

THE SEYBOLD

REPORT

Volume 8, Number 21 • November 6, 2008

The New Quark Publishing System: A View from the Field

By Ron Roszkiewicz

As the hub of many important publishing systems, a lot was riding on last year's release of Quark Publishing System Version 7, in reputation and licenses. So far, my unofficial survey of users leads me to believe that this release has been a success. This review reflects the experiences of users who have made the switch and are in day-to-day production with the system. The just-released QPS8 builds on the foundation laid by Version 7, and we will mention new features where appropriate (Putting aside the marketing implications of calling this Version 8, it's safe to say that it's really Version 7.5). The three areas we will focus on in this article are control, collaboration and quality.

Page 5

More Web 2.0 Observations

By Steve Paxhia

The recent East Coast version of O'Reilly's popular Web 2.0 Expo, held in New York, offered information and advice pertinent to publishers' strategies and operations. Drew Bartkiewicz, VP of cyber and new media markets for The Hartford, projected that information will take on greater value, as well as become a potential liability as the Internet continues to evolve. A panel moderated by Liz Danzico of bobulate.com offered some thought-provoking ideas for publishers trained in creating printed content products. "The Internet looks like writing, but it's actually a conversation," said Khoi Vinh of Subtraction.com.

Page 11

How Green Is My Media?

By John Parsons

Page 9

The first Green Media Conference in Boston drew a surprisingly large audience, which heard some interesting answers to the question on many people's minds: Can my information publishing efforts be sustainable AND allow me to stay in business?

Publishing and E-Discovery

By Venkat Rangan and Dean Gonzowski

The process of locating and presenting key evidence to a case, now known as "electronic discovery," has emerged as a critical business challenge, forcing enterprises of all sizes and types to more closely examine information stored on their computer networks.

Tech Companies Devise Global Code of Conduct

By L. Carol Christopher

Page 4

Three major technology companies have released a global code of conduct that spells out how Google, Microsoft and Yahoo will govern their business practices in nations that restrict free speech.

ALSO IN THIS ISSUE:

EDITORIALS

- Quark's New Groove?** 2
Quark's decision to include InDesign and InCopy in the QPS workflow has interesting implications for publishers.
- Saying No to Print** 2
The Christian Science Monitor newspaper chooses to go online-only.

NEWS

- Media Bytes** 15
More sales coming at Macrovision; MediaNews Group considering off-shore outsourcing.
- Featured Events** 16

IN UPCOMING ISSUES:

- Reports from the Frankfurt Book Fair: EPUB, XML and more**
- Customized Newspapers**
- CNN Competes with AP**
- IfraExpo and Graph Expo**

The New QPS: A View From the Field

By Ron Roszkiewicz

The introduction of Quark Publishing System 7 at the end of 2007 represented a commitment of resources and a calculated risk. Early discussions with QPS users lead us to believe that the move, and the announced changes in Version 8, is likely to be successful. In this report, we examine the experiences of companies that have made the switch, and the implications for day-to-day production.

As the hub of many important publishing systems, a lot was riding on last year's release of Quark Publishing System 7* (QPS) in terms of reputation and licenses. From an unofficial survey of users, the gamble appears to have paid off.

Quark had no option other than to write QPS from scratch. Each new wave of technology results in disruption. Publishers understand and accept that new operating systems usually require updated hardware and application software to take advantage of performance gains. For Quark, the requirements were compatibility with Apple's Intel platform and new operating system, Version 10.5 (Leopard), as well as the with Microsoft Vista. Quark's only solution was to rewrite the applications to support these new hardware and operating system technologies and retain the core features and benefits, as it did with QuarkXPress, with features such as object-based page layout, advanced user-configurable typography and mature extensions development.

With Intel hardware and new operating system compatibility as mandates, it was also possible to respond to customer requests for improvement in three key areas:

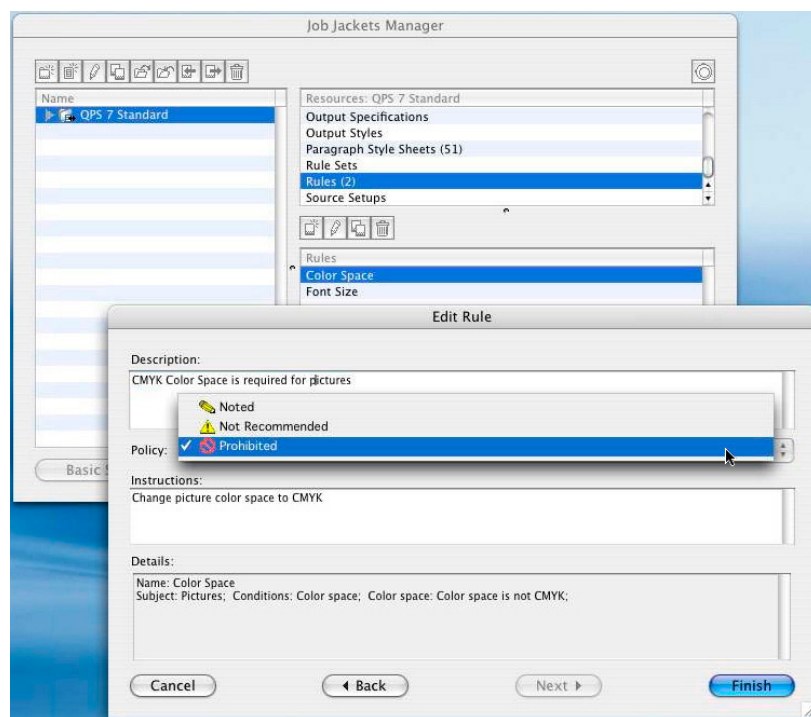
Control is a core feature for any publishing system. Quark has made improvements in the way assets are managed and distributed, as well as how users interact with the system. **Collaboration** is also an important area of improvement, as evidenced by the new functions that support it in QuarkXPress 7. Improvements in workgroup collaboration and content handling made in QuarkXPress are integrated into QPS7, along with enhancements to the original QuarkCopyDesk and the overall collaborative environment. Finally, **Quality** is one of the most important areas of concern for

content creators. Control over the distribution of assets, version tracking and digital signoffs is vitally important for maintaining the publication and corporation's brand. Both XPress and QPS7 support many layers of functionality to maintain quality through the use of iterative layout, JDF-defined document specifications through Job Jackets, support for sophisticated advanced graphic effects and secure, locked-down output through PDF/X formats.

Control: A DAM and CMS Is Not a Workflow

Control over digital assets through a digital asset and content management system results in quicker time-to-market savings for the upstream portion of the content creation supply chain. This means lower operating expenses as well as better version control of content. It also means a better grasp of the company's value, since assets are identified and more easily valued. Assuming a typical business, where 40% of a user's time is wasted

Job jackets can define many rules and stylistic parameters of the job. Job Tickets are defined in QuarkXPress and can be stored and imported from QuarkXPress Server.



* The just-announced version 8 builds on the foundation laid by version 7. We will mention new features where appropriate. Some are calling QPS8 the "designer's version," because many of its new features are clearly targeted at designers rather than production or layout professionals. Putting aside the marketing implications of calling this version 8, it's probably more accurate to think of it as version 7.5.

searching for assets and a significant number of hours are spent re-creating lost assets, the return even for a medium-size shop can be very slim.

QPS7 requires no scripting or other programming to get up and running. A few mouse clicks are all that's necessary to install the system. Also, since a specialist isn't required to manage the system, the total cost of ownership is absorbed into the day-to-day costs of the department.

Ralph Morano, VP of communications at Univers Workplace Benefits, estimated that he saves as much as six hours a week managing projects and attending production meetings with spreadsheets thanks to the unified projects view he has in QPS7.

A DAM and CMS system is still important, and QPS7 does rely on a repository for asset storage. In fact, at the repository level (also known technically as a "persistence layer"), QPS7 supports the local file system and WebDAV folders. It also supports HSQLDB (a Java-based, open source SQL database engine), Microsoft SQL Server and, in the near future, Oracle. This support broadens the workflow and IT possibilities for scaling the system and for integrating it into an existing IT infrastructure.

To support the content creation supply chain, QPS7 allows linkage with external data repositories, which can be achieved relatively easily due to QPS' service-oriented architecture. QPS7 is already integrated with Alfresco, an open source enterprise content management system, and picturesafe's myCONTENT, a media asset management system.

QPS8's enhancements to Web Hub allow remote users to interact with the publishing system hub like a DAM client and download assets to their desktops, and to "check in other" assets not part of active projects. For corporate and Oracle users, compatibility with LDAP and Oracle 10g was added in Version 7.4 and adopted in Version 8.

Collaboration

Publishing systems are naturally collaborative environments. Today this means virtually unlimited sharing of page elements, pages, projects and the parameters associated with them among one or hundreds of users, with parameters locked down to prevent inadvertent changes.

Quark's suite of publishing production tools provides for a number of different levels of collaboration: stylistic, consistent content and system-level enablers. Each approach is supported by rules that ensure that the system maintains digital integrity for assets. It is inherently critical that the standards of quality and accountability be maintained digitally. In each of the areas of collaboration, Quark has made critical decisions coupled with accessible functionality.

Stylistic collaboration. Quark made its first major commitment to metadata as a foundation for defining layout specifications with the introduction of QuarkXPress 7 and QPS7. Like any other text or image file, a QuarkXPress file begins as a plain, untagged binary object with very little structure (in the metadata, database sense). There are no tags to link it to other items in the layout, in the asset database or to the product

Quark Publishing System Components

As with any publishing system, the new QPS is a suite of many different products:

QPS Server is a networked application that keeps track of all the transactions (asset movements and revisions) on the system. It is where searches for assets are conducted and all access authorizations are managed.

QPS Connect Client is an application with two main modes. The first is a workspace mode where the status of projects can be viewed and tracked. Applications that run on Windows or Mac can be integrated into the workflow (such as Photoshop, Word, Excel) and content can be moved from QuarkXPress to the application while remaining part of the check in/out asset management process.) The second is an administrative mode where the formation of project groups is controlled and permissions and access is assigned.

QPS Web Hub is a browser-based way to create, search, track, preview and check out assignments from QPS. A dynamic application, QPS Web Hub provides real time notification of changes to page geometry. Using the special workspace designed for this Web editor, local and remote users can write, edit and copyfit text with full WYSIWYG previews. Work completed remotely can be checked in through QPS Web Hub.

QuarkCopyDesk and **QuarkXPress** share the same code base and the ability to work with QPS, so users can write, edit and copyfit text. New in Version 7 is the ability to edit images, add notes and redline copy. Version 8 will also allow Adobe InDesign and InCopy to carry out similar functions.

QPS Script Manager provides a method of scripting actions that determine how a QPS file is transformed and routed within the QPS workflow. For example, a QPS file can be converted to a PDF file format and another user can be notified of this status.

QuarkXPress Server is a core publishing technology that allows for layout automation and integration into variable data printing (VDP) environments, one-to-one marketing workflows, ad creation and catalog production, as well as a broader ability to control QuarkXPress projects programmatically. The new, enhanced XML capability in QuarkXPress Server 7.2 enables users to build a QuarkXPress project automatically from an XML file. In QPS, this core server-based technology provides the ability to create, edit and preview QuarkXPress files on the Web. It also extends QPS's ability to export content in a variety of formats, including PDF and XML, as well as full-size previews and thumbnails of QuarkXPress layouts and QuarkCopyDesk files. **TSR**

(project) it is intended to describe. That's the simple part. Tags that define its cropped size, page position and other layout-specific details are also absent.

Quark went to the next level and added stylistic collaboration by utilizing the job definition format (JDF) as the standard way to define and tag layouts for processing at different stages of the production process. To make sure that production and CI rules are not just guidelines and will not just be checked before output, Quark allows for real-time design checks within the layout phase. This means that problems due to the wrong fonts or images with the wrong color space are identified early in the process when time is cheaper and more available, and not only at the end of the output chain when plates are being made for press.

To further maintain continuity from publication to publication, specification files known as job jackets can be shared among users in a workgroup and distributed by a server. This means that a designer or creative director can define the basic specifications of a job along with associated templates and manage them through a central server.

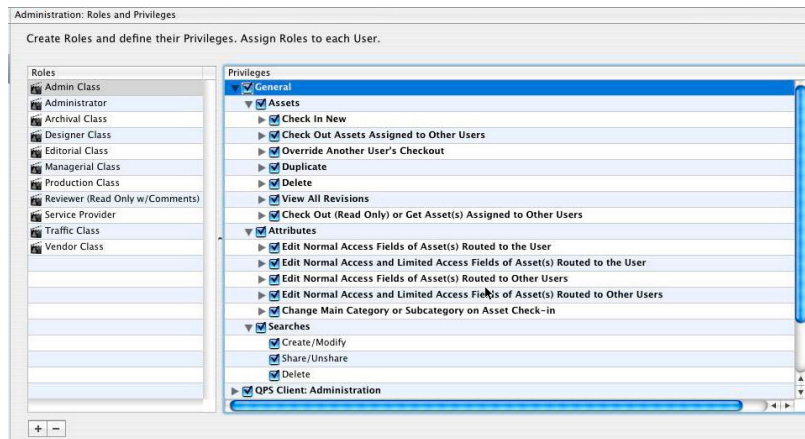
In QPS8, Web Hub maintains East Asian text and special East Asian character attributes in articles. New design-driven typography controls are highlighted by additional support for hanging character effects.

Consistent content. Quark introduced shared content and composition zones as a way to synchronize data. This collaboration on a machine level fits well with the cross-media publishing that QuarkXPress encourages. Unlike stylistic collaboration, dynamic content allows the user to define areas to keep synchronized. These areas can be printed or defined as Web pages or both. A change made to one element is reflected on other linked items wherever they are. This is more than a parlor trick in that it relieves users of having to locate all instances of the same content and making changes manually, further compounding the cost of repairing mistakes.

In the QPS7 environment, content is consistent among all variations of QuarkXPress used for the projects, including Quark Copydesk 7, QuarkXPress standalone and QPS Web Hub. Another interactive content-related collaboration is also possible in the QPS Web Hub, where each user receives real-time notification of any changes to page geometry. This interactivity is taken a step further and users can write, edit and copy-fit text while viewing the QuarkXPress layout remotely. The Web browser features a configurable workspace for input and preview of affected pages.

Enabling collaboration. In a robust publishing system it is important for all types of content to be supported. The unstructured data consists of the images and text objects that will be used within documents or extracted from them. The structured data is where metadata is embedded and/or the unstructured objects have been used to build a composite document.

Moving unstructured and structured data into and out of the system requires a powerful rules engine and

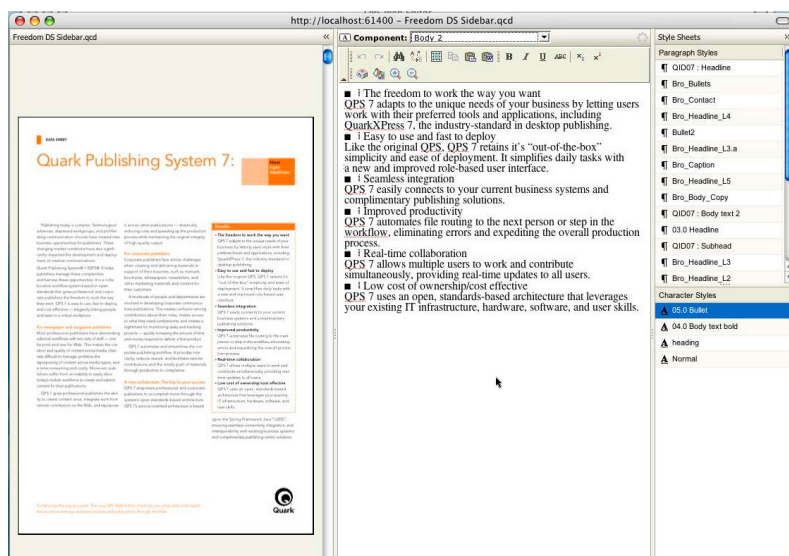


the metadata tags to trigger it. QPS7 shines in this regard because it provides comprehensive read and write permissions settings within easy control of creative department administrators. Since the majority of work is done within the closed loop of a local workgroup, it's more important for users to be able to control access settings on the fly than it is to set up procedures that are themselves a deterrent to unwanted access. QPS7 provides a clear and understandable selection of functions and the levels of user access attached to them. The result is that users can safely change data they have access to and any data outside their responsibility is protected by permissions to avoid unauthorized changes.

Systemic collaboration also means that inter-application communications are such that the act of breaking down documents for editing results in efficiency and not errors because of duplication or miscommunication at the human or machine level. For this reason changes made in one environment can radiate out to all other editing stations ready for updating. All of this activity is done under the watchful eye of QPS Connect Client, which includes a workspace mode for viewing and, if necessary, changing the status of all active projects. When the time comes to review and approve the jobs, each team member receives a color-coded notification that reflects the current status of projects. As

Assigning roles and privileges in QPS is simplified by the point-and-click interface. New groups can be set up using default privilege sets.

QPS Web Editor provides a workspace for editing and copy fitting with story and WYSIWYG views.



mentioned earlier, QPS Web Hub also displays real-time notification if the page geometry of the active project changes.

Univers' Morano sees future success with the QPS7 system linked to the ability to expand the use of remote freelancers without giving up any functionality or control. Installing QPS was a new development at Univers, which had used QuarkXPress for years but based its workflow on design templates and Word files managed by the communications consultants (who only work in CopyDesk) for the individual projects. Graphic designers would later be responsible for making changes from a marked-up Word file. Top-down managerial control over the projects was difficult and prone to errors.

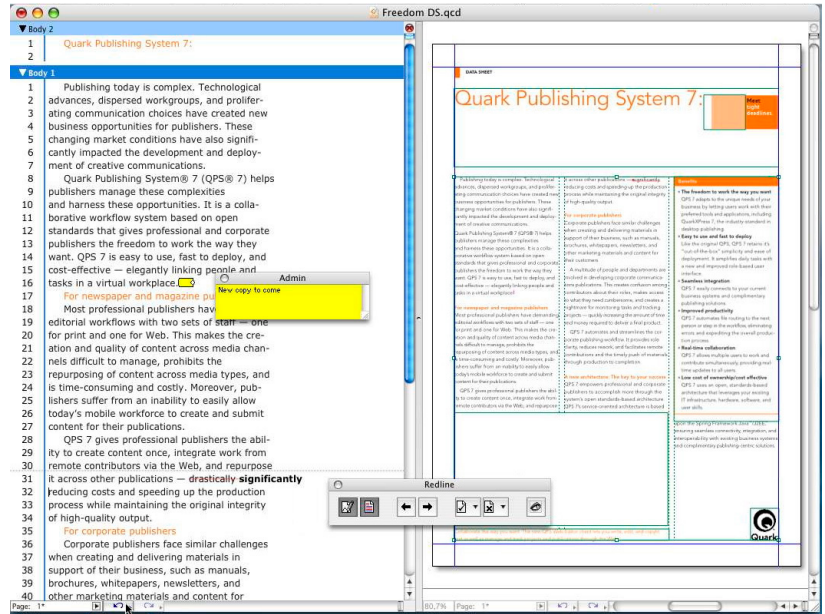
The bulk of the company's work is marketing campaigns to employee groups to communicate benefits and enroll them in plans. Univers serves companies ranging from 50 to 100,000 employees using media such as posters, postcards, html e-mail blasts and — the most time-consuming of all — employment guides that range from 16 to more than 50 pages, some of them in both Spanish and English. Univers gets by with a relatively small staff for most of the year. During the fourth quarter, when the workload peaks for open enrollment activities, it expects to handle 50 individual projects through QPS7.

A number of individuals might handle the text, including those at carriers and brokers. Editing can go through as many as half a dozen iterations. With offices in Florida, California and New Jersey, Univers also needed to communicate on content or translations of the content. The intention in the future is to give customers access to the WebHub along with the freelancers who are using it now. It also plans to extend the use of the system to managing its training and include human resources as users. Sales and marketing will also be included in the future.

Having worked with the beta version for months, Univers installed the system at the beginning of its busy Q4 period in 2007 and ran seven projects through it. To make the system a bit more streamlined for its communication consultants, Quark created a custom script that at the click of a button generates a PDF of the file and sends it to the client for review.

The overall installation process took about six months. The eventual goal of the publishing system is to blend reuse of designs and content with control over documents built from scratch through an XML-based process. QPS7 supports XML, which along with the company's familiarity with XPress made QPS7 the only choice. Univers was able to avoid hiring an additional graphic designer and expects to see a return on its investment in two years. It also anticipates being able to move beyond enrollment documents and onto other types of employee support documents.

QuarkXPress has always provided a developers kit (XDK) to extend the capabilities of an application. To allow extensibility and automation for a typical creative



workgroup that does not program, QPS adds the ability to script events in the workflow. QPS7 provides scripting capability through server-side Java scripts.

Quality

Even though there are many ways to collaborate, QPS7 quality is the result of control within the system. Maintaining quality begins at content creation and continues to output. Job jackets provide the mechanism for controlling critical parameters; ongoing layout evaluations alert the user when something has occurred outside of those parameters; and PDF/X file formats bundle and lock the output specifications when the job is complete.

Marty Yeager, VP of communications technology for O'Sullivan Communications, has been a QPS user since Version 1.x and was an active beta tester for subsequent products. About 35 copywriters and several layout people work on the company's seven QPS7 projects. O'Sullivan also uses WebHub, primarily for outside translators. The company expects to increase its use of WebHub for more contract language translators. Being able to work in an English environment with many languages is a winning proposition in the company's core business: airline menus.

Having been involved in the beta testing helped Yeager identify the right time to deploy the system in his organization. The main problem he faced involved migrating legacy data from older Quark documents (which seems to be the biggest criticism against adopting QPS7 from many of the users interviewed). This is typical of XPress upgrades from the past. In this case, because of problems with the migration routine from QPS versions 4 to 6 to 7, some aspects of layouts did not translate accurately.

Another issue, which had a bearing on the required training, was the "dumbing down" of the query method. Building queries is now easier for inexperienced

Continued on page 14

Quark CopyDesk provides a galley view and WYSIWYG view for marking up and copy-fitting. Items can be redlined and notes can be inserted where needed.

The New QPS – *Continued from page 8*

users but requires more steps for more experienced users. However, according to the users mentioned in this article, complicating the query process with additional mouse clicks is an area they can live with, since it makes the search process easier for inexperienced operators.

Perhaps the most important aspect of QPS7 is the inclusion of Unicode and support for 2-byte characters. Nearly all of O’Sullivan’s work is translated into 65 different languages, and being able to control this from QPS7 is critical. Unicode is the return on investment compared to the previous challenge of managing all of the different variations of the same document.

O’Sullivan also uses QuarkXPress Server to generate XML CopyDesk content. In this case, scripting is important to automate the process of generating the XML for output. Coupled with the fact that Quark has moved away from a proprietary database, this is a key feature for O’Sullivan.

Conclusion

We were pleasantly surprised that the suite of powerful applications that is QPS7 (and QPS8) interoperates so well behind such a disarmingly friendly user interface. On one hand, since Quark set the standard for simple drag-and-drop layout and user control over typography, so it should be expert at product GUIs, and should be able to take the workgroup version to the next level. However, this is a complete revamping of the system. The troubles at the company over recent years, its disastrous release of Version 5 and a hostile attitude toward customer support were not encouraging for either the standalone application or the system. Even fans of the company’s products were skeptical.

The suite of applications needed a total rewrite to comply with new desktop hardware and operating systems. With InDesign and InDesign Server nipping at Quark’s heels, failure was not an option.

We were prepared to uncover the worst, but discovered that other than some expected issues with corruption in legacy files, the transformation was a success. Installation is straightforward and system managers seem to drop QPS into production with a minimum of testing. Also adopting QPS7 are systems managers with mature, stable workflows based on versions as early as QPS3. All of them seem to be particularly pleased with the interoperability opportunities and the outsourcing potential with Web Hub.

QPS8 represents a further evolution for the line, including promised integration of InDesign and InCopy into the QPS workflow. This puts Quark in direct competition with Woodwing’s Smart Connection Enterprise and Softcare’s K4 as an InDesign system supplier. Since Adobe does not make a system per se and focuses on providing an open engine for integration in third party solutions, a head-to-head comparison isn’t possible. It is curious that Quark is able to create such a system because Adobe’s file format for InDesign is open, whereas the QuarkXPress file format is heavily encrypted and closed. This is not to say that it can’t be deconstructed, but replicating a similar solution with XPress compatibility on the InDesign engine is much more difficult. This new compatibility is unlikely to tip the scale for integrators using .NET to develop a solution on top of an InDesign engine. Most likely they will continue to do so and QPS7 and QPS8 will serve as the straightforward, out of the box solution for users with basic needs and uncomplicated workflows. **TSR**

The Green Media Show – *Continued from page 10*

magazine uncovered similar numbers — about 65-75% of the publication’s emissions came from paper mills.

Sustainability metrics and measurement approaches can become burdensome in the extreme, as Ohio State’s Center for Resiliency Director Joseph Fiksel pointed out. The Millennium Ecosystem Assessment, for example, provides a performance measurement system for 24 separate areas of concern, with climate impact being only one. He outlined a simpler approach, measuring return on energy over the lifecycle of an energy component, compared with its renewability (percent of input from renewable sources).

Another speaker, Robert Pojasek of **First Environment**, also pointed out that there are simply too many sustainability metrics today, and that most simply measure *results* (lagging indicators) rather than actual performance. As an alternative, he recommended that all businesses, including media companies, apply a Business Excellence Framework (BEF). Environmental performance under a BEF would measure leading indicators, and be verifiable by an inde-

pendent third party. To be considered, results would be evaluated based on such things as real business importance and whether an action plan was in place to address the results.

Conclusions

The body of practical knowledge presented at the event was formidable — which we hope will be widely disseminated by SustainCommWorld and its ally, the **Institute for Sustainable Communication**. Publishers and advertisers in particular are in need of tools and realistic measurement techniques, to move beyond green-speak and take practical environmental steps that are also practical and profitable.

Proactive vendors such as HP, Kodak, Xerox and many others are to be commended for their leadership role. Although they had little opportunity to tout their wares at the event, their support was appreciated by many media companies and their service providers. This writer hopes that next year’s roadshow events are similarly supported — and attended by a growing audience of media decision makers. **TSR**