EngageOne Accessibility
Version 1.0.3

User Guide
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1 - About This Guide

This is a user guide for installing, running and using EngageOne Accessibility software solution. By following the procedures given in this guide you will be able to:

• Create Accessibility projects
• Define Locators and Accessibility tags
• Define page and document structures
• Use the Accessibility Monitor to process projects and create accessible PDFs.

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Version History

<table>
<thead>
<tr>
<th>Release</th>
<th>Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>November 2016</td>
<td>Initial Version</td>
</tr>
<tr>
<td>1.0.3</td>
<td>July 2017</td>
<td>General Updates</td>
</tr>
</tbody>
</table>

Related Documentation

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Date</th>
<th>Comments</th>
</tr>
</thead>
</table>
PDF/UA (PDF/Universal Accessibility) is the informal name for ISO 14289. PDF/UA uses the PDF format to enable user accessibility by, for example, tagging the “real content” in logical reading order, tagging to represent the document’s semantic structures (headings, lists, tables, etc.) and including alternative text descriptions for meaningful graphics.

Governments are increasingly requiring their agencies and contractors to deliver accessible products and services. From websites to forms, regulations, product manuals and reports, documents in the US Federal government must comply with Section 508 accessibility regulations, in effect since 2001. Several state governments have similar laws, as do governments in Canada, various EU member states, Australia and elsewhere.

EngageOne Accessibility has been created to process individual PDF documents, or mail pieces, according to a set of rules. Using the structure defined in the Accessibility Designer, it can process any number of similar structured PDF documents and convert them to accessible PDF documents.
EngageOne Accessibility Workflow

User defines a set of rules, known as a tagging template, which are then published to the Accessibility Monitor.
Accessibility Components

The Accessibility Solution has two parts:

**Accessibility Designer**

Defines the document tagging rules that create the logical structure. This is used for specifying supplementary information, for example, document title, language and alternate descriptions for elements required to produced accessible PDF files. This information is stored within a rules file (based on Output Enrichment’s scripting language) which is then processed by monitoring service to convert PDFs to their accessible equivalents.

**Accessibility Monitor**

A production environment in which to create accessible PDFs from a batch of PDFs with the same structure. The rules file created with the Accessibility Designer is used as input for the tagging process. Projects are published/deployed to the Accessibility Monitor via Accessibility Designer.

Accessibility Designer

Defines the document tagging rules that create the logical structure. This is used for specifying supplementary information, for example, document title, language and alternate descriptions for elements required to produced accessible PDF files. This information is stored within a rules file (based on Output Enrichment’s scripting language) which is then processed by monitoring service to convert PDFs to their accessible equivalents.
Accessibility window

On starting Accessibility Designer, the welcome screen is displayed, as follows:

The main body of the window is empty as no project has been opened.

The left-hand panel gives a list of recently created/accessed projects, you can click one of these to open it. The bottom of the left-hand panel has the following tools:

1. Opens a new project.

2. Opens a dialog from which you can navigate to and select an existing project. Project files have an .apraj extension, these files are presented for selection. Once you have selected a project, the Accessibility Designer processes the input PDF file and loads the rules, locators and other project settings. The design environment is then displayed.

3. Manage your applications on a server.
Once a new or existing project is opened, the Design Environment is displayed, shown below:

This has the following components:

**Floating panels**

The Designer has four floating panels:

**Rules Editor**

Provides an area in which to define/edit tagging rules. It has a hierarchical tree structure. Each tag item has a parent and, depending on tag type, can have child tags. A top level parent branch provides the root of the logical structure tree. In addition, the Rules Editor defines the reading order of the PDF.

See Defining Rules on page 29

**Locators**

Used to define locators. Locator are similar to Boolean variables. These search the content of a specified window of interest for a string of text. If the string is found its value is set to true, if not, the value is set to false.

See Defining Locators on page 27
Properties

Provides an area in which supplementary information can be specified for previously tagged elements. For a PDF document to be accessible it needs to conform to a number of requirements, for example, alternate text for all images. Alternate text and languages can be added here.

See Defining Properties on page 40

Page Structure

Lists the images, text, vectors and links on the displayed PDF. This is used to identify the items by displaying the boundary of the selected item within the PDF. This is an aid to defining tagging rules correctly.

See Page Structure on page 41

Designer Toolbar

The Designer toolbar has the following tools:

- Opens a new project.
- Opens a dialog from which you can navigate to and select an existing project.
- Saves the current project. If the project has not been previously saved, you need to give it a name and specify a location in which to save it.
- Saves the project with a different name or to a different location.
- Processes the PDF file with the tagging rules to create an accessible PDF. This is in the beginning of the process for validating the project’s rule. You can save this PDF and use 3rd Party Accessibility checking tools to verify the output PDF file. You may need to repeat this operation until all the tagging rules have been defined correctly.
- Closes the current project and returns you to the welcome screen. If there were any unsaved changes, you are prompted to save or discard them.
### Page Navigation Controls
Navigate through the pages using the following controls:

- Move to the previous page. This is disabled if you are currently on the first page.
- Type in the required page number and click **Enter** to go to that page.
- The current page number and the total number of pages.
- Move to the next page. This is disabled if you are currently on the last page.

### View Controls
Use the following tools to control your view in the Designer:

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon1.png" alt="Rules Editor and Locators" /></td>
<td>Toggles between showing and hiding the <strong>Rules Editor</strong> and <strong>Locators</strong> panels.</td>
</tr>
<tr>
<td><img src="icon2.png" alt="Property and Page Structure" /></td>
<td>Toggles between showing and hiding the <strong>Property</strong> and <strong>Page Structure</strong> panels.</td>
</tr>
<tr>
<td><img src="icon3.png" alt="Rules Editor" /></td>
<td>Toggles between showing and hiding the <strong>Rules Editor</strong> panel.</td>
</tr>
<tr>
<td><img src="icon4.png" alt="Page Structure" /></td>
<td>Toggles between showing and hiding the <strong>Page Structure</strong> panel.</td>
</tr>
<tr>
<td><img src="icon5.png" alt="Zoom In" /></td>
<td>Zoom in.</td>
</tr>
<tr>
<td><img src="icon6.png" alt="Zoom Out" /></td>
<td>Zoom out.</td>
</tr>
<tr>
<td><img src="icon7.png" alt="Show Product Information" /></td>
<td>Show product information.</td>
</tr>
<tr>
<td><img src="icon8.png" alt="Connect to Accessibility Service" /></td>
<td>Connect to the Accessibility Service. This opens a dialog in which to browse projects registered with this service. The dialog allows you to connect to a service installed on any system, not just your local system. You can, therefore, manage projects on any other linked system.</td>
</tr>
</tbody>
</table>
Accessibility Monitor

The Accessibility Monitor is a production environment in which to create accessible PDFs from a batch of PDFs with the same structure. The rules file created with the Accessibility Designer is used as input for the tagging process. Projects are published/deployed to the Accessibility Monitor via Accessibility Designer.

See Using the Accessibility Monitor on page 43

Application Manager window

The Accessibility Manager window, shown below, is opened by clicking in the Accessibility Designer toolbar.

The main body of the window is empty as no application has been published. The left-hand panel gives a list of the ten most recently accessed servers. The right-hand panel gives a list of the ten most recently published applications.

The Accessibility Manager window has the following tools:

- Add a server.
- Remove this server.
- Publish an application/project to the service.
3 - Installation

This section describes how to install Accessibility Solution, giving the basic system requirements.

**Note:** EngageOne Accessibility should not be installed on a mapped drive (Network drive/shared drive). If you attempt this, the solution will not work.

**Note:** Network discovery and File sharing must be turned on in the Designer and Monitor (server) machines. See *Turning On Network Discovery* on page 18.

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<th>Section</th>
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<td>Installation</td>
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<tr>
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<td>Turning On Network Discovery</td>
<td>18</td>
</tr>
</tbody>
</table>
System Requirements

The following minimum system configuration is required:

Operating System

One of the following:
• Windows 7
• Windows 8
• Windows 10
• Windows Server 2008
• Windows Server 2012
• Windows Server 2016

Processing

1.6 GHz CPU or higher
4Gb RAM

Free Disk Space

The system needs a minimum of 300 Mb of free disk space.

Installation

To install EngageOne Accessibility, download the installer from the Pitney Bowes e-store for your region.

The install file may be provided as an archive or zip file and may need to be extracted before use.

The installer file name is:
EngageOneAccessibility1.0.exe

To install EngageOne Accessibility, follow the procedure below:

1. Double-click on the install file.
2. If a dialog is shown asking when you want this app to make changes to your PC. Click OK.
3. In the **Welcome** window, shown below, click **Next**.

![Welcome window](image)

4. In the **License Agreement** window, shown below, select **I accept the terms in the license agreement** and click **Next**.

![License agreement window](image)
5. In the **Destination Folder** window, shown below, either:
   - Click **Change** to specify a new destination and then click **OK**, or
   - Click **Next** to accept the default.

6. In the **Ready to Install the Program** window, shown below, click **Install**.
7. In the **InstallShield Wizard Completed** window, shown below, click **Finish**.

The software is now installed, you need a license in order to use it. The next step is to configure servers before you can use it.

### Installing the License

You can only use EngageOne Accessibility with a license. The license file, `license.dat` is provided by Pitney Bowes once you have purchased the software. This must be saved in EngageOne Accessibility's `System\License` folder, by default this is:

```
C:\EngageOneAccessibility1.0\system\License
```

### Turning On Network Discovery

In order to enable the Network Discovery and file sharing on a PC on a domain or workgroup, ensure the following services are enabled.

- DNS Client
- Function Discovery Resource Publication
- SSDP Discovery
- UPnP Device Host

Then follow the procedure below:

1. Open the **Control** panel, and click **Network and Internet**.
The **Network and Internet** window, shown below, is opened.

![Network and Internet window](image1)

2. In the left-hand panel, click **Change advanced sharing settings**.

Windows creates separate network profiles for each of your networks, for example, Home or Work and Domain.

![Network Sharing Center](image2)
3. Under the profile you wish to change, scroll to the **Network discovery** section and click **Turn on network discovery**.

4. Scroll to **File and printer sharing** and click **Turn on file and printer sharing**.

5. Click **Save Changes**.
4 - Getting Started

This section describes how to start Accessibility Solution.

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Starting Accessibility Designer

Start Accessibility Designer either by:

- Double-click the Accessibility Designer shortcut on your desktop, shown above, or
- Navigate to the following from the Start menu:

  Start | All Programs | Pitney Bowes | EngageOne Accessibility 1.0 | Accessibility Designer

Starting Accessibility Monitor

The Accessibility Monitor is a service installed with the rest of the solution. There is no separate shortcut for this service; however, the icon in system tray can be used to start and stop it. The Accessibility Monitor is started by default, in normal operation, you should not need to stop or restart it.

  Note:
  If the system tray icon is not visible, navigate to the following:

  Task bar properties | Notifications

  Ensure the Accessibility Monitor icon is set as Visible: Always). Right-click this icon to open a Managing Service menu.

Configuring Servers

  Warning: The server (Accessibility Monitor) must be on the same domain as the Accessibility Designer. If it is no, no connection between the two can be made.

In order to be able to publish your projects to make them available to other users, you need to configure at least one server. To do this, follow the steps below:

  1. Either:

     - From within the Welcome window, shown below, click , or,
     - From within the Accessibility Designer window, with an open project click .
2. In the Server Management window, shown below, click New.

3. A text field is displayed. Click within it and type the IP address or hostname of the machine on which the Accessibility Service is installed.

4. Click .
This attempts to connect to the Accessibility Monitor.

If successful, the message below is displayed and the server name appears in the left-hand panel.

![Successfully connected to the server: 19.229.66.98](image.png)

**Note:** This message disappears automatically, but you can click ![to dismiss it.](image.png)

If unsuccessful, an error is displayed. In this case, ensure that you have the correct IP address/hostname and that the server is currently online before clicking ![again.

The software is now ready to use.
5 - Using the Accessibility Designer

This section describes how to use Accessibility Designer.

It provides you with the ability to:

• Create a new project
• Open a recent project
• Open an existing project

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Creating a New Project

To create a new project, follow the procedure, below:

1. In the Welcome window, from the left-hand panel click .
2. In the displayed dialog, select the required PDF data file and click Open.

   Note: The PDF must not be secured in any way.

The design environment is opened displaying the selected PDF. This is shown below:

3. Use the Locators panel to search the content in a defined window of interest for a string. If search string is found in the associated window of interest, then its value is true. Locators are used when defining Section Rules.

   The procedure for doing this is described in Defining Locators on page 27 and Defining Properties on page 40.

4. Use the Rules Editor panel to define tagging rules. Elements in the PDF are "tagged" according to their type, for example, paragraphs, figures, tables, etc. Each tag has at least one Property, defined in the Property panel.

   You need to work through all the elements in the PDF assigning a rules to each.

   The procedure for doing this is described in Defining Rules on page 29.
5. When you have created all the rules you need, set the reading order of the elements in the PDF by specifying the order in which their rules appear in the Rules Editor. The tools for doing this are described in Defining Rules on page 29.

6. Save the project by clicking Save. a) This opens the Save As dialog. Specify a name for the project. Project files have an .aprov extension.
   b) Navigate to the location in which you wish to save the project.
   c) Click Save.

7. When you are happy with the project click Save. This processes the PDF file with the tagging rules to create an accessible PDF. This is in the beginning of the process for validating the project’s rule. You can save this PDF and use 3rd Party Accessibility checking tools to verify the output PDF file. You may need to add or correct tagging rules and repeat this operation until all the tagging rules have been defined correctly.

Defining Locators

Locators define conditional tagging rules, for example, a window of interest may be defined as a table but this might make sense only on first page of the PDF, therefore, the tagging rule can have an associated locator which restricts when that tagging rule is enforced. See Defining Rules on page 29. Locators are similar to Boolean variables. These search the content of a specified window of interest for a string of text. If the string is found its value is set to true, if not, the value is set to false.

Note: Locators must be created before creating the rules which will reference them.

The Locators panel is shown below:

![Locators Panel](image)

To define a locator, follow the procedure, below:

1. Right-click within the Locators panel and select Add Locator from the context menu.
2. Use the cursor to define a rectangular location in the PDF. The following dialog is displayed:

![Edit Locator dialog](image)

3. A unique **Locator Name** is automatically assigned. If required, change this by clicking within the text box and typing a new name.

   **Note:** If you specify a name which is already in use, as warning is displayed and you are unable to continue with this process until this has been addressed.

4. In **Search String** type the text for which you wish to search.
5. Click **OK**.

This is added to the **Locators** panel and may be used when creating rules.
Defining Rules

The **Rules Editor** provides an area in which to define/edit tagging rules. It has a hierarchical tree structure. Each tag item has a parent and, depending on tag type, can have child tags. A top level parent branch provides the root of the logical structure tree. In addition, the **Rules Editor** defines the reading order of the PDF.

The **Rules Editor** is shown below:

This panel has the following controls:

- ![Undock](image) This undocks an anchored panel, allowing it to be moved.
- ![Redock](image) This re-docks a floating panel.
- ![Close](image) Closes the panel.
- ![Delete](image) Deletes the currently selected rule.
- ![Move Up](image) Moves the currently selected rule upwards in the hierarchy. Click repeatedly to move to the required position.
- ![Move Down](image) Moves the currently selected rule downwards in the hierarchy. Click repeatedly to move to the required position.
- ![Open](image) Opens this branch in the hierarchy to display the child rules.
- ![Close](image) Closes this branch in the hierarchy.

**Note:** If there is no content in the area defined for a rule, the rule it is skipped.

**Supported Tags**

Below is a list of supported tag types:

<table>
<thead>
<tr>
<th>Tag Type</th>
<th>Properties</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section</td>
<td>Language</td>
<td>Used for grouping related elements on the page. These are the highest level elements, only <strong>Sections</strong> can be defined directly under the parent branch. Child Tags: Paragraph, Figure, Table, List, Heading, Caption</td>
</tr>
<tr>
<td>Tag Type</td>
<td>Properties</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Paragraph</td>
<td>Language</td>
<td>Defines a group of sentences describing a single idea. Paragraph tags can only be added to Sections. Paragraph tags need to be added to the Section and located inside the parent section of the PDF.</td>
</tr>
<tr>
<td></td>
<td>Expanded Text</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Link</td>
<td>The Expanded Text property can be used to describe abbreviations or acronyms in the paragraph.</td>
</tr>
<tr>
<td></td>
<td>Span</td>
<td></td>
</tr>
<tr>
<td>Figure</td>
<td>Language</td>
<td>This is an image, vector drawing or a group of images/vectors. It can be added to Sections only.</td>
</tr>
<tr>
<td></td>
<td>Alternate Text</td>
<td></td>
</tr>
<tr>
<td>Table</td>
<td>Language</td>
<td>Two dimensional data given in a row and column structure. It can be added to Sections only. There are two types of table, Table and Static Table. The Table attempts to automatically detect the table structure by defining cell boundaries, saving time by avoiding the need to define each cell individually.</td>
</tr>
<tr>
<td>List Tag</td>
<td>Language</td>
<td>Tags ordered/unordered list structures. Each item within the list contains a label and a body. A label is a bullet, name or number which separates one item in the list from another.</td>
</tr>
<tr>
<td>Heading Tag</td>
<td>Language</td>
<td>These are section titles within the PDF.</td>
</tr>
<tr>
<td></td>
<td>Expanded text</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Heading Type</td>
<td></td>
</tr>
<tr>
<td>Caption Tag</td>
<td>Language</td>
<td>An identifiers for figures, tables or lists. All captions accompanying a figure, table, list should be marked as Caption.</td>
</tr>
<tr>
<td></td>
<td>Expanded text</td>
<td></td>
</tr>
<tr>
<td>Span Tag</td>
<td>Language</td>
<td>Breaks a paragraph into segments of text especially when it contains acronyms, abbreviation or links in it.</td>
</tr>
<tr>
<td></td>
<td>Expanded text</td>
<td></td>
</tr>
<tr>
<td>Link Tag</td>
<td>Language</td>
<td>Marks link annotations and cross references.</td>
</tr>
<tr>
<td></td>
<td>Expanded text</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Alternate text</td>
<td></td>
</tr>
</tbody>
</table>

**Defining Sections**

Sections are used for grouping related elements on the page. These are the highest level elements, only Sections can be defined directly under the parent branch. This tag has only one property, Language, used where the elements defined are in a different language from the main.

Child Tags: Paragraph, Figure, Table, List, Heading, Caption

To define this rule, follow the procedure, below:

1. Right-click within the Rules Editor and select Add Section from the context menu.
2. Use the cursor to select a location in the PDF.

The following dialog is displayed:
3. A **Section Name** is automatically assigned. If required, change this by clicking within the text box and typing a new name.

4. If required click **Add locator** to attach a location-based condition.

   As a result, the item only appears on a page if all the associated Locator conditions are true.

5. If required, add further locators.

6. Click **OK**.

   This rule is added to the Tag hierarchy in the **Rules Editor**.

7. If required, set the **Language** option in the **Property** panel.

**Defining Paragraphs**

A Paragraph a group of sentences describing a single idea. Paragraph tags can only be added to Sections. Paragraph tags need to be added to the Section and located inside the parent section of the PDF.

This tags has only one property, **Language**, used where the elements defined are in a different language from the main.

The Expanded Text property can be used to describe abbreviations or acronyms in the paragraph.

To define this rule, follow the procedure, below:

1. Right-click the required Section and select **Mark Paragraph** from the context menu.

2. Use the cursor to create a border around the paragraph inside the parent section.

   This rule is added to the Tag hierarchy for the section.

3. A name is automatically assigned. To type in a new name either:

   • Press **F2**, or
   • Click twice (not double-click) the new paragraph rule

4. If required, set the **Language** option in the **Property** panel.

   This only needs to be set if the language of the paragraph differs from the language used in the remainder of the PDF.
5. If required, set the **Expanded Text** option in the **Property** panel to define abbreviations or acronyms.

**Defining Figures**

A Figure is an image, vector drawing or a group of images/ vectors. It can be added to **Sections** only.

This tag has two properties, **Language** and **Alternate Text**, which is a description of the image including what it represents and its context with respect to the content on the page.

To define this rule, follow the procedure, below:

1. Right-click the required Section and select **Mark Figure** from the context menu.
2. Use the cursor to draw a rectangle around the image, vector drawing or a group of images/vectors in the PDF.
   This rule is added to the Tag hierarchy in the **Rules Editor**.
3. A name is automatically assigned. To type in a new name either:
   - Press **F2**, or
   - Click twice (not double-click) the new Figure rule.
4. If required, use the **Language** in the **Property** panel to specify the required language.
   This only needs to be set if the language of the paragraph differs from the language used in the remainder of the PDF.
5. If required, use the **Alternate Text** in the **Property** panel to specify a description of the image including what it represents and its context with respect to the content on the page.

**Defining Tables**

Tables are two dimensional data given in a row and column structure. It can be added to **Sections** only. There are two types of tables:

- **Defining an Automatic Table** on page 32
- **Defining a Static Table** on page 34

The Table attempts to automatically detect the table structure by defining cell boundaries, saving time by avoiding the need to define each cell individually.

**Defining an Automatic Table**

To define an automatic table, follow the procedure below:

1. Right-click within the required Section and select **Mark Table** from the context menu.
2. Use the cursor to select the image, vector drawing or a group of images/vectors in the PDF. The following dialog is displayed:

![Edit table dialog](image)

3. A **Table Name** is automatically assigned. If required, change this by clicking within the text box and typing a new name.

4. In order for the Table rule to detect the table structure, select **Row Separation: Auto** check box.

5. From the **Row Separation** select the row separation method, either:
   - **Separator Guides**, uses vector lines in the table, or
   - **Connected Components**, uses the neighbor discovery algorithm for computing separations, which looks for objects within the vicinity of each other and imposes a grid based on that information.

   **Note:** Since this is a system-computed structure, any invisible items inside the given area may affect the results and may not detect the correct structure.

   **Note:** If no guides exist in the selected region and **Separator Guides** has been selected, the whole area may be marked as one table division.

6. From the **Column Separation** select the row separation method, either:
   - **Separator Guides**, or
   - **Connected Components**.

   **Note:** We strongly recommend that you select the same separator for both rows and columns.

7. In **Row Headers** specify the number of rows to be treated as headers starting from the top left cell.
8. In **Column Headers** specify the number of columns to be treated as headers starting from the top left cell.

9. Click **OK**.

   This rule is added to the Tag hierarchy in the **Rules Editor**.

10. If required, set the **Language** option in the **Properties** panel.

    This only needs to be set if the language of the paragraph differs from the language used in the remainder of the PDF.

**Defining a Static Table**

Use a Static Table tag when the table follows a fixed structure for all the mail pieces in the PDF. This requires that you define individual cells and set their properties. This is useful where a table has an irregular and/or complex structure, for example, where some cells span multiple rows or columns.

To define a Static Table, follow the procedure below:

1. Right-click within the required Section and select **Mark Static Table** from the context menu.

2. Use the cursor to select the image, vector drawing or a group of images/vectors in the PDF.

   The following dialog is displayed:

   ![Table Dialog](image)

3. A **Table Name** is automatically assigned. If required, change this by clicking within the text box and typing a new name.

4. In **Row Size** specify the number of rows in the table.

5. In **Column Size** specify the number of columns in the table.
6. Click **OK**.

The selected area is divided into equal partitions, an example is shown below:

7. In this example, a static table is tagged with row size and column size set as 6. A 6 x 6 table appears with TD (table division) shown in the top left of every cell. Mouse-over over a cell edge until the split cursor is displayed, click and drag the cursor to move the cells borders.

8. To add/remove rows/columns, right click inside the cell of row/column and select the required action.

   **Note:** The ability to add or remove rows and columns becomes unavailable once change the span of any cell in the table.

9. Repeat for the two previous steps for all the cell.

10. To set table cell properties, right-click on the cell and select **Edit Table cell properties** from the context menu.

The following is opened:
11. In **Cell ID** type a unique ID for this cell.
   This field is optional and used only when an association between cells and header cells is required.

12. Select the cell type from the following:
   - **Header Cell**, or
   - **Data Cell**

13. In **Row Span** type the number of rows this cell spans.

14. In **Column Span** type the number of columns this cell spans.

15. In **Associated Header Cells** select the associated header cells with current cell from the list.
   Once a cell is designated as a header cell its reference appears in the dialogs for other cells.

The final table is shown below:

![Example table](image)

This is an example of a data table.

The following video gives a step-by-step procedure for producing the tags:

**Defining Lists**

Use this tag for tagging ordered/unordered list structures. Each item within the list contains a label, which can be a bullet, name or number which separates one item in the list from another, and the body.

1. Right-click within the required Section and select **Mark List** from the context menu.
2. Use the cursor draw a border around the required list in the PDF.

The following dialog is displayed:

![Edit list dialog](image)

3. A **List Name** is automatically assigned. If required, change this by clicking within the text box and typing a new name.

4. If required, in **Label & body separator** type in the parameter for the list tagging algorithm. The default value is the space character which is used to separate labels from list item body. For lists using a separator other than a space, provide its value to produce better results. This rule is added to the Tag hierarchy in the **Rules Editor**.

An example of a list is shown below:

![Nested list example](image)

The top-left of the rectangle is marked with an "LI" to denote a list. The body is marked with "LB". The body of a list can contain a further list, commonly referred to as nested list. Any nested list is tagged and attached to its parent item automatically.
Lists also have the Language property, set this as previously described if it has different language from the parent section or document language.

**Defining Headings**

There are two types of headings:

- Numbered, used in documents that are weakly structured
- Unnumbered, used in documents that are well structured

To define this rule, follow the procedure, below:

1. Right-click within the required Section and select **Mark Heading** from the context menu.

2. Use the cursor to draw a rectangle around the heading text.
   
   This rule is added to the Tag hierarchy for the section.

3. A name is automatically assigned. To type in a new name either:
   
   - Press F2, or
   - Click twice (not double-click) the new Figure rule.

4. In the **Property** panel specify whether the headings are **Numbered** or **Unnumbered**.
   
   **Note:**
   
   By default, neither selected, however the default is unnumbered. If you select H1, H2, H3, H4, H5 and H6, the headings become numbered.

   If numbered heading tags are used, these should start with H1 and proceed in numerical order for nested headings. For example, H1, H2, H2, H3 is semantically valid while H1, H3 is not.

5. If required, set the **Language** option in the **Property** panel.
   
   This only needs to be set if the language of the paragraph differs from the language used in the remainder of the PDF.

6. If required, set abbreviation and acronym descriptions in the **Expanded Text** option of the **Property** panel.

**Defining Captions**

Captions in a document are identifiers for figures, tables or lists. All captions accompanying a figure, table or list should be marked as a Caption.

To define this rule, follow the procedure, below:

1. Right-click the required section in the **Rules Editor** and select **Mark Caption** from the context menu.
   
   This rule is added to the Tag hierarchy for the section.

2. Use the cursor to select a location in the PDF.
   
   This rule is added to the Tag hierarchy for the section.

3. A name is automatically assigned. To type in a new name either:
   
   - Press F2, or
• Click twice (not double-click) the new caption rule

4. If required, set the **Language** option in the **Property** panel.

   This only needs to be set if the language of the paragraph differs from the language used in the remainder of the PDF.

5. If required, set the **Expanded Text** option in the **Property** panel to define abbreviations or acronyms.

### Defining Spans

A Span can only be added to a Paragraph. It is used to break a paragraph into segments of text and is useful when the paragraph contains acronyms, abbreviation or links.

1. Right-click the required paragraph within the **Rules Editor** and select **Mark Span** from the context menu.

2. Use the cursor to select within the paragraph in the PDF.
   This rule is added to the Tag hierarchy for the section.

3. A name is automatically assigned. To type in a new name either:
   • Press **F2**, or
   • Click twice (not double-click) the new span rule

4. If required, set the **Language** option in the **Property** panel.

   This only needs to be set if the language of the paragraph differs from the language used in the remainder of the PDF.

5. If required, set the **Expanded Text** option in the **Property** panel to define abbreviations or acronyms.

   This rule is added to the Tag hierarchy in the **Rules Editor**.

### Defining Links

A Link tag is for marking link annotations and can only be added to a Paragraph tag.

To define this rule, follow the procedure, below:

1. Right-click the required Paragraph within the **Rules Editor** panel and select **Mark Link** from the context menu.

2. Use the cursor to select within the paragraph in the PDF.
   This rule is added to the Tag hierarchy for the section.

3. A name is automatically assigned. To type in a new name either:
   • Press **F2**, or
   • Click twice (not double-click) the new link rule

4. If required, set the **Language** option in the **Property** panel.

   This only needs to be set if the language of the paragraph differs from the language used in the remainder of the PDF.
5. If required, set the **Alternate Text** option in the **Property** panel to define abbreviations or acronyms.

6. If required, type descriptions for abbreviations and acronyms in the **Expanded Text** option in the **Property** panel to define abbreviations or acronyms.

This rule is added to the Tag hierarchy in the **Rules Editor**.

### Defining Properties

The **Property** panel provides an area in which supplementary information can be specified for previously tagged elements. For a PDF document to be accessible it needs to conform to a number of requirements, for example, alternate text for all images. Alternate text and languages can be added here.

The **Property** panel is shown below:

![Property panel](image)

<table>
<thead>
<tr>
<th>Control name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Title</td>
<td>The name of the document, which is also the name of the parent branch of the hierarchy.</td>
</tr>
<tr>
<td>Document Language</td>
<td>The language in which the PDF’s displayed. If there are areas within the PDF in a different language, this can be set in the separate Language property in the Rule for that element.</td>
</tr>
<tr>
<td>Bookmarks</td>
<td>Bookmarks are generated automatically from the document structure defined in the rules tree. This control can be used to filter the structure elements you wish to use as bookmarks.</td>
</tr>
<tr>
<td>Language</td>
<td>Sets the language for a specific rule. Each tag has this property with the exception of Head node. Used if tag uses different language from its parent.</td>
</tr>
<tr>
<td>Expanded Text</td>
<td>Describe abbreviations and acronyms. This property is only available for Paragraph, Span, Link, Heading and Caption tags.</td>
</tr>
<tr>
<td>Alternate Text</td>
<td>Used for providing meaningful alternate text descriptions for Figure and Link tags.</td>
</tr>
</tbody>
</table>

**Note:** We strongly recommend that you add the properties during the creation of the rules, as described in **Creating a New Project** on page 26

To add or edit Properties, follow the procedure below:

1. From within the **Rule Editor** panel select the required rule.

   The **Property** panel displays the available options.
2. Set a value for the required property.
   These are listed at the beginning of this section.

Page Structure

The Page Structure panel, shown below, lists the images, text, vectors and links on the displayed PDF. This is used to identify the items by displaying the boundary of the selected item within the PDF. This is an aid to defining tagging rules correctly.

Click to open the required list.
Click an item from the list to show its boundary in the PDF.

Opening an Existing Project

On starting Accessibility Designer, the welcome screen is displayed, the main body of the window is empty as no project has been opened.

To open an existing project, either:
• Click the name of the project in the left-hand panel, or if your project does not appear in the list,
• Click to display the Open dialog from which you can navigate to, and select the required project.

Publishing to the Application Monitor

Once you have created rules for tagging a document and saved the project file you need to publish it to the Accessibility Monitor. The project file and VDE script associated with it are packaged together as an "application", which can then be managed the Accessibility Monitor.

To publish the project and associated VDE Script to the Application Monitor, follow the procedure, below:

1. If you have not already, Configuring Servers on page 22.
2. Ensure that the project is complete and has been run and the errors removed.
3. Click 🕵️.

   The **Server Management** window, shown below:

![Server Management Window](image)

4. Click ⬆️

   The **Open** dialog is displayed.

5. Navigate to and select the required project.

6. Click **OK**.

   The application is shown in the right-hand panel and folder structure is created.
6 - Using the Accessibility Monitor

This section describes the service part of EngageOne Accessibility, covering service management, application management and directory structure of Accessibility.

In this section

- Managing the Accessibility Monitor 44
- Managing Applications 45
- Managing the Log Level 46
- Directory Structure 46
Managing the Accessibility Monitor

A production environment in which to create accessible PDFs from a batch of PDFs with the same structure. The rules file created with the Accessibility Designer is used as input for the tagging process. Projects are published/deployed to the Accessibility Monitor via Accessibility Designer.

The Accessibility Monitor is a service installed with the rest of the solution. There is no separate shortcut for this service; however, the icon in system tray can be used to start and stop it. The Accessibility Monitor is started by default, in normal operation, you should not need to stop or restart it.

Note:
If the system tray icon is not visible, navigate to the following:

Task bar properties | Notifications
Ensure the Accessibility Monitor icon is set as Visible: Always). Right-click this icon to open a Managing Service menu.

Click the Accessibility Monitor icon in the System Tray and to open a menu with the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Service</td>
<td>Starts the service. This option is disabled if service is already running.</td>
</tr>
<tr>
<td>Stop Service</td>
<td>Stops the service. This option is disabled if service is not running.</td>
</tr>
<tr>
<td>Manage applications</td>
<td>Used for managing applications/projects running on this service. This option is disabled when service is stopped. See Managing Applications on page 45.</td>
</tr>
<tr>
<td>Set log level</td>
<td>Controls the logging information sent to the log file. This file is located in \Accessibility\System folder. Selecting this option opens the Service Configuration dialog. See Managing the Log Level on page 46</td>
</tr>
</tbody>
</table>
Managing Applications

Open the **Applications Management** window by clicking on the Accessibility Monitor icon in the Service Tray and select Application Management from the context menu.

The window is shown below:

The server you are signed in to is given in the left-hand panel. In this example, it is Local-Host.

The main body of the window lists the applications on the current server. In this example, the project **Name** is test and its **Status** is **Enabled**.

Right-click an application with an **Enabled** status to open the context menu from which select **Disable** to make it unavailable on the server.

Right-click an application with an **Disabled** status to open the context menu from which select **Enabled** to make it available on the server.

Right-click an application with an **Disabled** status to open the context menu from which select **Delete** to remove it from the server. This can be made available again by republishing the associated project.
Managing the Log Level

The **Service Configuration** dialog controls the logging information sent to the log file. This file is located in `\Accessibility\System` folder.

Open the window by clicking on the Accessibility Monitor icon in the Service Tray and select **Set Log Level** from the context menu.

The window is shown below:

![Service Configuration Window](image)

Set the Log level to one of the following and click **OK**.

- Error
- Warning
- Information
- Trace

The default level is **Warning**. The logging includes all types preceding the set log level. For example if current log level is **Warning**, it includes both errors and warnings.

Directory Structure

The Accessibility Monitor’s `\APPDATA` folder contains the applications. This folder is monitored for input data. When an application is added to the service this is the location in which it is stored. Adding applications creates a sub-folder here of the same name. Further folders, given below, are also added:

<table>
<thead>
<tr>
<th>Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>\Lookup</td>
<td>The input PDF files are saved in this folder. The Accessibility Monitor scans this folder for new PDF files, which are then picked up and converted to accessible PDFs.</td>
</tr>
<tr>
<td>\Backup</td>
<td>Once processed, the input PDFs are moved to this folder.</td>
</tr>
<tr>
<td>Folder</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>\Failed</td>
<td>If the Accessibility Monitor fails to process an input PDF file it is moved to this folder, which is a sub folder of \Backup.</td>
</tr>
<tr>
<td>\Output</td>
<td>Successfully processed accessible PDF files are moved to the folder.</td>
</tr>
</tbody>
</table>
A - More Information

In this section

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Technical Support 50
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Technical Support

How to contact Pitney Bowes regarding this product.

You will find full details of the configuration and operation of this product in the user documentation supplied.

Should you encounter any difficulties that you cannot resolve with aid of the user documentation, you will be able to obtain technical support from your supplier, or from Pitney Bowes.

Support Email Address: software.support@pb.com

AMER:

Hours: Monday - Friday from 08:00 – 20:00 EST excluding US Holidays
Phone: +1 800 367 6950
Or if dialing from outside the US: +1 518 285 7283

APAC:

Hours: Monday – Friday from 08.00 - 18.00 AEST excluding Public Holidays
Phone: +1 800 648 899
Or if dialing from outside Australia: +61 2 9475 3500

EMEA:

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