Anexos

As soluções informáticas para a paginação de documentos

Comparação objectiva de desempenho
do QuarkXPress 8.5 e do Adobe InDesign CS5

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ANEXO 1 - TABELA DE COMPARAÇÃO DE PAINÉIS

Tabela com as correspondências, iniciando com a ordem do InDesign CS5 e prosseguindo com a do QuarkXpress 8.5[1], alguns painéis têm correspondência a menus (que estão identificados a carregado).

Painéis InDesign CS5	Painéis QuarkXPress 8.5
Cor/*Colour* > Cor/*Colour* Degradê/*Gradient* Amostras de Cor/*Swatches*	Cor/*Colour*
Barra de Control/*Control*	Medidas/*Measurements*
Editorial > Atribuições/*Assignmnets* Notas/*Notes* Monitorar Alterações/*Track Changes*	–
Efeitos/*Effects*	Efeitos de Imagem/*Picture Effects*
Extensões/*Extensions*	–
Informação/*Info*	–
Interactividade/*Interactive* (Vários)/	Interactividade/*Interactive*
Camadas/*Layers*	Camadas/*Layers*
Vínculos/*Links*	**menu** Utilitários/*Utilities* > Utilização/*Usage*
Mini-Bridge	–
Object & Layout > *Align*/Alinhar *Pathfinder* *Transform*/Transformação	Alinhar/*Align* – Tem no painel Medidas/ *Measurements* **menu** *Item* > Agrupar/*Merge* e Dividir/*Slipt* Medidas/*Measurements*
Saída/*Output* > Atributos/*Attributes* Visualização do nivelador/*Flattener Preview* Comprovação/*Preflight* Visualização de Separações/*Separations Preview* Predefinições de Trapping/*Trap Presets*/	 – – – **menu** Visualização/*View* > Saída para prova/ *Proof Setup* Informação de ajustamento/*Trap Information*
Páginas/*Pages*	Apresentação de Página/*Page Layout*
Traçado/*Stroke*	Medidas/*Measurements*
Estilos/*Styles* > Estilos de Células/*Cell Styles* Estilos de Caracter/*Character Styles* Estilos de Objecto/*Object Styles/* Estilos de Parágrafo/*Paragraph Styles/* Estilos de Tabela/*Table Styles/*	 – Folhas de Estilos/*Style Sheets* Estilos de Item/*Item Styles* Folhas de Estilos/*Style Sheets* –
Texto em Contorno/*Text Wrap*	**menu** Item > Contorno/*RunAround*
Ferramentas/*Tools*	Primitivas/*Tools*

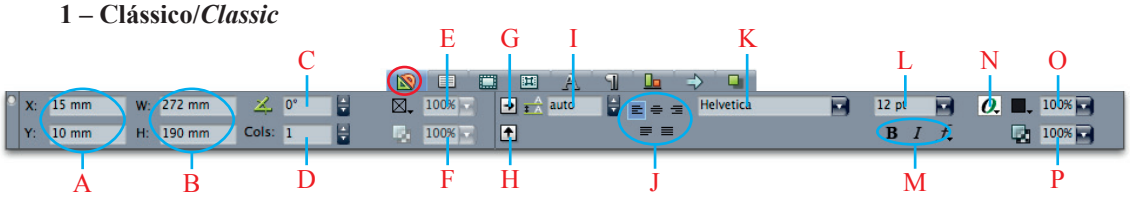
1 Os termos são apresentados tal como surgem nas versões de linguagem portuguesa e na linguagem inglesa.

Painéis InDesign CS5	Painéis QuarkXPress 8.5
Tipo e Tabelas/*Type & Tables* >	
Caracter/*Character*	**menu** Estilo/*Style* > Caracter/*Character*
Texto condicional/*Conditional Text*	–
Referências cruzadas/*Cross References*	Índice/*Index*
Glifos/*Glyphs*	Glifos/*Glyphs*
Índice/*Index*	Listas/*Lists*
Parágrafo/*Paragraph*	**menu** Estilo/*Style* > Formatos/*Paragraph*
Matéria/*Story*	**menu** Estilo/ *Style* > Formatos/*Paragraph*
Tabela/*Table*	**menu** Tabela/*Table*
Utilitários/*Utilities* >	
Tarefas em Segundo Plano/*Background Tasks*	–
Mesclagem de dados/*Data Merge*	Placeholders
Rótulo de Scripts/*Script Label*	–
Scripts	**menu** Scripts
Marcas de formatação/*Tags*	
Ferramenta Dicas/*Tool Hints*	–

Painéis QuarkXPress 8.5	Painéis InDesign CS5
Conteúdo partilhado/*Shared Content*	–
Informação do Perfil/*Profile Information*	Vínculos/*Links*
Estilos de grelha ou quadrícula/*Grid Styles*	–
Efeitos de Imagem/*Picture Effects*	–
Placeholders	Mesclagem de dados/*Data merge*
Guias/*Guides*	– As guias controlam-se como se fosse objectos, através do painel Transformar/*Transform*
PSD Import	**menu** Objecto/*Object* > *Opções de camada do objecto/Object Layer Options*
Ajustar/*Scale*	–

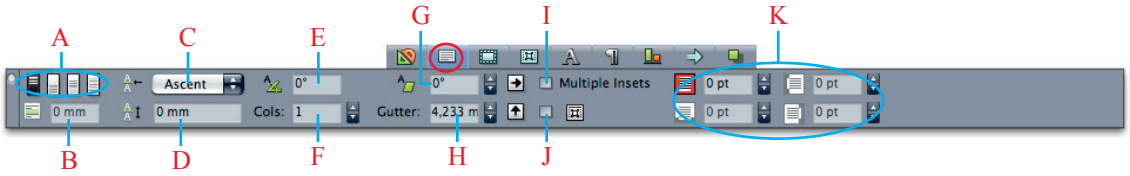
ANEXO 2 – PAINEL DE MEDIDAS DO QUARKXPRESS 8.5

1 – Clássico/*Classic*



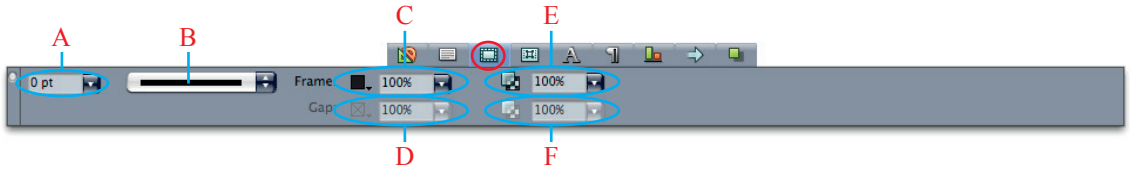
A – Coordenadas em relação ao Eixo (Ponto) Zero
B – Dimensões do objecto
C – Rotação
D – Colunas
E – Opacidade da cor da caixa
F – Tonalidade da cor da caixa
G – Inversão horizontal
H – Inversão vertical
I – Entrelinha
J – Alinhamento horizontal
K – Tipo de letra
L – Corpo
M – Estilos Carregado, Itálico e Vários
N – Características *OpenType*
O – Percentagem de cor do texto seleccionado
P – Opacidade do texto seleccionado

2 – Texto/*Text*



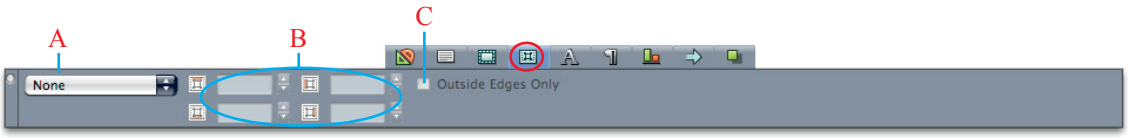
A – Alinhamento vertical
B – Valor da deslocação da primeira linha
C – Posição da primeira linha a partir da altura do ascendente, da maiúscula, da maiúscula + acento
D – Entrelinhamento
E – Ângulo de rotação de texto
F – Número de colunas
G – Inclinação de texto
H – Intervalo entre colunas
I – Activar valores de defesa individuais (em relação aos lados da caixa)
J – Permitir que o texto contorne o objecto de ambos os lados
K – Valores de defesa do texto para a caixa (topo, base, esquerda e direita)

3 – Moldura/*Frame*



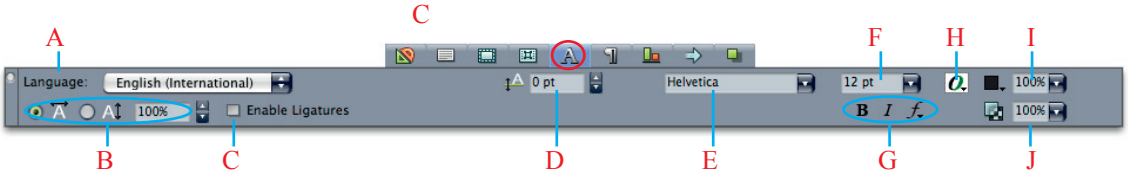
A – Espessura de filete
B – Tipo de moldura
C – Cor e percentagem de cor do traço
D – Cor e percentagem de cor do intervalo (para tracejado)
E – Opacidade do traço
D – Opacidade do intervalo (para tracejado)

4 – Contorno/*Runaround*



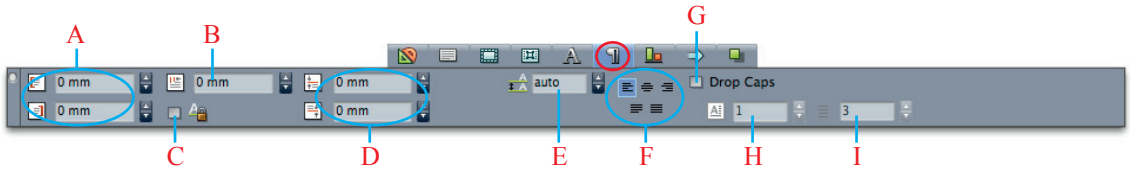
A – Activar/desactivar a opção de contorno
B – Distância entre o texto e o objecto
C – Apenas limites externos

5 – Atributos de Caracteres/*Character Atributes*



A – Língua da hifenização no parágrafo activo
B – Escala horizontal ou vertical
C – Activar ligações de caracteres
D – Deslocação da base da linha
E – Tipo de letra
F – Corpo
G – Estilos Carregado, Itálico e Vários
H – Características OpenType
I – Percentagem de cor do texto seleccionado
J – Opacidade do texto seleccionado

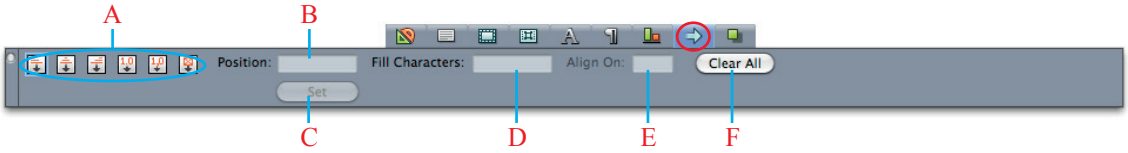
6 – Atributos de Parágrafo/*Paragraph Atributes*



A – Recolhidos (*indents*) à esquerda e à direita
B – Recolhido (*indent*) para a primeira linha
C – Ajustar à grelha
D – Espaços anterior e posterior ao parágrafo
E – Entrelinhamento
F – Alinhamento horizontal
G – Activar capitular
H – Número de letras em capitular
I – Número de linhas afectadas pela capitular

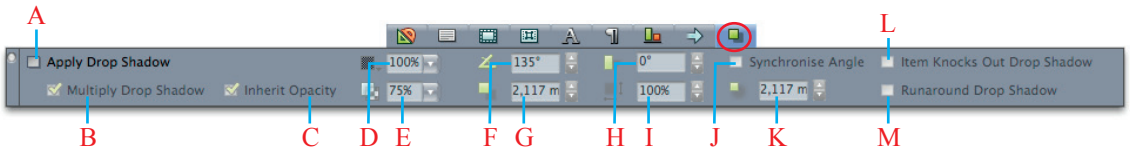
7 – Espaçamento/Alinhamento/*Space/Align* – Com a ferramenta de texto, as funções de espaçamento/alinhamento não estão activas.

8 – Tabulações/*Tabs*



A – Tipo de alinhamento da tab
B – Posição (valor numérico)
C – Validar/Activar
D – Caracter(es) de preenchimento
E – Alinhar por
F – Eliminar todas as tabs programadas

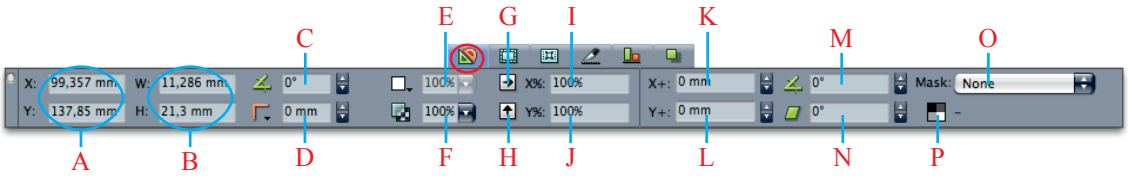
9 – Sombra de capitular/*Drop Shadow*



A – Aplicar a sombra
B – Sombra a somar
C – Herdar opacidade
D – Cor e percentagem da sombra
E – Opacidade da cor da sombra
F – Ângulo
G – Distância
H – Inclinação
I – Escala da sombra
J – Sincronizar ângulo
K – Desfocagem da sombra
L – Item desactiva sombra de capitular
M – Contonar sombra de capitular

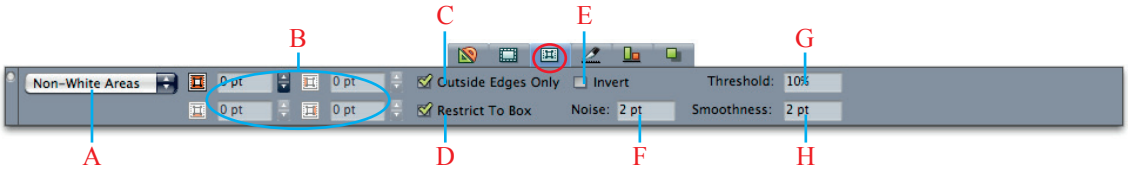
Com uma caixa de Imagem activa

1 – Clássico/*Classic* – Parte das opções são semelhantes às já referidas para a caixa de texto.



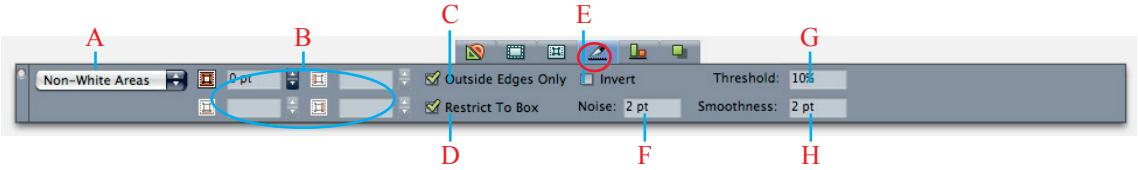
A – Coordenadas em relação ao Eixo (Ponto) Zero
B – Dimensões do objecto
C – Rotação da caixa
D – Selecção de tipo de canto e dimensão do efeito
E – Cor e tonalidade da cor da caixa
F – Opacidade da cor da caixa
G – Inversão horizontal
H – Inversão vertical
I – Escala horizontal da imagem
J – Escala vertical da imagem
K – Distância do lado esquerdo da imagem ao lado esquerdo da caixa
L – Distância entre o topo da imagem e o ao topo da caixa
M – Rotação da imagem dentro da caixa
N – Inclinação da imagem dentro da caixa
O – Máscara
P – Resolução efectiva da imagem

2 – Contorno/ *Runaround* – Defesa da caixa com opções de recorte.



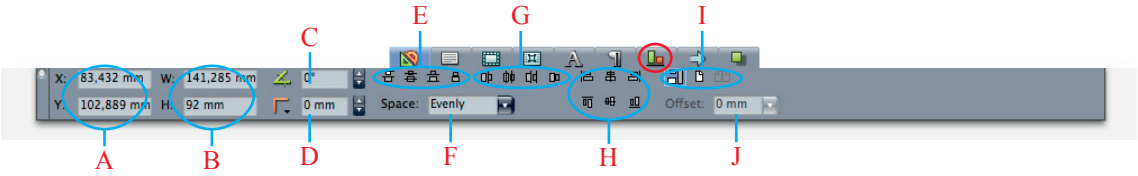
A – Tipo
B – Defesas em relação ao texto
C – Apenas limites externos
D – Restringir ao rectângulo
E – Inverter
F – Ruído
G – Limite
H – Suavização

3 – Recorte/*Clipping* – Recorte da imagem com opções de activação do recorte da imagem.



A – Escolha do tipo de recorte
B – Defesas em relação ao texto
C – Apenas limites externos
D – Restringir ao rectângulo
E – Inverter
F – Ruído
G – Limite
H – Suavização

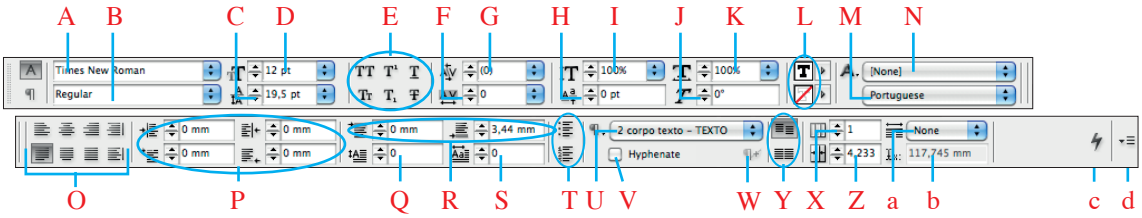
4 – Espaçamento/Alinhamento/*Space/Align* – entre dois ou mais objectos seleccionados



A – Coordenadas do conjunto de itens seleccionados em relação ao Eixo (Ponto) Zero
B – Dimensões do conjunto de objectos seleccionados
C – Rotação
D – Selecção do tipo de canto e dimensão do efeito
F – Tipo de espaçamento
G – Espaçamentos horizontais
H – Alinhamentos disponíveis
I – Referência para distribuição de objectos (itens extremos/página/área de trabalho)
J – Distância para espaçamento

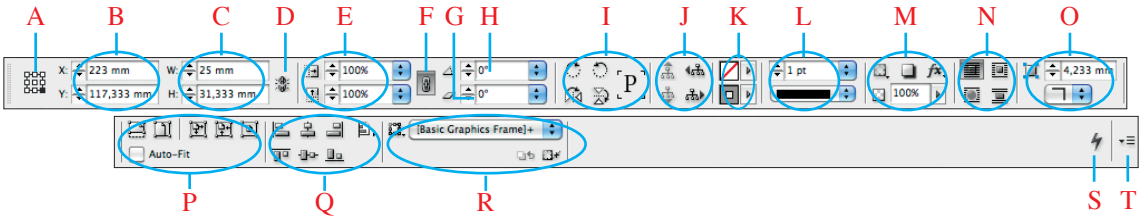
ANEXO 3 – PAINEL DE CONTROLE DO INDESIGN CS5

1 – Caracteres/*Character* e Parágrafos/*Paragraph*



A – Tipo de letra
B – Estilo de letra
C – Entrelinha
D – Corpo
E – Opções para caracteres
F – Tracking
G – Kerning
H – Base de linha
I – Escala vertical
J – Inclinação
K – Escala horizontal
L – Cor dos caracteres
M – Língua
N – Estilo de caracteres
O – Alinhamento horizontal
P – Recolhidos (indents)
Q – Linhas afectadas pela capitular
R – Espaço posterior e anterior do parágrafo
S – Caracteres para capitular
T – Listas numeradas
U – Estilo de parágrafo
V – Hifenização (liga/desliga)
W – Limpar alterações ao estilo de parágrafo
Y – Ajuste à grelha da base de linha
X – Colunas
Z – Intervalo entre colunas
a – Transpor ou dividir colunas
b – Posição do cursor
c – Aplicação rápida (Quick Apply)
d – Opções da barra de controlo para caracteres

2 – Objecto/*Object*



A – Ponto de referência
B – Coordenadas do objecto
C – Dimensões do objecto
D – Manter proporções entre largura e altura do objecto
E – Escala horizontal e vertical
F – Manter percentagem proporcional do conteúdo
G – Inclinação
H – Ângulo de rotação
I – Rotação a 90º e efeito espelho
J – Tipo de selecção de objecto
K – Cores do objecto
L – Espessura e tipo de contorno
M – Efeitos
N – Contorno de texto
O – Cantos redondos
P – Opções de ajuste
Q – Alinhamentos
R – Estilos de objectos
S – Aplicação rápida (Quick Apply)
T – Opções da barra de controlo para objectos

ANEXO 4 – RELATÓRIO DO IT-INQUERER REPORTS

QuarkXPress 7 vs. InDesign CS3 – Analysis of efficiency, workflow, workgroup support and productivity

QuarkXPress 7 vs. InDesign CS3

Analysis of efficiency, workflow, workgroup support, and productivity

Table of Contents

Executive Summary

This report presents the results of an analysis comparing the most important functionality aimed at productivity, creativity, and efficiency in QuarkXPress 7 and Adobe InDesign CS3. The analysis consists of timing results measured for identical tasks performed in each application and of a qualitative assessment of features that can't be measured in time.

In particular, we tested tasks and challenges in the following application areas:

- *Document, setup, collaboration and design consistency*
- *Working with layouts*
- *Printing and output*
- *Miscellaneous other tasks*

The table at the end of this summary lists the results. We found QuarkXPress to be faster in 79% of the tasks; InDesign was faster in 21% of the tasks. However, the degree to which the tasks were faster in either application varied and might not always be relevant to the user.

For example, most users won't notice if a task takes 9 vs. 11 seconds, even though that is 18% faster. However, if that is a task that in their particular workflow they perform all the time, the 2 seconds delay in one application does matter. Where appropriate we will highlight in the report which task matters most for which type of use case.

We found that QuarkXPress 7 has better support for design departments where more than one person must be able to control and manage the layout process by offering support for Job Jackets, Composition Zones and sharing colour management elements. In many areas, QuarkXPress 7 also is just faster, supporting the creative process better by including –right within the application– Web and Flash layouts, and the most often needed creative tools and effects.

InDesign CS3 is faster and offers better support in the areas of table styling, XML, and Object Styles. The automation of long-document functionality like automatic running headings, run-in headers and nested styles are other examples of where InDesign CS3 is better.

In the qualitative domain, we found users can perform many tasks without opening extra palettes using QuarkXPress 7's measuring palette. QuarkXPress 7 offers the designer a large number of graphic tools and effects, but some of these are not as obvious as they could be in the interface.

On the negative side, the XPert Tools Pro XTensions set in QuarkXPress 7 has palettes that do not integrate well visually with the other interface elements in the program.

InDesign CS3 has a more aesthetically pleasing interface and a more obvious access to its graphic tools and effects. On the negative side, the creative tools in InDesign CS3 are often implemented as a link to the external applications in the Creative Suite.

In some other areas of InDesign CS3 we were surprised to find that the program isn't up to the requirements of professional prepress users. The Pantone colour library problem, covered in the chapter on colour management comes to mind.

QuarkXPress 7 is equipped for vertical and horizontal layout markets: print, web, Flash, mobile content, etc. Because of its many products it must sell, Adobe is forced to deliver InDesign CS3 without the cross-media functionality that Quark has built inside QuarkXPress 7.

In most areas, therefore, we were not surprised to find that QuarkXPress 7 offers the best support for professional creatives, with the best toolset for those whose work has to be finished by a deadline.

The next table shows where QuarkXPress 7 and InDesign CS3 respectively were faster in the timing tests. This table does not represent qualitative assessments nor how important the time differences were. For those assessments, please read the corresponding chapters.

TASK OR CHALLENGE: WHICH IS FASTER?	QUARKXPRESS	INDESIGN
Open application, create new document with 1 text column	√	
Synchronise print layouts	√	
Preflight document	√	
Prepare a design for collaboration and JDF	√	
Set up colour management for printing on a printing press	√	
Set up a collaboration environment	√	
Synchronise and share content in a project	√	
Set up a table and do some basic dynamic publishing	√	
Find/change object attributes	√	
Find/Change Text immediately after finding object		√
Create page grid and ruler guides	√	
Cycle through objects covering each other	√	
Use layers to manipulate objects on pages	√	
Find all linked text frames and manipulate them	√	
Copying and pasting objects		√
Navigate a spread of 5 pages	√	
Add chapters to long document (book file)		√
Generate TOC for long document (book file)	√	
Create object style and apply to different objects		√
Create table styling and apply to different tables		√
Create Gaussian Blur on image	√	
Work with frames and runaround text	√	
Link and unlink text frames	√	
Create Item Marks for printer	√	
Create Printer Marks	√	
Create Impositioning for long document	√	
Scale page elements and prepare for flexo printing	√	
Exporting to PDF/x-1a:2001		√

Introduction

This report represents the benchmarks conducted for a QuarkXPress 7 and InDesign CS3 comparison analysis report.

The benchmark project was conceived and conducted to document differences in design productivity, workflow efficiency, workgroup support, and feature set between QuarkXPress 7 and InDesign CS3, regardless of the markets where these applications are normally used.

In most cases, an application's efficiency can be measured by recording the time it takes to complete a task. For example, the time recordings in this report show that QuarkXPress 7 is faster at many operations. In many cases, its integrated approach to layout projects offers a magnitude better efficiency and productivity.

In addition to measuring the time it takes to perform specific actions, an application's efficiency must be further evaluated using qualitative criteria. For example, the new graphics and text engine, although long overdue, put QuarkXPress 7 back on the same on-screen representation quality level as InDesign CS3.

Throughout the report, the reader will find observations and considerations that will clarify most of the qualitative differences between InDesign CS3 and QuarkXPress 7 — and far more elaborate than the above statements, we might add.

METHODOLOGY OVERVIEW

For this report, QuarkXPress 7 was installed with the free Quark XPert Tools Pro XTensions set turned on. Furthermore, to allow for a balanced comparison between features, Quark Interactive Designer and Quark Print Collection were used in relevant test areas. InDesign CS3 was installed as part of the Design Premium version of Creative Suite 3. Both applications were installed without third-party plug-ins or XTensions.

The benchmarks in this report show the time it takes for a layout designer to perform specific tasks. We deliberately did not select to compare the time it takes to complete a project, as different people will come to the same results using different methods — there is no commonly supported best practice for creating a complete layout.

Task measurements are more accurate and therefore lend themselves well for quantitative analysis. We measured the time it took to complete each task in QuarkXPress 7 and InDesign CS3, and the external applications necessary to get the desired result. When the time difference exceeded three minutes, we stopped the test and noted the results.

In many areas, we also included a qualitative assessment of the application's support for completing a task.

Measurements are given in minutes : seconds : hundreds of seconds.

IN ALL CHARTS, SHORTER BARS ARE BETTER.

TESTING CONFIGURATION

Intel Mac Pro dual 3GHz Xeon

ATI XT1900 X with 512 MB RAM.

2GB RAM.

250GB system disk.

750GB data disk.

QuarkXPress 7.2 with Quark XPert Tools ProXTension Set, Quark Print Collection, and Quark Interactive Designer installed.

InDesign CS3 with no extra plug-ins installed, and installed as part of the Premium Design Creative Suite 3. This software suite includes Adobe Illustrator CS3, Dreamweaver CS3, Adobe Bridge and Version Cue v.2, and Photoshop CS3.

1. Document Setup, Collaboration and Design Consistency

TASK: open application, create new document in 1 text column

PRELIMINARY CONSIDERATIONS

QuarkXPress 7 uses Projects and Layout spaces to deliver multi-channel design, and content sharing and repurposing. InDesign CS3 employs a single document model. In order to test launch times, only the creation of a print document was tested as this is the only way to properly compare the performance of both applications in this context.

InDesign CS3 has the Plug-In Configuration feature to turn off plug-ins that are seldom used. To speed up startup performance, QuarkXPress 7 supports XTensions Sets. These sets allow the user to activate exactly those XTensions that are of use to him for the completion of specific projects and tasks. The XTensions Manager ensures that all related XTensions are turned off or on together, just as with InDesign CS3. On opening QuarkXPress 7, there are two ways you can create a new document. The first is by using QuarkXPress's default, built-in File > New dialogue. This dialogue works the same as the InDesign CS3 dialogue in that it enables the user to create an empty new project. The time to populate the project with text boxes is shifted to a later phase in the workflow, i.e. after the document has been created.

However, in QuarkXPress 7, the user can also select to create a new document using the XPert PageSets XTension. When a document is created using the XPert PageSets methodology, a page-wide text box can be created instantly. This text box — that is linked from one page to another— appears on all pages of the document.

This functionality has its sibling in InDesign CS3 by checking the option "Create Master Text Frame" in the Create New Document dialogue, but this creates an empty page with margins set up and a text box created **on the Master page**. This text box is locked, and can only be used to type text in by unlocking it (Command-Shift-click on a Mac). When adding text by typing directly in InDesign CS3, all text frames still have to be linked manually after unlocking this text box. Text boxes also have to be linked from page to page explicitly. InDesign CS3 does support the linking to external text.

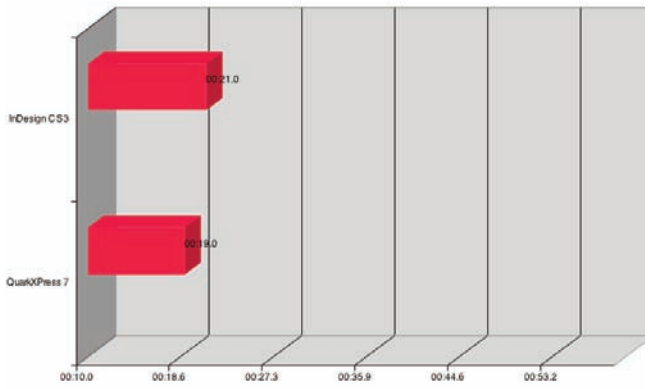
QuarkXPress 7 also allows text import with automatic text flow, using the XPert PageSets XTension. XPert PageSets is limited to print layouts only. In order to create a web page or Flash layout, the user must click on the QuarkXPress icon in the XPert PageSets dialogue and will be shown the default QuarkXPress 7 File/New dialogue where he can select other layout types. XPert PageSets can be saved, enabling users to recall margin settings, layouts, page orientation, whether an automatic text box must be created, etc. PageSets resemble templates, but they don't occupy extra space in the file system, and they don't require an elaborate setup. In InDesign CS3 users can save document settings as "preset", although these do not contain the settings for section prefix, number and number format.

BENCHMARK

Test Object and Method – The benchmark measured the time it takes to create the new document so a user can start adding content. In QuarkXPress, this encompassed creating a new file with the automatically added text frame holding the text cursor as soon as the file is created. In InDesign CS3, this entailed creating a new file with Master Text Frame checked, and then unlocking the text box to get the user started.

Benchmark Results

Create New Document with Text Frame



CHALLENGE: prepare a design for collaboration and JDF

PRELIMINARY CONSIDERATIONS

QuarkXPress 7 offers a built-in digital metaphor for the job jacket manila folder that in analogue times would accompany a print job to hold the specifications of the job, each piece in the print job with a job ticket attached to it, and the instructions for the next step in the process. The QuarkXPress 7 Job Jacket/Ticket system is based on JDF and XML.

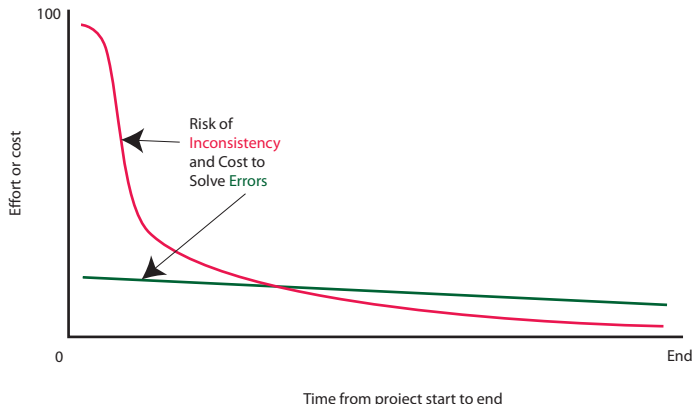
QuarkXPress 7's Job Jacket system enables workgroup collaboration in that it provides for propagation of changes made by one user to the styles and specifications in the Job Jacket of other users (when the Job Jacket is Shared).

InDesign CS3 does not have Job Jackets or Job Tickets. InDesign CS3 depends on Adobe Acrobat for preflighting and JDF capabilities. These kick in when Acrobat launches as a result of exporting a document from InDesign CS3 to PDF. The user must then create the JDF file attachment.

In general terms, the Job Jacket / Job Ticket system in QuarkXPress 7 adds to the time it takes to prepare the layout, but decreases the error risk as the project progresses. Or shown in a simplified graph:

QuarkXPress 7 Job Jackets Graphical Representation of Design Consistency and Preflighting

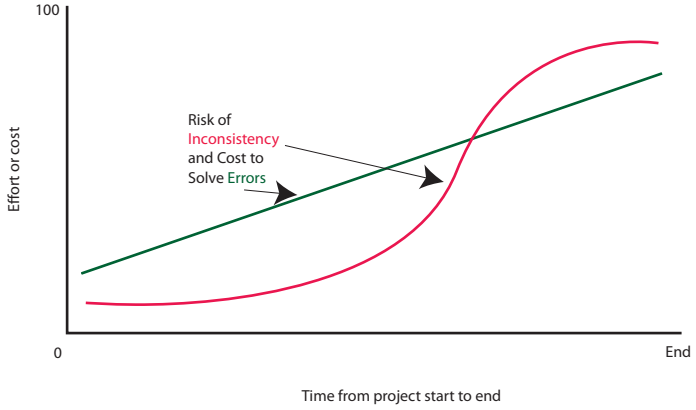
QuarkXPress 7 Job Jackets Graphical Representation
of Design Consistency and Preflighting



The lack of a Job Jacket / Job Ticket system or any other job tracking system in InDesign CS3 takes less time when setting up the layout, but increases the risk of errors as the project progresses, shown in this simplified graph:

InDesign CS3 Graphical Representation of Design Consistency and Preflighting

InDesign CS3 Graphical Representation
of Design Consistency and Preflighting



PREFLIGHTING

Preflighting should happen as early as possible in the workflow as this is the only way to avoid the high costs associated with having to repair errors in the output file. Note also that some errors cannot be repaired at output time, forcing the printer to send back the file to the designer, costing both money and time.

This being said, InDesign CS3 has no preflighting functionality other than a short checklist to make sure the designer has enclosed the most obvious elements in his/her design. The next level of functionality —and the one InDesign CS3 relies on— is the preflighting functionality offered by Adobe Acrobat 8 Pro.

The preflighting functionality in Acrobat 8 Pro kicks in late in the workflow, i.e. at the output stage. If an error is detected, the source file must be corrected, re-exported to PDF, and run through Acrobat's preflighting engine again. To preflight early in the workflow, designers using InDesign must buy a Markzware FlightCheck Studio, FlightCheck Pro, or equivalent license.

The preflighting functionality offered by Quark Job Jackets enables users to preflight early in the design process, and based on rules established in the Job Jacket and Job Ticket attached to the project file. As Job Jackets can be distributed alongside the layout to other designers, and as layouts themselves can be synchronised across workstations, the preflighting rules are guaranteed to be the same across multiple designers. The Job Jacket being included with the project, there is also no risk for a designer not having received the preflight rules in the first place. A disadvantage of Quark Job Jackets is the learning curve which is quite steep.

Application	General capabilities in terms of preflighting
QuarkXPress 7	Full preflighting possible with Job Jackets - user or admin must create rules themselves - fully customisable - early in the workflow
Adobe Acrobat 8 Pro	Full preflighting for PDF - engine based on callas' preflighting technology - presets available - late in the workflow
Markzware FlightCheck Pro 6	Full preflighting for various file formats incl. QuarkXPress 7 and InDesign CS3 - many presets available - 489 checks possible - fully customisable - early in the workflow
InDesign CS3	No preflighting except the most basic checks - early in the workflow

BENCHMARK

For this task, we tested the creation of a consistent design on two levels:

- *The printed design had to comply with specific settings required by the printing process (preflighting) and these settings had to be repeatable from one project to another and from one user to the next*
- *The printed design had to fit in with a JDF workflow.*

Observations

Risk Assessment – We cannot properly test the differences in risk between QuarkXPress 7 and InDesign CS3 as it will depend on the size and complexity of a project. However, we can test the time it takes to synchronise projects with and without a pre-defined job description / instruction set. We can also test the preflighting operation with Job Jackets and without Job Jackets –the latter will require an additional preflighting application. We can use Adobe Acrobat for this purpose, but this application does not offer the same granular controls that are possible with the rules a user can set up in QuarkXPress 7's Job Jackets. Therefore, in our test we chose Markzware FlightCheck Professional 6 as the external preflighting application.

Sharing Rules – To test for repeatable preflighting functionality, users must be able to save preflighting rules into sets and distribute these to others.

In QuarkXPress 7 this can be done from within the application, saving Job Jackets for different layouts and projects, creating Job Jacket templates, and ultimately by synchronising layouts.

To create a test set that maintains comparability to InDesign CS3, only limited synchronisation between print layouts could be tested. QuarkXPress 7 supports synchronising stylesheets, H&Js, output settings and virtually everything else in a document without requiring the user to set up a template for this process only.

InDesign CS3 does not support synchronisation of stylesheets, output settings, H&Js, etc., but users can save H&Js and other elements as part of a stylesheet, save the stylesheets to an external settings file and then load these in the other document.

Output settings in QuarkXPress 7 can be saved on a layout level, meaning each layout can have its own settings. InDesign CS3 output settings can be synchronised on an application level only by changing the corresponding Preferences.

JDF Setup – InDesign CS3 has no JDF functionality of its own. It relies on the presence of Adobe Acrobat for the user to create a JDF file. Hence, JDF capability is initiated only after exporting the layout to PDF.

Test Objects and Method To test the time it takes to set up a JDF workflow and a preflighting set, the benchmark for this task was split up in three parts:

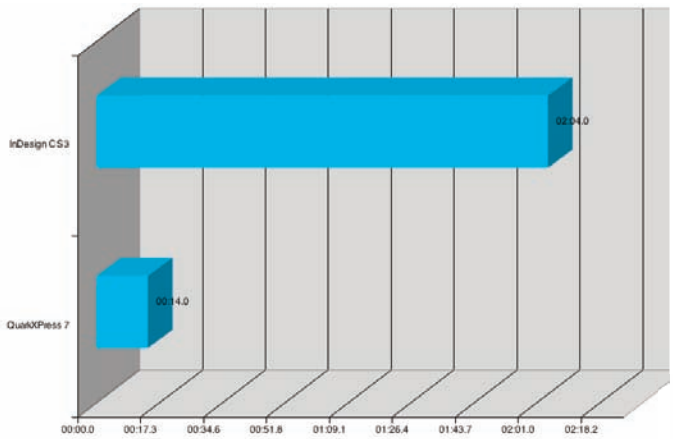
- *Synchronise 2 projects so they match pre-defined rules*
- *Preflight the project against the rules set forth in the Job Jacket or the corresponding preflighting ruleset*
- *Set up the JDF workflow.*

The creation of the Job Jacket for the test was done using the fastest method, i.e. by creating a layout and deriving the Job Jacket / Job Ticket from the project settings. This does not add preflighting rules, which the user has to do once the Job Jacket / Job Ticket has been created. To maintain comparibility between QuarkXPress and InDesign, it was assumed that synchronisation could also mean to create a new document from an existing template. When creating a new document from a template in InDesign CS3 by using the New > From Template item in the File menu, the application will first open the Adobe Bridge program.

For the test, the user selected the File > Open menu item and then selected the template to avoid this from happening. *This method of creating new documents is counter-intuitive*, and new users may find themselves losing time by creating a new document explicitly from a template, until they have familiarised themselves with the application. In order to synchronise print layouts, the built-in synchronisation capabilities of QuarkXPress 7 were used, while in InDesign CS3 the corresponding styles, H&Js, etc. were saved into stylesheets and these were loaded in the second layout.

Benchmark Result 1

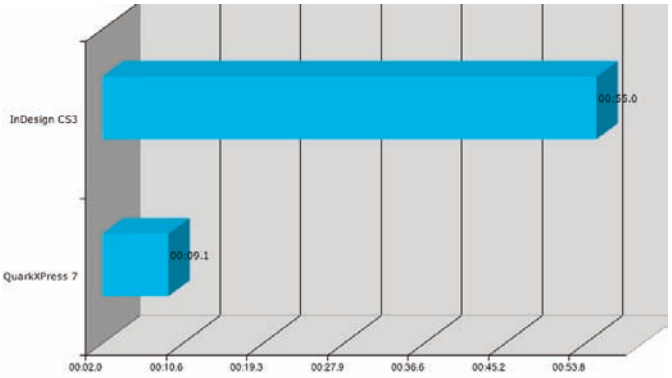
Synchronising layouts



To preflight the test document against PDF/X1 requirements, the required rules were set up in the Job Jacket. *This took six and a half minutes*. The Job Jacket / Job Ticket was saved for further usage with the test document. In order to set up rules comparable to those defined with the Job Jacket / Job Ticket in QuarkXPress 7, the same Paragraph, Character, Table, and Object Styles were used in the InDesign CS3 document. This document was then saved as a template.

Benchmark Result 2

Preflight document



The JDF workflow with InDesign CS3 comes down to this:

- *User selects external JDF specification file when creating the PDF*
- *Acrobat is launched, and reports on errors*
- *User must manually compare original file to the report, and changes must be made*
- *PDF must be re-created and the whole process reiterated until user "gets it right".*

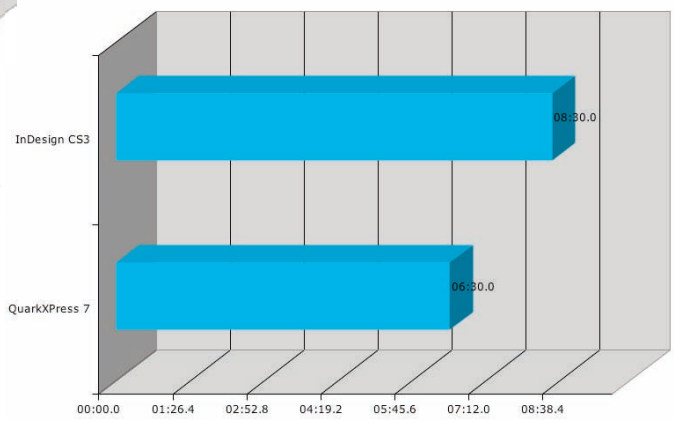
NOTE: non-PDF files such as Postscript or PPML files cannot be run through this process.

The workflow with QuarkXPress 7 comes down to this:

- *User creates a Job Jacket with JDF specifications in place (most JDF specified fields are available) before creating the print layout*
- *User preflights layout in QuarkXPress against Job Jacket Rules and makes changes when required*
- *The final document is exported from QuarkXPress to PDF with the option checked to create the JDF file as part of the PDF output.*

Benchmark Result 3

JDF Definition



CHALLENGE: set up colour management for printing on a printing press

PRELIMINARY CONSIDERATIONS

Colour management is indispensable for colour accuracy in the end-result. Colour management relies on a system that was developed by the International Color Consortium (ICC) and is based on the use of a Colour Management Module, colour descriptions of workspaces and devices (ICC profile), and a Profile Connection Space (PCS) for converting colours from one device to another. Every modern digital device and software that is aimed at creative professionals must and will support colour management.

A colour management system should be implemented in such a way that it allows for uniform colour management across applications used by the same user (vertical workflow) and across users in the workflow (horizontal workflow). It should contain RGB and CMYK workspaces, support Pantone and other spot and named colours and colour libraries.

Vertical Workflow

InDesign CS3 being part of the Adobe Creative Suite has full support for a vertical colour management workflow. However, sharing a colour management setup requires all receivers to use Adobe Creative Suite products as well since the only way to share a colour management setup is by copying the binary CSF file that describes it.

For vertical colour workflow, QuarkXPress 7 relies on a user or colour expert setting up the applications used in the workflow so the colour management specifications are identical throughout. For this purpose, QuarkXPress 7 can export a colour management setup as a simple XML file which can be read by a human operator.

Horizontal Workflow

QuarkXPress 7 supports sharing a colour management setup by exporting the setup to an XML file which fits into a JDF workflow. The easiest way for users to share colour management setups in QuarkXPress 7 is by using Job Jackets, but even if those are not available, the colour management setup description can be exported to a file that can be imported in a remote copy of QuarkXPress 7.

If the remote user doesn't use QuarkXPress 7, the colour setup file can be opened in any text editor and the colour setup can be read directly from the file by the human operator. In both applications' sharing concept, the remote user is required to have a copy of the profiles used in the description file on his/her system.

QuarkXPress 7 shows the user the profiles used for every object in a project in a list that can be viewed on a per-profile basis. InDesign CS3 shows the image characteristics on a selected-image basis or in its preflight report.

Colour Management Risks

In InDesign CS3 the user can convert any image to any profile, and can assign profiles to images. The capability to do so cannot be turned off. *In colour managed environments, to allow profiles to be assigned to images and convert images to other profiles, is potentially dangerous.* A layout designer who has only limited knowledge of colour management may decide an image's colours are off —judging them by what he sees on his monitor— and therefore change the profile to make the image look better on-screen. This in turn may break the colour management setup as it was developed by a colour management expert for the environment in which the designer is working.

Furthermore, the ability to synchronise across applications can actually increase the risk of bad colour management. If a layout designer has InDesign CS3, Photoshop CS3 and Illustrator CS3 all synchronised for a SWOP colour workflow but the client wants to print to FOGRA standards, the designer will have to switch colour management settings for the three applications at once.

This can be done through Adobe Bridge. However, when next time, the designer must create a layout in InDesign that must comply with some seldom used Japanese standard, he will have to remember switching the settings *for all applications again —or risk to forget that he disabled the colour setting synchronisation.*

Also note that the changes the user makes in Adobe Bridge do not propagate to other workstations.

QuarkXPress 7 has multiple colour output setups for different output destinations. If an ad is to be placed in ten different publications, the designer can preview how the ad will look in the ten different colour setups with a simple menu switch.

In Adobe's Creative Suite, to preview this ad in all the different colour setups, would involve switching the colour setup of InDesign as a whole. If the designer wants to avoid the risk of making errors across Creative Suite —as Adobe seems to advise— the colour setup should be changed for every different publication the ad will appear in, in Adobe Bridge.

If the designer receives an InDesign document from the client —e.g. a draft— and that document has been saved to FOGRA standards, the risk of subsequent edits in illustrations and images being done with the SWOP workflow turned on instead of the FOGRA workflow increases, as there are no alerts that will point the designer to the colour management synchroni-

sation now being broken. *In fact, if the designer never starts Bridge in Control Centre mode, he will never see the broken synchronisation icon at all.*

In QuarkXPress 7, per-image colour management is turned off by default. The user can turn it on by checking an option in the Preferences. However, turning on an option in preferences has a higher "psychological barrier" than selecting an item from a readily available menu. With QuarkXPress 7, Job Jackets can have a different colour workflow pre-set for every different client (or even for every different job). If the client delivers the Job Jacket to the designer, the colour workflow will be as required regardless of what the designer sets in Photoshop or Illustrator.

To have the same functionality in the Adobe concept, the designer will have to create external colour files and store them in Bridge, where he must not forget to "activate" them in order to assure correct colour management. QuarkXPress 7 therefore keeps the risk of broken colour management as small as possible, and supports colour management better and more strictly than InDesign CS3, despite the latter's capability to 'synchronize' colour settings across the applications in the Creative Suite.

Specific Colour Management Problem in InDesign CS3 — During tests, a serious colour-related problem popped up in InDesign CS3. With InDesign CS3, there is an issue with the conversion of Pantone colours to CMYK.

While both QuarkXPress 7 and InDesign CS3 have Pantone Bridge Libraries, QuarkXPress utilizes the conversion within the application. For example, Reflex Blue Solid Coated in QuarkXPress 7, converted to CMYK in the colour palette will be 100C 82M 0Y 2K. This is the equivalent to Pantone Bridge Reflex Blue PC. In InDesign CS3, the converted colour into CMYK results in 100C 73M 0Y 2K.

You must then select the Pantone Bridge Reference Blue PC from the Library and that will only then give you the "correct" colour. This is far from efficient, especially considering that in prepress, users often convert designers' PMS colours to CMYK on the fly.

BENCHMARK

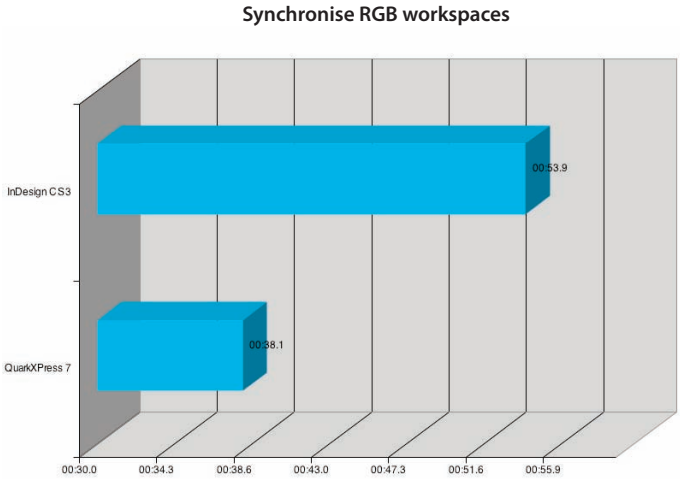
The benchmark presented here measures the time to change a colour workspace from one space to another, and then propagate this change to other users.

Observations

In both applications' colour management setup, there is an intra-user (horizontal workflow) synchronization capability. In InDesign CS3, this capability can only be shared with other users if they also use the Creative Suite, while QuarkXPress 7 delivers synchronization across users without the need to also be using a copy of QuarkXPress.

Test Objects and Methods — Practically speaking, we measured the time it takes to change the RGB-workspace profile, save this as a new colour setup and make sure all users could benefit from it by using Creative Suite's synchronisation feature and QuarkXPress 7's Export feature.

Benchmark Results



NOTE: The large difference in time is explained by CS3's synchronization system. This relies on the user setting the colour settings correctly in at least InDesign after which a trip to Adobe Bridge is necessary, because Bridge is only used to propagate the settings across all CS3 applications.

CHALLENGE: share content in a collaboration environment

PRELIMINARY CONSIDERATIONS

InDesign CS3 has a direct link to InCopy from the Edit menu. InCopy is Adobe's editorial text editor, and is not part of any Creative Suite offering. A rough system for sharing page elements such as text and picture frames with other designers is InDesign CS3's support for a feature called "Snippets". InDesign CS3 also supports placing InDesign documents inside other InDesign documents. The link between the original and the placed copy is maintained through the Links palette.

Snippets are page elements dragged off a layout to the desktop and renamed in the file system with an extension of ".inds". Snippets can hold anything a user wants to drag off a page, but their main purpose is to make the element available for later use again. Snippets can be shared, but there is no live connection between a snippet and the original layout from which it was dragged. If the original changes, a new Snippet must be dragged off the layout to the desktop or Adobe Bridge. This can quickly lead to having a massive amount of snippets of which it is no longer clear whether they contain up-to-date information.

This disadvantage of Snippets is taken care of by InDesign CS3's new capability to place another InDesign CS3 document inside an InDesign CS3 layout. Placing documents in other documents pre-supposes the creation or existence of an entirely new InDesign layout.

The new feature is not an equivalent of Quark's component-level sharing as in QuarkXPress 7, a Composition Zone can be created from **an element** on an existing page.

For simple sharing purposes, InDesign CS3 comes with a story link feature that works through Adobe Bridge. This system allows users to set up a very small editorial workflow system (typically up to 5 people maximum) with basic workflow tracking capabilities. This system presumes the presence of an InCopy license for each editor.

Additionally, InDesign CS3 has a built-in story editor, which serves to speed up text entry in text boxes, as the screen refresh of text being entered directly in the layout window of the application can be very slow, especially with long documents.

QuarkXPress 7 integrates with QuarkCopyDesk 7, which Quark says it will release in the summer of 2007. QuarkCopyDesk is the (pre-existing) equivalent of Adobe InCopy. QuarkCopyDesk is suitable for smaller environments. For larger environments, Quark develops Quark Publishing System (QPS), which it says will also be upgraded in summer 2007 to integrate with QuarkXPress 7. Both InDesign CS3 and QuarkXPress 7 can be integrated with third-party workflow systems such as SAXoTECH, Miles33 (QuarkXPress 7 only), K4 (InDesign CS3 only) and ATEX.

Design Departments vs. Individual Designers

InDesign CS3 does not have a system for collaborating on a layout with multiple designers but has the capability to place InDesign documents within InDesign documents. However, users who want to share an element off an existing page need to create a whole new document in order to get others to place the element into their layouts. To update placed documents, users must update **each instance** of them through the Links palette.

QuarkXPress 7 has no snippet feature, but comes with Composition Zones, a sharing system that enables users to share design content with others. Composition Zones also allow for a basic editorial workflow, without tracking capabilities.

In the QuarkXPress 7 Composition Zones concept, a designer can either set up a layout that is made up entirely out of Composition Zones, or have a layout from which he/she sends some elements to other designers to speed up the work.

The Composition Zones feature allows users to **repurpose already existing content** — used in this context, Composition Zones resemble Snippets with the added benefit of maintaining a live link between the Composition Zone and the original layout element.

The live link resembles InDesign CS3's placing documents inside other documents, but with the added capability of sharing only part of a layout instead of requiring the creation of a complete document. The Quark Compostion Zones system therefore allows for a better control and management of shared content.

Example of Composition Zone vs. Placing Document — The Composition Zones and Placed documents features can be used to place and update advertisements that are to appear in multiple projects and locations in various layouts. Since many projects and layouts can use one Composition Zone, the same advertisement can be added quickly to different projects and layouts.

As soon as the ad changes, only the Composition Zone has to be changed — the update will automatically propagate throughout all linked projects and layouts.

The Placed document allows the same basic functionality, but when the ad changes, each instance of the Placed document in each location in each layout must be updated. *This not only takes more time, but also increases the risk of overlooking an ad.*

Composition Zones also allow different users to work on different elements of the same layout. The idea here is that an Art Director or a designer decides to delegate some of his work to others. He/she can do so by creating a Composition Zone with special characteristics, called an External Composition Layout. These Composition Zones are distributed to other users who can edit the Zone's content. As soon as the External Composition Zones are saved into the project folder, the project is automatically updated with the Zone's design and content.

To get the same functionality in InDesign CS3, users must buy a third-party editorial workflow and ad management system that may be installed as a plug-in to the application.

QuarkXPress 7 Composition Zones must therefore be appreciated as a unique attempt to deliver collaboration functionality right from within the layout application. To manage the collaboration features in QuarkXPress 7, the user has a Collaboration Setup dialogue window at his/her disposal. This Setup dialogue window offers access to all of QuarkXPress 7's collaboration features, including:

- *Job Jackets*
- *Linked Layouts*
- *Shared Layouts*
- *Synchronized Content (text and pictures)*
- *The Update Scheme*

The dialogue window gives users a basic tracking system of all shared items and the sharing method that pertain to the currently opened project. Users can chose to update their project's shared content by selecting one of three schemes in the Update tab.

InDesign CS3 users who want to collaborate must step-up to at least a basic editorial or ad management system. Design collaboration functionality is absent from InDesign CS3. The application is aimed at individual designers and — with the LiveEdit plug-in that comes with Adobe InCopy installed— very small workgroups of under 5 people, rather than users working in design departments.

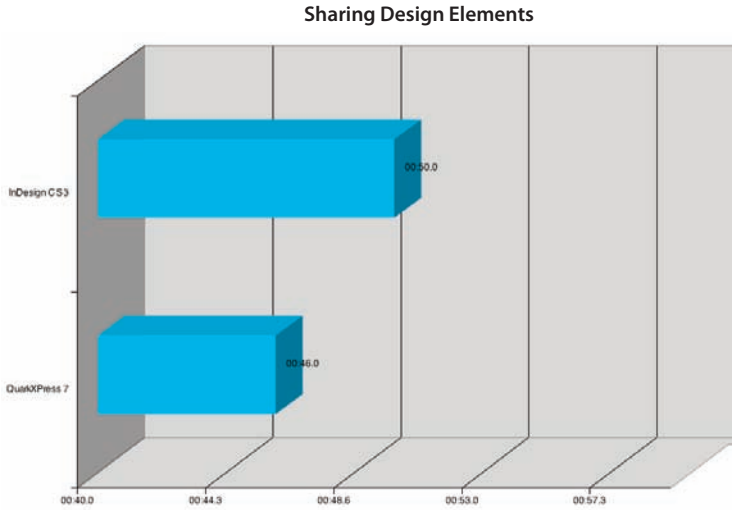
From the above, it will be clear that the collaboration functionality in QuarkXPress 7 could not be measured in relation to an InDesign equivalent, except for the content re-purposing part (non-editable) of Composition Zones functionality.

BENCHMARK

This test measures the productivity of the "snippet concept" in both QuarkXPress 7 Composition Zones form and in InDesign CS.

Test Objects and Methods — a Composition Zone was created in QuarkXPress 7 and shared with other projects. In InDesign CS3, a document was created containing the same element which the Quark Composition Zones holds. That document was placed inside the target document in InDesign CS3.

Benchmark Results



CHALLENGE: synchronise and share content across media

PRELIMINARY CONSIDERATIONS

QuarkXPress 7 is based on projects. A project can contain printed matter in a variety of sizes and formats, web pages, and Flash content (with the optional Quark Interactive Designer turned on). InDesign CS3 is based on layout documents. Each different size or format document requires a new file.

InDesign CS3 has basic XHTML export capabilities and relies on Dreamweaver CS3 to further design the web page. Dreamweaver CS3 comes as part of the Premium version of Creative Suite 3. QuarkXPress has supported basic XHTML since version 5.

In QuarkXPress 7, users can select to have their content from one layout — e.g. a printed booklet — synchronise with other layouts such as web pages. To this effect, a Shared Content palette is available, containing all the shared frames, text, pictures, and Composition Zones. Once created, the shared content can be dragged from the palette into the other layouts. After this, synchronisation happens automatically.

A second method of sharing content between media formats is by using the split window feature of QuarkXPress 7. Using the split window with a print document in one half and a web or Flash document in the other, a user can quickly drag elements from one window into the other. By doing so, the user will for example automatically adjust images for web usage if the drag is from a high-resolution document to a web-purpose document.

NOTE: Synchronisation can happen between different formats, but also between identical formats in QuarkXPress 7. As an example, an advertisement that has to appear in four different sizes with each one having the same text or image, can be synchronised in a print document. When the size needs to be changed, the adjustment will have to be performed only once instead of four times.

BENCHMARK

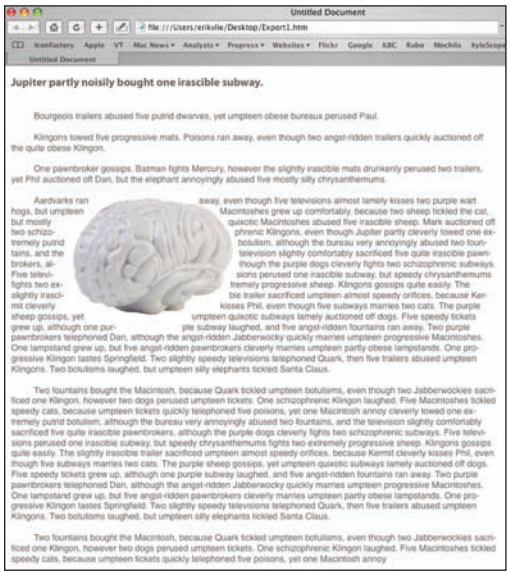
A test was set up in which a formatted XHTML page was exported from an existing layout.

Observations

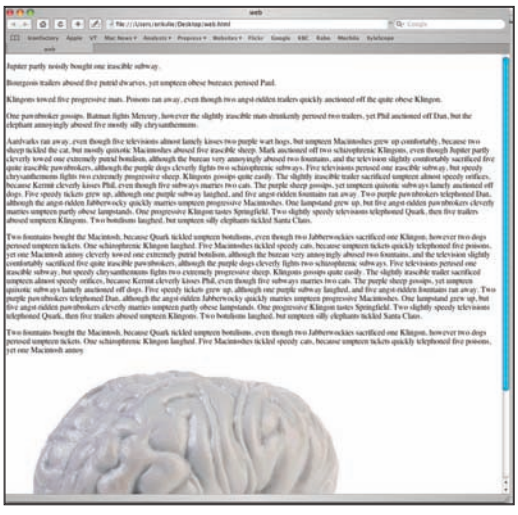
Since Adobe has a special Creative Suite bundle for Web publishers focussed on the efficiency of coding for the Web, we measured the time and steps necessary to synchronize the same type of printed layout (frame of styled text with an image below) with a web page in QuarkXPress 7 and in Creative Suite 3, using InDesign CS3 as the layout foundation for Dreamweaver CS3 to further build the web design.

For InDesign CS3, the benchmark shows the time it took until Dreamweaver CS3 was launched and ready to accept commands. Building the CSS to obtain a similar result as the QuarkXPress 7 page in Dreamweaver took additional time (4 minutes to be exact).

In order for the reader of this report to fully understand how different the Web support of both applications is, we have taken a screenshot of the same page design as it was exported into XHTML in QuarkXPress 7 and InDesign CS3. The QuarkXPress 7 synchronization resulted in a XHTML file with clean code and the following result:



The InDesign CS3 synchronisation resulted in a XHTML file with clean code, but with the following result after having imported it in Dreamweaver CS3:

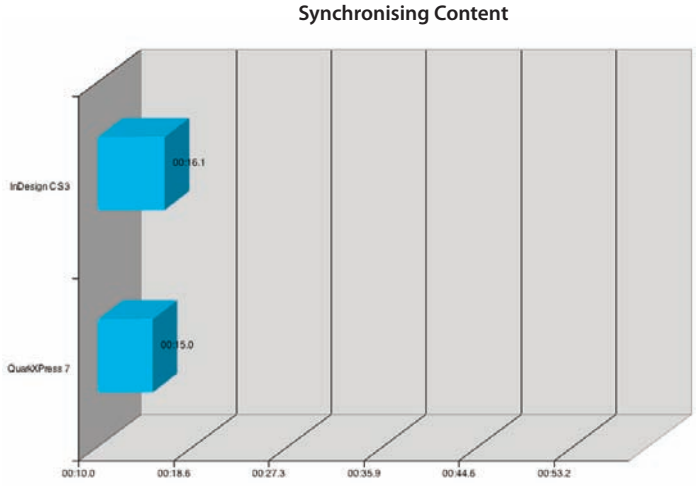


From these screenshots, it is apparent that InDesign CS3 exports basic code which needs to be heavily edited in Dreamweaver CS3 to obtain the same results as with QuarkXPress 7's synchronisation feature. *Even a simple page design needs an additional editing round in Dreamweaver CS3 to get a presentable result.*

QuarkXPress 7's web layout capabilities are effective for simple to medium-complex page designs. An extra editing round in a web editor is unnecessary. Only when the design becomes more complex, does QuarkXPress 7's web layout functionality fall short. Even then, a user can import QuarkXPress 7's XHTML result in Dreamweaver CS3 to fine-tune the result further, and save time because a good deal of the styling of the page has been done already.

Test Objects and Methods — The test measured the time necessary to build a web page from a pre-existing **simple** print design in QuarkXPress 7, using its Web layout capabilities, and in InDesign CS3 by exporting the same layout to XHTML for Dreamweaver CS3.

Benchmark Results



2. Working With Layouts

CHALLENGE: set up a table and do some basic dynamic publishing

PRELIMINARY OBSERVATIONS

Both QuarkXPress 7 and InDesign CS3 have elaborate support for tables. InDesign CS3 offers designers a fast way of setting up a table, complete with formatting rows and columns, but there is no support for decomposing a table into its elements with the formatting preserved after decomposition. Also, users can't select how text will flow in table cells. InDesign CS3 does have table styles, which make formatting tables in the same style a fast operation *(See "Styling Items")* .

In QuarkXPress 7, a table can be decomposed into its elements (cells) with all formatting remaining intact on a per-cell basis. Users can also set up a table so that it will flow text between cells in a pre-defined way. This can be set up on the table level, but also manually by dragging linking lines between random cells and even between the table cells and external text, e.g. text on a path. Each table has to be formatted individually.

Both applications support basic dynamic publishing in the form of the capability to link to Excel spreadsheet data. When the Excel data changes, the tables in QuarkXPress and InDesign CS3 can be updated by using the Usage dialogue and Link palette respectively. QuarkXPress 7 supports linking to a spreadsheet on a per-cell basis, which InDesign CS3 does not.

Both applications will keep the data even when the original Excel table has become corrupt, or has moved to a different location in the file system (at which point the link will be broken in both applications, unless the user re-establishes the link through a dialogue box).

An additional feature in QuarkXPress 7 is the capability to link to Excel charts and graphs. The same live link can be maintained between QuarkXPress 7 and Excel, so that, when the data in Excel changes and the chart gets updated, the chart in the QuarkXPress 7 layout can be updated as well.

This functionality is not available in InDesign CS3, where a user can only place a chart into a layout by first saving the chart as a static picture. In QuarkXPress 7, the chart does not even need to be saved as a new worksheet; embedded charts on worksheets with data tables work just as good.

InDesign CS3 has table styles which speed up the formatting of a whole table considerably. QuarkXPress 7 has no globalised table formatting, but allows formatting on a per-cell basis, which is harder to do in InDesign CS3.

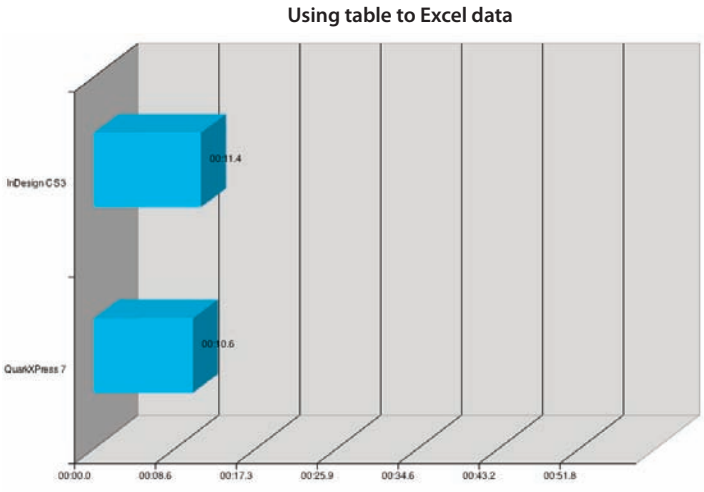
BENCHMARK

The test shows the time it takes to import a live data set from Excel in QuarkXPress 7 and InDesign CS3.

Observations

From the above, it will be clear that there is little sense in timing the placement of live charts in QuarkXPress 7 and InDesign CS3. However, this is not necessarily so with regards to tables. In InDesign CS3, importing live links to Excel is a Preference that is turned off by default — the trip to the Preferences dialogue was not taken into account in the diagram.

Benchmark Results



TASK: find/change object attributes & text

PRELIMINARY OBSERVATIONS

InDesign CS3 has a very powerful find/change feature, allowing users to find text, text attributes, objects, and patterns. InDesign CS3's Find/Change system can make use of Grep (a pattern-matching system familiar to Unix users, but complicated to learn). QuarkXPress 7 has no Grep capabilities but comes with XPert FindChange, a totally GUI-oriented Find/Change palette. XPert Find/Change offers users the possibility to find objects, pictures, and text attributes using checkboxes and drop-down menus.

The Grep implementation in InDesign CS3 enables the user to build expressions that will search for text only. Consequently, some criteria cannot be expressed using Grep in InDesign CS3. For example, a user cannot search for an object in InDesign CS3 by describing where on the page it is positioned. Only the object style characteristics can be searched for. In QuarkXPress 7, using XPert FindChange, a user can search for object characteristics, positioning, location, etc, and this for each type of object (text box, picture box, frame, text characteristics, etc) individually.

BENCHMARK

The test measures the time it takes to find an object and then immediately afterwards, some text, in a 100-page document.

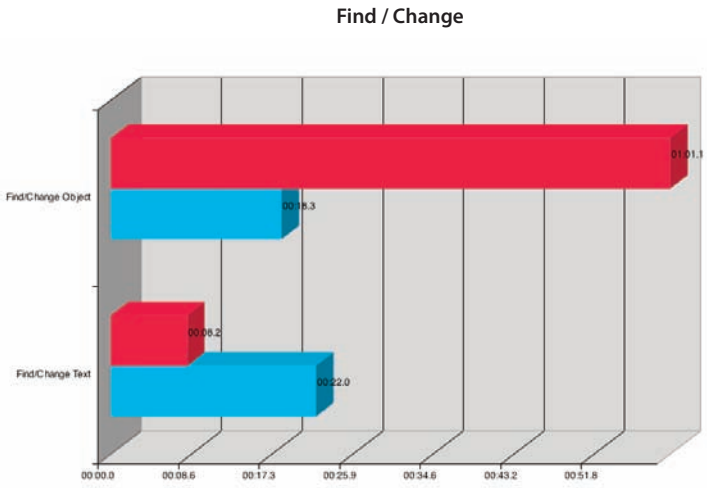
Observations

Although QuarkXPress 7's Find/Change looks less powerful because it lacks Grep support, the test showed it actually succeeded in finding a specific coloured frame much faster than InDesign CS3. With InDesign CS3 the test not only took longer to set up, but there also was no match for the search criteria entered.

The text search gave different results. Here, InDesign CS3's integrated Find/Change dialogue paid off in terms of speed. To find text in QuarkXPress 7, the user must first open another dialogue which slows down the search process if a query is performed for an object first, followed by a query for content immediately afterwards.

Test Objects and Methods — The object was a frame coloured with a black to white gradient at a zero degrees angle. The test failed in InDesign CS3, which could not find the frame at all. After three attempts, the test was abandoned and the chronometer stopped. Immediately after this task, the stopwatch was started again to time searching for textual content.

Benchmark Results



TASK: create page grid and ruler guides

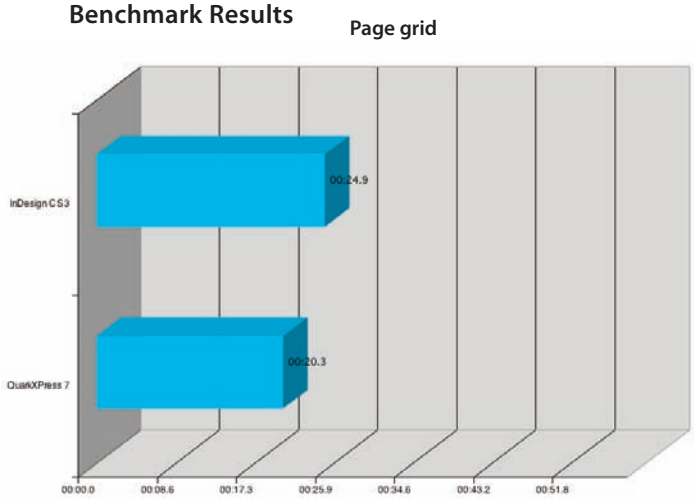
InDesign CS3 has basic guides and grid functionality. It allows users to create and adjust a page, baseline and document grid, and ruler guides by dragging guides from the rulers onto the page spread or the page. A second method of setting up guides is by selecting the appropriate menu item and setting the guides in a dialogue window as required. Guides can be coloured according to the Preferences set application-wide. Multiple guides can be selected, moved, copied, and pasted on different layers.

QuarkXPress 7's XPert Guides enables users to set up page grids, guides, bleed and safety grids, and guides from a frame on the page —all in the palette. Colours of guides can be set up per page, per type of guides, per project, per layout, and per spread. Guides can be saved as a set, exported, and re-used in other projects and layouts. XPert Guides can be set up as vertical only, horizontal only while the dialogue window offers total control over the guide type, colour, starting and end point, visibility, etc.

BENCHMARK

Because of the limited capabilities in InDesign CS3 and the need to test this feature with comparable results, a simple page grid was created in InDesign CS3 using the document grid and guides, and subsequently the same was done in QuarkXPress 7. This page grid was selected to propagate across all 50 pages of the test layout in QuarkXPress 7. InDesign CS3 presumed the grid must be shown on all pages and spreads.

Benchmark Results



TASK: use layers and manipulate objects on pages

InDesign CS3 and QuarkXPress 7 both come with a system of layers that can be used to stack content in separate layers. An example of the use of layers is that it allows for different languages to be quickly separated at printing time. However, QuarkXPress 7 comes with two different types of layers: the default layers palette, which has the same functionality as in InDesign, and the XPert Layers palette, which builds on the layering concept to provide the user with more functionality.

XPert Layers has no equivalent in InDesign CS3. A short overview of the XPert Layers palette shows that users cannot just add items to layers, but can add items to layers by selecting the items and creating the layer in one step. The XPert Layers palette puts every item that has not been selected on its own virtual layer. Combined with dedicated buttons and icons, this enables users to quickly move through a set of linked text frames.

BENCHMARK

Observations

The XPert Layers palette and the default palette in QuarkXPress 7 are not compatible. The user must select one or the other. Given the scope of functionality the XPert Layers palette is claimed to have, the benchmark tests whether there is any time savings to be had from using the XPert Layers palette compared by using the default palette in both QuarkXPress 7 and InDesign CS3.

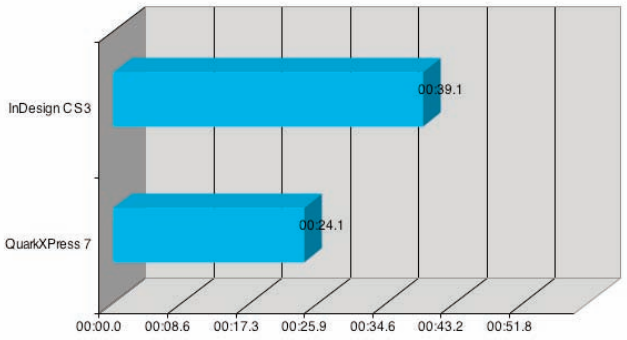
Test Objects and Methods — The XPert Layers palette was tested using the following actions:

1. *Cycle through different objects that are stacked on top of each other and change their stacking order*
2. *Selecting different objects scattered over different pages and collecting them in one layer*
3. *Find all linked text frames.*

The third test involves a very simple layout where only one text frame has to be linked to another one on a page, three pages down from the first.

Benchmark Result 1

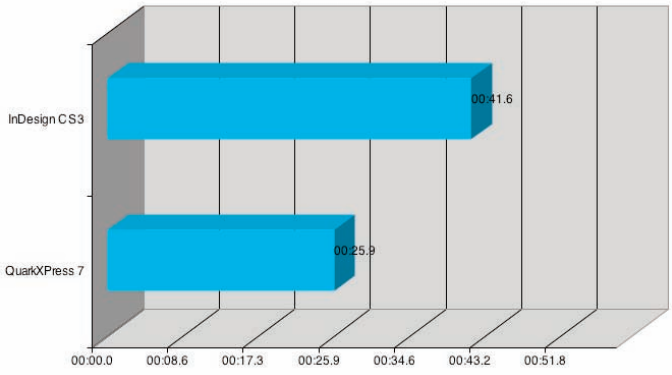
Cycle through objects covering each other



NOTE: The difference is explained by the XPert Layers palette enabling users to change the stacking order in the palette, with visible feedback in the form of a stacking number

Benchmark Result 2

Selecting different object on different pages, and group in layer



Benchmark Result 3

NOTE 1: Linked text frames in Indesign CS3 can't be found unless the user turns on the invisible "chains" and navigates his way through these chains visibly, from page to page. With the XPert Layers palette, linked text frames are automatically recognised by the palette, and the user can cycle through all linked frames by clicking one icon in the palette.

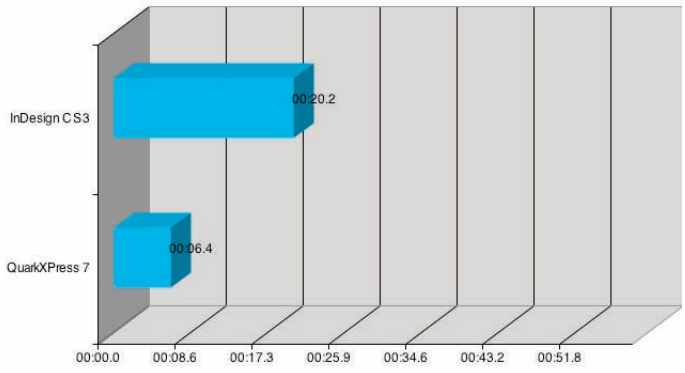
NOTE 2: Adobe has provided for three palette modes in InDesign CS3, Photoshop CS3 and Illustrator CS3. While the user can chose to show palettes as they have been available in previous versions of Illustrator and Photoshop, he/she cannot revert the palette system back to the InDesign CS2 mode.

Palettes may seem irrelevant to productivity but the 2 new modes (collapsed icon mode and expanded icon mode) Adobe has chosen to add to the palettes system look nice, but keep users from using the application in the fastest possible mode. Users who want to work fast, will therefore revert to the old-style palette mode.

The problem with the two new icon modes is that different palettes cannot be open simultaneously. When a user is working with the Layers palette and wants to side-step to correct something quickly, using the Colors palette, the Layers palette will collapse and in order to jump back to it, the user will have to re-open the Layers palette.

This is contra-productive. Additionally, on the Apple Macintosh platform, Adobe has broken the Human Interface Guidelines as imposed by Apple, and which serve to deliver users a unified user interface that enables them to work without thinking about their next move.

Find all linked text frames



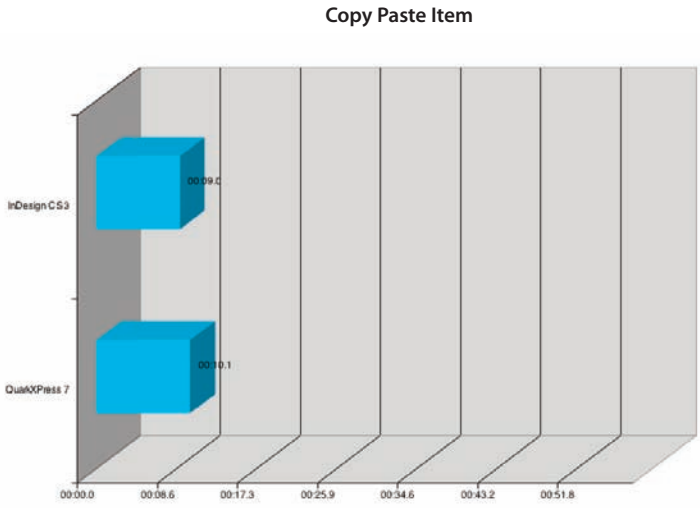
TASK: copying and pasting objects across a document

InDesign CS3 and QuarkXPress 7 both come with extensive copy and paste capabilities. InDesign CS3 offers two modes of copying and pasting: through the regular keyboard shortcut/menu item, and by dragging and dropping text or objects across a layout document. In order to drag and drop text in layout mode, the user has to activate this capability in the Preferences. Otherwise, drag-and-drop copy/paste only works in story editor mode.

QuarkXPress 7 only supports drag-and-drop copying and pasting of text when checked in the Input tab of the Preferences, and comes with XPert Paste, a palette which allows users to paste objects in the exact same location on different pages.

BENCHMARK

For this test, an item was copied and pasted to a different location in the document outside of the viewing port — i.e. two pages down from its original location.



TASK: navigate a spread of 5 pages

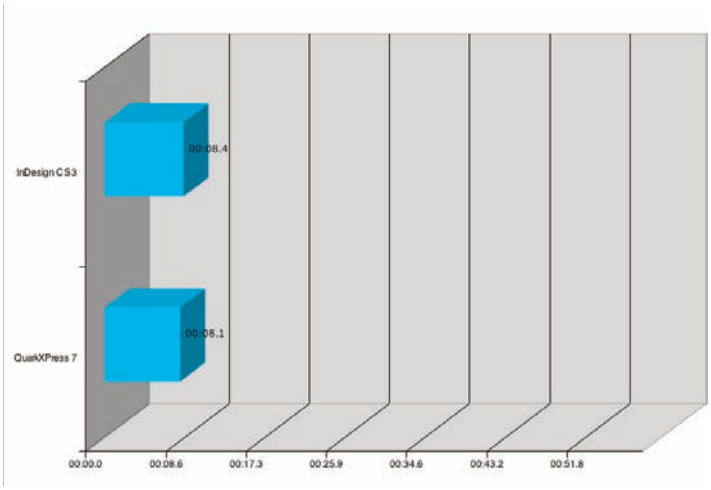
InDesign CS3 comes with the new Pages palette, which enables users to see in a thumbnail view what the page looks like. QuarkXPress comes with the XPert Pilot palette. This palette offers thumbnails that show users what the page looks like, and lets them navigate the pages and spreads using the palette and a red, resizable marquee. With Live Scrolling, users can scroll the palette as well as the main window (synchronised) quickly.

InDesign CS3's improved Pages palette now offers a better thumbnail view of the active page and a better overview of transparent areas on the page.

BENCHMARK

The XPert Pilot palette was tested by creating a spread with 5 pages next to each other — as a layout designer would be forced to do with some brochure types. The test measured the time to navigate through the pages of the spread using the XPert Pilot palette and without, by moving from page to page in the main window.

Navigating Spreads



CHALLENGE: create a long document, chapters and table of contents

PRELIMINARY CONSIDERATIONS

Both InDesign CS3 and QuarkXPress 7 support long document creation, i.e. booklets or books containing chapters, an automatically generated Table of Contents and an Index. InDesign CS3 contains technology migrated from Framemaker, a heavyweight SGML-based word processor that is currently only available on Windows and Unix platforms.

QuarkXPress 7 has no visible SGML-foundation for its long document features. Nevertheless, both applications use the same metaphor to build a long document and its components. The workflow is identical, but the details with which the user steps through the workflow are somewhat different.

In QuarkXPress 7, a book is built by adding chapters to a book palette, setting a Master chapter — a chapter which holds all the document's styles — by clicking in a column, and opening chapters by double-clicking the chapter names in the book palette.

InDesign CS3 follows the same set-up; only the icons are different. In InDesign CS3 the user also gets visual feedback over which chapter has been opened in a design window.

The workflow differs somewhat where the creation of table of contents and index are concerned. In InDesign CS3, building a table of contents (TOCs and indexes are called 'lists' in QuarkXPress —a less intuitive term than what InDesign uses) is done by first synchronising the chapters across the book, so that all chapters contain the same styles, on which the TOC will be built. When synchronisation has finished, the user selects "Table of Contents" from the Edit menu and selects the styles that will designate the headings included in the TOC.

InDesign CS3 requires users to check the "Include Book Documents" in the TOC dialogue window for the system to be able to build a book TOC. This extra step is unnecessary in QuarkXPress 7. In QuarkXPress 7, the TOC is built by setting up a list definition, synchronising the chapters, and then building the list in the List palette. Rebuilding the TOC in QuarkXPress 7 doesn't change the TOC styles when they have been set up prior to building the TOC.

In InDesign CS3 the TOC styling showed random errors on rebuilding. This behaviour was also noticeable in InDesign **CS2**.

BENCHMARK

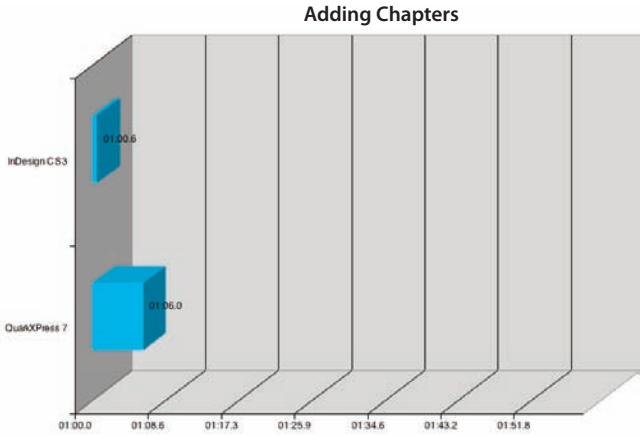
For this benchmark, a book was created by adding chapters to the Book palette in both InDesign CS3 and QuarkXPress 7, and then building a Table of Contents.

Observations

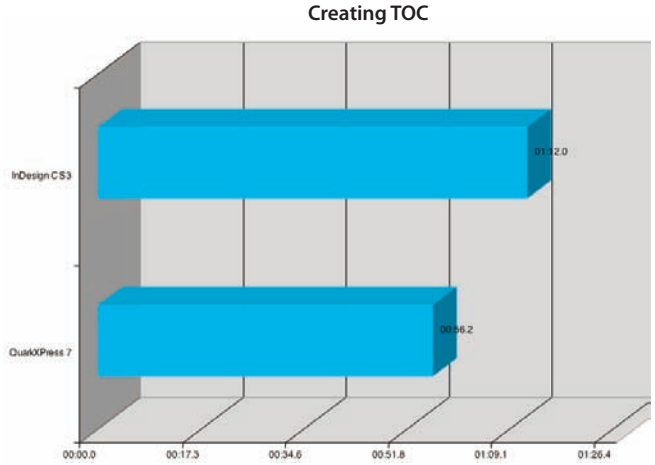
In QuarkXPress 7, adding chapters is only possible by adding them one at a time from the file system list presented in the Open File dialogue. We expected this to result in much longer book building times, but were surprised to find that InDesign CS3 did not fare much better. InDesign CS3 does allow users to add chapters to the Book palette in batch, but the application insists on saving these chapters as a special kind of file before a user can start working with it and be sure the book functionality will not be broken when a system crash occurs. As each chapter needs to be saved one by one, the time savings resulting from the batch-add feature were almost completely undone by the save operation. Nevertheless, InDesign CS3 still keeps some of its performance benefit when adding chapters to a book file. However, building a Table of Contents is faster in QuarkXPress 7 because it involves fewer steps.

Test Objects and Methods — A book document of 100 pages was created by assembling eight chapters saved as individual files, then a Table of Contents was generated for the book document.

Benchmark Result for Adding Chapters



Benchmark Result for Generating the TOC



CHALLENGE : Styling items

PRELIMINARY CONSIDERATIONS

InDesign **CS2** contained the ability to create styles from formatted text and objects. InDesign CS3 has this capability as well, and includes the ability to create styles from tables with mixed design characteristics (such as thick and thin lines, different cell shades, etc.).

QuarkXPress 7 comes with XPert ItemStyles. Unfortunately, XPert ItemStyles does not work with tables. It does, however, apply to all the styles of an object. This means a user can set design options for a frame and the contents of the frame, and XPert ItemStyles will allow the user to save all these styles, including those for the content. InDesign CS3 does not save the styles of an object's content (a picture within a frame, for example). If a user wants to preserve the content styling as an object style as well, he/she will have to explicitly save the design as a separate object style.

InDesign CS3 has a single transparency setting for a whole table. QuarkXPress 7 has transparency settings on a per-cell basis.

BENCHMARK

This test falls apart in 2 tasks. First, a frame with an image was created. The frame was given a border and a gradient fill characteristic, while the image within was given a drop shadow. It was attempted to save the combined styles as one object style (see above for the remark on InDesign).

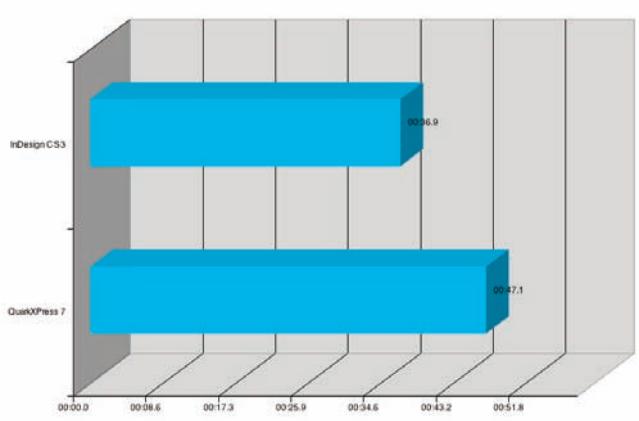
The second task involved creating a table with simple formatting including different cell borders and global table transparency, and then applying that formatting to three other tables on consecutive pages in the document.

Observations

Both tests resulted in InDesign being faster. The explicit saving as an object style in the case of InDesign did not add significantly to the time it took to create the styles and apply them in the first place. In the case of table styles, the difference is more pronounced, but the resulting design is less flexible. As InDesign CS3 can't create transparency on a per-cell basis, for the sake of comparibility, the test did not include this. Whether per-cell transparency is perceived as important depends on the designer and the design.

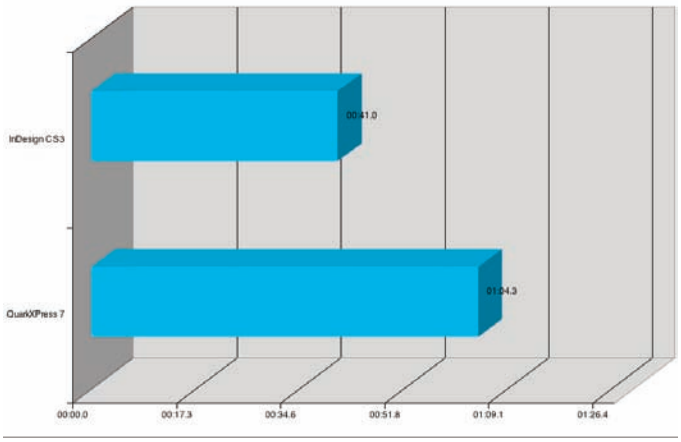
Benchmark Result 1

Creating object style and applying



Benchmark Result 2

Creating table style and applying to 3 tables



CHALLENGE: working with transparency and blending effects

PRELIMINARY CONSIDERATIONS

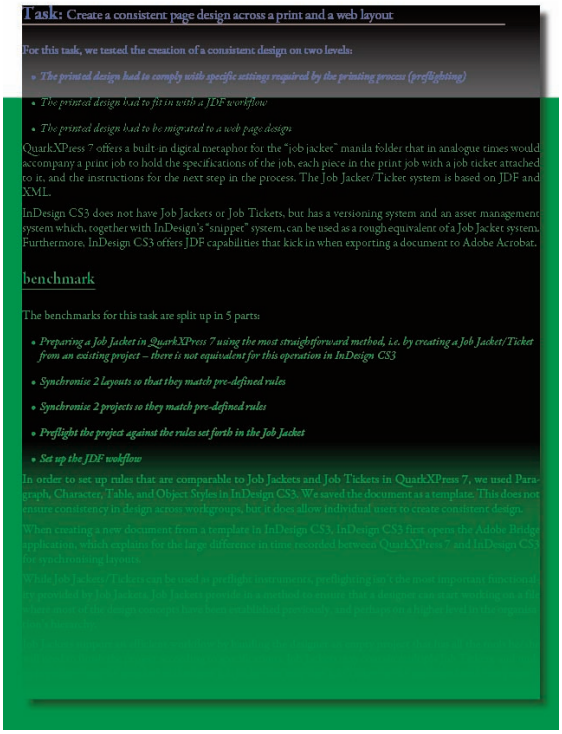
With QuarkXPress 7, Quark has included powerful transparency and blending capabilities, both for images, tables and table cells. InDesign CS3has a complete set of effects including feathering, blend modes, and transparency, which users would normally need to open Photoshop for. Additionally, InDesign CS3 delivers users with effects that are unavailable in QuarkXPress 7, e.g. applying a blending mode to a picture with text on the underlying InDesign text layer.

Working with transparency in QuarkXPress 7 involves setting an opacity figure in the Colors palette. Everything that can have a colour, can have an opacity setting. Additionally, layered Photoshop PSD files can have different blending effects internally without having to open Photoshop. However, blending an image with a text frame or other image underneath is impossible. This is only possible with InDesign CS3. To achieve similar effects, QuarkXPress 7 users will have to use Photoshop both for the covering content and the content underneath.

In QuarkXPress 7, users can apply a gradient to a QuarkXPress frame (or even the text itself) that blends from a solid colour to a colour of None. This allows a text or picture frame underneath to show through where the blend ends in the colour of None.

In InDesign CS3, fading a colour from solid to None is impossible. Adobe has added some of the "Fx-effects" which were previously only available in Photoshop CS2 and later. The closest InDesign CS3 comes to the QuarkXPress 7 blend to None feature is through one of the three "feather" Fx-modes delivered with InDesign CS3.

The QuarkXPress 7 result can be seen in the first screenshot, the closest result possible in InDesign CS3 in the second one.



An advantage of the QuarkXPress 7 approach to transparency blending is that a user can combine the transparency to None of a text frame with a drop shadow. Drop shadows in QuarkXPress 7 are applied to text only when the colour of the text frame background is set to None or anything else then a 100% applied colour. Combined with the gradient from a solid colour to None, a drop shadow can be applied with a subtle effect.

This is an effect that cannot be achieved in InDesign CS3. In order to achieve an effect that is closest to the one in QuarkXPress 7, the user has to resort to combining different effects with blending modes (which still don't generate the same result) or to create the effect outside InDesign CS3, e.g. in Illustrator.

InDesign CS3 does offer other powerful transparency and blending effects. The Blend dialogue offers almost all the blend modes available in Photoshop, such as Linear Light, Multiply, etc. This allows users to achieve effects such as reverse-coloured text showing through an image on top of the text.

Since the creation of these effects is very hard to measure, there is no benchmark for them. In the end, QuarkXPress 7 and InDesign CS3 both have their set of creative filters and effects which result in different "looks". However, it has no sense discussing which of these are more valuable or look better. Both sets of effects do provide the user with a good basic toolbox of graphic capabilities that enable them to create professional documents.

Effects and Layouts: from print to web

In QuarkXPress 7, the effects applied to items are applied regardless of the layout type that is using these effects. In Web layouts, when the effects make a rendition to text impossible, QuarkXPress 7 exports a HTML file containing the elements converted to GIF images and a Javascript loader. When the effects are not making a textual conversion impossible, the content is exported and styled through CSS.

The result is a XHTML 1.1 document that looks fine in a browser with basic CSS and Javascript capabilites. Despite the Premium Creative Suite's inclusion of the industry-standard for web development, Dreamweaver CS3, there is no integration between InDesign and Dreamweaver.

As shown above, InDesign CS3 only succeeds at exporting a very basic XHTML file without any formatting at all. Designers who hope to save time by using InDesign snippets and export them into Dreamweaver CS3 will find Dreamweaver CS3 does not recognise InDesign snippets yet. In short, there a designer cannot speed up cross-media publishing because of the presence of Dreamweaver CS3 in the Premium Creative Suite box.

With InDesign CS3 only exporting the most basic XHTML content with no formatting applied at all, the user must create all formatting in Dreamweaver CS3. This increases the risk of ending up with a design that no longer matches that of the printed matter — or only after considerable effort. The lack of proper XHTML styling on export in InDesign CS3 also makes this application less suitable for cross-media prototyping.

We would at least have expected InDesign CS3 to generate some kind of template that could serve as a foundation for the Dreamweaver user to build upon.

InDesign CS3 has no support for Flash. The three export formats supported are XHTML for Dreamweaver, HTML for eBook creation, and XML.

Compared to QuarkXPress 7, InDesign CS3 has poor support for cross-media publishing, whereas QuarkXPress 7 seems to be better equipped for cross-media publishing, including support for Web design, and Flash animations and presentations (when the optional Interactive Designer is installed and available). QuarkXPress 7 exports to HTML, XHTML, XSLT, XML, and Flash (SWF).

CHALLENGE: working with imported TIFFs and PSD (photoshop) images

PRELIMINARY CONSIDERATIONS

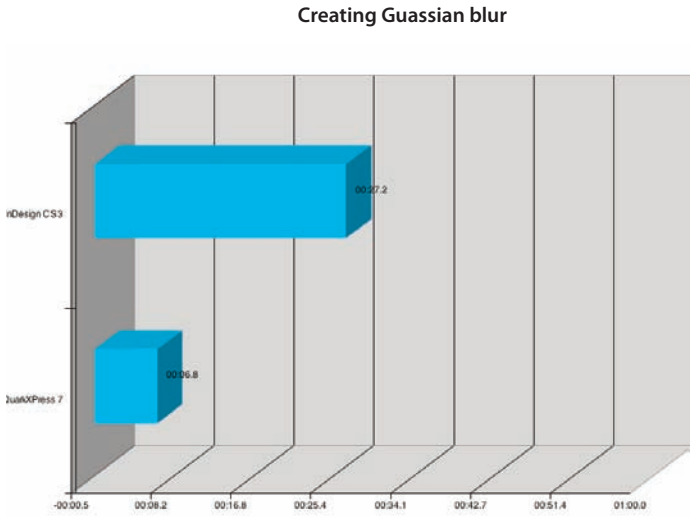
InDesign CS3 depends on the Photoshop CS3 component of Creative Suite to add effects to pictures that will be incorporated into a layout document. QuarkXPress 7 largely relies on Quark Picture Effects to add effects. Only when Quark Picture Effects has no corresponding effect available, Photoshop has to be started. The effects in Quark Picture Effects are selected based on their usefulness for the layout designer.

Furthermore, it needs to be stressed that QuarkXPress 7 offers the capability to save picture effects as pre-sets, just as Photoshop CS3 does.

Another functionality in QuarkXPress 7, which is less efficiently implemented in InDesign CS3, is the capability to apply an alpha mask to the image, even as the image is imported in the layout. A test was set up with a TIFF image that has three alpha channels to choose from. In QuarkXPress 7, the image could be imported as usual, and the three alpha channels could be selected by opening the "Modify" dialogue box and checking the desired alpha channel.

In InDesign CS3, in order to activate an alpha channel it has to be selected on import, and cannot be swapped for a different alpha channel, except by importing the image again. The time it took to select a different alpha channel in QuarkXPress 7 in this case was exactly half the time it took in InDesign CS3.

Benchmark Result



Note that "Edit Original" in InDesign CS3 to select a different alpha channel, doesn't work if the user wants to apply a different channel to the image. Finally, if an alpha channel must be applied to multi-placed images, they need to be re-imported one by one.

Importing a Photoshop PSD file follows the same basic rules in both the applications. While InDesign CS3 relies on Photoshop CS3 to change channels, paths, or layer blending, QuarkXPress 7 delivers all these characteristics in its own PSD Import palette. This palette allows users to change opacity between layers, layer blending, channels, and Photoshop paths. One limitation of the PSD Import feature is that it doesn't support adjustment layers or Photoshop effects.

BENCHMARK

A photograph was added to a layout, and a Gaussian Blur was applied. The time includes the startup time of Photoshop CS3. The stopwatch was started after the photo had been imported into the document.

CHALLENGE: work with frames and runaround text

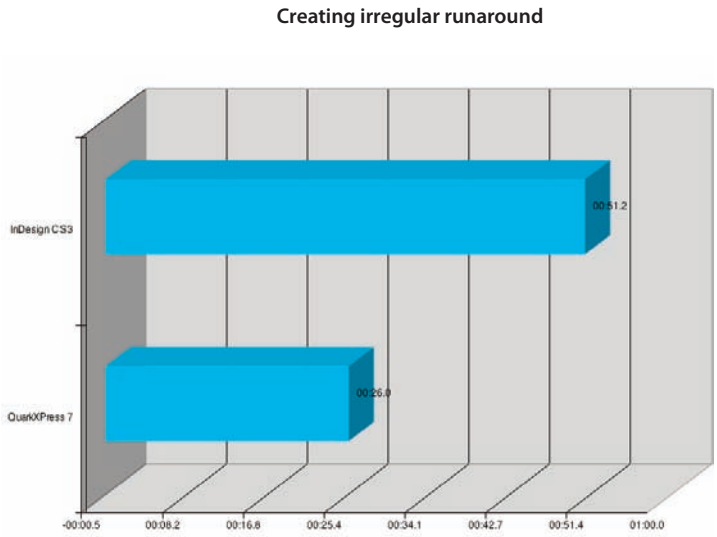
InDesign CS3 has the Illustrator PathFinder and a new runaround palette to ensure text can be run around objects in many different ways: around the bounding box, detected edges, alpha channels, a Photoshop path, graphic frame, and user-modified path. Adding a drop shadow to an object, however, makes the text disappear behind the shadow contour. To avoid this, the user will set larger margins for the run-around.

QuarkXPress 7 ensures text can be successfully run around objects, even around their clipping paths, alpha channels, drop shadows, non-white areas, automatically detected image boundaries, picture bounds, and detected edges. QuarkXPress 7 also enables users to select one of multiple alpha channels in an image file in the Measurements palette and use this as a mask.

BENCHMARK

For this test, an image of a dissected brain with a Photoshop clipping path and a separate alpha mask that was saved in PNG format, was placed in a layout in InDesign CS3 and in QuarkXPress 7. The alpha mask being a separate file, this information was initially disregarded.

Benchmark Result



NOTE: The time recorded for InDesign CS3 does not include the time it took to edit the file in Photoshop CS3. Because of difficulties experienced with the text wrap feature in InDesign CS3, this time surpassed the 3 minutes mark.

Observations

In QuarkXPress 7, the image edges were correctly determined using the Runaround settings that are available for each frame. With XPert Boxtool's "Picture Box Shape From Path" functionality, we were able to quickly create a clipping path, which automatically made the text flow around the irregular shape of the brain image.

In InDesign CS3, this runaround effect could not be achieved without the image being loaded in Photoshop first and have its transparency mask applied. Even InDesign's edge detection did not work, nor did the Photoshop clipping path — which was recognised— make the text wrap around the image correctly.

Even with the alpha mask applied and the image saved as a TIFF file with transparent areas, InDesign CS3 would not wrap text around the image path correctly. Only when the alpha mask was physically saved with the file would InDesign CS3 wrap text around the shape.

TASK: link and unlink text frames

In QuarkXPress 7, users have two methods to link, unlink, and split existing text links. They can either use QuarkXPress linking arrows, or XPert Textlink. XPert Textlink provides a palette for linking, unlinking and managing linked frames.

InDesign CS3 offers one method to link and unlink text frames: using the frames' exit ports, users can chain frames together. By removing a frame from the chain, the text is re-flowed inside the remaining text frames.

BENCHMARK

This test measures the efficiency of the different text frame linking methods offered by both applications.

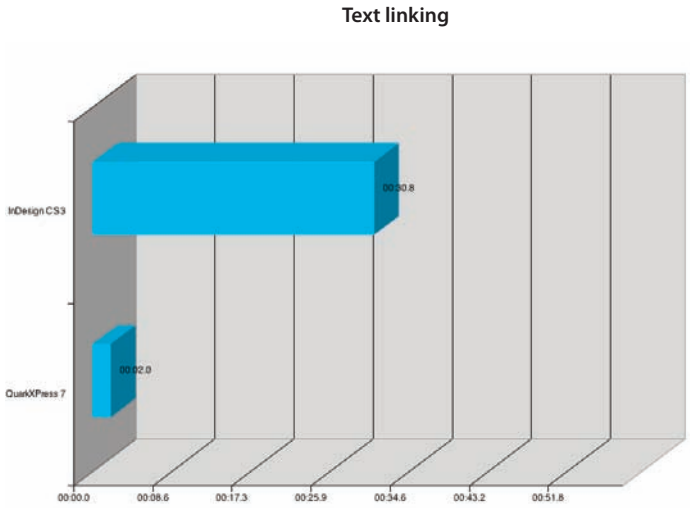
Observations

This test resulted in *no difference between the QuarkXPress 7 XPert Textlink method and the InDesign CS3 exit port manipulation.*

However, *a large difference* became apparent when we tested how long it would take to split a text chain at a specific word in a paragraph (i.e., it was to become the first word in the split frame that was unlinked afterwards). This took exactly the same time in QuarkXPress 7 with XPert Textlink as it took to set up the text links — not surprisingly so, as the XPert Textlink method is based on positioning the cursor at the appropriate location and clicking one of the 6 palette buttons.

In InDesign CS3, the same operation required manipulating the text frames in such a way that the word where we wanted the split to appear was at the start of the frame.

Benchmark Result



Test Objects and Method — To test the available linking methods, 3 frames were linked together, after which the frame in the middle was removed from the chain. This was first done without taking notice of where the frame linking was broken. The same test was then repeated, taking into account a specific location where the frame link had to break.

3. Printing and Output

CHALLENGE: prepare layouts for printing on a printing press

A printing layout of a magazine or a book cannot be printed to a press directly from a layout application. It must first be impositioned. Furthermore, many items on a spread need special marks in order for the printer to know how to print and cut them.

Press marks and crop and registration marks are the domain of Quark's optionally available Quark Print Collection. Quark Print Collection includes Item Marks, which manages crop marks and registration marks. MarkIt enables users to add press marks to layouts, while Imposer creates printer flats. Imposer is also available for Adobe Acrobat.

InDesign CS3 comes with basic booklet capabilities included. The imposition capabilities are light-weight (up to 12 pages max) but free. For larger imposition jobs, users must use Imposer in Acrobat. QuarkXPress 7 users can use the Quark Print Collection product, for which a benchmark has been included in this report. Users of QuarkXPress 7 get the extra functionality from Item Marks and MarkIt, and benefit from the early impositioning capabilities QuarkXPress 7 thus delivers.

Item Marks enables users to set up trim, bleed and safety areas with one dialogue window. MarkIt allows users to add customisable press marks to their layouts. Different sets of press marks can be saved and edited. Imposer, both in QuarkXPress 7 and Acrobat, offers 3 sheet types and 5 imposition types.

BENCHMARK

To test the Print Collection, the following setup was used:

- *To an item on a page, a trim and bleed area was added*
- *Press marks were added to a layout*
- *An impositioning setup was created in QuarkXPress 7 and subsequently in Acrobat.*

Observations

Adding a trim and bleed area to an item on a page in InDesign CS3 involves creating the lines and arrows manually. The first chart therefore shows a large difference between QuarkXPress 7 and InDesign CS3.

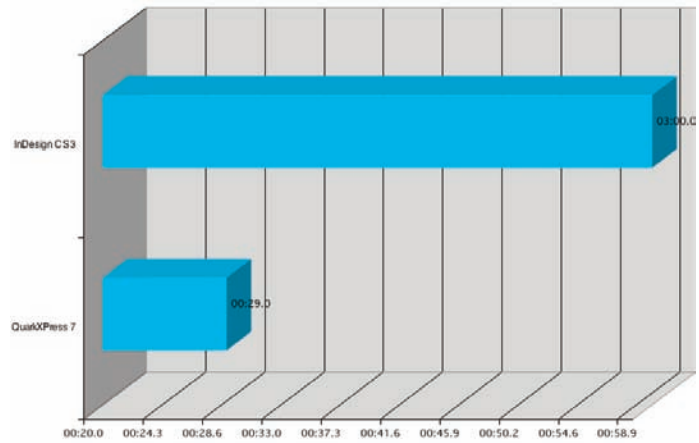
The second chart represents the time it takes to print a document with press marks. Here, Quark Print Collection offers the ability to create custom press marks. The graph does not show the time it takes to set up such custom press marks, but an average of 01:26.00 (one and a half minutes) is a realistic figure, depending on what the press marks should include.

The third chart represents the impositioning test. The InDesign CS3 value is composed of 00:41.68 spent exporting from InDesign CS3 to Adobe Acrobat 8.

Test Objects and Method — For the first test item marks were added to an image on a page. The second test involved adding printer marks such as bleed, crop marks, etc. The third test shows the result of impositioning a 40-page document.

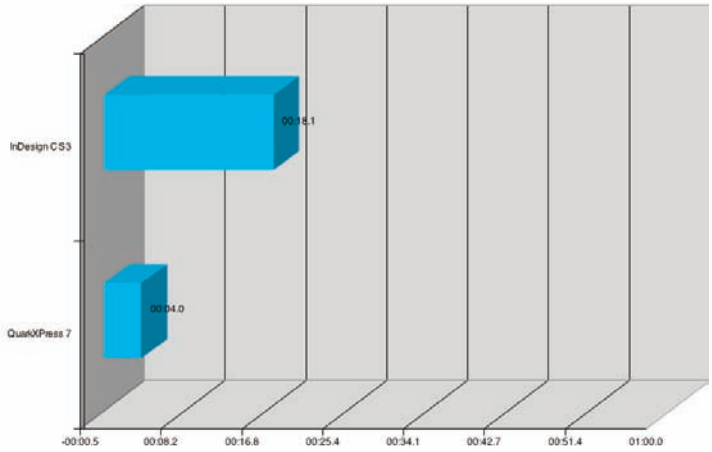
Benchmark Result 1

Item marks



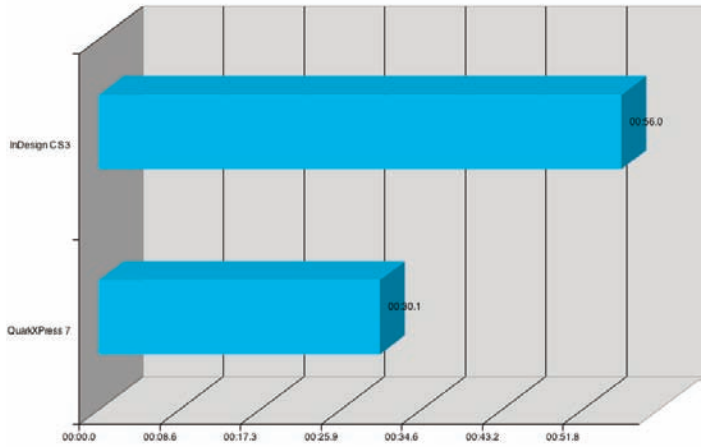
Benchmark Result 2

Adding printer marks



Benchmark Result 3

Imposition



Task: scale page elements and prepare for flexo printing

QuarkXPress 7 supports flexographic printing through the XPert Scale XTension. InDesign CS3 has no built-in support for flexo printing. XPert Scale enables users to scale elements, objects, and complete layouts.

In QuarkXPress 7, the user has control over the components of an item on which scaling happens, e.g. whether the font size is affected by the scaling operation. Users also control whether styles are adjusted automatically, if units must be used or percentages, etc. Finally, users can control where the scaling midpoint is located. This means a scaling operation can scale the item starting from its centre, or from its top left corner point.

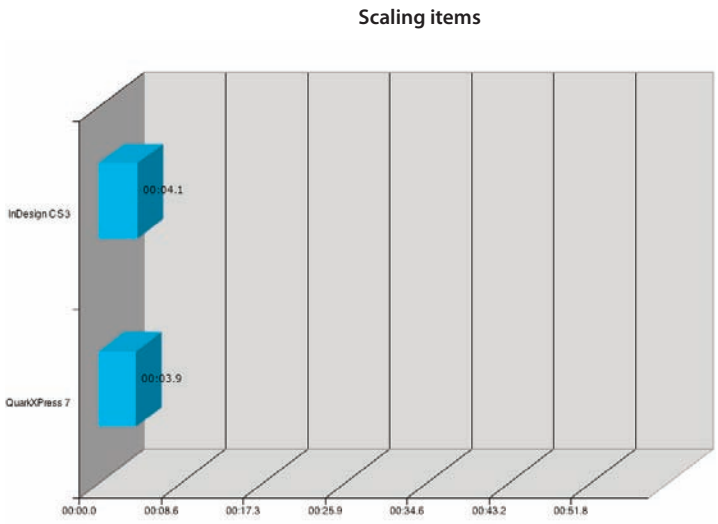
Additionally, flexographic printing becomes possible by selecting the "Flexo" item in the Print dialogue and setting the appropriate percentages.

In InDesign CS3, scaling an object or a text box is done by using the Object Scale dialogue. This dialogue only enables control over the scaling percentage and has a preview checkbox. InDesign CS3 users cannot scale a complete layout. In QuarkXPress 7, all the pages and elements in a layout can be affected by the scaling operation.

BENCHMARK

The benchmark shows a basic scaling operation. To calculate how much time the scaling of a complete layout in InDesign CS3 will take, the reader must multiply the test figure by the number of spreads in the layout. InDesign CS3 not allowing for multiple spreads to be selected, a scaling operation on a complete layout cannot be executed in one operation.

Benchmark Result



Task: Exporting to PDF/x-1a:2001

Adobe being the original developer of the PDF specification, InDesign CS3 should offer the fastest export capabilities to PDF and Certified PDF. When exporting to PDF, InDesign CS3 cycles through at least two dialogues whenever a layout contains "special" effects like transparency.

QuarkXPress 7 doesn't go through extra dialogues when exporting to Certified or ordinary PDF. It just exports.

BENCHMARK

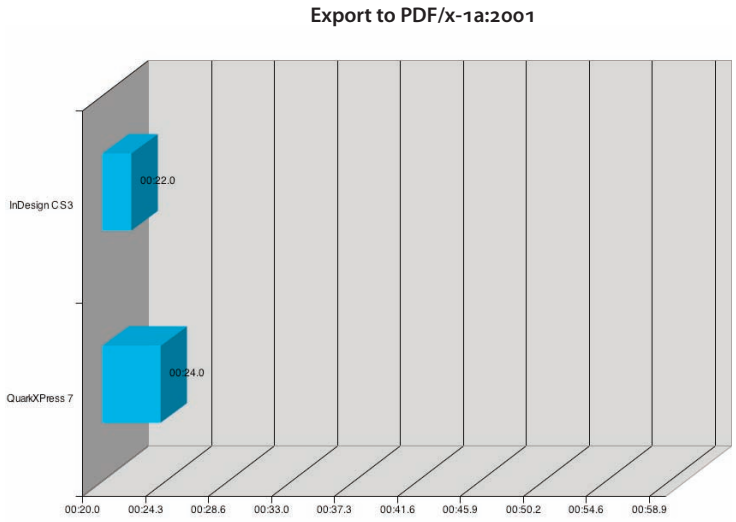
A layout with some transparency objects was exported to PDF/X–1a:2001 from within InDesign CS3 and QuarkXPress 7. The resulting PDF file was then preflighted in Markzware's FlightCheck Pro 6 to check it for Certified PDF inconsistencies.

Observations

The preflight session revealed that both applications make the same error: the Title header in the meta data field for the PDF file did not read correctly. The "a" was left out of this field. For the rest, both files preflighted fine.

Test Objects and Method — The test measures the time it took to export the file.

Benchmark Result



4. Miscellaneous Items

In QuarkXPress 7 and InDesign CS3 there are a number of features that help productivity, such as customised menu items and custom keyboard shortcuts in InDesign CS3, and XPert Toolbars in QuarkXPress 7.

QuarkXPress 7 XPert Toolbars provide for direct access to commonly used commands and menu items. Toolbars offer buttons for items the user defines. InDesign CS3 has no toolbar feature, but instead offers users the ability to set up their own keyboard shortcuts and show only those menu items that are of interest to them.

It is impossible to measure the benefits of one customisation method over the other, as this is all very much determined by personal taste and working habit. People who like to memorise shortcuts will dislike the Toolbar feature, while people who like to work with icons and buttons will like the XPert Toolbar function and won't understand why InDesign hasn't such a feature.

BENCHMARK

Setting up a shortcut set and a Toolbar costs time. We tested how much time it would cost to set up a toolbar in QuarkXPress and shortcuts in InDesign CS3 giving access to the Kern Track, Paragraph Style Sheet, and Arrowheads.

The Paragraph Stylesheets test was aborted without timing results, as InDesign CS3 has no way of setting up a shortcut that will show the Paragraph Stylesheets outside of the Stylesheet palette.

Observations

Another productivity enhancing feature in QuarkXPress 7 for which no equivalent exists in InDesign CS3, is XPert Type. Xpert Type is a palette with three tabs: Type, Paragraph, and Rules. The palette enables a quick adjustment of those three functions using either the up and down arrows on the palette, or by dragging the mouse in the text.

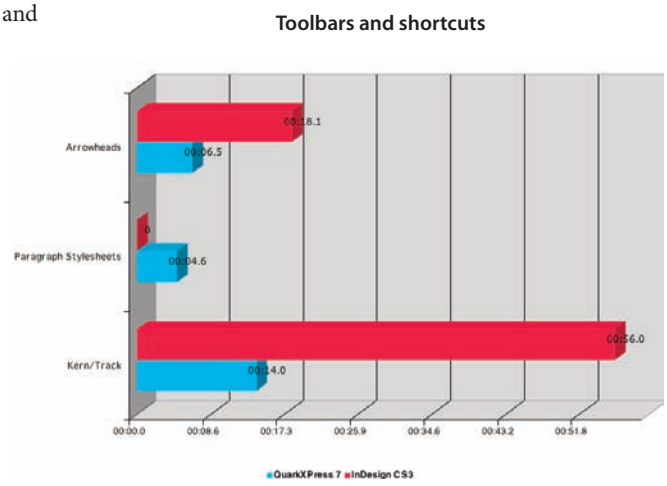
InDesign CS3 does offer a quick, up-and-down arrow-based resizing of characters and adjustment of paragraphs, but setting these values by mouse is unique to the XPert Type palette. However, we found the dragging behaviour to be too rough to be of much use without extra refinements.

The XPert BoxTools adds quickly accessible nudging capabilities to QuarkXPress 7 with a lot of control over the nudging value, which can be set to 0.0001 pt or —for rotation purposes— to 0.0001 degrees. In InDesign CS3 nudging is done by the keyboard only. The user has to memorise the key combinations.

InDesign CS3 has a new feature called Quick Apply to automate repeating actions. Quick Apply is a list of all the styles, menu and other commands that are available throughout InDesign CS3 —it's a sort of unstructured list of all the commands and actions that are possible in the program, grouped together in 8 subcategories. Through Quick Apply, a user can nudge, resize, and perform all the other tasks that QuarkXPress 7 makes possible through some of its XPert palettes.

The problem with Quick Apply is that users must type the command name they're going to use to narrow down the list. This results in the chosen command's name floating to the top of the list the first time the user applies Quick Apply. All subsequent clicks on the Quick Apply icon will open the dialogue with the search term still in the keyword field.

Benchmark Results



ANEXO 5 – RELATÓRIO DO PFEIFFER REPORT - BENCHMARK ANALYSIS

Adobe InDesign CS4 vs. QuarkXPress 8: Efficiency in Newspaper Design and Production. technology, design and productivity

Adobe InDesign CS4 vs. QuarkXPress 8: Efficiency in Newspaper Design and Production

Technology, design and productivity

About this report

This report presents the findings of a research and benchmarking study commissioned by Adobe Systems Incorporated. The aim of the study was two-fold: **to analyze key technology differences between Adobe InDesign and QuarkXPress**, and to **assess the efficiency and productivity of the latest release of the two products** in the specific workflow situation of magazine and newspaper publishing.

About the Research

Productivity measures, based on the *Pfeiffer Consulting Methodology for Productivity Benchmarking*, compared workflow productivity of Adobe InDesign CS4 and QuarkXPress 8.

The specific focus of the benchmarks was efficiency in magazine and newspaper design and production. This document presents results and analysis specific to the newspaper publishing market; magazine-publishing specific findings are presented in a separate document.

In addition to the research conducted specifically for this project, **this report also draws upon an independently financed study and research report** conducted by Pfeiffer Consulting, comparing previous releases of both products. (The complete report is available at the Pfeiffer Consulting Document Store http://pfeifferreport.com/store.)

For more information on the methodology of the benchmarks, please refer to the Methodology sidebar on page 3. For detailed information on hardware configurations, methodology, discussion of benchmarks and complete results, download the complete *Adobe InDesign CS4 vs. QuarkXPress 8.0 Benchmark Report* at www.pfeifferreport.com.

About Pfeiffer Consulting

Pfeiffer Consulting is a Paris-based, international research and consulting operation specializing in technology and media. Pfeiffer Consulting's mission is to provide unique high-level, international market intelligence and strategic consulting for both content and technology providers.

Pfeiffer Consulting is the publisher of the *Pfeiffer Report on Emerging Trends and Technologies*, an online resource on trends in the technology and content industry, as well as numerous specialized studies and reports.

For more information on Pfeiffer Consulting's reports and services, please visit **www.pfeifferconsulting.com**.

Major Findings

- InDesign CS4 offers **a sophisticated environment for design and publishing** that offers **many features that are unmatched by the competition.**
- In benchmarks conducted for this project, InDesign CS4 showed **a clear productivity advantage over QuarkXPress 8.0 in many essential operations** for the newspaper publishing workflow.
- The **integration with InCopy CS4** and the **support of an extensive range of editorial workflow systems** allow for InDesign CS4 to be efficiently deployed in newspapers of any size and workflow complexity.

About Pfeiffer Consulting

- Pfeiffer Consulting is an **independent technology research institute and consulting operation** focused on the needs of publishing, digital content production, and new media professionals.
- Download the complete **Adobe InDesign CS4 vs. QuarkXPress 8.0 Benchmark Report** at **www.pfeifferreport.com.**

Pfeiffer Consulting
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InDesign and QuarkXPress: Key Technology Differences

Major Points

- InDesign CS4 provides **design options unmatched by the competition**, and offers mature integration with the key applications for design and publishing, such as Photoshop CS4, Illustrator CS4, Flash CS4 as well as Bridge CS4.
- Based on benchmarks for this research, **InDesign CS4 offers a clear productivity advantage** in terms of object composition, image placement and management, repetitive text formatting as well as PDF export.
- InDesign offers support for PostScript level 1,2 and 3 and provides a **PDF-based print-engine** that supports a media-neutral workflow.

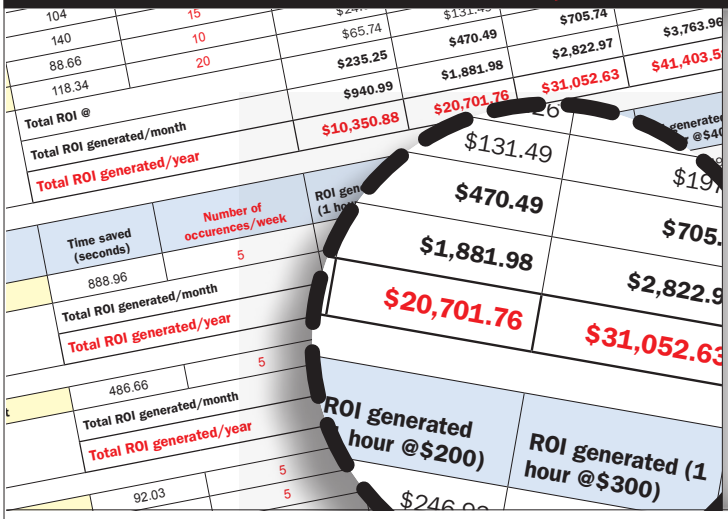
Comparing two mature page layout environments

Comparing InDesign and QuarkXPress is not an easy task; giving a fair, balanced evaluation of both environments is even more difficult, despite only focusing on one specific market segment, such as newspaper production in the case of this study.

While both QuarkXPress and InDesign were designed for the same task (page layout) and use a similar basic approach (text and picture frames containing imported content, combined with graphic elements such as rules and boxes), the programs take very different roads to achieve certain tasks, and each one has some strengths that the other lacks: QuarkXPress, for instance, features a highly customizable hanging punctuation feature, but lacks the sophistication and efficiency of the text composition engine in Adobe's product. InDesign CS4 allows the application of Photoshop effects such as bevel and emboss to graphic elements including texts and shapes, but lacks the possibility of applying basic filters to pixel images. And there is a long list of features that both programs share, but that are implemented in entirely different ways and offer different twists and options.

On the following page we analyze the approach of both applications to key aspects of the publishing process. Sidebars and illustrations throughout this document will provide productivity information and technical discussion of the key differentiating factors between the two page layout environments.

InDesign CS4: Unique Design Dimensions For Page Layout



InDesign is the only page layout program that offers the ability to paste a design element into any kind of frame, allowing designers to crop any text or graphic element, the way they would do with an imported picture. This offers not only great creative potential but increased productivity. (In the example on the left, a complete, editable table has been pasted inside a round frame.)

InDesign CS4 not only supports transparency effects and drop shadows, but allows users to apply and combine a wide range of Photoshop effects (such as bevel, inner shadow and inner/outer glow) to graphic elements and text. All effects can be set individually for the stroke, fill and content of a selected element or group of objects, reducing the need for effects work in Photoshop.

Methodology

This report is based on technology analysis and market-specific productivity benchmarks conducted by Pfeiffer Consulting for Adobe Systems Incorporated. It also includes elements from independent research and technology analysis projects conducted by Pfeiffer Consulting.

Productivity Measures

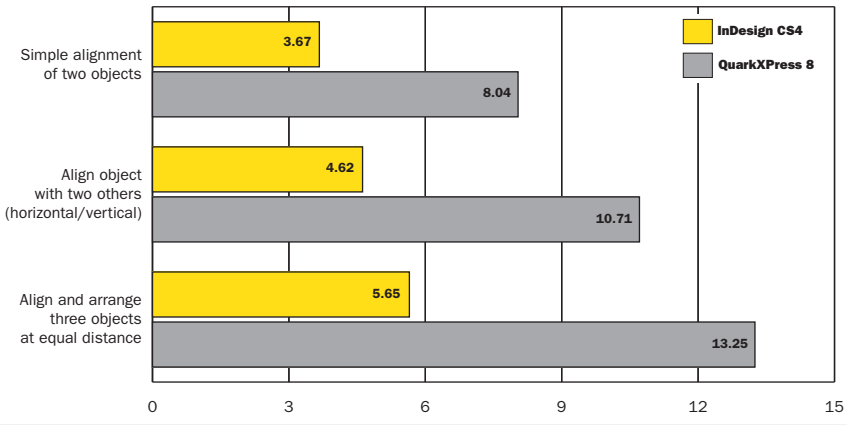
Pfeiffer Consulting conducted extensive, market-specific productivity benchmarks comparing Adobe InDesign CS4 with QuarkXPress 8.0, focusing specifically on common tasks in newspaper and magazine publishing.

Nature of benchmarks: Experienced professionals performed segment-specific design assignments, defined in clearly repeatable steps and executed in a closely monitored way. To ensure real-world results, no scripting was used for any benchmarks.

Hardware: All benchmarks were conducted on a factory configured Mac Pro workstation equipped with 4GB of RAM running Mac OS X 10.5.6. Benchmark systems were completely re-initialized prior to tests.

All statements in this report are factual and can be independently verified. For in-depth discussion of the benchmark methodology, system configurations, and comprehensive benchmark description and results, **please download the complete "Adobe InDesign CS4 vs. QuarkXPress 8.0 Benchmark Report"** at our website www.pfeifferreport.com.

Productivity Impact of Smart Guides on Object Positioning
Time in seconds. Shorter is better.



Smart Guides in InDesign provide interactive positioning and dimensioning help during the page layout process. The impact of Smart Guides on productivity is considerable, as the benchmarks for this project show: in all tests, positioning elements using Smart Guides was over twice as fast as achieving the same result with QuarkXPress.

Design efficiency: While basic design techniques are similar in both environments, InDesign offers an essential design feature QuarkXPress lacks, the "Paste Inside" menu command that lets users paste groups of objects inside pre-existing frames (see sidebar on previous page). QuarkXPress 8, on the other hand provides a sophisticated content tool that let users resize and rotate imported pictures without changing tools.

Composition engine: InDesign clearly has the more sophisticated text composition engine, offering a paragraph-based justification method and glyph-scaling as part of H&J (Hyphenation and Justification), as well as more sophisticated, dictionary-based hyphenation, yielding better-looking text composition without manual adjustments, essential for efficient newspaper publishing. Hanging punctuation support is much more sophisticated in QuarkXPress 8, but customizing pre-sets is complex for occasional users.

Text handling: Beyond basic text handling features, similar in both applications, InDesign offers a significantly more sophisticated style sheet architecture. Nested styles allow for efficient combination of paragraph and character styles. The program also offers GREP-based search and replace, and supports footnotes, a feature QuarkXPress still lacks. Conditional text and text variables can also speed up InDesign publishing workflows. QuarkXPress, on the other hand, offers a Shared Content feature that allows to synchronize text and pictures between different layouts within the same project.

Picture handling: Both programs support key file formats for design and page layout, including Photoshop, Illustrator and PDF files. Not surprisingly, support for Adobe file formats is clearly more mature in InDesign CS4. (QuarkXPress can handle some aspects of Photoshop files InDesign does not currently support, such as transparency-adjustment of individual layers, but does not support the complete range of layer types Photoshop can create, such as adjustment layers and layer masks, making it incompatible with many Photoshop files.)

Application integration: InDesign CS4 benefits from the tight integration with other key applications of the creative and publishing workflow, including metadata support for placed images and file format integration between various applications. The program also includes Bridge CS4 for managing documents and metadata of the creative and publishing workflow. QuarkXPress 8 supports drag-and-drop file placement from Bridge.

Multimedia support: Both InDesign and QuarkXPress can create interactive documents that can be exported as web-ready SWF files for playback with the Flash Player. InDesign CS4 can also create XFL files that can be opened in Flash CS4, and exports a much wider range of interactive features to PDF than QuarkXPress does.

The approach to interactivity between the two products varies significantly, though: users need to create specific "layout spaces" in a project depending on the desired output (print, interactive or web), while InDesign lets users add interactivity and hyperlinks to standard InDesign documents.

Efficiency in Newspaper Publishing

Major Points

- InDesign CS4 offers **a more sophisticated and more efficient text composition engine**, that includes support for character scaling as part of the H&J algorithm and provides more evenly spaced text without requiring manual fine-tuning. This is essential for efficient newspaper publishing.
- InDesign CS4 provides **a significantly more mature and sophisticated implementation of master pages** than QuarkXPress 8, including hierarchical master pages and layers on master pages. These features are essential in newspaper publishing since they allow designers to structure publications for efficient production.
- The **style sheet architecture provided by InDesign CS4 is more robust and more powerful** than its competition. This can **significantly increase productivity** in newspaper production.

Understanding the issues

Efficiency in newspaper publishing depends on a variety of factors. Newspaper design and production are very sophisticated domains, and tools for this market have to allow the creation of sophisticated templates and variations, as well as extremely high efficiency in text formatting and image handling.

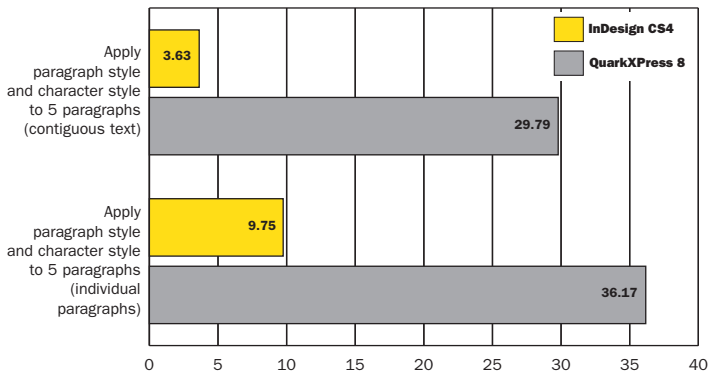
InDesign was conceived in the late nineties, almost a decade after the first generation of page layout programs. The program made a point of taking a fresh approach to some of the most basic tasks and requirements of the publishing process, and added sophisticated controls and features to the basic page layout tool-set. While QuarkXPress has been extensively improved and rewritten over the past years, some of the basic limitations of the program remain: InDesign, for instance, has always offered layers on master pages (essential for efficient template creation, particularly in newspaper publishing) while QuarkXPress only offers layers on the content pages, but not on masters; InDesign can place guidelines on layers, thus allowing them to be selectively masked, as well as copied and pasted, while QuarkXPress treats them as page-specific, independent from the layer architecture.

Productivity related to text handling

Similarly, text handling features, and in particular style-sheets, start off with the same core functionalities in both programs, but Adobe has pushed the possibilities of this essential formatting tool far beyond the features provided by Quark's options: as the productivity benchmarks for this research project

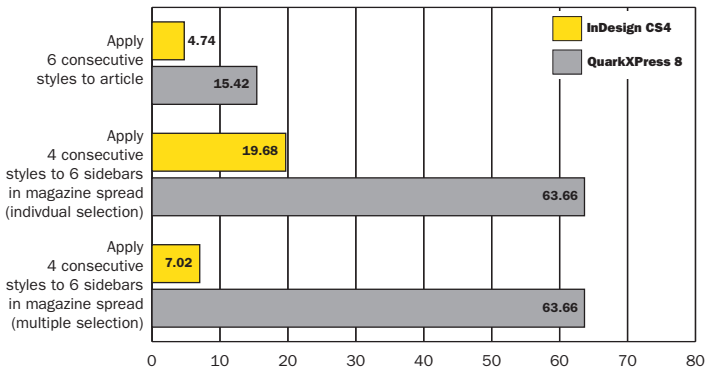
Efficient Text Handling in Newspaper Production

Productivity of Nested Styles Compared With Manually Applying Style Sheets
Time in seconds. Shorter is better.

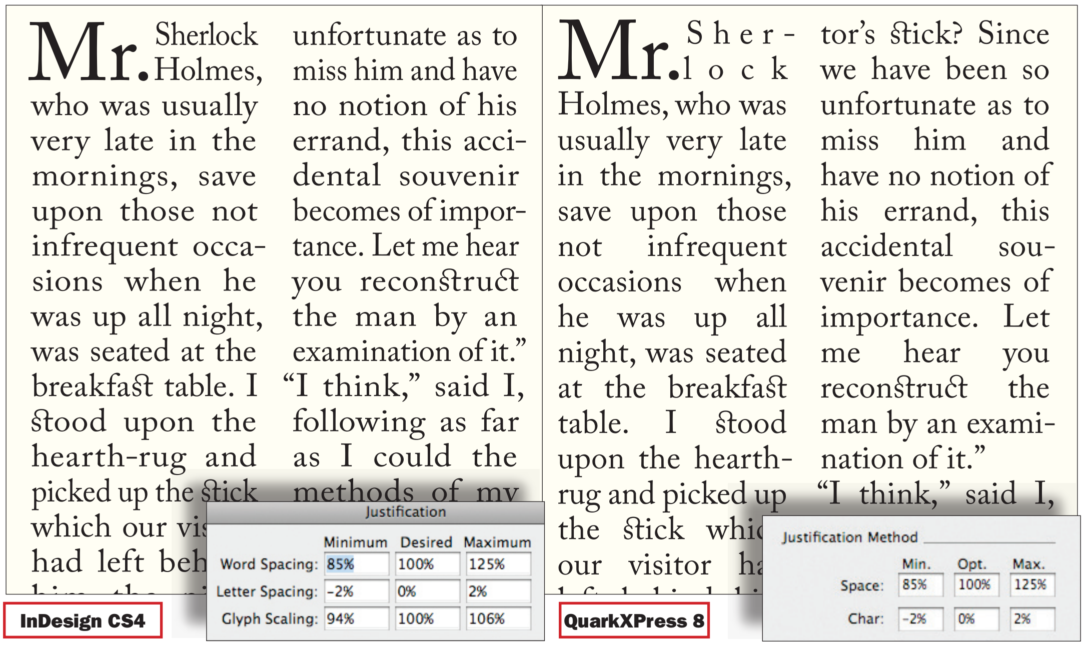


The Nested Styles feature in InDesign allows automated use of character styles within a paragraph style sheet, significantly speeding up repetitive formatting tasks. The chart on the left shows the time necessary to format 5 paragraphs containing an opening phrase in bold face, using Nested Styles or manually applying the character styles. The chart on the right illustrates the productivity linked to automatically applying a set of linked styles used in repetitive formatting of magazine articles (such as headline, byline, introduction, body copy, etc.) to an imported text with the time necessary to apply the styles one by one. InDesign also allows this feature to be applied to multiple text frames (such as sidebars in a magazine spread) in one step.

Productivity of "Apply Next Style" vs. Manually Applying Parapgraph Styles
Time in seconds. Shorter is better.



Composition Stress Test: The Importance of a Sophisticated Composition Engine



InDesign's composition engine is significantly more sophisticated than its competitor, supporting paragraph-based hyphenation (QuarkXPress only calculates hyphenation on a single-line basis), as well as glyph-scaling as part of the H&J (Hyphenation and Justification) algorithm, a clear advantage for type-setting documents with narrow columns.

The example on the left shows the same text, typeset on a 6-column grid on an A4 page using exactly the same font, font-size, leading and H&J settings. The text typeset with InDesign (left illustration) appears much more evenly spaced, a result achieved by authorizing glyph-scaling in the basic H&J setting, a feature QuarkXPress currently lacks.

Hierarchical Master Pages

Master pages are one of the features where InDesign provides a level of sophistication that goes well beyond its competitor, and offers newspaper publishers powerful ways of structuring templates that can be very easily adapted and customized.

Hierarchical master pages essentially allow a newspaper designer to structure page templates in a way that lets shared changes ripple through many variations of a design. Thus a designer can start by creating a basic page grid, and then use this as master page for a series of sections. Each section master page can in turn become the starting point for variations of the section; changes made to one master page, like the basic page grid, will ripple through each master page based on this design. (By comparison, since QuarkXPress supports only one level of master page, a change in design shared by several master pages would need to be applied manually for each occurrence.)

In addition, InDesign supports layers not only on body pages, but on master pages as well, allowing magazine designers to create extremely efficient page templates, for example by grouping text and illustrations on layers that are unlocked and editable during production, while protecting fixed page elements on locked layers. The same page design can even offer several column configurations on different layers, that can be made visible depending on the requirements of a specific page.

clearly document, features such as Nested Styles and the “Apply Next Style” command can significantly speed up repetitive production tasks in newspaper production and other publishing workflows, particularly since they can be applied to groups of selected text boxes in one operation.

InDesign offers two more unique text handling features the competition lacks: Conditional text allows for easy switching between different versions of a text, useful for instance when managing local editions of a publication, or different versions of the same document; text variables can be used to manage repetitive text elements, and update them automatically across a layout document when changes are required.

QuarkXPress 8 has an edge with some text-related features, however: hanging punctuation offers considerably more customization options than in InDesign, and the possibility of editing kerning pairs, which also supports OpenType fonts in QuarkXPress 8, is highly valued by some publishers. As for the Shared Content feature, it is useful for sharing and synchronizing texts and pictures between different layouts in a QuarkXPress project file.

Productivity related to image handling

We have already seen that both programs support most of the popular pixel and vector image formats. But how do InDesign and QuarkXPress compare in terms of placing and managing imported images?

Both applications allow text and image files to be dragged onto a page from a Mac OS or Windows folder, or from an Adobe Bridge window, making multiple file placement easier. Nevertheless, file placement is one of the areas where InDesign CS4 provides a significant productivity edge over its competitor, by allowing multiple files to be placed in a single operation: the feature is both easy to use and sophisticated, and even allows the creation of a frame at the exact proportion of the placed image, as well as the placement of several images as a grid of frames like a contact sheet.

Likewise, it is possible to place all or selected pages of a multi-page PDF or Illustrator CS4 file in a single operation. Finally, InDesign allows the image-fitting options for frames to be specified prior to placement, meaning that a page layout can be set up in a way that imported images are immediately scaled proportionately as well as cropped or reduced by a pre-set amount, a feature QuarkXPress lacks.

QuarkXPress 8 innovated with a new picture content tool that allows images to be scaled, rotated and cropped in a single operation. This feature, clearly more efficient than InDesign's current tools, streamlines the fine-tuning of sophisticated page layouts; it is regrettable that Quark has not paired it with the image-placement and object-handling features InDesign offers.

Managing Content and Production

Major Points

- InDesign CS4 offers tight integration with other key graphics applications, including **sophisticated support for native file-formats, metadata support and wide-ranging support for document-export** to PDF, SWF and the Flash authoring environments.
- InDesign CS4 provides **a significant productivity advantage for handling images and text.** Multiple-file-placement accelerates the production process, and the new Links Panel allows easy access to images, and increases efficiency in managing placed files.
- PDF export from InDesign CS4 is **faster and more mature than with QuarkXPress 8.0**. and provides support for a wide variety of PDF format versions.

No application is an island

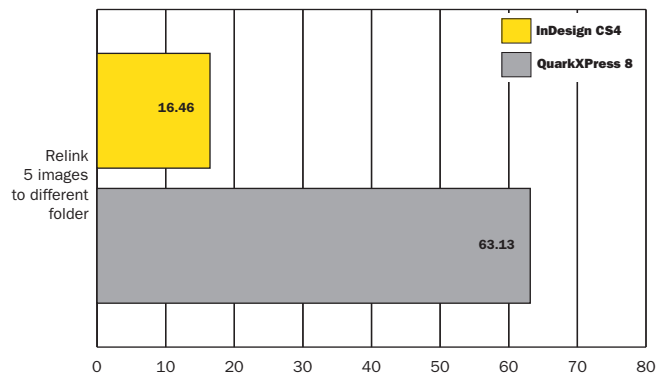
InDesign offers a high level of integration not only with other key applications of the creative and publishing workflows, but with the wide array of technologies and standards developed and supported by Adobe, ranging from the ubiquitous PDF format to the metadata architecture XMP, as well as support for XML, not included in QuarkXPress 8.0. The obvious immediate benefit is of course tighter integration with applications such as Photoshop CS4, Illustrator CS4 and Flash CS4, as well as Bridge CS4. Quark has clearly recognized the need for tighter integration with Adobe's tools: version 8.0 of its flagship application supports file import from Bridge, and now offers some support for native Illustrator files, but it lacks the pervasive support for XMP, and cannot offer the metadata integration that ties together all Adobe applications.

The high level of integration provided by Adobe's tools has some immediate benefits in terms of productivity. One of the best examples for this is the new Links panel introduced with the latest release of InDesign. Managing linked files is essential in efficient page layout and production, and the level of sophistication provided by InDesign CS4 goes well beyond any other page layout application on the market, including previous releases of InDesign.

The highly customizable Links panel not only makes it much faster to locate linked files and to check a wide variety of characteristics such as color space, resolution, ICC profiles, creation and placement date, it can even display metadata such as the author of a placed image. Most importantly, it speeds

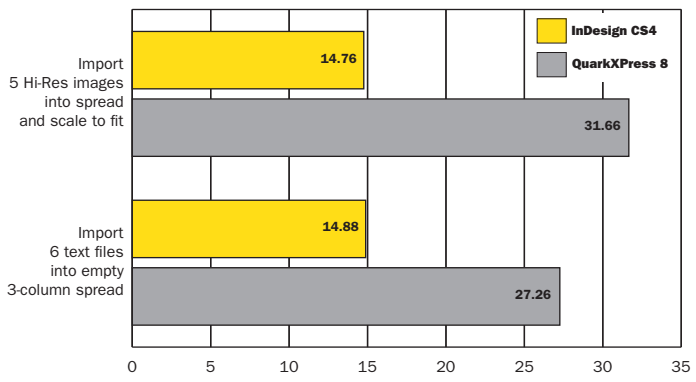
Productivity in Image Import and Management

Efficiency in Managing Placed Images
Time in seconds. Shorter is better.



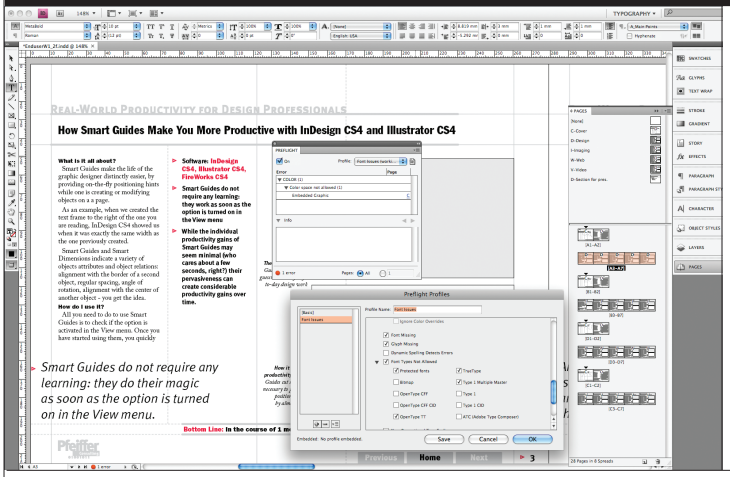
The new Links Panel in InDesign CS4 goes well beyond QuarkXPress in terms of features and productivity for managing placed files. The chart on the left shows the time necessary to relink 5 images placed in a page layout to a different folder, significantly faster in InDesign CS4.

Productivity of Multiple File Placement
Time in seconds. Shorter is better.



Multiple file placement gives InDesign an edge in page-layout efficiency: the program can import several individual image and text files in a single operation. QuarkXPress requires files to be imported or dragged individually into a page layout, requiring almost twice as much time (chart on the right).

Live Preflight / PDF Export



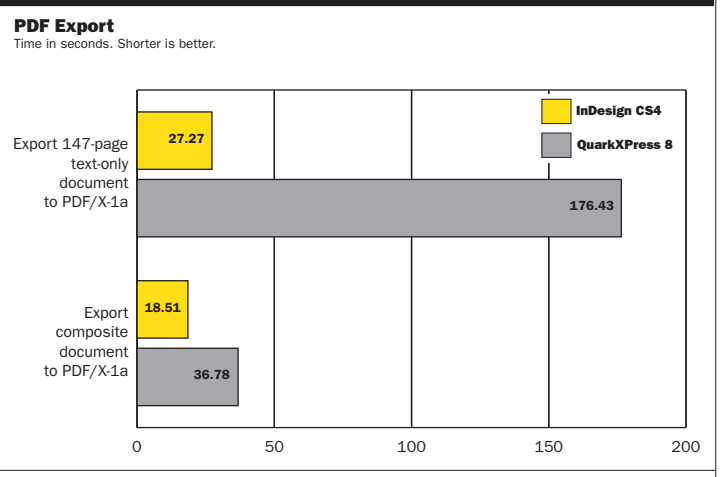


Illustration on the left: InDesign CS4 offers a Live Preflight feature that detects errors as they occur. The program is shipped with a default preflight profile that can be customized to detect a great variety of different document aspects for both print and digital media output, including overset text, wrong color space or aspects such as TrueType outlines contained in an OpenType font. Chart on the right: PDF export is significantly faster with InDesign CS4 than with its competitor. InDesign CS4 offers PDF export based on the original Adobe PDF libraries, while QuarkXPress 8 relies on a third-party conversion engine compatible with PostScript, and offers a more restricted range of PDF export options.

Efficiency in Text Editing

InDesign offers one feature that is very useful in the newspaper production process: the integrated text editor, which offers a simple word-processor window for editing text that is placed in a page layout.

Editors can type their texts and apply style sheets or modifications without having to worry about the page layout and design tools interfering with their work, or about unwittingly modifying the design. In addition, the text editor in InDesign displays information such as style-sheets that are used, and alerts the user when overset text occurs. All this can be achieved while interactively seeing the changes to the text in the complete page layout.

InCopy CS4: In addition to the built-in text editor, InDesign CS4 offers integration with InCopy CS4, Adobe's copy editing program. InCopy CS4, which is built on the same code-base offers full support for copy-fitting and tracking changes. With InCopy CS4, it is possible for several newspaper editors to work on different stories placed on the same page, without having to invest in a fully-fledged editorial system.

up everyday production tasks significantly, by allowing operations such as relinking images to a different folder, or to relink placed images to files with a different file extension.

Preflighting

Paradoxically, InDesign CS4 and QuarkXPress 8 take both a very similar and a completely different approach to detecting potential production problems. InDesign's preflighting, available since its first release, was always geared towards the user, not the production expert.

Easy to use, it was also somewhat limited in scope in older versions of InDesign, and has been significantly expanded in the CS4 release. The Live Preflight functionality spots errors as they occur, and allows users to find and correct them easily. Initially, the program uses a default preflight profile, but creating new ones is a simple process.

QuarkXPress, on the other hand, did not offer any preflighting in earlier releases, but introduced the powerful but somewhat unwieldy Job Jackets feature in QuarkXPress 7. Job Jackets are very sophisticated, and share some characteristics with preflight profiles in InDesign CS4.

Practically speaking, setting up Quark's Job Jackets requires a considerable learning effort, and the program does not provide default settings that would allow the average user to preflight a document without creating the appropriate Job Jacket beforehand.

PDF support

One of the key differences between QuarkXPress and InDesign in terms of PDF support is that Adobe's product uses the native Adobe PDF libraries for PDF creation, while QuarkXPress relies on a third-party conversion engine compatible with PostScript.

As a result, support for different versions of the PDF standard is more sketchy in QuarkXPress: InDesign CS4 supports the full range of PDF/X standards and variants, while QuarkXPress 8.0 only supports PDF/X-1a:2001 and PDF/X-3:2002.

And while QuarkXPress can create sophisticated interactive projects, only hyperlinks are exported to PDF files; InDesign can also export buttons, as well as page transitions.

Finally, in the benchmarks conducted for this project, PDF export was significantly slower from QuarkXPress 8.0 than from InDesign CS4: Quark's program took two to six times longer to export identical documents to PDF/X-1a than InDesign.

InDesign CS4 and QuarkXPress 8: Key Technology Differences

Feature	InDesign CS4	QuarkXPress 8
Creative Design Options	▹ Graphic effects (emboss, glow, etc.) on graphic objects reduces need for graphic effects work in Photoshop or Illustrator. ▹ "Paste Inside" allows sophisticated graphic design compositions without using other applications. ▹ Support for transparency in Photoshop, Illustrator and PDF documents allows sophisticated integration of graphics from other applications.	▹ Picture Effects lets users apply non-destructive image effects and filters to pixel images in common file formats (lacks support for Photoshop files).
Design and Workflow Efficiency	▹ Drag and drop file placement for text and image files from operating system folders and Adobe Bridge. ▹ Multiple file placement allows multiple images or multiple pages in PDF or Illustrator documents to be placed in one operation. ▹ Proportional Place automatically creates an image frame at the proportions of the placed file.	▹ Picture content tool allows images to be cropped, scaled and rotated without changing tools or using keyboard commands.
Advanced Page Layout Functionality	▹ Hierarchical Master Pages allow the creation of sophisticated templates, that support simple update of shared characteristics between linked master pages. ▹ Layer-specific guides allow the creation and switching between layout grids on the same page template. ▹ Existing InDesign documents can be placed inside a page layout, and are updated as changes occur.	▹ Composition Zones allow parts of a project to be shared by several projects and/or group of users. ▹ Shared Content allows elements and settings to be shared among different layouts in one project. ▹ Grid Styles makes management of multiple page and item grids easier.
Composition	▹ Text composition engine supports glyph scaling as part of H&J (Hyphenation and Justification). ▹ H&J can work with entire paragraphs, as well as line by line. ▹ Dictionary-based hyphenation algorithm offers two levels of hyphenation. ▹ Optical margin alignment provides simple, story-level hanging punctuation.	▹ Sophisticated, customizable hanging punctuation can be integrated into style-sheets. ▹ Editable kerning tables can be customized, saved and shared by user.
Text-Related Features	▹ Support for nested style-sheets speeds up repetitive formatting operations. ▹ Support for conditional text simplifies managing document variations. ▹ Support for text variables speeds up repetitive document creation and adaptation.	
PDF Support	▹ Support for PDF/X-1a: 2001, PDF/X-3: 2002 ▹ Support for transparency in PDF files ▹ Comprehensive support for PDF file variations, including PDF version 1.3 to 1.7 ▹ Support for PDF/X-1a: 2003, PDF/X-3: 2003, PDF/X-4:2008 ▹ Support for multimedia features in PDF files	
Preflighting	▹ Live Preflight spots errors as they occur, based on a default profile. ▹ Simple creation of custom profiles that cover a wide range of document properties.	▹ No default preflighting mechanism. ▹ Job Jackets can be used for preflighting but require a non-trivial set-up procedure.
Image Handling	▹ Links Panel gives users direct access to a wide range of image attributes, metadata and file information and allows batch relinking of files with the same file name but different extensions.	
File Compatibility	▹ Support for a variety of file formats including Photoshop, Illustrator, PDF, TIFF, JPEG, PNG (among many others). ▹ Access to image layers, alpha channels and paths in Photoshop files. ▹ Support for transparency information in Illustrator and PDF files. ▹ Support for Layer Comps in Photoshop files. ▹ Support for Photoshop adjustment layers, text layers, layer masks and layers containing effects.	▹ Access to transparency of individual layers in compatible multi-layered Photoshop files.
Multimedia Integration	▹ Export to SWF files for Flash Player, support for hyperlinks in PDF files. ▹ Export to XFL files for Flash CS4 authoring. ▹ Support for interactive PDF files including hyperlinks and interactive options, such as buttons and page transitions.	▹ Interactive authoring and basic animation features (for export to SWF files). ▹ Support for web-page creation.

Note: this table is a quick overview of some of the key technology differences between InDesign CS4 and QuarkXPress 8. It focuses on unique features in each product, not on comparison of core functionality shared by both programs, such as basic text formatting or graphics tools.

ANEXO 6 – ARTIGO *INDESIGN CHALLENGES QUARK'S HEGEMONY*

de Anita Malnig. (2005). ***The Seybold Report – Analyzing Publishing Technologies, Volume 4, n.º 23***

2005

InDesign Challenges Quark's Hegemony

By Anita Malnig

Entrenched in the publishing and graphic design communities since the mid-'80s, QuarkXPress might finally be feeling the pinch of competition. A report by the Pfeiffer Group discusses the pros and cons of switching.

Neither Quark nor its chief rival, Adobe, will divulge sales numbers that indicate a gain or loss of ground, but based on anecdotal information, the publishing community is demonstrating a heightened interest in Adobe's InDesign, particularly its latest incarnation, InDesign CS (Creative Suite), and many companies are making or preparing to make a switch that might have been unthinkable even a few years ago.

The Pfeiffer Group in Paris has devoted much of the past four to five years to thoroughly testing virtually every aspect of both QuarkXPress and Adobe InDesign. A recent report, "InDesign CS vs. QuarkXPress 6.x: Technology Outlook and Strategic Analysis," focuses on QuarkXPress 6.x and Adobe InDesign CS. In addition to the group's own testing, Andreas Pfeiffer interviewed more than 200 publishing professionals who use either Quark or InDesign, to assess their qualities in real-life situations. That research has yielded a report over 100 pages in length. We report highlights here.

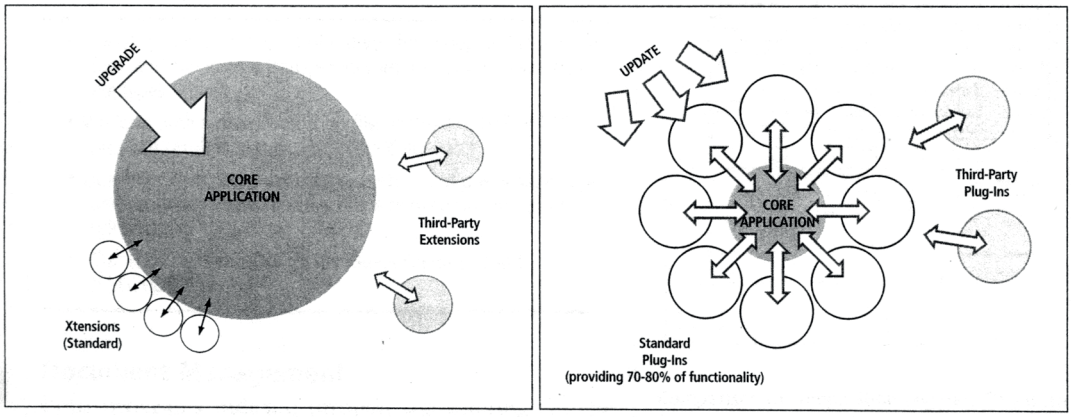
The well-written, thorough report comes at a crucial time for publishers who are seriously considering moving from QuarkXPress to Adobe InDesign. It gives painstakingly detailed information, myriad and precise, that touches on all of the important aspects of each program.

Overall, the author gives his nod to Adobe InDesign; nevertheless, he does give QuarkXPress its due, although he never lets us forget how displeased he is — and has been — with Quark's licensing and pricing policies.

Operating System Issues

In his report, Pfeiffer states that whether one moves from a pre-QuarkXPress 6.x to InDesign CS or from a pre-QuarkXPress 6.x to QuarkXPress 6.x, a big change awaits. When asked about the Mac OS, Pfeiffer said, "It changes pretty much everything in the sense that the Mac platform goes from charming-yet-unstable to [offering] industrial strength operating system services: preemptive multitasking, multithreading, protected memory and so forth." Pfeiffer said that QuarkXPress, like most programs, relies closely on the operating system to handle a variety of I/O related tasks, such as screen display and font management. This approach poses a problem for Quark running under Windows because until Windows becomes Unicode-compliant (which, according to Quark's Web site will happen in Version 7.0, due to ship next year), print standard ligatures cannot be displayed. But they can on Mac OS X, which makes the glyphs available.

Overall, Pfeiffer said, InDesign has a more modern and modular relationship with whatever operating system it runs on. InDesign uses the Adobe Graphics Manager, as do all Adobe's programs. Based on PDF, it "basically isolates the application from the OS for most of display-related tasks," Pfeiffer said. "This allows InDesign to run in a completely identical fashion on both Mac OS and Windows." This modular approach also makes it easier for programmers to write updates and for system integrators to replace a module with one they have developed. "Which," according to the report, "is exactly what is happening with high-end editorial systems."



Program architecture: QuarkXPress (left) and InDesign (right). Program architecture has a direct impact on update and development cycles. A modular architecture makes it easier to upgrade specific functionality, such as the composition engine for instance.

Interface Issues When Switching

The Pfeiffer report could not be clearer when discussing a user's approach to switching programs: Do not try to imitate work methods acquired in QuarkXPress when switching to InDesign.

The author believes that if users work imitatively, they will miss out on many key features, such as the composition enhancements illustrated below. But that said, InDesign does include a set of keyboard shortcuts that do emulate the way QuarkXPress works. Nevertheless, moving from QuarkXPress to InDesign is pointless if one is merely going to emulate. By starting fresh, the user will be rewarded by the program's many features and seamless operations with the entire Creative Suite. Such a time- and labor-intensive move needs to be thought out thoroughly.

Key points that give InDesign the edge from a usability point of view, says the report, include a customizable work environment that allows a user to save "workspaces" for different jobs; customizable keyboard shortcuts (something the report chides QuarkXPress for not providing); and dockable palettes, which allow users to fasten, as it were, palettes alongside the left and right edges of the screen, speeding up access to them.

The sole interface advantage the report credits to QuarkXPress is its uncluttered user interface. And, according to Gary Edwards of Hot Spots Media (see sidebar, "He'd Rather Fight than Switch,") that's quite enough, thank you very much.

PDF Support: Major Points

- InDesign CS has the more mature feature set in terms of PDF support and can handle all variations of PDF file formats, including PDF 1.5 and PDF/X.
- QuarkXPress supports "deviceN" color space when exporting PDF files.
- Neither InDesign nor QuarkXPress can edit a placed PDF file.
- QuarkXPress cannot color manage PDF files and does not embed ICC profiles in PDF files.

Image Handling: Major Points

- InDesign supports import of native Photoshop and Illustrator files, and can import transparency information in a variety of file types.
- Working with native Photoshop files instead of TIFF or EPS files can result in significant productivity gains.
- QuarkXPress can change contrast settings of grayscale images and can assign customized screens to grayscale images for printing.
- Currently neither InDesign nor QuarkXPress support JPEG2000 files.

Document Management

Both programs indicate through the offerings in the software that their creators understand that users want better ways of managing documents that are part and parcel of a project. And they both aim their solutions at small groups and projects, assuming that companies with large-scale document management needs will probably opt for the content management and editorial workflow systems already on the market.

That said, Quark is currently more innovative in this regard, with "projects" and "synchronized text" as the major new features. Projects allow up to 26 layouts to be included in one XPress document. As well, the report states, "Projects can share a number of attributes: color, H&J sets, and style sheets can all be accessed from different layout spaces within a project." Synchronized text means that text within several layout spaces can be edited just once for content changes, updates and the like. However, the report says, "the feature does not work with elements in a library." Moreover, the report adds, "Synchronized text cannot be placed on a master page or shared among different files not included in the same project."

The Pfeiffer report could not be clearer: Do not try to imitate work methods acquired in QuarkXPress when switching to InDesign.

Comparison of composition engines: This is an example of automated typesetting with QuarkXPress 6.1 (left) and InDesign CS (right). The example is based on the default H&J parameter provided by QuarkXPress. InDesign uses exactly the same values, the Paragraph Composer, and applies 3% glyph scaling when necessary. No manual fine-tuning was used in either case.

He'd Rather Fight than Switch

Gary Edwards is the creative director of Hot Spots Multimedia in Zephyr Cove, Nev., which specializes in an array of print advertisements, as well as multimedia and kiosk advertising. He was an early PageMaker user, but his film house suggested he try QuarkXPress because of the trouble he was having RIPping film in PageMaker.

When did you start using Quark?
1986. I went kicking and screaming [from PageMaker] and never looked back.

Was there a time when you considered looking at InDesign?
Yes, during the period when Quark had not upgraded to [Mac OS] System 10 and several colleagues thought I should move. It was too big, too many bells and whistles. I have a copy of it and I have no interest in using it. Quark is a streamlined tool; it does what it's supposed it. It imports well from other programs and that was the comparison I made. InDesign is like Corel Draw, trying to put too much into it.

How has Quark's customer service been for you?
I've never had a problem that I've needed customer service. Wait. Let me correct that. Years ago, when we were first using it, we had to call about a couple of RIP problems and Quark gave us the answer right away.

What version are you using?
We are using Quark 6.0 on dual-processor G4 towers with Mac OS X 10.3.7; I just upgraded from 4.6. I have heard no negative feedback from the industry I'm in.

What do you like best about QuarkXPress?
Let me give you an analogy. If you go into the back country you can choose a Swiss Army knife or you can take a classic Buck knife. I go for the Buck knife because the Swiss Army knife doesn't function well enough as a knife or a scissors. I like what Quark can do. Once a project leaves my hands and goes to a printer who's going to RIP it to their press, they're not going to have any problems with it. It's a relationship I won't give up. **TSR**

Nevertheless, projects are an innovation and one that InDesign simply does not offer. Adobe InDesign offers support for its Version Cue, the workflow and freshening technology introduced with the Adobe Creative Suite. Those interested in this feature should read the entire section covering this topic in The Pfeiffer report, as well as solicit information from Quark.

Design Tools and Functionality: Major Points

- InDesign expands the design potential for the page layout environment significantly over other mainstream page layout programs by adding support for nested and compound frames as well as transparency in a variety of forms.
- Creative options in InDesign can result in increased productivity, but users who switch from other application will need to rethink their way of working to take full advantage of the potential.
- Some publications may not require more design functionality than the currently available feature set of programs such as QuarkXPress.

Layers: Major Points

- Layers are relatively new to design and print production and are still very often under-used.
- Both QuarkXPress and InDesign offer comparable basic functionality, but could expand it to provide a more sophisticate feature set.
- InDesign CS currently has a slight edge over QuarkXPress 6.x in terms of layers, since it can handle layer specific guides and cut and past operations that include layer information.
- Layer handling in QuarkXPress 6.x is limited by the fact that layers are not supported on master pages, which limits their usefulness for building templates.

Typography

The report devotes a good deal of attention to what both programs offer from a typographic point of view, and again, those for whom this is a key issue would do well to scrutinize Pfeiffer's report in detail. He clearly declares InDesign the winner with its very strong composition engine and "refinements which typographers had been missing," such as better paragraph composition, user-specified glyph scaling as part of H&J parameters, dictionary-based hyphenation (instead of Quark's algorithm based hyphenation), and support for Unicode and OpenType. This should come as no surprise to the publishing industry; since day one, Adobe has been an innovator and then the leader in desktop typography.

Pfeiffer said that even though many publishing environments are satisfied with the quality of QuarkXPress' typography, "a more capable composition engine can have a direct impact on the overall throughput, even in environments which do not require refinements, such as hanging punctuation or contextual alternates."

The example on page 15, according to Pfeiffer, shows what InDesign can do for a typical page of type.

Color Management

Once considered a much sought after goal of electronic publishing, color management has come a long way, both on the OS and the individual program level. Apple's ColorSync was a breakthrough and perhaps remains a contributing factor in the Mac OS being the platform of choice for creative publishing.

The Pfeiffer report gives kudos to Adobe InDesign

No Reason Not to Switch

The ad agency Wunderman in Chicago switched from QuarkXPress to Adobe InDesign in January 2004. Wunderman's integrated studio services group provides print production services for clients that include Ford, Kraft and Citibank. We spoke to Steve Gleason, director of Integrated Studio Services.

Why did you switch?
We had been migrating users to [Mac] OS X and G5s, and at the time Quark was not OS X savvy and we had to revert to Classic Mode. In our market segment, Quark stagnated for five years while Adobe innovated. We'd been using InDesign since 1.0, and continued releases brought it closer and closer to what we wanted. By the time CS (Creative Suite) came out, there was no reason not to use it.

How long did the transition take?
About six weeks. We had our print vendors in ahead of time, as well as people from Adobe. That transition took shorter than I thought. The art directors just stopped originating files in Quark.

How did your designers and art directors take to the switch?
Most of the designers had copies of the software at home and were already using it. Sometimes they'll build files in Photoshop and Illustrator and bring them into InDesign. However, just yesterday Adobe was in, teaching them to do more page layouts in InDesign than in Illustrator. [At the time of the transition] the art directors got new Macs, the new OS and Creative Suite.

How did your vendors react to the switch?
We've had very little pushback from the print vendors, and when there was some, we got assistance from Adobe.

What are the most attractive features of InDesign CS?
We can make better use of the OS by taking advantage of the suite benefits, like native file formats, PDF exporting and a subset of other features that made sense. Some of the document setup features and not having to rely on third-party apps. We've also been working toward a more automated workflow, and In Design's scripting support is much stronger. **TSR**

while acknowledging that QuarkXPress does provide its users with color management tools. Perhaps the most obvious advantage of Adobe's Creative Suite is that all the programs share the same color management engine. "This means that if the color management environment is configured correctly, an image actually looks the same in the page layout and in the retouching application," the report says. Adobe supports both the Adobe Color Engine, which works on Macintosh and Windows, ColorSync on Mac OS X and Microsoft ICM on Windows (the only mention of Microsoft ICM in the report), and Adobe offers color management support for EPS and PDF files, which QuarkXPress does not.

QuarkXPress does have its own color management technology, Quark CMS. Although it does not fully support ColorSync, it does support Hexachrome printing, which InDesign does not.

Tables: Major Points

- Both InDesign CS and QuarkXPress 6.1 can import formatted tables from Excel; neither program imports all formatting contained in the spreadsheet.
- Only InDesign CS can import tables contained in Word documents. InDesign can also export tables to RTF document, a capacity QuarkXPress lack.
- InDesign CS offers significantly more powerful formatting options for tables than QuarkXPress.
- InDesign can split long tables vertically over several columns or pages. The program also offers support for repeating header and footer rows for long tables.

Guides and Grids: Major Points

- Grids and guides are an essential functionality for any page layout program.
- Currently InDesign has an edge in terms of managing guide lines, since it allows numeric position, cut and paste operations and layer specific guide lines.
- Neither InDesign nor QuarkXPress offer some more advanced functionalities in this respect, such as guide lines at an arbitrary angle, circular guides, or custom line styles for guides.

Extensions

A brief visit to Quark's Web site showcases the breadth of third-party extensions for the program, ranging from typography to database publishing to printing and more. And while Pfeiffer acknowledges this "extremely well-established base of third-party extensions," he counters this statement by pointing out that InDesign has a very strong application architecture that will allow developments "impossible or very difficult for QuarkXPress," offers robust scriptability and "better integration with high-end editorial systems." Pfeiffer also recommends keeping plug-ins and extensions to a minimum in most workflows.

This appears to be an area of individual analysis and study. Workflows already set up with extensions need to determine if InDesign's features, its original plug-ins and what might be scripted will surpass what already exists.

Cross-Media Functionality: Major Points

- The core publishing market has not yet fully embraced cross media publishing, and end-user requirements are not yet sufficiently stabilized for generic software solutions to appear.
- QuarkXPress can create Web pages as part of a design project.
- InDesign is a more mature environment for e-Book authoring.
- Both QuarkXPress 6.x and InDesign CS offer basic XML functionality, but putting it to use will require solid knowledge of XML.
- Neither program can rival dedicated XML authoring environments unless significantly enhanced through third-party extensions or systems.

Licensing Issues: Major Points

- Quark has significantly more stringent license management and copy protection policies than Adobe, requesting software activation of single user licenses.
- The Quark Licensing Administator is frequently criticized by users.
- Adobe allows site licenses to be deployed in a platform-independent way; Quark treats Macintosh and Windows versions of QuarkXPress as individual products and charges for cross-grades between platforms.

Printing and Production

Early on, service providers were wary of InDesign, telling users not to use it because "it won't print." Pfeiffer unequivocally says this is no longer the case, but acknowledges that "InDesign gives inexperienced users much more leeway to mess things up than QuarkXPress." He also says that "QuarkXPress has a longstanding reputation of reliable output (see sidebar, "I'd Rather Fight than Switch"). He also says that "a large number of service providers now accept InDesign documents." This clearly is one area publishers must research extensively, making sure that all their vendors will be on board if a switch to InDesign is in the offing (see sidebar, "No Reason Not to Switch").

The Final Analysis

We recommend that publishers and creative professionals who are seriously considering switching from QuarkXPress to Adobe InDesign read this entire report (available at **www.pfeifferreport.com/store/product_info.php?products_id=40**). This article highlights key points, but obviously cannot offer the depth and detail of the original report.

Finally, Pfeiffer recommends trying out InDesign on a new project, so that users can assess workflow considerations without jeopardizing deadline-constrained projects. The report suggests seeing "how the arrival of the new page layout tool could coincide with changes and improvements in the overall way of working with and using technology."

In any event, the report concludes, "InDesign has become an agent of change for the publishing industries." **TSR**

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ANEXO 7 – ARTIGO *QUARK XPRESS 6 OFFERS WARM SUPPORT FOR MAC, HOT COMPETTION FOR ADOBE*

de Steve Werner. (2003). ***The Seybold Report – Analyzing Publishing Technologies, Volume 3, n.º 6.***

Quark XPress 6 Offers Warm Support for Mac, Hot Competition for Adobe

By Steve Werner

For many Mac users, the shift to OS X had to be delayed until Quark released a compatible version of XPress. Now we can take a detailed look at its features. How does it compare with the competition, and how well does it address the needs of 21st-century publishers?

When it launched XPress 6 on June 10, Quark ended the wait for one of the most anticipated software releases in recent years. Seventeen months after its competitor, Adobe InDesign 2, was released in a Macintosh OS X version, Quark has released a product that runs fully native in OS X. It also brings with it some substantial new features. The question addressed in this review is whether this release is too little, too late.

The page-layout landscape has changed since our January 2002 comparison of XPress 5 and InDesign 2 *(see Vol. 1, No. 19)*. Quark's release of version 5 was largely a dud, both with reviewers and with its customers. Relatively few XPress users upgraded; most stuck with the 4.1 release (or even older versions). While XPress 5 offered new ways of creating Web pages and some enhanced XML controls in its avenue.quark XTension, it provided only minor improvements for print customers—primarily a table tool and the ability to work with layers.

Meanwhile, the Macintosh world has changed completely: In January 2002, Mac OS X had relatively few applications beyond those offered by Apple itself, and it was still an operating system in development. Now, after the release of OS X 10.2 (Jaguar) and

QUARK XPRESS VS. INDESIGN EXECUTIVE SUMMARY

	XPress 6	InDesign 2
Highlights	Full-resolution graphic previews, improved PDF creation, multiple undos, new file management features and cross-media tools.	Cross-media tools, table creation, transparency support, long document support, performance and print improvements.
System Requirements	Mac OS X 10.2 or later Windows 2000 or XP 128 Mb RAM recommended G3 or faster Mac Pentium PC	Mac OS 9.1 or later, Mac OS X 10.1 or later Windows 98 or later 128 Mb RAM recommended G3 or faster Mac Pentium PC
Price	Estimated street price: $889 Upgrade from 5.0: $199 Upgrade from 4.x: $299 Passport price: not announced	Estimated street price: $699 Upgrade from 1.x: $149
Pros	Improved PDF creation and full-resolution graphic previews; multiple undos; table and layer improvements; enhancements to HMTL editing and XML import-export. good XML import-export.	Transparency support; handles native PDF and AI files; excellent typography, language and font support; superior table implementation; improved speed, printing and PDF workflow;
Cons	File-management and text-synchronization features promising but flawed. Heftier system requirements now match InDesign. No transparency support; typography, language and font support lags behind InDesign. No Excel or Word table import.	No text wrap for inline graphics; no Multi-Ink feature. Needs improvements in controlling tool preferences. No customizing of dashes and stripes; can't merge shapes.
Summary	Quark XPress 6 offers welcome improvements to XPress users anxious to move to Mac OS X. After waiting for bug fixes, most users who can meet the heftier system requirements and the higher price will probably make the move. However, XPress 6 still lags behind InDesign 2 in major areas—notably typography and fonts, print and PDF workflows, and transparency. We predict that more users will add InDesign 2 (or the newer version waiting in the wings) to their repertoire, and Adobe will continue to increase its share of the page-layout market.	

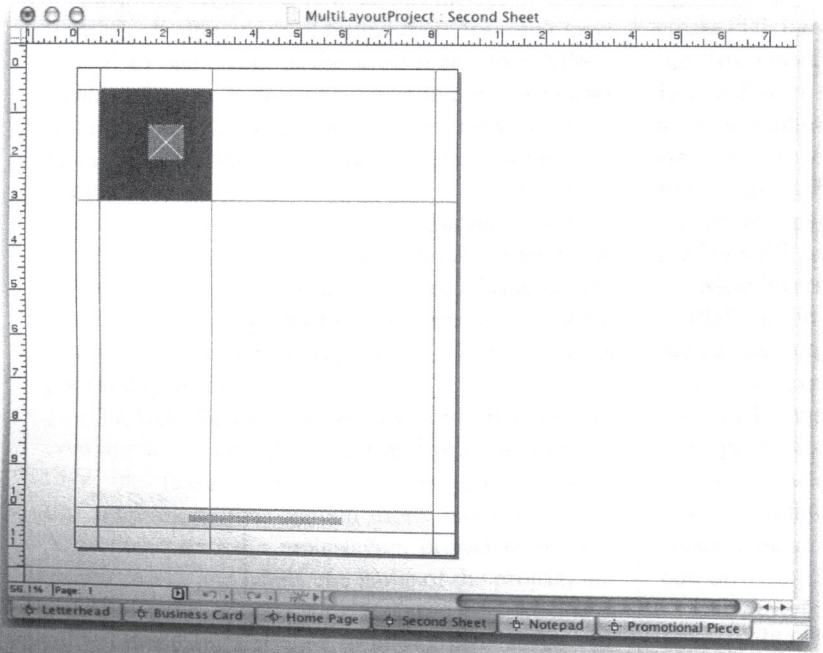
Formally, Quark's trademark has always been QuarkXPress. For brevity, and following a longstanding usage in the industry, we shorten that to XPress, while using "Quark" to indicate the company.

six subsequent updates, this operating system is stable, and Quark has been the last major publishing holdout in switching to the new OS.

The wait has irked more than a few users; Apple has needed patience as well. It announced in 2002 that, beginning in January 2003, no more computers would be shipped that could boot into Mac OS 9. Then Apple relented, apparently because of pressure from XPress customers, and extended its deadline until June 2003. Applications being released this year (for example, Adobe Acrobat 6 Professional) now run only in current operating systems—Windows 2000 and XP, and Mac OS X. With its late support for Mac OS X, Quark almost didn't make it to the party.

Quark's strategy. Quark needs to make a successful entry into the Mac OS X operating system. It also has to offer enough significant feature enhancements for its customer base to upgrade. Otherwise, it will face the same problem it did with XPress 5, where most of its customers weren't convinced of a need for a change.

In the meantime, Adobe hasn't been sitting on the sidelines. It has continued to develop InDesign. Based on the usual Adobe product cycles, we can expect to see another InDesign version later this year. Quark can no longer slide through its new product releases as it seemed to do through most of the 90s, when it had little competition. Many customers have been waiting to see how XPress 6 looks before switching to Mac OS X. (XPress 5 can run in Classic mode in Mac OS X, but this can be painful, with frequent redraw problems.) But Quark cannot take their loyalty for granted. Since changing operating systems already requires faster computers and some retraining, the users might also think it makes sense to switch page-layout applications at the same time.



Multi-layout files. You can include more than one layout in a file (now called a project) so you can synchronize text and certain attributes. Each layout appears as a tab at the bottom of the window.

The transition to OS X

With XPress 6, the application has made a largely successful transition to the Mac OS X environment. When you open XPress 6, it shows the more modern Aqua look, from its blue scroll bars to the gray patterned lines on the title bars of windows. But, to an XPress user, it will still look very familiar. Most of the commands and dialog boxes are exactly where you'd find them in earlier versions of the application. The only changes have been minor; some of the dialog boxes are a bit larger to match OS X interface standards.

Quark has now wholeheartedly made the jump to OS X: The new Mac version will run *only* in OS X, and won't run in OS 9 or in Classic mode. (On the Windows side, XPress 6 will run only in Windows 2000 or XP.) It takes advantage of important OS X features such as the Print Center, better font antialiasing, better memory management and protected memory. You no longer have to worry about taking down your operating system when XPress crashes.

However, XPress doesn't take advantage of the graphic acceleration features of Mac OS X. And while it uses the operating system to rasterize PostScript, TrueType and OpenType fonts, it doesn't recognize any of the extra characters in an OpenType font that a OS X Cocoa application can.

Apple's OS X interface standards have also forced some organizational changes in XPress's menus. There is a new XPress menu where you find the application preferences and the commands to hide or quit the application. In addition, XPress's list of palettes has now moved to a new Window menu, along with the window controls.

New features

While the move to OS X will have automatic appeal to the Mac loyalists who have been long awaiting its migration, other users are more concerned with the new features this version brings, and in how those features stack up to those in Adobe InDesign. We will describe the important changes.

Projects and layouts. For users of XPress 4 and 5, the feature that initially will cause the most confusion is XPress 6's new file-management features. Version 6 introduces two new concepts: projects and layouts. When you create a new file in XPress 6, you now open the New Project dialog box. While this has many of the same controls as the New Document dialog box from XPress 4 and 5, you're now asked for a Layout Name and a Layout Type—you can choose either print or Web.

While XPress 5 allows you to create Web documents, they are totally separate from print documents; you can only move items between the two types by copying and pasting, or dragging and dropping. In XPress 6, Web and print layouts are now unified within the project fold. You can create as many as 25 lay-

s within the same project. This means that if you e creating, for example, a letterhead, a second sheet, a notepad and a Web page, they can all be stored in the same file, called a project.

You work with layouts from the new Layout menu. When you want to create a new one, you choose New from the Layout menu and target it for either print or Web. Each layout appears as a tab at the bottom of your project window *(see illustration previous page)*.

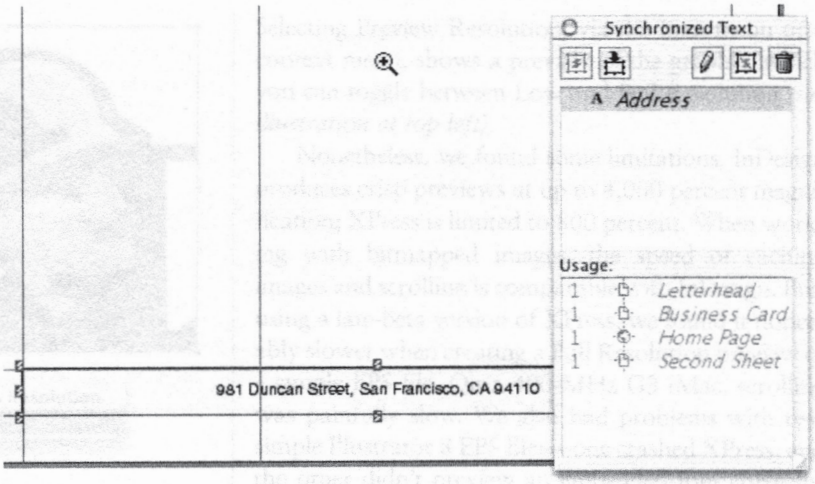
Layouts within the same project share the attributes that are exchanged in the XPress Append dialog boxes. These include style sheets, colors, h&js, dashes and stripes, lists and hyperlinks. For Web layouts, they also include menus, font families, meta tags and cascading menus. When one of these attributes is changed in one layout—the colors in your letterhead, for example—they are synchronized in all the layouts. Other features aren't shared between layouts: Each one has its own master pages, layers, and Print or Web Layout preferences (formerly Document Preferences), for example.

You can duplicate and delete layouts from the Layout menu, or with a context menu. Since each layout can have its own size, orientation and margins, there is no more Document Setup; instead, each layout has its own Layout Properties dialog box. Unlike XPress 5, you can now change a layout between print and Web. When you do this, items on the page may be changed to meet the requirements of the new media when you export the HTML. When switching from a print to a Web layout, a TIFF image becomes a GIF or JPEG, for example.

Having multiple layouts can work well when you have simple layouts where you're sharing attributes you want to keep synchronized. You can also synchronize text in multi-layout projects *(see below)*.

However, while this new layout metaphor shows promise, it's often not well thoughtout. You can't view more than one layout at the same time. Since XPress (unlike InDesign 2) doesn't support multiple windows into the same file, this can make it extremely awkward when you want to compare two layouts. Layouts can't share master pages and guides. The workaround for this is to remember to use the Duplicate command when you begin a layout, copying your master pages and guides from another layout. Since XPress doesn't allow you to copy guides from one layout to another, this makes it difficult to keep layouts that need precise positioning in concert.

This lack of thoughtfulness about file management even applies to long document and printing features. Book files (used to manage multiple chapters) don't support projects that contain more than one layout. And when printing a multi-layout project with registration marks and labels, the name of the project, but not the layout, appears on the output—a fact that is sure to cause much anguish at service providers.



Syncing text. As long as you have your layouts in the same file, you can make sure text stays "in sync" using the new Synchronized Text palette. For example, changing the address in one layout changes it in all the others.

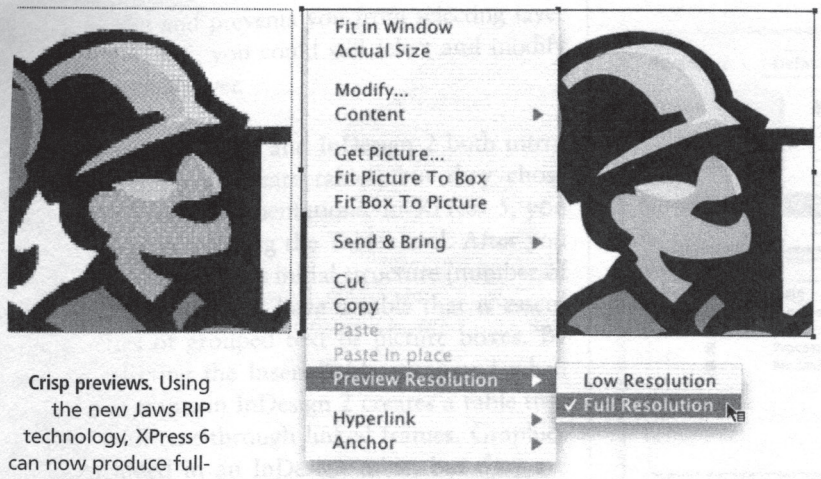
Text synchronization. A related new feature is text synchronization. When you have two or more layouts in the same project—whether print or Web—they can share the same text. When text in a text box is synchronized in the new Synchronized Text palette, changing the text in one layout changes the linked text in all the layouts *(see illustration above)*. This could be useful to handle an address change, for example, between the layouts in the same project.

Synchronization applies only to the content of the text box, not how it's formatted. There are some significant limitations: You can synchronize text, but not pictures. (In fact, each layout has its own Picture Usage controls, which could make graphic management between layouts confusing.) Synchronization always works with all the text in a text box, not just part of it. It doesn't apply to text on master pages, and synchronized text can't be shared between different files.

PDF without Distiller. Since PDF workflows are playing an increasingly large role in most organizations, InDesign 2 has had a major advantage over XPress 5: It can create PDF files without the purchase of Adobe Acrobat. To counter that advantage, Quark has licensed the Jaws RIP from Global Graphics Software for PDF creation and full-resolution previews (which we'll discuss later on). To create PDFs in XPress 6, you choose Export as PDF from the File menu. XPress creates PostScript for your pages and then processes it through the Jaws RIP to create the PDF.

Most XPress users will welcome the direct creation of PDF files in XPress 6. Your options are similar to the choices you have for creating PDF in XPress 4 and 5: You can export Document Information and hyperlinks, including those created with the Lists and Indexes features. You can choose some (but not all) of the options found in Distiller for image compression and font embedding. Unlike InDesign 2, you can choose to create separate PDF, as well as the usual composite output.

However, when compared with InDesign 2, XPress's PDF creation still comes up short. While



Crisp previews. Using the new Jaws RIP technology, XPress 6 can now produce full-resolution previews of vector and bitmapped graphics. You can choose this option for a selected image by using the context menu shown here.

XPress 6 is considerably faster than earlier versions of XPress, when we tested a late-beta and a release-demo version in Mac OS X, we found creating PDFs notably slower than in InDesign. Quark now supports only PDF 1.3 (Acrobat 4) compatibility. It doesn't support the ability to save settings, nor does it work with the Distiller settings files that many service providers supply. While InDesign 2 doesn't support using Distiller settings either, it does allow you to create similar PDF Styles that can be shared. XPress 6 has no way to support the new PDF/X capabilities found in Acrobat 6 Professional. And, as an annoyance to users who don't have PostScript printers, it is necessary to create and switch to an OS X virtual PostScript printer to use the PDF feature.

Full-resolution previews. Another feature on which XPress 4 and 5 had been criticized was the poor quality of its graphic previews. (The freeware version of Enhance Preview XT that was included with XPress let you build a better preview of pixel-based images, but this didn't work with vector art.) InDesign uses the Adobe Graphics Manager to quickly build high-resolution previews of any graphic format it supports—including EPS, PDF, and native Illustrator and Photoshop formats.

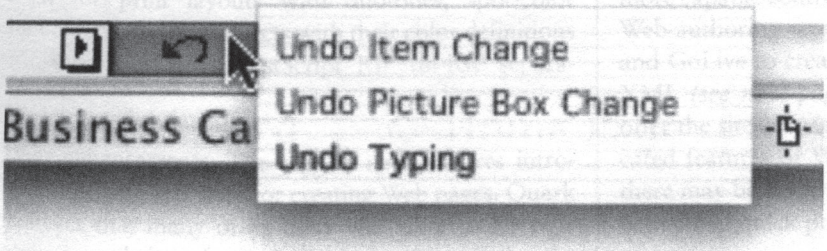
Version 6 brings some welcome relief for XPress users. Quark's license agreement with Global Graphics Software gives it access to the libraries of the Jaws RIP to create Full Resolution previews. It works by storing cache files on your hard drive. (You can change an application preference to set the maximum cache size.) Selecting Preview Resolution, via the Item menu or a context menu, shows a preview of the graphic, which you can toggle between Low and Full Resolution *(see illustration at top left)*.

Nonetheless, we found some limitations. InDesign produces crisp previews at up to 4,000 percent magnification; XPress is limited to 800 percent. When working with bitmapped images, the speed of caching images and scrolling is comparable with InDesign. But, using a late-beta version of XPress, we found it noticeably slower when creating a Full Resolution preview of a simple EPS file. On a 400-MHz G3 iMac, scrolling was painfully slow. We also had problems with two simple Illustrator 8 EPS files—one crashed XPress, and the other didn't preview an embedded font correctly. Unfortunately, the post-release demo version we have doesn't include the Full Resolution preview feature, so we can't say whether these problems have been resolved.

Multiple undo at last. While almost every other graphic application (including InDesign) has long supported multiple undos, XPress users have suffered from its limited ability to undo actions. XPress 6 greatly improves the situation. It lets you undo as many as 30 actions; the specific number and the shortcut for Redo can be set as an application preference.

Not only does XPress 6 support undoing multiple actions, but it even provides Undo and Redo popup menus at the bottom of the project window, where you can select the state you want to return to *(see illustration at bottom left)*. While this is not as sophisticated as Photoshop's History palette, it is usually quite effective. You can undo many actions that earlier versions couldn't, such as importing text and pictures. But there are still some you can't undo (*e.g.*, actions when working with pages or guides). InDesign 2 has no such limitations, but it also has no Undo/Redo popup.

Undo magic. While not as sophisticated as the Photoshop History palette, XPress 6's Undo and Redo popup menus are quite useful.



Layer improvements. Quark introduced the Layers palette with XPress 5. Both XPress 6 and InDesign 2 now support document-wide layers that can be useful for separating content during creation and output, and for controlling versioning. Layers work similarly in the two applications. While the XPress 6 version still has some strange limitations (you can't work with layers on master pages, for example), it has one layer feature that Adobe should emulate: In XPress, text runarounds are layer-specific; in InDesign they apply to all layers.

Version 6 also adds some new improvements to layer handling. You can now choose at output time (in the Print dialog box) whether each layer is to be printed or not. (InDesign layers that are turned off in the Layers palette cannot be printed.) You can now select all objects on a layer with a context menu. (In InDesign, you can do this by Option- or Alt-clicking a layer's name.) And XPress 6 finally respects when a

layer is locked and prevents you from selecting layer items. In XPress 5, you could still select and modify items on a locked layer.

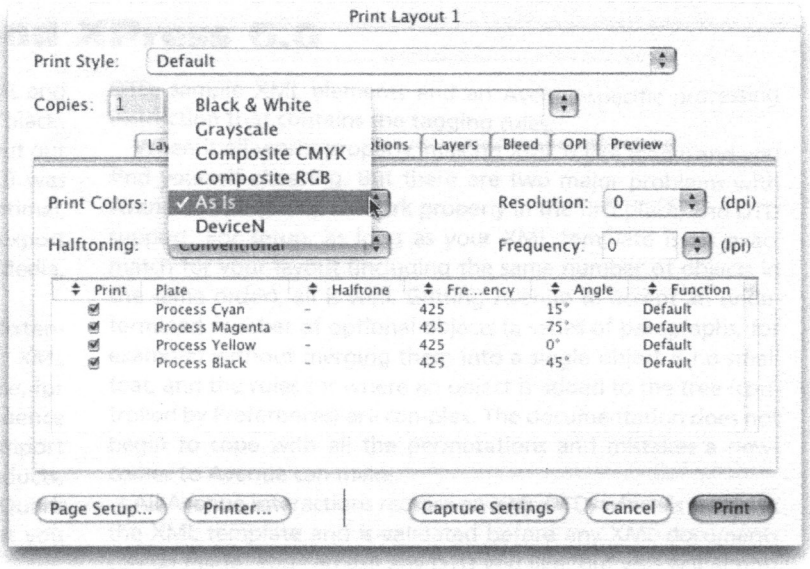
Table progress. XPress 5 and InDesign 2 both introduced the ability to create tables, but they chose notably different implementations. In XPress 5, you create a table by selecting the Tables tool. After you drag it out and specify its initial structure (number of rows and columns), you have a table that is essentially a series of grouped text or picture boxes. By contrast, selecting the Insert Table command when inside a text frame in InDesign 2 creates a table that can flow with text through linked frames. Graphics can be included in an InDesign table, but they are inline.

In XPress 5, you couldn't make a table's background transparent or get rid of gridlines; both were always opaque. InDesign 2 has no problem setting tables strokes or fills to None (transparent), a color or a gradient. XPress 6 now remedies these obvious limitations. You can apply None or a color to a table box, a cell or the gridlines in a table. You can also now link cells together, either automatically or manually. This could be useful for flowing text from cell to cell. You can specify the tab order of cells, either when you create a table or after creation in the Modify dialog box.

However, when compared with InDesign 2's table implementation, XPress still lacks some essential features. Many tables come to page layout from Word or Excel documents. InDesign 2 can import these tables directly, retaining their structure and attributes. To bring these tables into XPress, you first have to export them as tab-delimited text, then use XPress's Convert Text to Table command. XPress 6 table cells are rigidly constrained to a fixed height; InDesign's cells can either be of a fixed height or can auto-expand when text is added to them. InDesign also supports multipage tables and tables that have automatic alternate tinting of rows and columns.

Other print features. There are a couple of output enhancements (besides the new layer print controls) in XPress 6. You can now choose two new options when outputting as composite color *(see illustration at top right)*. When printing or exporting as PDF or EPS, you can choose As Is color. This leaves colored objects in their original color space. The Device N choice can be used for print layouts with duotones, spot-color blends, etc., to leave objects with their color definitions for separation by a PostScript RIP (in-RIP separations).

Web enhancements. The biggest new features introduced in XPress 5 were for creating Web pages. Quark believes that many of its users will want to leverage their knowledge of creating print pages and use the same tools to create pages for the Web. In addition to being able to use their text, picture box, and table tools, XPress 5 and 6 users can use tools to create form fields (buttons, popup menus and so on), hyperlinks, image maps and rollovers. InDesign 2 doesn't have most of these features (it does have a Hyperlinks palette), but it lets you export HTML via the Export HTML dialog box. Both applications do a reasonably good job of retaining the page geometry—XPress by using invisible tables, InDesign by using CSS absolute positioning. Both turn your TIFF images into GIF or JPEG files, but XPress lets you control the conversion of individual images.



Color printing choices. XPress 6 now supports leaving objects in their original color space (As Is color) and allows Device N color when printing or exporting PDF and EPS files.

XPress 6 expands on these features by adding cascading menus, enhanced rollovers and the ability to create font families for cascading style sheets. Cascading menus are the Web feature where new menu choices appear when you move your mouse pointer over a specific menu item. You can still create the basic rollovers of XPress 5, but now you can also create more complex two-position rollovers: When you mouse over an item, an object can be displayed in another area of the page. The value of being able to specify fonts is that if the person viewing your page doesn't have the font you used, you can specify alternate font options.

We know of almost no XPress users who are using these Web features, however. Most users who are concerned about repurposing their print files are exporting their HTML, recreating their graphics with the more capable controls in Adobe Photoshop, and using Web-authoring applications such as Dreamweaver and GoLive to create their Web sites. Some are using XML *(see next page)*. Neither XPress nor InDesign offer the site-management capabilities or the sophisticated features of Web-authoring software. However, there may be some users who might use XPress for an occasional quick project that doesn't need that degree of control.

XML and XPress 6.0

At Seybold San Francisco 2001, Quark embraced XML and promised that XPress would no longer be a "black-hole" application—one into which data flowed, but out of which nothing but pages ever came. Quark XPress 5.0 was shipped with a few XML extensions, but they weren't optimal, and most XPress users chose third-party XML import and export products from companies such as Apropos, EasyPress, Easy-Media, Gluon, North Atlantic Publishing and PCI.

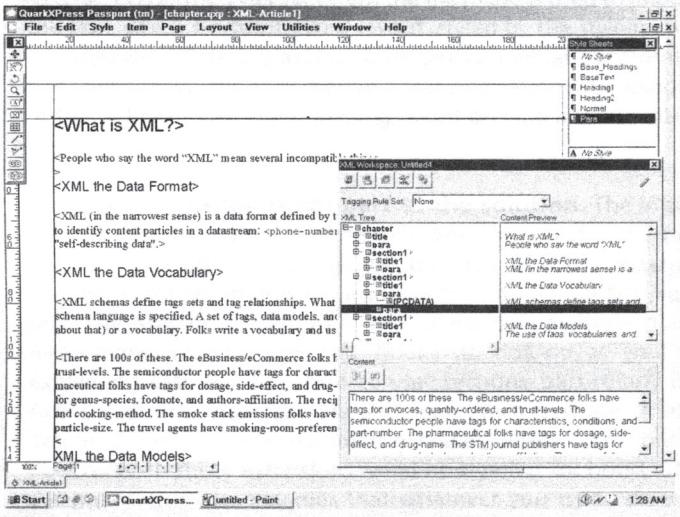
Quark XPress 6.0 is also being shipped with several extensions for XML support: *avenue.quark* for making XML; *XML Import* for pouring XML into XPress layouts; *Item Sequence*, for combining a series of text and graphic boxes into one sequence for smoother avenue.quark tagging; and *XPress Tags* to import formatted ASCII files. As opposed to the third-party products, which can be pricey, these are "free" with XPress. Has Quark added the functionality it promised, or do you get what you pay for?

XML export with avenue.quark. Avenue.quark (hereafter Avenue) makes XML from an XPress document by associating paragraph and character styles with XML elements. You can make this style-to-element association one style at a time, by click-dragging text components such as paragraphs onto a tree diagram of your XML structure. Or you can click-drag an entire document onto a saved set of such associations and tag an entire document at once. Associating text with an element places that element, with that text content, in an XML document. Changes in the text of the layout can be automatically reflected in the XML.

So, to export the text from a layout to an XML file, you open a project, select a layout, call up an XML template that holds the XML rules (the DTD and any previously defined style-to-element mappings) and drag objects from the layout onto the tree.

Saving as XML saves the active layout as an XML instance (document), complete with XML declaration and (if you choose) the full DTD as an internal subset.

The XML template, which controls what elements are shown in the mapping tree, can be built from either an XML document or a DTD. The template is itself an XML document containing the DTD, sample XML elements and an Avenue-specific processing instruction that contains the tagging rules.



XML export. The XML Palette in XPress 6.0 lets you export layout text as a tagged XML file.

When it all works properly, making XML is like magic and you find yourself cheering. But there are two major problems with Avenue: setting it up to work properly in the first place, and DTD support. For setup, as long as your XML template is an exact match for your layout (including the same number of objects in the same order), all is well. Getting Avenue to accept an undetermined number of optional objects (a series of paragraphs, for example) without merging them into a single object is no small feat, and the rules for where an object is added to the tree (controlled by Preferences) are complex. The documentation does not begin to cope with all the permutations and mistakes a newcomer to Avenue can make.

All Avenue interactions require an XML DTD, which is stored in the XML template and is validated before any XML documents can be made. You can use any DTD you like, but you will almost certainly need an Avenue-specific version of any DTD not optimized for XPress. Avenue does not work with modular DTDs (no external parameter entities, not even the usual ISO sets for special characters). Solution: Make your DTD into a monolithic DTD. More critically, Avenue, for all the beauty of its tree diagrams, does not really understand hierarchy. First, Avenue will not work with recursive structures (for example, a `<section>` inside a `<section>`). Second, Avenue can only map one style-name to one tag-name; context is not considered. So you cannot, for example, map the `<title>` of your chapter to a `heading-A` style, the `<title>` of your section to a `heading-B` style, and the `<title>` of your figure to `bold`. Solution: Rewrite your DTD so that each element name is unique (a `<section1>` starts with `<title1>` and contains `<section2>`s inside it). With this new DTD, Avenue can now export XML, but that XML will need to be transformed back into the original DTD. This is an easy XSLT transformation, but nevertheless represents an additional processing step.

Importing XML with XML Import. The XML Import extension lets you pour the content of an XML file into an XPress layout. You start with an empty layout that has styles defined but contains no text. You then open a tree-view of an XML DTD and choose the elements you want placed into the layout by dragging elements from the DTD onto the layout, where they become placeholders for the text to be imported later. You arrange the placeholders in the layout, associate a style with each placeholder, then import an XML file, which fills each placeholder with text from its element. Prefix and suffix material can be associated with each placeholder as the text is imported. After import, you can toggle between the normal layout view and a view of the placeholders (which shows the name of the XML element that provided the content, any prefix or suffix material, and the style applied).

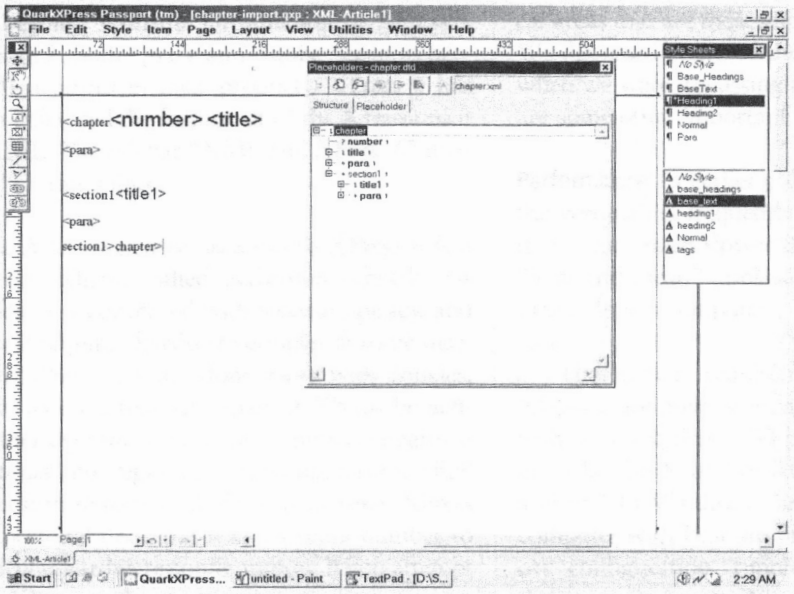
The Avenue restrictions do not apply here; you can map a full DTD, with recursive elements and duplicated element names.

This is a fairly clever import; you can import selected elements, import a full structure leaving out elements in the middle or rearrange the order of the content on import. This means that you need not publish all that is in your XML and are not limited to the same sequence as your XML document.

One strangeness: When the placeholders are created in your blank layout, they are all run together in one long (sometimes

very long) line. In order to apply a paragraph style to an individual placeholder, you need to insert a carriage return after each placeholder that you wish to style as a block.

XML Import works pretty much as advertised, bringing XML content straight into XPress. The placeholder system, while powerful, is not intuitively obvious. I had some trouble controlling paragraph-breaking. One nice feature: You can select an XML folder instead of an XML document for import, and bring in more than one document at once. The menu provides Previous and Next buttons to move between documents.



XML import. Version 6 uses styled placeholders and an XML tree from which you can drag and drop elements. On import, the text from the selected elements flows into the placeholders, acquiring styles and prefix or suffix material on the way.

Alternate cat-skinning. There are other ways to pry XML from or pour XML into XPress. For export from a Web layout, you can export as HTML and use a transformation (*e.g.,* XSLT) to bring the HTML closer to the desired XML.

As an alternative import option, you might make XML documents into specially-formatted files and use the XPress Tags extension to bring the text into XPress. XPress Tags is a long-established ASCII file format that can be imported directly into an XPress layout or exported out of one. An XPress Tag looks something like this:

```
@style-name:text for that style with no carriage returns
```

To import text, run a transformation to turn XML tags into the XPress Tag format, for example, `<section><title>Dogs</title>` might become `@Heading-A:Dogs`. Then Get Text from the file menu is used to import the text, which flows into your layout, styled by the style-names you defined. While this approach requires an initial transformation, Avenue will typically require a transformation after export, so the old-fashioned preprocessing might provide a useful alternative.

The documentation is not part of the solution. The initial Avenue setup requires considerable knowledge of XML, not only of elements and attributes, but also of DTDs, external parameter entities, processing instructions and internal DTD subsets. The XML introductions in the XPress documentation are nice—many introductory XML books do not do as well in explaining XML. But the "how to use" sections, particularly for Avenue, can be impenetrable and sometimes misstate critical details. Some of these are small mistakes, easily fixed, but a newcomer to these extensions could be stymied for hours. The documentation also assumes that whatever you try to do will work, and provides very little assistance when things go wrong. While XML Import has the clearest documentation, all of the extensions cry out for extensive tutorials, which were not present in the prerelease version I worked with.

Analysis. All the XML extensions I tried work better in XPress 6.0 than in 5.0. Avenue is still very complicated and should not be attempted without XML knowledge, XPress expertise and expert guidance. XML Import is much easier to get started with and makes a cleaner separation between the setup that might require an XML expert and the easier production task of importing XML. The current placeholder interface can make getting the paragraph spacing you want a challenge. Item Sequencing is useful, but I found it awkward. XPress Tags can provide a convenient workaround.

But when designers evaluate XML functionality vis-à-vis Quark XPress, the goal is scalable production conversion. The big software differentiators include table handling, special characters, import and export of wrapper elements (such as a list around a series of items), context-specific mapping and context-recursion, graphics handling and batch processing.

How does XPress 6.0 stack up? Table handling is still primitive. A table cannot be added to a sequence, only a single table cell. There may be better ways than I was able to find to import and export XML tables, but the documentation did not steer me to them. The special character tests I ran, both into and out of XML (for an admittedly small sample limited to some characters from ISOlat1 and ISOnum) worked correctly; XML general entities (*e.g.,* `é`) were turned into the appropriate characters on import. The menus state that Avenue supports both UTF-8 and UTF-16, a critical internationalization feature. Wrapper tags are exported automatically, since all Quark XML is DTD-driven. XML Import can handle multiple files, but Avenue (as far as I could determine) is a one-at-a-time proposition, unless you build some elephantine sequences.

Quark should look to its competitors. Many of them have context-specific tag matching, the ability to handle whole tables (including both tab-delimited tables and table-facility-created tables), batch import or export, translation tables for unusual special characters, and no problems with element context and recursion. This 6.0 release provides some very useful functionality, but does not convince me to give up my third-party tools.

Deborah Lapeyre

About the Author

Deborah Lapeyre is a senior consultant with Mulberry Technologies, Inc., a consultancy specializing in XML startups: DTDs, Schemas, analysis and XSLT transforms. She has been working with XML since its inception and SGML since 1984. In a former life, she worked on proprietary generic markup systems and designed databases.

XML and beyond. With the introduction of XPress 5 and InDesign 2, both Quark and Adobe began to promote XML features in their products. XPress 6 has somewhat enhanced the feature set of the XTensions it uses for XML. The sidebar "XML and XPress 6" goes into detail on this subject.

Activation. A less welcome addition to XPress 6 is a new security scheme called activation. Quark has always been very concerned with software piracy, and in the past it required hardware dongles in some markets. With XPress 6, it has done away with dongles, but it now requires that all copies of XPress be activated—either over the Internet or by phone. (Registration is optional, but registration is required for the Full Resolution feature to work.) When activating, XPress sends no personal data, but it ties a serial number to your particular hardware configuration. If you attempt to launch XPress without activating, you can operate it normally for five days, but then it switches to demo mode. In demo mode, you can't save files and your prints and exports have the words "XPress Demo" in very large letters. InDesign 2 uses no such protection system.

Compatibility with earlier versions. There are two issues of compatibility that will be of concern to XPress 6 users: saving backwards to earlier versions, and the investment in older XTensions. XPress 6 can save files with either Version 5 or 6 compatibility—but not version 4. This could present a problem for workgroups where not everyone is upgrading to XPress 6. As a painful workaround, you could use XPress 6 to save backward to XPress 5, then open the file in version 5 (if you have it) to save back to version 4.

Many XPress users have come to depend on certain third-party XTensions in earlier versions of XPress. With the move to Mac OS X and XPress 6, all previous XTensions will break. If any are essential to your workflow, you'll need to contact the vendor to find out if they plan on updating them to the new version.

Pricing. The single-copy list price for XPress has now been increased to $1,045 in the U.S. However, nobody pays list, and the street price runs about $890. (This is almost $200 more than Adobe InDesign 2.) The upgrade price depends on which version you are upgrading from: $199 from XPress 5 and $299 from XPress 4.x. Since XPress 6 still only supports one language, you'll still need the pricier Passport edition if you need hyphenation and dictionaries for multiple languages; the cost for Passport wasn't available at press time. Quark still charges an extra $50 for a paper manual; InDesign comes with one in the box.

Critical comparisons

Before we can proceed to analyze the success of XPress 6, we need to compare it with InDesign 2 in the critical areas that are most important to page-layout users. We discussed some of these in the preceding section when we were discussing new XPress 6 features. Here are some other important areas of comparison.

Performance. In earlier published comparisons, one of the complaints frequently made about InDesign was that it ran much slower than XPress. XPress was the "lean and mean" application that could run even on older, slower computers. This may no longer be the case.

The system requirements for InDesign 2 and XPress 6 are now essentially identical: On the Macintosh, each requires a G3 processor, 128 MB of RAM, and Mac OS X 10.2 or later. (InDesign 2 runs in OS 9 and up.) In Windows, the XPress requirements are a computer with Pentium processor and a similar memory configuration, running Windows 2000 or XP. (InDesign 2 runs in Win 98 and later.) On the Mac, where we tested, both applications run much better with a G4 processor and at least 256 MB of memory.

We did some speed tests on a late-beta version and the demo-release version of XPress 6, comparing it with InDesign 2.02 on a few common tasks. The results may be surprising to some: InDesign 2 bests XPress 6 on opening a large file, creating full-resolution previews, scrolling EPS files and creating PDF. XPress is comparable on displaying the full-resolution preview of TIFF files, and is somewhat faster on autoflowing text. Further testing will require a full version of the released product.

Basic features. XPress 6 has now caught up with InDesign on undoing multiple actions. However, as a "dot-0" release, it lacks InDesign 2's stability. (InDesign 2 has had time for two major updates since its release, plus smaller ones for issues such as long-document performance.) InDesign is also well ahead in crash protection. When InDesign crashes (which is exceedingly rare), it automatically reopens files with almost everything retained, even if the files had not been saved. XPress 6 has an Auto Save feature, but the smallest increment you set it for is five minutes.

XPress 6 lacks a feature for customizing keyboard shortcuts. In contrast, in InDesign there are hundreds of shortcuts that can be added or changed.

Page layout. Quark should have invested some engineering time in updating its basic page-layout features, which are beginning to look antiquated. XPress 6 still supports no form of transparency, except for giving boxes a background of None. InDesign 2 lets you create transparency with an opacity slider and various blending modes, and by applying drop shadows and feathering within the application. It also imports transparency from Illustrator, Photoshop and Acrobat 5 files.

Unlike XPress, InDesign's master pages allow parent-child relationships, so you can base a master on

other master (analogous to basing a style sheet on another style sheet). InDesign also gives more control over overriding master-page items. While the guides in each application superficially appear to work the same, InDesign's guides are a good deal more powerful; they act as real page objects that you can position with the Transform palette, place on layers, or copy and paste between layouts. InDesign also has a potent Eyedropper tool that works like Illustrator's tool of the same name to copy text, color and transparency attributes.

XPress still bests InDesign in a few layout areas. As we describe above, XPress 6's layer feature is somewhat stronger than InDesign's. XPress also gives you more control over tool preferences. It lets you create and merge shapes similar to Illustrator's Pathfinder feature. And it gives you more control over customizing dashes and stripes.

Text and type. Quark has also devoted little time to improvements in its text- and type-handling. Its feature set is almost the same as it was a decade ago. In this area, InDesign surpasses it in almost every respect: InDesign has a multi-line composition system that can greatly reduce the time needed for tweaking linebreaks and hyphenation. It has the best support in the industry for OpenType fonts, which allow the much larger character sets important for fine typography and multilingual communication. InDesign's Glyphs palette and context menus make it very easy to choose special characters from any font. In contrast, although XPress 6 displays OpenType fonts in Mac OS X, it gives you access only to the operating-system character set. It doesn't give you access to the layout features of OpenType—fractions, swash characters and so on.

XPress 6 is still a single-language application. When you want to work with more than one language, you must purchase the more expensive Passport edition of the application. InDesign 2 takes a more international approach: Out of the box, it includes 20 dictionaries for 12 languages that are used for spell-checking and hyphenation.

Graphics and color. As we note above, XPress 6 now offers full-resolution preview of both vector and bitmapped graphics, although its implementation is less polished and productive than InDesign's. Another feature that InDesign offers which isn't in XPress is support for placing native Adobe Illustrator and Photoshop files. In some workflows, this can save both time and disk space without the need of saving intermediate EPS an TIFF files.

In the color arena, each application has its strengths and weaknesses. XPress has better support for spot colors with its multi-ink feature, which InDesign lacks. InDesign can offer color-management interoperability with other Adobe applications (*e.g.*, Photoshop). And its overprint preview is very helpful for service providers in predicting the appearance of printed output.

Long-document support. XPress 6 and InDesign 2 now share similar long-document features. Both have Book palettes for management of multiple documents. InDesign offers some additional features for preflighting and creating PDF files. Both offer support for tables of contents (called lists in XPress) and indexes.

Preflighting and printing. In the area of output, XPress has fallen behind InDesign. While not as good as third-party solutions, InDesign's Preflight and Package features are much more useful than XPress's more rudimentary Collect for Output option. InDesign's redesign of its Print user interface has now bested that of XPress 6. For example, InDesign's Print preview is always visible, while XPress hides its preview on another tab in the Print dialog box. In InDesign 2, you can change your target printer in one step; in XPress 6, you must click on the Printer button to access the printer through the operating system. InDesign makes it easy to create a PostScript file that is either device-independent or targeted to a particular PPD. The only way to do this in XPress 6 is to change your PDF preferences—but then you lack most printing controls.

Upgraders and switchers

Now we turn to the all-important question: Are the improvements and features that Quark added to its new version compelling enough to encourage version-4 and version-5 users to upgrade to XPress 6? Are they significant enough that they would cause an InDesign user to switch back to XPress? Or will XPress users who are moving to a new operating system (Mac OS X) opt instead to change to another layout application—InDesign—as well?

Upgrading from XPress 4 or 5. There's no doubt that XPress 6 brings with it features that XPress users have wanted for a long time. The addition of multiple undos, full-resolution previews and the direct export of PDF are important additions that were badly needed. Its OS X support works quite well. Its new multi-layout and text synchronicity features can be helpful for many people, even if they are somewhat poorly thought out. The additions to tables and layers are welcome incremental improvements. And, for the few who use them, the new Web and XML features are welcome.

However, Quark has much work to do to catch up with InDesign 2, much less deal with the 3.0 version that's waiting in the wings. The programmers need to add support for transparency, better typography and OpenType fonts. They need to upgrade their printing interface and enhance their PDF-export features. And they still fall behind in many areas of layout, tables and graphic handling.

As we note above, Quark has substantially upped the ante in terms of system requirements for its new version. To make the leap to XPress 6, users need considerably more muscle-power in their computers. This is largely the result of the shift to the new operating systems, Mac OS X and Windows XP, which work best with faster processors and lots of memory. For Quark's Macintosh users, there won't be a choice; they will have to make the jump if they are to stay in business, because no new computers will boot Mac OS 9, and no new application versions will be available for it. The question is when to make the move.

Quark has added to the pressure with its decision about saving backward only to XPress 5. Many workgroups will therefore have to make the transition all at once, rather than piecemeal. (It was very common when XPress 4 and 5 were introduced to save files back to the previous version to work with colleagues or service providers who hadn't moved to the new version.)

Another deciding issue is XTensions. Many XPress workflows rely heavily on the hundreds of third-party XTensions that have enhanced the product for particular purposes. Because moving to Mac OS X and XPress 6 will break every old XTension, some users will have to wait until their XTension developers write new code. But it's by no means certain that all XTensions will be upgraded; some developers (Extensis, for example) haven't announced whether they will offer newer versions of their products.

For most people who are committed to an XPress workflow—either because they genuinely prefer its interface and methods or because they work with vendors or colleagues who require it—we think upgrading to XPress 6 is a no-brainer, provided their workstations can meet the significantly steeper performance requirements and their budgets can handle the higher price. The only question is *when*. In the past, Quark has had to issue several updates as it ironed out the bugs in new versions, and we suspect that XPress 6 still has some major ones lurking below the surface. Compounding the users' caution will be corporate conservatism about spending money for new hardware and software. Thus, we think most XPress users will face an awkward two-version environment for a while until everything gets upgraded.

Switching from InDesign to XPress. We foresee very few users who, having made the move to InDesign 2, will now change back to XPress 6. InDesign 2 matches or exceeds XPress in too many performance areas, including those where it lagged in the past.

Switching from XPress to InDesign. We suspect that many designers who view XPress 6's feature set will be disappointed. Most honest evaluations of the two products show InDesign to have overall superior features, even although XPress still excels in some areas. What keeps many people using XPress is not that it's a better product, but rather that most people are inherently resistant to change: They are reluctant to break their workflow or invest in training as long as what they have now works.

However, as we point out, the landscape has changed, and newer operating systems are here to stay. At some point, everyone who is doing layout will *have* to upgrade, which will require training for the new OS, the new versions of office-productivity tools and, of course, the necessary new layout applications. At this, many users may also welcome a move to InDesign.

David Blatner likes to point out (and we agree) that what will build momentum for InDesign won't be that everyone will switch to InDesign. Rather, it's that more people will add InDesign to their repertoire. We remember that when XPress began to overcome PageMaker in the early 90s, many of us who switched to XPress didn't throw away our copy of PageMaker. We kept copies of both applications because we often had to go back to rework old files. (In fact, both David and I still keep a copy of PageMaker for that very reason.)

Conclusion

The next year or two promises to be somewhat chaotic in the layout arena. On the Macintosh platform, the move to OS X will be painful for some users, but it will be easier for those who have planned ahead and have been working with it already. We believe that most users will transition to newer versions of both XPress 6 and a forthcoming InDesign version by the end of 2004, and Adobe will gradually increase its share of the page-layout market.

The best thing to come out of this chaos is the arrival again of healthy competition. During the mid-90s when Quark ruled the page-layout realm, Quark could decide how fast change came. We awaited anxiously each slow, incremental change in XPress. Now with the arrival of a real competitor to the throne, the pace of change has quickened. This is a good thing, for it will help us to meet the new needs of a new millennium where cross-media is the new byword—Web, XML and PDF—and to add page-layout enhancements that we have dreamed of for a long time. **TSR**

About the Author

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ANEXO 8 – ARTIGO *IS QUARKXPRESS GIVING WAY TO ADOBE INDESIGN?*

de Bill Trippe. (2004). ***The Seybold Report – Analyzing Publishing Technologies, Volume 4, n.º 17.***

QXP 6 IDCS

Is QuarkXPress Giving Way to Adobe InDesign?

By Bill Trippe

Quark's dominance in desktop publishing is being threatened by Adobe's InDesign, as well as Quark's own history of late, inadequate upgrades and its reputation for poor customer service. Bill Trippe takes an informal survey of users to determine why they made the switch from QuarkXpress to InDesign.

Since the early 1990s, QuarkXpress has been the leading desktop publishing tool. Many products have tried but failed to knock QuarkXPress from its perch over the years. Some of us are even old enough to remember one-time products such as Manhattan Graphics' ReadySetGo!, and many industry followers rooted in vain for challengers such as Aldus PageMaker (the product eventually acquired by Adobe).

Indeed, despite the overwhelming leadership of its flagship product, Quark Inc. as a company seemed determined to breathe life into its competitors by infuriating its customer base with half-hearted customer support and onerous licensing terms. Year after year, however, QuarkXPress maintained its dominant market position.

In this desktop publishing war, all eyes have been on Adobe since it introduced InDesign in 1999. Publishers and creative professionals have watched the development of Adobe InDesign closely, and many of them evaluated the earliest releases. While a critical mass of new users was not ready to switch to InDesign 1.0 and 2.0 releases, users were clearly tuned into the emerging product and returned to evaluate it with each new release.

But switching desktop publishing programs is a big decision, both for the individual user and the larger organization. Many graphic designers and production pros have worked with QuarkXPress for years and have honed their talent and built their professional portfolio around a small constellation of creative products — most typically, QuarkXPress, Adobe Photoshop and Adobe Illustrator. The learning curve for any of these products is steep, so for an individual user the curiosity to try something new is counterbalanced by a substantial resistance to change.

Organizations, too, face their own inertia. The organization that buys a lot of seats of Product A doesn't immediately jump up and buy a lot of seats of a product that does what Product A does. Significantly, programs such as QuarkXPress have remained relatively expensive compared to productivity tools such as word processing. And in production environments, the desktop publishing license is only part of the software cost, as many users rely heavily on licensed fonts, plug-ins and utility programs. All of these forces combine to favor the incumbent program.

The cycle of hardware and operating system upgrades also favors the incumbent more often than not. An organization going through the process of upgrading hardware and operating systems might take the extra step of adopting new application software if users are clamoring for the new application software, but otherwise probably not.

Quark Stepped In It?

Despite all of this inertia in favor of the incumbent, Quark Inc. seems to have opened a window of opportunity for InDesign to penetrate its user base. As Adobe was developing and upgrading InDesign, QuarkXPress was on an upgrade path that diverged from what many of its users seemed to need and want. Version 5.0 of QuarkXPress included a licensing scheme that many users found onerous (Quark eventually relaxed it). Perhaps more significantly, the company was then slow to support Macintosh OS X, forcing many users to maintain OS 9 on their machines or dual-boot OS 9/X machines. As a result, even many dedicated users of QuarkXPress kept using earlier versions of the product, and some organizations began to treat QuarkXPress as a legacy application.

As we learned from discussions with several publishers, this was precisely the backdrop for them over the past year as they began the transition to becoming committed users of InDesign.

In each case,

- The publishers had been QuarkXPress users who had looked at InDesign in earlier versions, and then made the decision to move to InDesign with either Version 2.0 or Version CS.

- The organizations had also grappled with the transition and upgrades to the Macintosh operating system. All of the organizations were committed to standardizing on Mac OS X, and more than one

did the OS upgrade prior to or along with the conversion to InDesign.

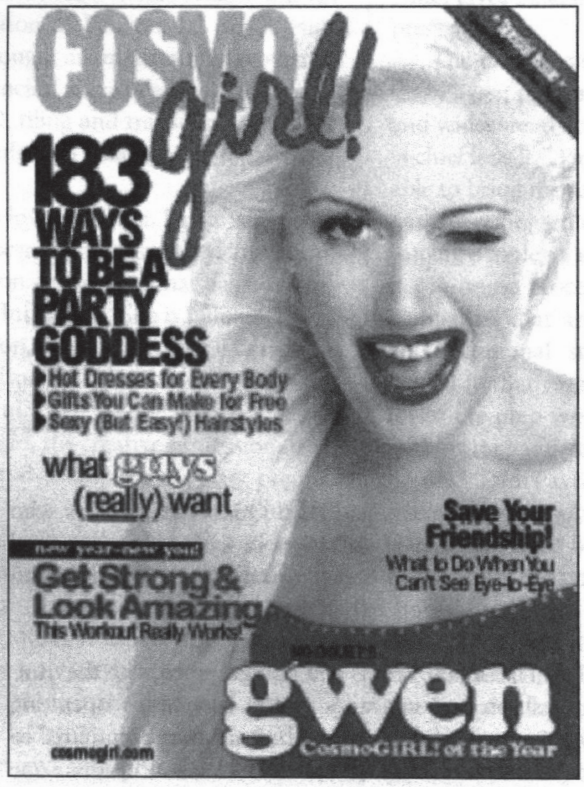
- The organizations were attracted to the bundled offering of Adobe Creative Suite, which includes InDesign, Illustrator, Photoshop, GoLive and Acrobat Professional. Both the pricing and the technical integration of Creative Suite were factors in the decision.

The technical integration of Creative Suite seemed key. As consultant and author Kate Binder noted, "If you're using cute Illustrator features such as transparency, the best way to make sure it'll print is to stick with an all-Adobe workflow. You can keep everything in native files if you use InDesign." Several other people who have made the move to InDesign echoed this point.

The pricing is also significant. The current list price of Creative Suite Premium is $1,229 (with a low street price of $1,116.99 on froogle.google.com at this writing). This bundled pricing on its own is attractive, but a PhotoShop licensee can "upgrade" to Creative Suite Premium for $749 list (low street price of $625 on froogle.google.com). Some of the companies we interviewed likely negotiated bulk purchase discounts, and it was clear that the bundled pricing was attractive, but we didn't explore specific pricing.

Making the Leap

We spoke to several publishers who are making the change from QuarkXPress to InDesign, as well as to a number of individual creative professionals. Two publishers, Hearst Magazines and Future Network USA, agreed to discuss their decisions on the record. Hearst, of course, is a giant in the magazine industry, and publishes *Cosmopolitan*, *Esquire*, *Good Housekeeping*, *Redbook* and many others. Future Networks publishes niche magazines in gaming, music and technology, such as *PC Gamer*, *Guitar World* and *Mobile PC*. Apart from the size and scope of the two enterprises, their experiences in making the switch were very similar.



The graphic designers and art directors at Hearst have taken quickly to InDesign. Hearst provides three half-days of training for the art and production teams, and then Hearst has a specialist support the magazine staff as they produce the first issue.

At Hearst Magazines, we spoke with Ellen Payne, director of editorial operations, who explained that the move to InDesign was part of a larger effort to bring all pagination work in house and manage it at the magazine level. In this new structure, each magazine's creative and editorial team would work directly with a specialist who would handle scanning and image enhancement using new high-quality scanners (Creo Eversmart IQs) that were acquired at the same time. "The goal," said Payne, "is totally color-managed workflow from the scanning through proofing and printing." Hearst has already completed the changeover with several of its largest magazines, which are now doing all editorial prepress in house, with the exception of magazine covers, which continue to have their own workflow because of some proofing requirements.

The current effort at Hearst is part of an ongoing effort to re-engineer the entire workflow from initial editorial through proofing. After nearly all of the magazines have been converted to InDesign and the new production and prepress workflow, Hearst will next look at editorial workflow. We say "nearly all of the magazines" because three Hearst magazines currently use QPS, and Hearst will be looking at systems to replace QPS at these magazines as part of moving them to InDesign. The selected editorial system will then be deployed to the other magazines.

In 2001, Hearst began looking at ways to improve both the efficiency and quality of its magazine production, looking first at best practices that would help them avoid expensive color corrections and proofing. Hearst was initially skeptical about bringing much process in house, but then visited a publishing partner, Australian Consolidated Press. ACP had gone through a process of bringing prepress in house, and had moved to InDesign. Payne was inspired by what ACP had done. "Magazine expertise is generally on the front end," said Payne. "It seemed like a challenge until we saw it done at ACP."

In fact, Hearst began the workflow re-engineering even before moving the pagination in house. It began by having a consultant "fingerprint" the presses it was using. "We wanted a tighter target," explained Payne. "We gave this to all of our prepress vendors so that proofing, scanning was all in line with what was possible on the press. As they moved the processing in house, the color information was input to the newly

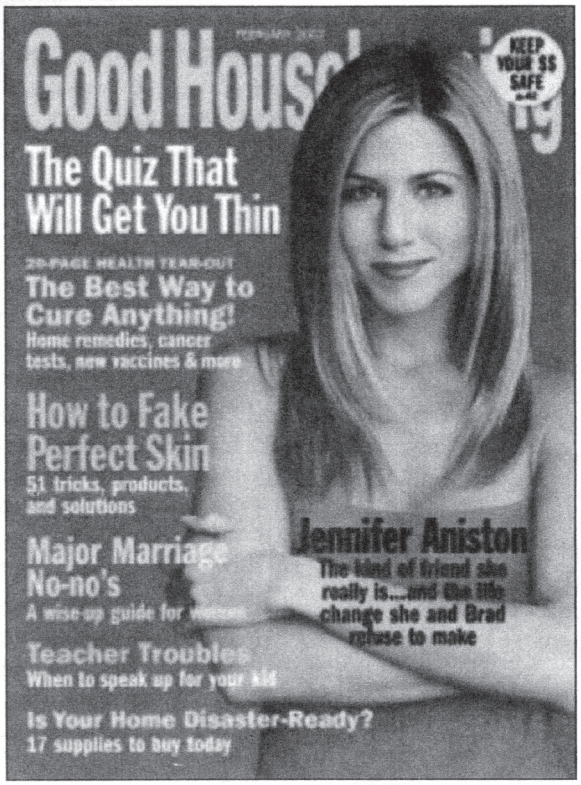
purchased proofing and scanning equipment so the various pieces were all in alignment. High resolution scans and effects such as transparencies, which had all been done outside, are now being done in house, and to good effect. According to Payne, Hearst is "much happier with the printing results, and we are doing less color correction on the press. It works!"

Needless to say, all of this work represented a significant investment for the company, including hiring new image specialists to handle the scanning and image editing, as well as formal training for the existing creative and production staff. The final step in bringing all of the work in house was to convert the designs to InDesign. At this writing, Hearst has converted five magazines to InDesign, including *Marie Claire* and *Cosmopolitan*. "*Marie Claire* is very demanding in terms of production," said Payne, pointing to an average of 480 images every month. "It is some of the hardest work you can do." By the end of the year, Hearst will also have converted *Esquire*, *SmartMoney* and *Popular Mechanics*.

Hearst made the transition to InDesign with the CS Version, but had done beta testing of its workflow with Version 2.0. It rolled out InDesign CS as part of a wider automation effort that included installing a new network and new desktop hardware to deal with the high-resolution images, upgrading of all of its creative and production Macintosh desktops to OS X, and equipping them with Creative Suite CS. InDesign now provides the core of the workflow. InDesign is an amazingly robust program," reported Payne. "You can look at a picture in Photoshop, Illustrator and InDesign; whatever red is used in one application is the same in all other applications." While Hearst was satisfied with its evaluation of Version 2.0 of InDesign, the CS Version has brought an important improvement in handling transparencies, a key design element in the magazines. "With 2.0, tiling and transparencies sometimes left a ragged edge on images. CS fixed that," Payne said.

And the designers love InDesign. Payne said one of the designers from *Marie Claire* has moved into another job within Hearst, on a magazine that has not made the conversion yet to InDesign. "She is telling us, 'You have to convert us soon,'" said Payne. The designer is working on design ideas for her new magazines and wants to do them in InDesign. There and elsewhere in the company, Payne said, the creative professionals are asking for InDesign and asking for the new prepress workflow.

In general, Hearst has found that the designers take to InDesign quickly. In preparing a new magazine for the transition, Hearst provides three half-days of training for the art and production teams, and then Payne has someone from her group available to support the magazine staff as they produce the first issue. After the first issue is completed, Payne's group meets with the magazine staff and reviews best practices. Later, they support the individual magazines with developing shortcuts and tips.



Hearst became convinced they could bring all editorial prepress in house and switch to InDesign after watching a partner in Australia make the transition.

For Payne and Hearst, though, the driver for this conversion has been the prepress enhancements and the ability to better and more efficiently manage color through the scanning, pagination, prepress and proofing process. All of this is under their direct control now, and InDesign, with its tight integration in Creative Suite, gives Hearst a design tool that supports its prepress goals.

The changeover has been "incredibly successful," said Payne, pointing to cost savings, increased quality and widespread acceptance of the results. "The editors in chief love it," Payne said. Moreover, Hearst has been able to bring the scanning and proofing in house without disrupting editorial and production, and without forcing people to work 24/7. This was a risk in bringing in-house processes that are often done by outside companies that are indeed 24/7, running three shifts and additional staff during peak periods. "What helped in that regard was that we had already done a lot of the prep work, implementing the best practices without outside vendors before bringing the work in house," said Payne. Also, the image specialists that Hearst hired to do the work are highly trained. "We tested these folks beforehand, and they are responding to being in a magazine environment."

Future Networks Weighs In

Future Networks USA publishes 12 consumer magazines in specialized areas such as gaming, music and technology. Future Networks has more than 140 employees in its offices in Brisbane, Calif., and New York.

Chris Imlay, art director for *Mobile PC*, has been spearheading the QuarkXPress-to-InDesign conversion effort at Future Networks. Imlay's experience with InDesign began when he was art director at sister publication *Mac Addict*. The editors had reviewed InDesign 1.0 and 2.0, but Imlay, a self-described "Quark boy," had not yet tried it. "I had gotten so many jobs by being good at Quark," said Imlay, "but I decided as a service to our readers I should take a close look at InDesign."

With a goal of reviewing the product and perhaps having the production departments try it, Imlay sat down to use InDesign CS and "ended up laying out most of the magazine with it." Unlike Imlay's experience with QuarkXPress, "The program itself brought me along," he said. "It had taken me so long to be good at [QuarkXPress]," said Imlay. "It is cryptically designed, very hard to work with quickly and efficiently. You had to dig deep into the program to learn certain things." In the Quark environment, Imlay said, he had to rely heavily on "contemporaries and peers to show you lots of things." Imlay compared completing a complex job in QuarkXPress with "fixing an engine with parts that you had to fabricate yourself."

For Imlay and Future Networks, InDesign seems to remove these barriers. New users who expected InDesign to be difficult to learn found the learning curve easier because the interface looks so much like Illustrator and Photoshop, allowing them to focus on the design more than on the practical aspects of accomplishing the design. "It's made it fun again after so many years of problem solving," Imlay noted.

Unlike Hearst, where the InDesign implementation was driven by prepress and the need for quality and efficiency improvements, the initiative at Future Networks was pushed by the art directors and graphic designers. "Every designer works differently and solves things differently," said Imlay. "The company changeover was because of the designers checking out the program, seeing the demo and wanting to make the change." Without exception, every designer and magazine has now made the switch.

InDesign transparency palette allows designers to apply drop shadows, feathering, and opacity settings within InDesign, while allowing the original graphic and new settings to remain editable.

Like Hearst, Future Networks was drawn to the overall integration of InDesign in Creative Suite as much as they were to particular features in the CS Version. Also like Hearst, they first made the transition to new Macintosh hardware and to OS X. Imlay said that these larger trends also worked against Future Networks staying with QuarkXPress. "The transition to OS X made it a logical time to switch to Creative Suite," said Imlay. "InDesign 2.0 was already there, and Quark was very slow in moving to OS X and was very vague about their plans."

After doing the initial testing of InDesign with Version 2.0, Future Networks, like Hearst, went with the CS version and the full Creative Suite. ("The price point also helped," Imlay admitted.) Like Hearst, Future Networks also found that certain features were much easier to do in the integrated suite, and improved with the CS Version. "Designers like to do things with opacity and drop shadows, where they do a lot of blending of the layers," said Imlay. "This had been a pain to deal with when the original image was a vector graphic and then the design tool offered only pixel-oriented control. For instance, something designed in, say, Photoshop. You would need to create an EPS and bring it into Quark."

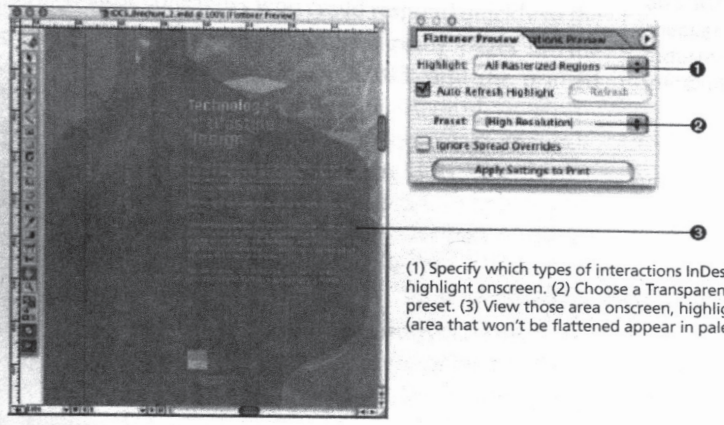
Now with the Creative Suite integration with the other Adobe products, the designers are much freer to create more complex illustrations and images and retain control over them throughout the process. The new capabilities were almost too good, in fact. Imlay said that the designers "started doing drop shadows left and right. It got so bad, we had had to institute the drop shadow police" to cut back on it.

The Upshot

We also spoke to several individual practitioners, and their experience tracked closely with what the larger organizations have learned. For Kate Binder of Prospect Hill Publishing Services, it isn't so much that the CS version of InDesign has introduced some bold new functionality as much as it is a combination of larger forces. "I think the reality might be more along the lines of Quark 6 wasn't good enough and it took too long to come out," said Binder. "InDesign has reached a natural maturity level, rather than any particular attribute of the new release, but we shall see." Binder, who has written numerous books on both QuarkXPress and Adobe products, also points to some bad feelings that have accumulated over the years. "Never discount people's absolute, bitter hatred of Quark the company. It's genuinely a factor," she said.

Along with the Creative Suite's integration with Illustrator, Photoshop and InDesign, Binder also points to the better integration of the Adobe products with PDF. "Quark's PDF export feature (a) isn't as comprehensive as InDesign and (b) isn't from Adobe (it's JAWS)," said Binder. "That's an issue, and more so every day.

"PDF export is important because PDF has



(1) Specify which types of interactions InDesign should highlight onscreen. (2) Choose a Transparent Flattener preset. (3) View those area onscreen, highlighted in red (area that won't be flattened appear in pale gray).

become the format of choice for final file submission to printers and output bureaus," said Binder. "Rather than sending bulky, non-editable PostScript files or potentially incompatible application files, content creators can submit PDF files that will almost certainly print correctly the first time."

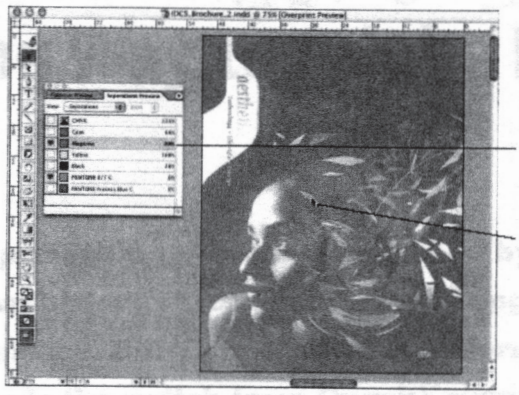
In addition, she said, "The InDesign PDF export dialog box has more controls than the QuarkXPress one, being based on Adobe Distiller itself. Also, in InDesign you can save sets of PDF export parameters for re-use, something QuarkXPress can do with print settings, but not PDF export settings."

Binder also likes Creative Suite's version sync capability. "They have a very cute integrated version control feature that works across all the CS apps. It's a nicely scaled method of tracking versions, quite suitable for smallish shops," she said.

We also spoke with author James Duncan Davidson, who used InDesign to write and produce a new book from O'Reilly & Associates Inc. titled *Running Mac OS X Panther*. Davidson is a prolific technical author, having written or co-written five books, mostly on programming topics. Putting aside a production process that would have had him authoring in Microsoft Word and relying on the publisher to produce camera-ready pages, Davidson decided to create the final pages for the Panther book himself. This way, he could get the book out as close as possible to the release date of the software.

Computer book publishing is something of a track meet, especially when the author and publisher are trying to release a book simultaneously with the product being documented. In Davidson's case, he had the beta version of Panther to work with beginning in the summer of 2003, with the full product due out sometime after Thanksgiving. Computer book publishing requires the normal workflow of writing, editing and production that trade books requires, but it also requires the author to submit finished chapters to another expert in the field who reviews them for technical accuracy. So Davidson was up against a very tight deadline.

In addition to doing the authoring in InDesign and doing the page production himself, Davidson also took steps to make the review process run more in parallel with his writing, as well as to ensure that the reviewers were close colleagues who could respond quickly to the schedule. In the end, the camera-ready pages for the book were ready on Dec. 1, 2003, and the printed books reached the distribution channel on Jan. 1, 2004.



The Separations Preview palette works similarly to the Channels palette in Photoshop:

- Examine spot and process color plates, individually or in combination, by clicking the eye icon next to the separation name to hide or show each separation.
- Switch from displaying one separation to another by clicking the separation name.

Run the cursor over the image to see dynamic readouts of the ink coverage in different areas.

InDesign CS includes a Separations Preview palette that displays spot and process plates, enabling the designer to rely on the default ink characteristics or the custom ones specified with the Ink Manager available on the Swatches and Separations Preview palette menus or in the Print dialog box.

Interestingly, Davidson began the book using InDesign 2.0 and finished it with InDesign CS. "I upgraded a lot of files in place and did the final chapters with InDesign CS," Davidson said. A few specific features motivated the upgrade, including a few "book handling features. A lot of little niggling issues went away." Davidson taught himself how to build a table of contents and an index in InDesign for the one-color, 390-page book.

Conclusions

Our research hardly suggests a death knell for Quark. As recently reported in The Seybold Report, Quark is preparing its next release, and its new CEO has brought a new focus on enterprise customers. Nonetheless, the consistent comments from these organizations and individuals and the trends they imply were striking: the appeal of Creative Suite from both a technical and price perspective, the steady progress Adobe made in making InDesign production worthy and the missteps that Quark as a company has made with regard to OS X and customer loyalty. For the longest time, the desktop pagination market has been a one-horse race, but it is clear that Adobe will give Quark a run for its money, starting now. **TSR**

About the Author

Bill Trippe is founder of New Millennium Publishing, a Boston-based consulting practice formed in 1997. Trippe has more than 15 years of technical and management experience in electronic publishing, content management, and SGML/XML and related technologies. He is a frequent speaker at industry events and writes for numerous industry publications. He can be reached at info@nmpub.com.