Mac or Windows. It was developed as a joint project between callas software and axaio software and is available to download for free at https://www.callassoftware.com/en/products/pdfgohtml.

Create MathML Annotations

In MadeToTag step 7 'Create PDF file with tags' you can now check the box '*Create MathML annotations*'. An annotation is automatically placed over all formulas contained in the document and contains the corresponding MathML of the formula.



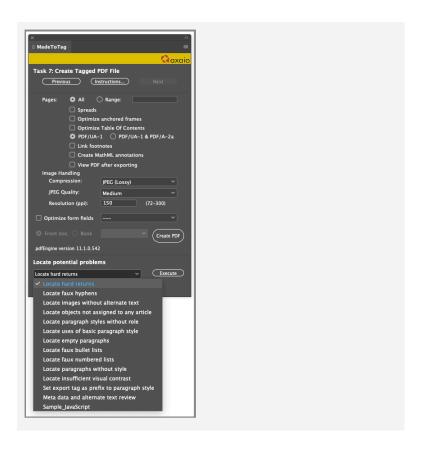
Since version 1.9.100 MadeToTag can create MathML Annotations inside the PDF/UA. The only requirement for this is that you work with formulas that were created in InDesign using MathTools from movemen. Furthermore, MathTools must be licensed in the "Enterprise" version.





"Troubleshooting" for accessible PDFs

At the bottom of the MadeToTag window, the user can access a drop-down list of options for locating and resolving problems.



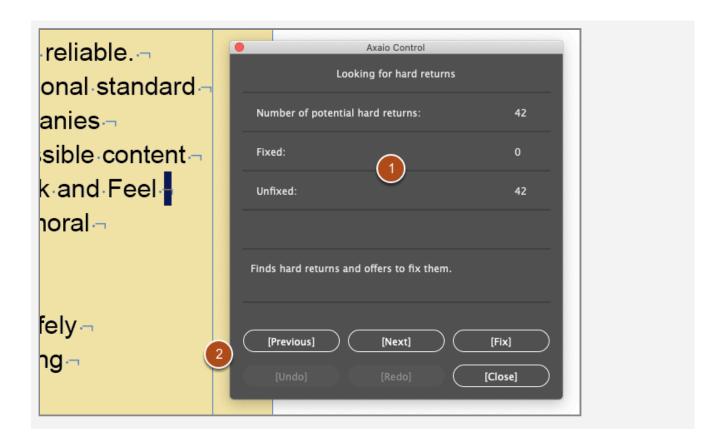
MadeToTag can locate problems which prevent straightforward creation of accessible PDF files.

Select a function and click *Execute* to open the corresponding dialog.

[If MadeToTag finds no problems of the selected type, it will report back with a window saying *No problems found*.]



Locate hard returns



When this function is called, the MadeToTag Problem Locator window will open at *Looking for hard returns*.

- 1. The window shows the *Number of potential hard returns* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate faux hyphens

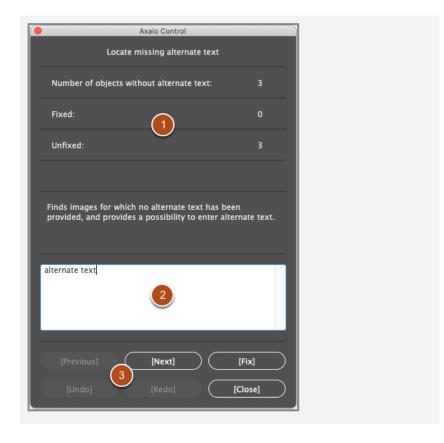


When this function is called, the MadeToTag Problem Locator window will open at *Find faux-hyphens*.

- 1. The window shows the *Number of potential faux hyphens* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate missing alternate text



When this function is called, the MadeToTag Problem Locator window will open at Locate missing alternate text.

- The window shows the Number of objects without alternate text as well as the number of Fixed and Unfixed items.
- 2. The *text box* lets you enter alternate text for selected images.
- 3. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate objects not assigned to any article



When this function is called, the MadeToTag Problem Locator window will open at *Find unassigned articles*.

- 1. The window shows the *Number of unassigned articles* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate paragraph styles without role



When this function is called, the MadeToTag Problem Locator window will open at *Find paragraph styles not mapped* (paragraph style with no export tag assigned).

- 1. The window shows the *Number of paragraph styles not mapped* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate uses of basic paragraph style

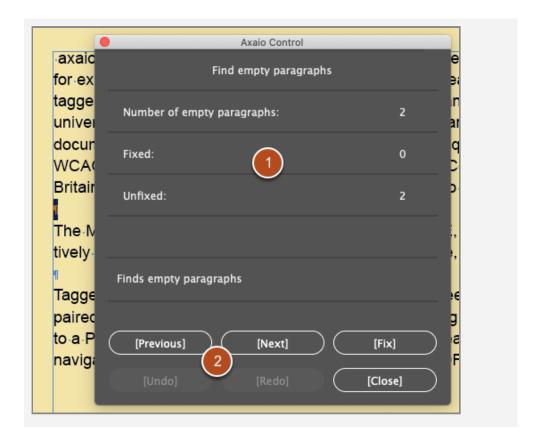


When this function is called, the MadeToTag Problem Locator window will open at *Find basic paragraph styles*.

- 1. The window shows the *Number of basic paragraph styles* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate empty paragraphs

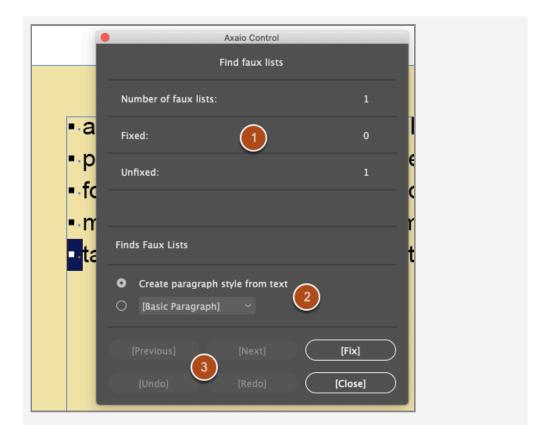


When this function is called, the MadeToTag Problem Locator window will open at *Find empty paragraphs*.

- 1. The window shows the *Number of empty paragraphs* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate faux lists

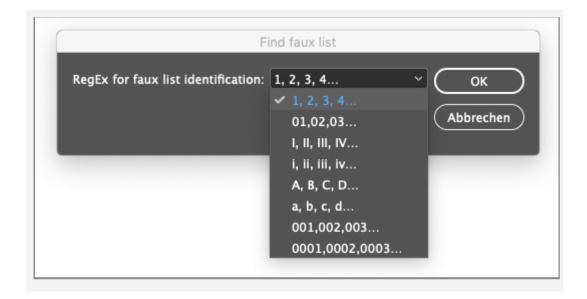


When this function is called, the MadeToTag Problem Locator window will open at *Find faux lists*.

- 1. The window shows the *Number of faux lists* as well as the number of *Fixed* and *Unfixed* items.
- 2. For each item found, you can either *create a new para-graph style* or use a *paragraph style from the list* of styles already in use.
- 3. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.

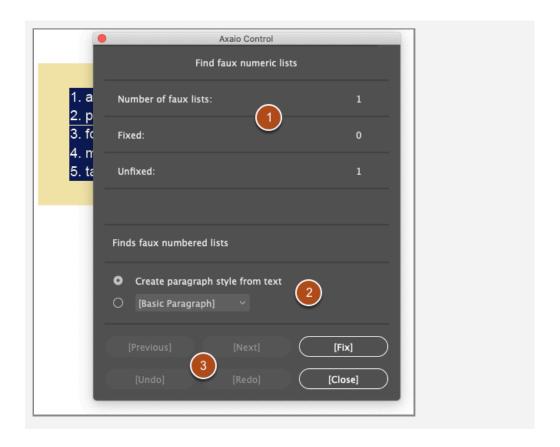


Locate faux numbered lists



When this function is called, the *Find faux list* window will open.

In the drop-down menu you can select which list type to search for.



Click **OK** to open the **Find faux numeric lists** menu.

- 1. The window shows the *Number of faux lists* as well as the number of *Fixed* and *Unfixed* items.
- 2. For each item found, you can either *create a new para-graph style* or use a *paragraph style from the list* of styles already in use.
- 3. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate paragraphs without style



When this function is called, the MadeToTag Problem Locator window will open at *Find paragraphs with no stylesheet assigned*.

- 1. The window shows the *Number of paragraphs with no stylesheet assigned* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



Locate insufficient visual contrast



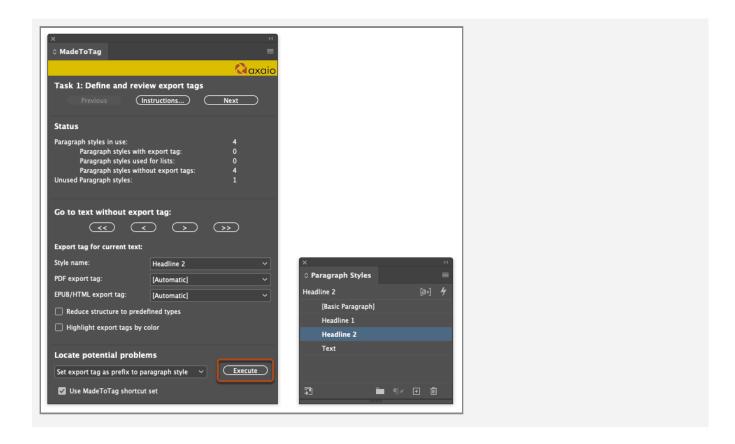
Insufficient contrast makes it harder for readers with visual impairments to identify content. An example of insufficient visual contrast would be light gray text on a white background.

When this function is called, the MadeToTag Problem Locator window will open at *ContrastChecker*.

- 1. The window shows the *Number of objects with insufficient visual contrast* as well as the number of *Fixed* and *Unfixed* items.
- 2. The interface at the bottom allows you to *navigate*, *Fix* items, *Undo* and *Redo* actions and *close* the window.



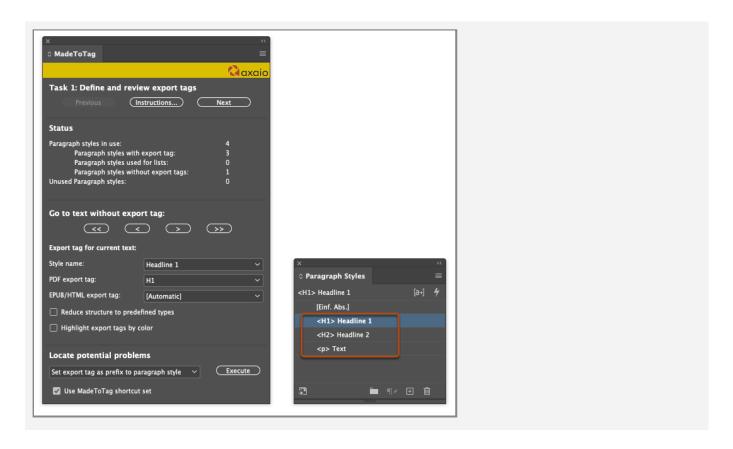
Set export tag as prefix to paragraph style



Select Set export tag as prefix to paragraph style and click Execute...

66

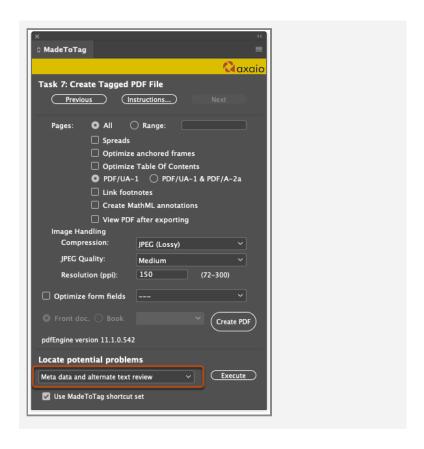




... to add **export tags as a prefix** which will be either assigned directly through the paragraph style or through MadeToTag.

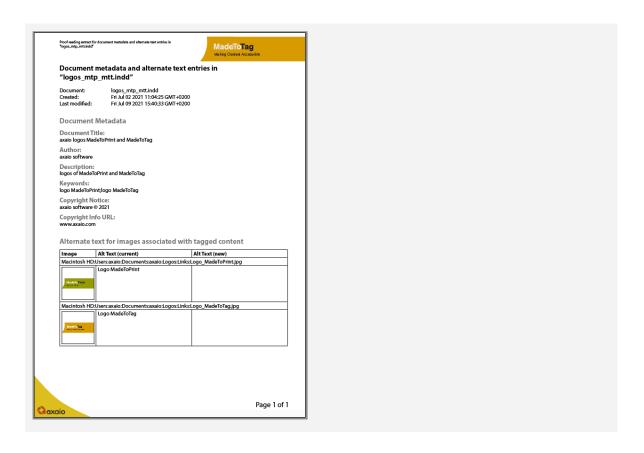


Meta data and alternate text review



Select *Meta data and alternate text review* and click *Execute...*

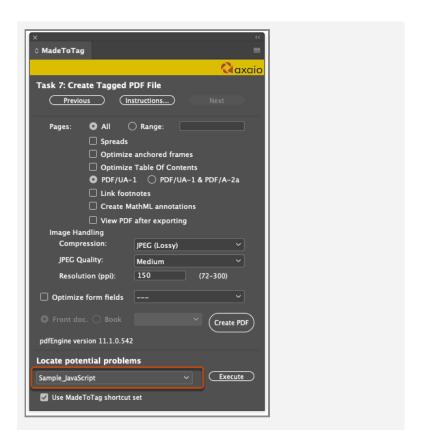




... to see an **overview** of the **meta data** in the document and **alternate text** for imagesin **a new InDesign document**.



JavaScript

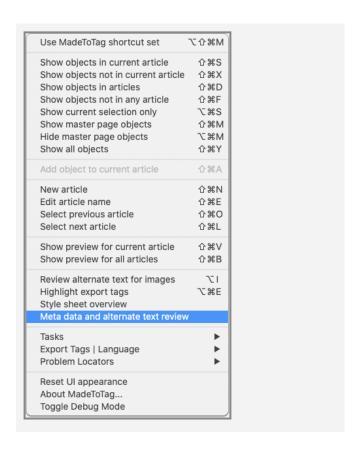


The *JavaScript...* entry lets you execute an example script or integrate and execute a user-defined JavaScript for user-specific actions.



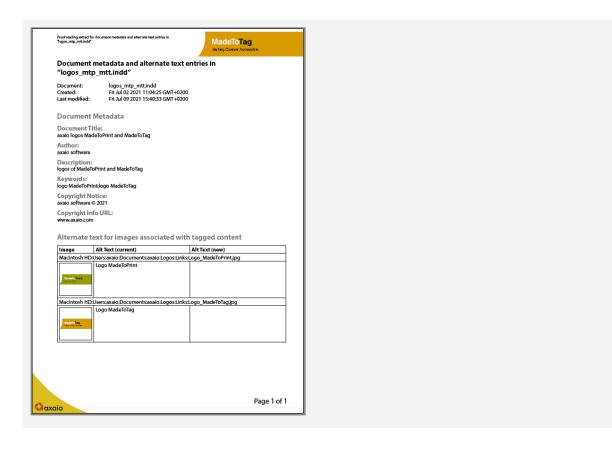
Review meta data and alternate text for approval

To simplify communication relating to tagged documents with other users during the workflow, MadeToTag provides the *Meta data and alternate text review* function. This can be useful for approval, corrections and other purposes.



This option can be found in the MadeToTag flyout menu.

MadeToTag generates an overview of the meta data and alternate text for images within the document which will be shown as a list in a new InDesign document.



This document can be forwarded directly, as a PDF, or as a printout.

Note that the alternate text for images function takes into account whether an article is anchored or otherwise associated.

Customizing

MadeToTag uses an InDesign template to create this overview.

From MadeToTag version 2.8.124 onwards, you can adapt the template to have your own color scheme, translate it, match your Corporate Identity, or having a different format/paragraph styles. The default template is installed into the following folder:

 Mac: \$InDesign_Plug-ins_folder\$/axaio software/MadeTo-Tag.InDesignPlugin/Versions/A/Resources/JS/Walkers/ template



 Win: \$InDesign_Plug-ins_folder\$\axaio software\MadeTo-Tag\JS\Walkers\template\

The name of the template file is **Metadata and alt text review TEMPLATE.indt**. You can also download it here:



Metadata and alt text review TEMPLATE.indt



The MadeToTag installer will overwrite this file every time you install a new version. To keep your changes, you can rename the file (or create a copy) with the name Metadata and alt text review CUSTOM.indt and save it into one of the following library folders.

MadeToTag will look for the template (either Metadata and alt text review CUSTOM.indt or Metadata and alt text review TEMPLATE.indt) in one of the following folders (if those folders do not exists, you can create them).

- User Data: ~/Library (Mac) resp. %APPDATA%(Win)
 - (Mac) ~/Library/Application Support/axaio software/ MadeToTag/Summary and review templates/
 - (Win) %APPDATA%\axaio software\MadeToTag\Summary and review templates\
- System Data: /Library (Mac) resp. %PROGRAMDA-TA% (Win)
 - (Mac) /Library/Application Support/axaio software/ MadeToTag/Summary and review templates/
 - (Win) %PROGRAMDATA%\axaio software\MadeToTag\ Summary and review templates\
- Plug-In folder (do not modify)
 - (Mac) /Applications/Adobe InDesign 2023/Plug-Ins/ axaio software/MadeToTag.InDesignPlugin/Versions/ A/Resources/JS/Walkers/template/
 - (Win) C:\Program Files\Adobe\Adobe InDesign 2023\ Plug-Ins\axaio software\MadeToTag\JS\Walkers\template\



Wherever it finds the InDesign template first, it will use it.

Modifying the template

To modify the template, open the InDesign template (.indt) in InDesign. You can now modify it as you like, just like any other InDesign file. You can use your own paragraph styles, modify colors and images, modify page size. To work properly, MadeToTag relies on the existence of the following three paragraph styles:

- 1. "Table column head"
 - used for the column headers in the image table
- 2. "Table content cell image file name"
 - used for the file name of the image
- 3. "Table content cell alt text"
 - used for the current alternate text of the image

You can freely modify those, but the name must be kept!

Additionally, MadeToTag supports some Variables to be used in the template. They will be replaced by the values of the current document.

- <DOCUMENTNAME>
 - The document name of the document for which the review is created
- <TEMPLATEPATH>
 - Path to the template used, can be good for debugging
- <METADATA[...]>
 - Will be replaced by the meta data value of the original document. Possible meta data variables are:
 - <METADATA[author]>
 - <METADATA[copyrightInfoURL]>
 - <METADATA[copyrightNotice]>
 - <METADATA[description]>
 - <METADATA[documentTitle]>
 - <METADATA[jobName]>
 - <METADATA[creationDate]>
 - <METADATA[modificationDate]>
 - <METADATA[copyrightStatus]>



- <METADATA[keywords]>
- <IMAGECOUNT>
 - Number of images associated with articles in the document
- < IMAGETABLE>
 - will be replaced with an tabel containing all the images.

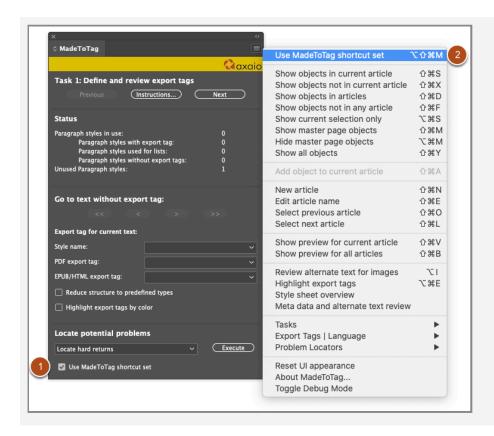
After you finished editing, save the file as InDesign Template (InDesign -> Save As... -> InDesign-Template) and the new template will be used.

The text frame with the <IMAGETABLE> should be the primary text frame! MadeToTag will then create new pages to fit all the images.



Work faster with keyboard shortcuts / the flyout menu

The flyout menu lets you control all important MadeToTag tasks.



Even better, these tasks can be executed using **keyboard shortcuts** if this option is enabled (either using the checkbox in the main window (1) or the first entry in the flyout menu (2)).



Note: If MadeToTag keyboard shortcuts are enabled, any other keyboard shortcuts in Adobe In-Design will be temporarily disabled.

Functions that can be executed via keyboard



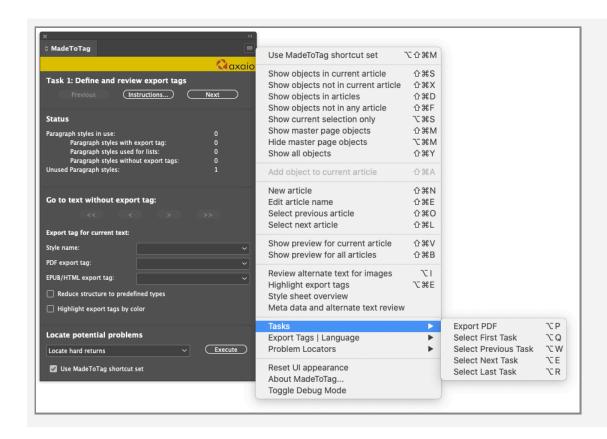
shortcuts



- 1. At the top, you can *enable keyboard shortcuts*. (Option-Shift-Command-M)
- 2. This section relates to **object functions**:
 - Show objects in current article (Shift-Command-S)
 - Show objects not in current article (Shift-Command-X)
 - Show objects in articles (Shift-Command-D)
 - Show objects not in any article (Shift-Command-F)
 - Show current selection only (Option-Command-S)
 - Show master page objects (Shift-Command-M)
 - Hide master page objects (Option-Command-M)
 - Show all objects (Shift-Command-Y)
- 3. This section relates to articles:
 - You can Add an object to the current article. (Shift-Command-A)
 - *New article* (Shift-Command-N)
 - Edit article name(Shift-Command-E)
 - Select previous article(Shift-Command-O)



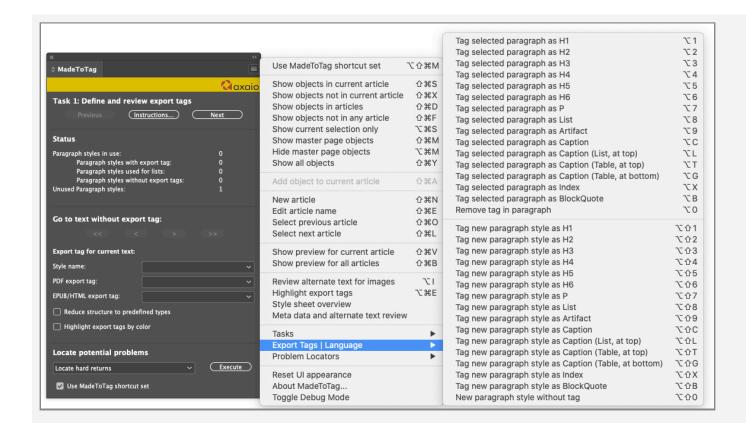
- Select next article(Shift-Command-L)
- 4. This selection relates to previews:
 - Show preview for current article (Shift-Command-V)
 - Show preview for all articles (Shift-Command-B)
- 5. This section relates to a range of tasks:
 - Review alternate text for images (Option-I)
 - Highlight export tags(Option-Command-E)
 - Style sheet overview (No keyboard shortcut)
 - Meta data and alternate text review (No keyboard shortcut)



The Tasks section covers the following functions:

- Export PDF (Option-P)
- Select First Task (Option-Q)
- Select Previous Task (Option-W)
- Select Next Task (Option-E)
- Select Last Task (Option-R)



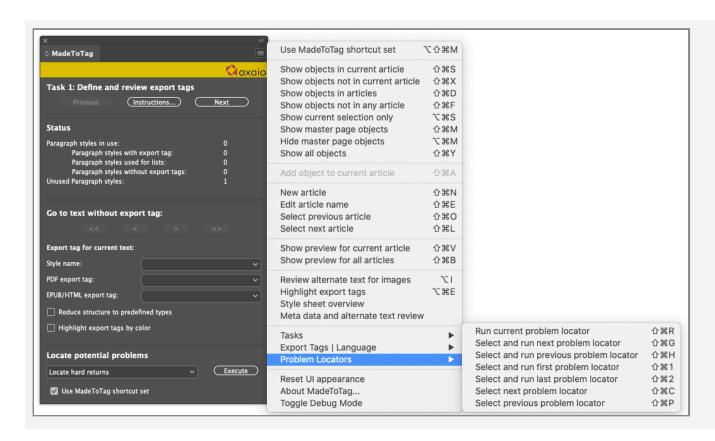


The Export Tags | Language section covers the following functions:

- Tag selected paragraph as H1 ... H6 (Option-1 ... Option-6)
- Tag selected paragraph as P (Option-7)
- Tag selected paragraph as List (Option-8)
- Tag selected paragraph as Artifact (Option-9)
- Tag selected paragraph as Caption (Option-C)
- Tag selected paragraph as Caption (List, at top) (Option-L)
- Tag selected paragraph as Caption (Table, at top) (Option-T)
- Tag selected paragraph as Caption (Table, at bottom) (Option-G)
- Tag selected paragraph as Index (Option-X)
- Tag selected paragraph as BlockQuote (Option-B)
- Remove tag in paragraph (Option-0)
- Tag new paragraph style as H1 ... H6 (Option-Shift-1 ... Option-Shift-6)
- Tag new paragraph style as P (Option-Shift-7)
- Tag new paragraph style as List (Option-Shift-8)



- Tag new paragraph style as Artifact (Option-Shift-9)
- Tag new paragraph style as Caption (Option-Shift-C)
- Tag new paragraph style as Caption (List, at top) (Option-Shift-L)
- Tag new paragraph style as Caption (Table, at top) (Option-Shift-T)
- Tag new paragraph style as Caption (Table, at bottom)
 (Option-Shift-G)
- Tag new paragraph style as Index (Option-Shift-X)
- Tag new paragraph style as BlockQuote (Option-Shift-B)
- New paragraph style without tag (Option-Shift-0)



The Problem Locators section covers the following functions:

- Run current problem locator (Shift-Command-R)
- Select and run next problem locator (Shift-Command-G)
- Select and run previous problem locator (Shift-Command-H)
- Select and run first problem locator (Shift-Command-1)
- Select and run last problem locator (Shift-Command-2)
- Select next problem locator (Shift-Command-C)
- Select previous problem locator (Shift-Command-P)



Custom keyboard shortcuts

Keyboard shortcuts can be edited via the InDesign option for keyboard shortcuts (*Edit -> Keyboard Shortcuts... -> Product Area*: *axaio MadeToTag*). Items that currently do not have a keyboard shortcut or even existing ones can have a new keyboard shortcut assigned.



MadeToTag Video Tutorials





Create export presets in MadeToTag

In this tutorial, you will learn how to create individual export presets for the PDF export in MadeToTag task 7 so that you can save them for various repetitive projects.

https://youtu.be/De3SflK_zwE



Set correct reading order with articles in MadeToTag

This video explains how to determine the logical reading order with MadeToTag. You will see how the article assignment in MadeToTag Task 2 "Structure content in articles" is made.

https://youtu.be/xyMPBxVqO0o



A quick MadeToTag overview

This video gives you a quick overview about MadeToTag's features.

https://youtu.be/lBhFqZgmQWk



The 7 MadeToTag tasks to get your accessibility project done

This video gives an overview of the seven MadeToTag tasks in order to export a PDF/UA document from Adobe InDesign.

https://youtu.be/9Qu4htGSSil



Tagging InDesign tables with MadeToTag

We've created a series of short video tutorials that explain the functionality and benefits of the table tagging in axaio MadeToTag.

Overview table function

https://www.youtube.com/watch?v=Wp1fSFYDKmc

Tag simple tables

https://www.youtube.com/watch?v=lNcZAkcGw0U

Quick headers for complex tables

https://www.youtube.com/watch?v=owvZCSo3Rd4

Smart headers feature for very complex tables

https://www.youtube.com/watch?v=1CQw89PTP5s

Layout tables (tables that are no tables)

https://www.youtube.com/watch?v=n4r9Dnbi2j4



How interactive forms can be created in InDesign using MadeToTag

An overview presentation about the creation of interactive forms in InDesign using MadeToTag.

https://www.youtube.com/watch?v=cn7OUssTbtc



Advantages of using MadeToTag for generating accessible PDF documents

In this video Klaas Posselt talks about why accessibility is the future and how MadeToTag helps to manage this challenge.

Accessible PDF documents, also called tagged PDFs, are often requested by law for many kinds of documents. Besides that, accessible PDFs give a huge additional benefit to all users.

During this session you will learn about these benefits, but also about the basics and you will see an interesting project example on how accessible PDF documents were generated at the "German Federation of Journalists" with axaio MadeTo-Tag.

https://www.youtube.com/watch?v=ZIZuJQkwL4k



Creating PDF forms with MadeToTag

This webinar explains, how MadeToTag makes editing documents and form fields more comfortable, faster and thus more efficient, demonstrating the MadeToTag feature "form field optimization".

https://www.youtube.com/watch?v=-4kf0n6MWzk



Creating a flyer as accessible PDF with MadeToTag

In this video you can learn how to generate an accessible PDF document with help of MadeToTag, based on a flyer example.

https://www.youtube.com/watch?v=DcqXAUeMshE?list=PLf-GR40SWnakin9_KKsTEQ__nWi8cut6WI



Create accessible PDFs with Adobe InDesign CC and axaio MadeToTag

This sequence of screen recordings explains and demonstrates how to create accessible PDF using Adobe InDesign CC and axaio MadeToTag. The focus of the 7 steps of this tutorial is on the following five core principles:

- semantic role
- · reading order
- alternative text for images and graphics
- contrast
- metadata

Obviously a recording of a two hour introductory session does not cover all details that are relevant when the goal is a 100% accessible and fully PDF/UA conforming PDF document. Nevertheless, for a surprisingly huge portion of documents following the five core principles listed above will result in almost perfectly accessible PDF documents.

Part 1: Five core principles

https://www.youtube.com/watch?v=8RU1tOxbhtk

Part 2: Export tags

https://www.youtube.com/watch?v=Fup_ukjjqEU

Part 3: Reading order

https://www.youtube.com/watch?v=z0TMfoqQjsM

Part 4: Alternative text

https://www.youtube.com/watch?v=z0TMfogQjsM



Part 5: Contrast

https://www.youtube.com/watch?v=H6pLUbD-pjQ

Part 6: Metadata

https://www.youtube.com/watch?v=B_7C1PdNHhk

Part 7: Export to tagged PDF

https://www.youtube.com/watch?v=ZziQW6d0nGQ

Part 8: Checking the exported PDF

https://www.youtube.com/watch?v=y5XKXBd5SKk



Troubleshooting





Unable to access post processing engine

For proper creation of PDF/UA, MadeToTag relies on a pdf post processing engine. It is installed along with MadeToTag and placed next to the Plug-In. MadeToTag uses this pdf engine to fix a couple of issues in the PDF generated by InDesign, as well as applying custom features like the table tagging.

In rare cases, MadeToTag cannot access or execute this post processing engine. An indication for that is that in <u>Task 7</u> the version number of the post processing engine will only display "pdfEngine version" (without the actual version number). In such cases, when trying to export a PDF/UA, you will either see a warning message dialog ("There seems to be a problem with accessing the post-processing engine...") or other error messages ("Warning: Internal error...").

How to solve the issue

To solve this issue, in most cases it helps to reinstall MadeTo-Tag with a few additional steps to ensure a correct installations:

- Download the latest version of the MadeToTag installer from https://www.axaio.com/doku.php/en:down-load#madetotag. Make sure to select the correct InDesign version.
- Quit InDesign
- Restart the computer
- Remove the "axaio software" folder from the InDesign Plug-Ins folder.
- Run the installer and follow instructions.
- · Restart InDesign.

Now, in Task 7, the full version number should be displayed, e.g. as "pdfEngine version 13.1.0.587" (note that the actual version number can be different).

If you still see the same issues, please contact support.