

The Methodologie Best Practices Guide

# Designing PDF Reports

Prepared by Methodologie in 2009

# Is print the only way to go?

As more and more organizations shift to sustainable practices, they are choosing to forego printing annual reports and sustainability reports and opting to produce more interactive PDFs and microsites.

Methodologie took a deeper look at the process of designing electronic reports, with a focus on the PDF format. We explored what drives the decision to go digital, as well as what design and print considerations to keep in mind.

Why are companies moving to electronic reports?

Top drivers:

1. Conserve natural resources
2. Cost considerations
3. New regulations, such as Notice and Access, are requiring online reporting
4. Ability to reach a wider audience

If not print,  
then what?

Option 1\*

PDF report  
(static/interactive)



A PDF posted on your website, either in a clickthrough navigable form or a downloadable form.

Option 2\*

Online report



A section of your website or a separate microsite dedicated to the report.

The report could be flash or html.

This approach requires consideration of printability.

\*Many companies choose to offer a PDF as well as an online report.

What's the best choice? A PDF or a website?

Beyond the primary considerations of time and budget, here are some questions to ask when trying to decide the best format for your project.

1. What do you want your report to do?
2. What features does each format allow for?
3. How will the report be viewed?

PDF vs. website:

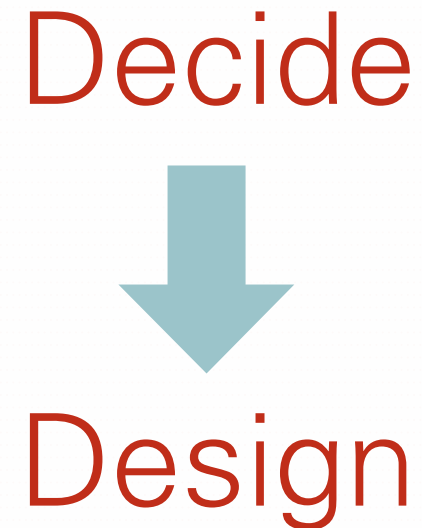
Interactive Features	PDF	Website
Ability to create an encompassing/complete experience	X	X
Embedded videos	X	X
Embedded sound	X	X
Navigation links	X	X
Jump links	X	X
Links to relevant pages within document	X	X

PDF vs. website:

Viewing Options	PDF	Website
Launch full screen	X	X
View in browser	X	X
Ability to download document	X	
View offline	X	
Ease of printing entire document	X	
Ease of printing page by page	X	X

Think before  
you leap.

It's always smart to consider production before diving into design.  
Decide which format the final piece will live in first.



Why?

# Reading a book is very different from reading a PDF online.

Design conventions for commercially printed and bound reports are based on the experience of a reader holding a book and turning pages, the qualities and expense of paper, the technical requirements of commercial printing, and the limitations of mailing.

Conventional PDF reports generally have been identical to the printed report and created almost as an afterthought. When you remove the printed piece from the picture, it's worth rethinking many assumptions about design, content, format, and so forth and making full use of the given media/format.

Design considerations:

Type size, color, layout, etc.  
Are these things only designers  
should think about?

While PDFs and online reports offer a wide spectrum of functionality previously unavailable with print design, they also present some limitations.

Understanding these limitations will help set the right expectations and ensure a smooth work process going forward.

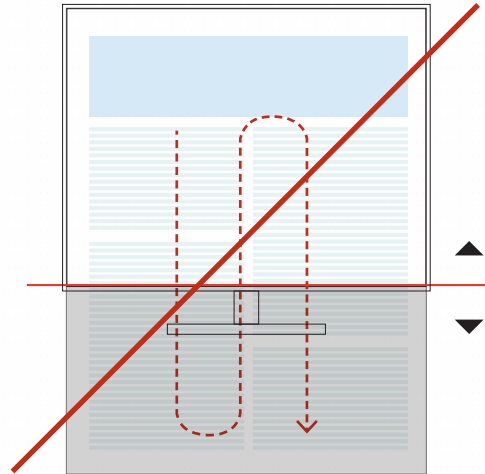
Here are some best practices.

1.

## Page Orientation

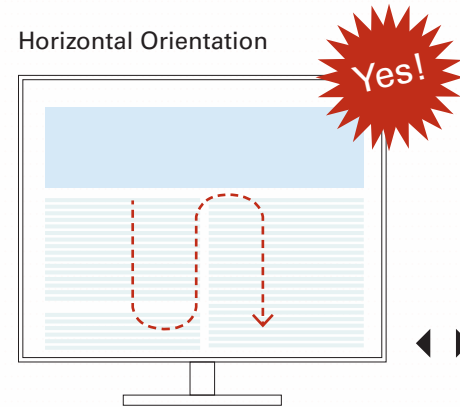
If it's online, horizontal is better than vertical.

Vertical Orientation



Avoid unnecessary scrolls.

Horizontal Orientation



It's seamless. The best use of real estate and shows the full picture.

2.

Type Size

You don't want your clients to go blind reading 100 pages like this.

  
This is too small, even for footnotes.


Nor do you  
want to yell  
at them.

▲  
This is too big, even for headlines.

Type size:

## Keep it readable.

Screen size, contrast, and type size play a huge role in a reader's comfort. And while zooming in is a useful feature of PDFs, ideally the design should be best viewed at 100% of its intended size.

A large, dark red, jagged shape resembling a sunburst or a stylized flame, positioned on the right side of the page. It has multiple sharp points of varying lengths and widths, creating a dynamic, organic form.

Users should click  
by choice, not by  
compulsion. Don't  
make them over-click!

Type size:

Although ideal type sizes will vary depending on the typeface used, here are some general guidelines to follow.

7 pt	Type Size	Too small
10 pt	Type Size	Good for footnotes
12 pt	Type Size	Body copy
14 pt	Type Size	Body copy
16 pt	Type Size	Body copy/Pull quotes/Headers
18 pt	Type Size	Pull quotes/Headers
20 pt	Type Size	Pull quotes/Headers
22 pt	Type Size	Pull quotes/Headers
24 pt	Type Size	Pull quotes/Headers
26 pt	Type Size	Pull quotes/Headers

3.

## Color

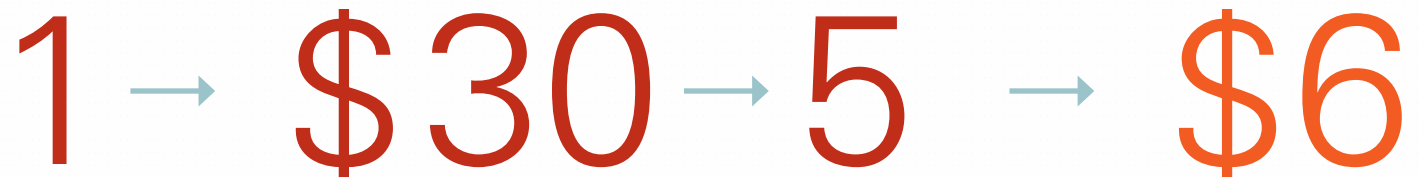
Color looks different on all monitors and printers. Accept that you can't control it, and use color as a design element instead of a design driver.

The majority of printers and monitors in use are not color-correct and, therefore, should not be relied on to reproduce color accurately. However, PDFs do allow for up to 100% accurate color reproduction on printers and monitors that have been color-calibrated and profiled. Most color on traditional web pages is not accurately reproduced, even on color-optimized systems, since only the Safari browser respects color profiles.



Color:

Printing in color is expensive.



Inkjet  
cartridge

Average price of a color  
cartridge. A standard  
desktop color printer needs  
at least four of these  
(C,M,Y, and K) to work.

Average number  
of letter-size full-  
bleed copies that  
a single cartridge  
can print flawlessly.

Cost of each  
printed copy.

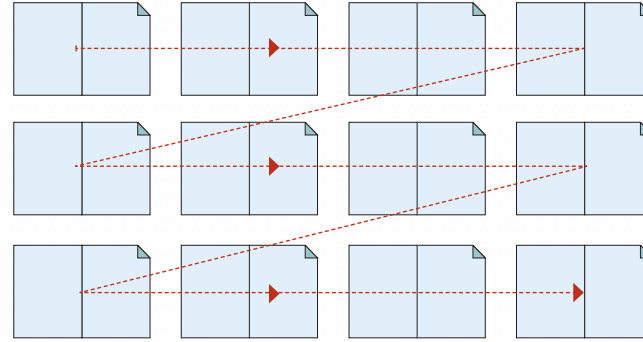
4.

Page Design

Plan for nonlinear navigation, especially if designing a PDF with interactive capabilities and features.

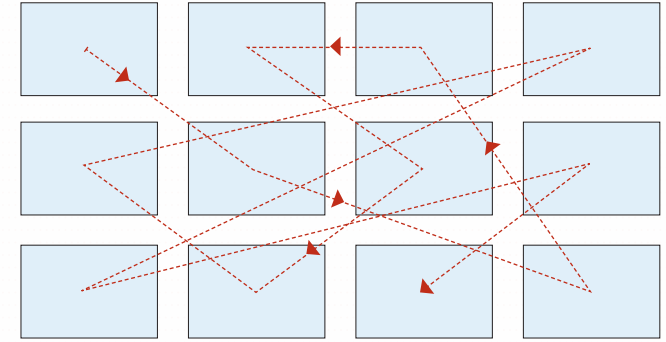
**Linear navigation**

- Common in printed books
- Calls for pacing



**Nonlinear navigation**

- Common in websites
- Reader can navigate by subject/interest using jump links/related links



5.

Page Size

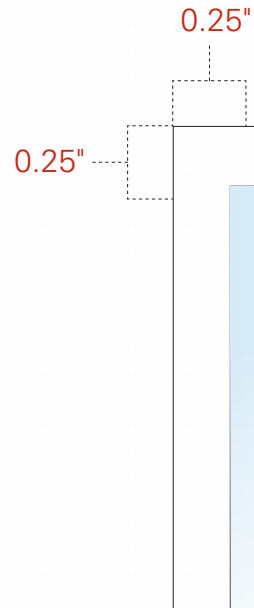
## Most desktop printers only print letter size.

Although oversized books have great impact, they only work if printed commercially. Desktop printers may shrink-to-fit all pages to letter size, and that in turn may affect type size and readability. It's safest to assume the PDF will be printed, and that it will be printed letter size.

6.

## Print Considerations

When using full-bleed colors or images, be aware that desktop printers may shrink the design and produce a white margin around the piece. The design may not look as originally intended.



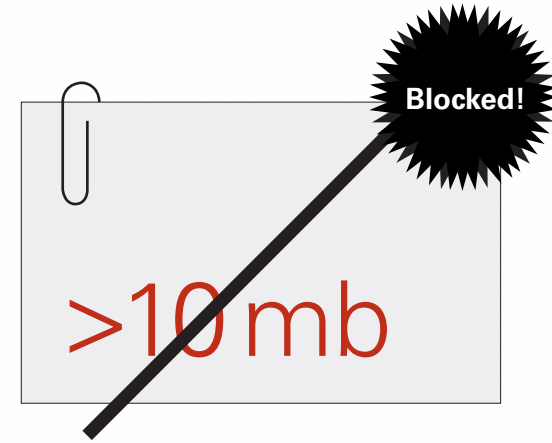
Most  
desktop printers  
are set to print  
with a 0.25"  
margin.

## Other Print Considerations

1. Readers may print on one side or two.
2. Many organizations encourage or even mandate two-sided printing.
3. Image areas shouldn't bleed, as many office printers require a nonprinting margin.
4. Low-resolution images open up more options.
5. Settings allow readers to view background colors on screen, but not necessarily print them.
6. On-demand printing reduces large print runs and gives the user the choice to print.

## 7.

## File Size



Even though the PDF report may be available online, the file size should be small enough to e-mail. Most mail servers block files bigger than 10 megabytes.

Although there are several ways to reduce a file's size, it's best to use fewer, and relatively low-resolution, images in the design.

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