

Simple PDF checklist

1. Optimize pdf first
2. Add metadata
3. Name file correctly (lower case, use dashes instead of spaces, if date is necessary, year first then month).

How to name, optimize and add metadata to PDFs

UK HealthCare Marketing Web Team 2015

Correct naming, optimization and metadata help PDFs be more easily and accurately found in search. Whenever possible, the designer should optimize the PDF, then the author should enter PDF metadata before adding the PDF to the website. Metadata should also be entered into existing PDFs.

1. SLMM provides keywords the audience would use to find this PDF:

Provide text for the **PDF Document Properties** and **Description** screen as shown below:

| Field name | Description | Example |
|----------------------------|---|---|
| Document title: | Title in plain English | Kangaroo Care Pre-natal |
| Author: | http://ukhealthcare.uky.edu | http://ukhealthcare.uky.edu |
| Author title: | UK HealthCare | UK HealthCare |
| Description: | Author provides a summary; or can use the first paragraph of the document | Kangaroo care (skin-to-skin) is the term used to describe the practice of a parent holding a newborn skin-to-skin after delivery. Skin-to-skin contact has many proven benefits and is a great way for parents to bond with their newborn baby. |
| Description writer: | UK HealthCare | UK HealthCare |
| Keywords: | Words our audience would use to search for this document | Kangaroo care; newborn; after delivery; skin-to-skin; new mom; delivery; birth |
| Copyright status: | Copyrighted | Copyrighted |
| Copyright notice: | © University of Kentucky, Lexington, Kentucky, USA + date | © University of Kentucky, Lexington, Kentucky, USA 2015 |
| Copyright info: | Link to legal page | http://ukhealthcare.uky.edu/legal/ |

2. Designer: Name, optimize and save the PDF for web as follows:

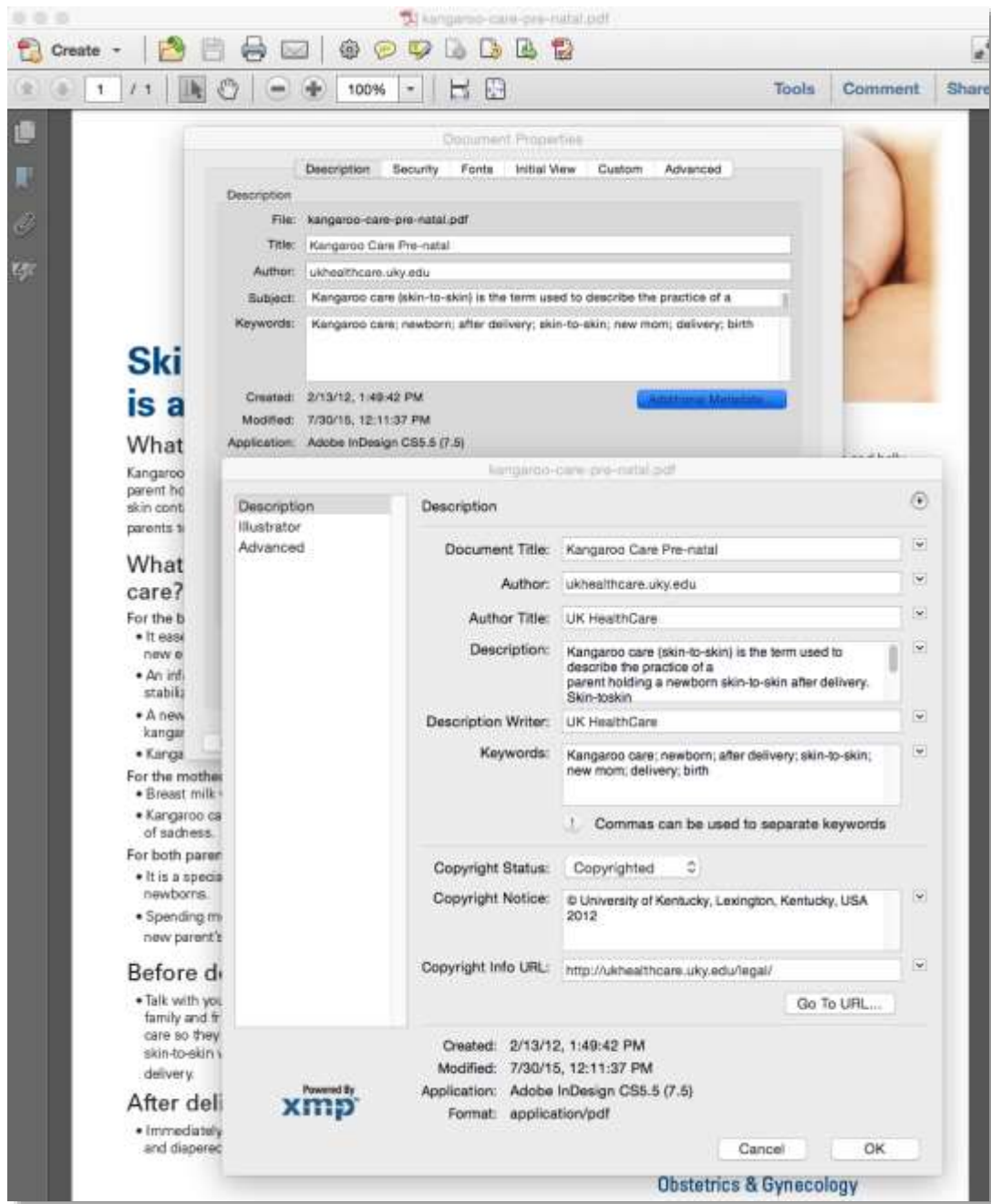
- Save preferably in spreads with no crop marks
- Optimize for the web (reduce file size):
 - Use <http://smallpdf.com/compress-pdf> to reduce and optimize single PDFs.
 - Acrobat batch optimizing: <https://www.youtube.com/watch?v=QBu7zOuy3uM>
 - Check the PDF after optimizing to make sure there is no significant loss of quality.
 - Always optimize for web before adding keywords as optimizing may remove them.
 - Do not optimize fillable forms or they will no longer be fillable.
- Make the pdf accessible

- Open the action wizard in the tools area and choose Make Accessible.
- Run Accessibility Full Check, check all boxes, run check. Save.
- Name PDF with descriptive long-tail names, all lower case, with hyphens between words:
 - **publication-name-YYYY-month.pdf** or **publication-name-2015-winter.pdf**
 - Don't make the filename too long; beyond 50 characters the name may be clipped.
 - Don't use words like "web" or "final" in the name.
 - Don't use characters that are not supported, like * < > [] = + " \ / , . : ; ? % # \$ | & •
 - Don't use a space as the first or last character of a filename
 - Don't use underscores in the name.

3. Writer, designer or SLMM: Enter keywords and metadata into the PDF

- Open PDF; click **File > Properties** to get to the **Document Properties**; enter text provided by SLMM.
- Click the button labeled **"Additional Metadata"** to open **Description screen** and fill out those fields as needed and save.





- You're done! This PDF is ready to be placed on the website. Send to webteam.