

# Editable PDFs... The Holy Grail of Design Clients

A WHITEPAPER

As a corporate graphic design professional, I often get requests from clients for an **editable PDF**. They say that the client is always right, but this is one of those times when they are not. A little information can be dangerous, especially when that information is outside someone's wheelhouse.

One of the issues with software is that there are many ways to accomplish something, but generally there is one **right** way. Another issue, and this is especially true in photography, is that today **everyone** is a photographer, or designer, due to the popularity of smartphones and photo apps. As I am also a photographer that uses large format film cameras (negative sizes of 4x5", 8x10" and 11x14") that are based on centuries-old technology and are 100% manual, develops my own film, and prints my own images in a traditional wet darkroom, I can emphatically attest that not everyone is a photographer, and not everyone is a designer.

I believe that part of my job as a design professional is to, when necessary, tell a client **no...** or **educate** the client if you prefer that language. In this whitepaper I will provide several examples of why editable PDFs are the Holy Grail.

We must first define the process, or flow, of a graphic design project.

The client usually supplies the content source files. These can include Microsoft Word files, text files, InDesign or Quark XPress files, other PDF files, or, heaven forbid, Microsoft Powerpoint files (that will be future whitepaper all on its own). Also supplied are logo files, graphs or charts, usually in Microsoft Excel files, and other artwork files. Sometimes, I even receive hand-drawn mockups!

From there, if there are already corporate design guidelines in place, the job of the designer is to take that content and apply those guidelines to provide a finished piece of collateral that aligns with the corporate design philosophy. If there are no guidelines, then it is up to the designer to come up with a design that is both **readable** and, for lack of a better word, pretty.

Design software is how all of this is accomplished. Today, Adobe Creative Suite, which includes InDesign (layout), Photoshop (raster/pixel-based images), and Illustrator (vector-based artwork and logos), is the industry-standard.

## Editable PDFs... The Holy Grail of Design Clients

Files created in these applications are known as **design source files**. It takes a long time to learn how to use these applications, and even longer to learn how to use them efficiently and using best practices. Non-designers can use these applications, but the great majority of the time the files they create are not optimal. In my experience, non-designers create files that are overly complicated, bloated, and inconsistent.

Some of the larger mistakes that non-designers make are 1) using many more text boxes on a page than are necessary— in fact, the optimal number of text boxes per page is one (I will explain this shortly); 2) low resolution graphics or images in the wrong format; and 3) inconsistent use of fonts, or use of too many fonts. The list is much longer than this but for the purposes of this whitepaper they will suffice.

### OUTPUT FILES, OR PDFS

As stated, design source files are used to create the layout. However, these files are not practical for the casual, non-designer client. The years of experience to use these applications correctly is just not part of the average clients' job description. You also cannot distribute an InDesign file to anyone who does not have InDesign. A Creative Cloud subscription is over \$53 per month. An InDesign only subscription is \$21 per month. Most clients cannot justify this expense. Enter PDFs, or Portable Document Files.

PDFs can be distributed to anyone. Adobe Acrobat Reader is a free application, as is Apple Preview, and Microsoft Windows has the ability to read PDFs. However, PDFs are an **end-product** file, not a source or design file. They are not meant to be edited, only distributed, read and/or printed.

### TEXT BOXES

Each text box is an **object**. When an InDesign file is exported to a PDF each one of these objects remains an individual object, not connected to any other object. If you **edit** the PDF and add several sentences to a paragraph, that object will expand to accommodate the additional text, but any following paragraphs, or images, will **not** move. Then you have to manually move everything that follows. A real pain in the you know what, and not very accurate or consistent. Also, PDFs are page-based. This means that each page is also a separate object. So, if the text runs over to the next page, you will have to manually copy/paste to the end of the document. Absolutely not best practices, and definitely a huge waste of your valuable time.

A single text box per page alleviates this to some extent, but you still can't get past the page-based obstacle. Effectively this means that your **editability** is reduced to changing single words that do not affect line breaks, paragraph breaks or page breaks.

### IMAGE RESOLUTION

Many clients often supply images they found on the internet. The internet is 72 dpi. Print (desktop) is 300 dpi. Professional printing (on a printing press) can be up to 3600 dpi.

PDFs can be different resolutions. A web PDF will generally be 72 dpi, or more often 150 dpi. A high resolution PDF will be 300 dpi. A print PDF will be much higher. With a good, professional designer the InDesign source file will contain only high resolution images. These can be resampled downward to provide web or hi-res PDFs, while retaining the resolution required for professional printing.

When you replace an image in a PDF it should be the same resolution as the images that are already present in the file. Mixing resolutions (downward in a high resolution or print PDF, or upward in a web resolution PDF) will affect print quality and image size negatively.

# Editable PDFs...

## The Holy Grail of Design Clients

### FONTS

Fonts... ahhh... He who dies with the most fonts wins! There are thousands of fonts available, both professionally designed, and knockoffs. Even among the professionally designed fonts there are variations by different foundries. There are probably hundreds of different variations of Garamond alone. Helvetica goes by different names such as Swiss, Helios, and many more. Fonts are what make PDFs **portable**. That means that you don't need the fonts in order to read the file and that it will look identical on any computer or mobile device, or printed on paper.

In a PDF fonts can be set to **subset**. This is a way to keep file size down by incorporating only the characters of a font that are actually used on each page. If a "z" is never used, it doesn't get incorporated into the PDF. If you have to edit the PDF and use a word that contains a "z", you are out of luck. Fonts can also be set (in the InDesign export process) to include the entire font character set. In this case you would be able to add a word with a "z" in it.

If, however, the fonts have been subset, and you don't have the exact same font available on your device, the font will be substituted by a system font, such as Arial or Times New Roman. This will break any corporate branding or consistency, and appear unprofessional.

### CONTINUITY

That's a term used in the film industry to make sure that things look the same from scene to scene, or are correct for a specific time period. Once you edit a PDF, **continuity is gone**. I cannot tell you how many times a client, and usually the same suspects, have sent me back a PDF that has been edited where they don't disclose that to me. It usually doesn't take long for me to discover it, and then I have to go back to the client, ask them exactly what they changed (and they usually don't remember), and tell them that I now have to go through each page, very carefully, and find out what is different. I then have to make those same edits to the design source file, and then I can make the newly requested edits and send back a new PDF. At this point I also have to tell the client that they have to proofread the entire document 100% over again. I then ask them to never do this again, usually falling on deaf ears.

### CONCLUSION

The best practices for my industry are 1) you let the designer make the changes, and 2) you let the designer make the changes. Graphic design is a specialty... better to let the experts do what they do best. Yes, it will cost a little more, but it would cost more if you go back to your designer with a PDF that has been modified from the design source file.

### ABOUT RICHARD CODA DESIGN

I have always been interested in design. As a child I was always drawing something. Growing up with a father who was a professional printer I used to love going to "help my dad" at the shop on Saturdays. I became interested in how the process worked... concept... setting type... layout... camera-ready... the printing press.

After college my first job was as a Quadex 5000 typesetter for The Great Atlantic & Pacific Tea Co. in Paterson, NJ (better known as A&P Supermarkets). Here I built on the knowledge and skills that my father had instilled on me as a youngster. Years, and jobs, later, I entered the digital age. Where once before, and not that long ago, there was a whole team of highly talented specialists working together in an agency or department, there was now one person doing the jobs of all those people. Graphic designers had to learn new skills and forget old ones. The pace increased exponentially to the point where what used to take weeks to do could now be accomplished in just a few hours.

Always wanting to be my own boss I started my own design firm, PC Type, in the late 1980s. Moonlighting at first, I was soon able to go full-time in 1995. I provide design and production services for all types of printed projects, as well as support for digital projects. My clients range from small businesses to global leaders in their fields, many of them for over a decade. In 2017, we became Richard Coda Design, LLC.

Call us at **480.751.8684**, or email us at **rich@richardcodadesign.com** to learn more. Download my lookbook at **<https://tinyurl.com/y3xsgkz4>**