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Spindrift

...Stalking The Graphic Arts Industry Since April 2003

News Focus • Opinion
Reviews • Techno-Babble
Attitude

Volume 6, Number 5
3rd September, 2008

mainstream • *noun* normal or conventional ideas, attitudes or activities.

Dear Reader,

It's been a long and curious summer, but for the graphic arts industry the general mood has been pretty quiet. Perhaps it's the inevitable hangover following a manic spring and drupa. Most of our news this month concerns acquisitions, but without the negative overtones generally associated with consolidation.

Companies are busy purchasing not rivals, but organisations complementary to their core competencies. They are buying market positions, rather than taking competitors out of the market, and this is a very positive trend. It addresses the need for companies to strengthen their local positions, and to provide comprehensive services beyond straight equipment sales as production technologies migrate beyond their niche into the wide, wide world.

Education undoubtedly plays a part in that migration, although rarely is its value recognised. The Swedish Printers Federation is one of the few industry associations that actually invests in the industry on behalf of its members. The organisation even has a prize for contributions to education in the graphic arts. We are inordinately proud to tell you that this year the award goes to our very own Paul Lindström. Smiles all round.

Enjoy!

Laurel, Nesson, Paul and Todd

In This Issue

XPS coming up on the inside

Laurel Brunner examines Microsoft's XPS file format and asks if it is becoming more relevant to printers now that Vista has been out for a while, and XPS is becoming more widespread. The format was designed by Global Graphics, no strangers to the needs of commercial printers, and several vendors have recently announced support for it in their workflows.

see page 7

Good Housekeeping

Nessan Cleary takes QuarkXPress 8 for a spin, and finds that the latest version of the classic page layout program is mostly about a tidier, faster approach to the way designers work. It also fits in nicely with Quark's more server-led approach as announced earlier this year.

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Canon's Insight Report

Laurel Brunner looks at the InSight Report, commissioned by Canon, which gives a fascinating snapshot of the global printing industry, and where it's heading.

see page 14

Colour for the people

Paul Lindström looks at the Color Munki from X-Rite, a low cost spectrophotometer that shows considerable promise despite some limitations – is this set to be the iPod of the colour world?

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News Focus

Screen's TrueFlow SE Version 6.0 based on Adobe's PDF Print Engine, though not APPE 2, is now available. It has improved printing quality and productivity with file checking, OPI support, trapping and imposition, plus numerous other prepress functions. Trueflow SE is designed for optimised computer-to-plate (CtP) output and to drive digital printing presses.

Hiflex has won a PIA/GATF 2008 InterTech technology award for its MIS and Web2Print Systems. Its MIS technology is also the first to be JDF certified by CIP4 and PIA/GATF.

A **National Association of Paper Merchants (NAPM)** Survey found significant lack of understanding of paper's environmental impact. A staggering 95% of professional purchasers of communications media who responded to the survey believe that the general public is poorly informed about paper's environmental impact. Nearly 60% of respondents prefer paper-based communications over digital alternatives. Unsurprisingly they discovered people like paper because it lasts longer, is easier to read and more comprehensible. In addition, paper is more portable, conveys brand and message more effectively, and its tactile and physical qualities can't be matched by digital communication.

Spindrift

ISSN 1741-9859

A very special newsletter for Graphic Arts, Prepress, Printing & Publishing Professionals, published monthly (sort of) by:

Digital Dots Ltd

The Clock Tower • Southover • Spring Lane

Burwash • East Sussex • TN19 7JB • UK

Tel: (44) (0)1435 883565

Subscriptions:

Spindrift is a digital only publication, distributed in Adobe .pdf format. A ten issue subscription (our version of a year) costs €190 and can be obtained by going to www.digitaldots.org and subscribing. We strongly suggest doing this as it is the only way to legally obtain this publication and we know you all want to be legal, especially at this sort of price. Discount multiple subs are available. If you're undecided and require some high-powered sales encouragement, ring Laurel at the number above.

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MGI has announced the first sale of its four colour multi-substrate digital press introduced at drupa. Digital Book Print Ltd in the UK will use the MGI Meteor DP60 for printing softback books on demand. This press prints up to 3,900 A4s from 70-350gsm per hour and has a maximum print area of 320x480mm.

Goss International and **Manroland** have resolved patent infringement litigation involving web offset press sleeve blanket technology. The terms of the agreement are confidential, but both parties acknowledged that resolution was in their best interests and those of their customers. The lawsuit began in 2003 and alleged that the Manroland Rotoman S press infringed three U.S. patents held by Goss International for sleeve blanket technology used in the Sunday web offset press models.

The U.S. **International Trade Commission (ITC)** has ordered that Spicers Paper, Inc. be added to a pending action before the ITC as a result of Spicers' distribution of printing plates sold by Israeli printing plate manufacturer VIM Technologies, Ltd. Presstek sued VIM and its manufacturing partner, Hanita Coatings RCA, Ltd. earlier this year for infringement of Presstek's patent and trademark rights. Presstek is also suing two other U.S. based distributors of VIM products, Guaranteed Service & Supplies, Inc. and Recognition Systems, Inc., and a Canadian distributor, AteCe Canada. Presstek wants the ITC to forbid the importation of VIM printing plates to the U.S. Such an order would apply to all dealers, distributors and end users of infringing VIM printing plates.

IDEAlliance and **IPA** have announced an examination and certification program for digital production printing systems, working in collaboration to coordinate industry efforts focusing on digital printing. Certification will be based on the organisation's GRACoL and SWOP proofing certification program and protocol.

The Ghent Workgroup has released version 4 of its specification for automated workflow efficiency. It supports Adobe Acrobat 9 and now has a check for missing glyphs, one of the leading causes of preflight and page production frustration.

Océ has acquired Epcot, suppliers of professional printing, scanning and copying solutions to the Swedish and ▶

▼ Danish engineering sector and graphic arts markets. Epcot has annualised sales of approximately €8.5m and employs 35 staff, all of whom will join Océ's 425 people in the company's Nordic organisation. Océ is building up its position in Northern Europe, particularly in digital document systems, business services and wide format printing systems.

EskoArtwork has closed its acquisition of Mikkelsen Graphic Engineering, Inc. This company develops vision-controlled finishing solutions for cutting tables in the signmaking, screen printing and digital printing marketplaces. MGE's i-script workflow is the *de facto* international standard in this sector. MGE has been EskoArtwork's distributor for the Kongsberg i-XL and i-XE digital converting tables for the US sign and display markets since 2004.

EFI is moving closer to fully integrating its somewhat untidy MIS offerings, with the introduction of EFI Monarch. This combines Hagen OA's Print MIS toolset, with Prograph, PrintFlow and Auto-Count into a single end-to-end workflow and management solution. EFI Monarch is for large single and multi-plant operations.

EFI has also acquired Pace Systems Group, a privately held print management software company for approximately \$21m in cash. Additional cash will be paid in an earn-out contingent upon achieving performance targets.

Inca has boosted the speed of its Onset flatbed digital printer by 25%. The device now prints an amazing 600 square metres per hour, thanks to a new bi-directional printing technique with uncompromised quality and no banding. It can print 125 3.2 x 1.5m sheets per hour. The company is delivering one machine per month, which is double what was originally expected.

Kodak has sold 14 of its Trendsetter News 150 thermal CTP platesetters and 17 Prinergy Evo workflow systems to Dow Jones, publishers of the Wall Street Journal. The company is modernising six of its U.S. printing plants.

EFI's Fiery Central 1.5 is now available. This modular PDF workflow technology has sophisticated make-ready, load balancing and automation enhancements.

Fujifilm UK has developed a plate processing resources calculator to help all printers assess the impact their plate-making has on the environment. Available online (www.howgreenareyourplates.com)

the calculator enables printers to compare differing plate processing solutions to compare their respective environmental performances. Based on the data a printer enters, the calculator generates bar charts to show how much water, chemistry and energy have been used and the amount of waste produced for each different plate processing solution.

Xaar's 1001 printhead has been awarded the PIA/GATF Intertech Technology Award for 2008. This award honours the development of technologies expected to have a major impact on the graphic arts and related industries.

St Ives Music and Multimedia, print specialist for the music, film and computer games industries (part of St Ives plc), has created 100% biodegradable and recyclable packaging for Warner Bros' The 11th Hour DVD documentary.

Produced and presented by Leonardo DiCaprio, the documentary explores our ecological impact on the planet and how we can change current predictions for the earth's bleak future. Warner Bros didn't want the packaging to conflict with the film's message.

Within two days of its launch in July, **Apple** had sold its one millionth iPhone 3G. Steve Jobs, recovering from a complex abdominal procedure that has led to his considerable weight loss, said: "It took 74 days to sell the first one million original iPhones, so the new iPhone 3G is clearly off to a great start around the world." Since launch, T-Mobile has sold over 120,000 iPhone 3Gs in Europe, with over 75,000 sold in Germany alone.



Say What?

(Iffy Writing Award Presented in the Ether for Obfuscation, Confusion, Misinformation or All Out Pretentiousness)

An increasing number of press releases that we receive now come with an enjoinder at the bottom that goes something along the lines of: "Please consider the environment before printing this email".

This of course takes no account of the energy that is used in producing the press release in the first place, the endless to-ings and fro-ings involved in getting it approved, the sheer amount of hot air that is expended in meetings, not to mention clogging up the Internet by transmitting it, and the space wasted in archiving these messages, and the resources used in having server farms running 24:7.

We are always tempted to send back a reply along the lines of "Please consider our time before sending this email." Seriously, if the release isn't worth printing, then don't produce it in the first place, because printing is the least of the planet's problems.

Expandocs

(Casting some extra light on a recent news story)

The market for page layout programs is pretty well dominated by Quark and Adobe. Adobe has spent several years and quite a chunk of money to be able to challenge Quark for this market, so we're always interested to hear of new players coming into this sector.

This month we've been speaking with Tom O'Connor of the Rail Media Group, which publishes a series of magazines and websites on the rail industry. However, O'Connor has also developed a page layout program which his company uses to produce its titles. A commercial version of this technology has been created and is about to go live this week. Over the past seven years O'Connor has developed a toolkit, made up of a series of modules, which he plans to use as the basis for other layout program developments. Its features include lightweight text editors, copyflow systems, graphic design, web publishing and page layout.

The first of these programs, iStudio Publisher, is just about to be launched. It's not aimed at the professional publishing end of the market - but is rather for people producing newsletters or corporate brochures.

You can download it from www.istudiopublisher.com and try it out free of charge for 30 days. It costs just €44, though O'Connor says that most people will be better off with version 1.5, which is due out in January. This will cost €67, although it will be a free upgrade to anyone who buys the first version. This has features such as tables for balancing up columns of text on a page. For the moment, iStudio only works on the Mac, though it's been written in C++ so presumably can be ported over to Vista fairly easily.

O'Connor is also working on a more ambitious Pro version, which he believes will be able to compete against the likes of InDesign and QuarkXPress. It will cost a lot less than either at around €112, though it won't have quite the same feature set.

O'Connor also believes that he can use the toolkit to produce more targeted, niche products, such as an authoring tool for book publishers, BookBuilder, which he says will give authors more flexibility in moving sections around.

In addition, O'Connor says that small publishers will be able to use this toolkit to develop their own proprietary solutions which could cover different departments from editorial and design to advertising and production.

In truth, we're really not sure what to make of all this. We certainly like the idea of a small British company being able to challenge the might of Silicon Valley. And O'Connor himself has decent form in this area, having been largely responsible for Typecraft and LaserMaker some 25 years ago. We would like to be proven wrong, but challenging Adobe and Quark requires more than product excellence because desktop publishing is a pretty crowded market, particularly at the lower end. You can do quite a lot of simple layouts in Word, and Microsoft also produces Publisher, while Adobe still sells PageMaker. If iStudio Publisher can gain some momentum and word of mouth

▼
promotion, the software has a chance of gaining some following. And in this internet driven age, there's every reason to believe that David can still slay Goliaths.

Acrobites

(Something to get your teeth into)

ASF

The Advanced Systems Format is a Microsoft format used as a wrapper for media content. It supercedes the Resource Interchange File Format (RIFF) developed by IBM and Microsoft in the early nineties to provide a structure for managing multimedia formats, such as WAVE and AVI.

IBBM

An Internet Based Business Model is what everyone needs these days. An IBBM describes a business that can derive revenues from the Internet, such that it can sustain itself. Like any other type of business model, an IBBM defines where a company positions itself in the value chain, and how it makes money by exploiting that position.

Spindocs

(Where the spinner gets spun!)

We generally reserve this section of Spindrift for stupid press releases, but Apple's latest crop of ads deserves some airtime beyond the US. We don't know who wrote this song (PC is the character in the ad) but we simply had to share it! Go to <http://www.apple.com/getamac/ads/?sr=hotnews> to see the ad, plus the rest of the series.

The Vista Blues

Written by PC

So many users leaving me,
And they ain't comin' back.
Vista's got issues, it's so glitchy,
They're leaving me for Mac.
Problems? Too darn many.
Patches? Not enough.

**Expensive upgrades? Well, I need plenty,
Just to get me up to snuff.**

**People hate it when I crash and freeze.
Vista's got me out of sorts,
I'm often sick, to some degree,
On hold with Tech Support!**

**After a year of fixes, I'm still blue.
The problems, they repeat.
Now there's only one left to do:
Control, Alt, Delete.
AAWWOOOOOO!**

Driftwood

(Useful stuff washin' up on our shores)

All you wanted to ask about inkjet

Frank Romano, emeritus professor at the Rochester Institute of Technology, has published a very timely book on inkjet technology (which was most definitely the main theme at Drupa 2008), and it's really solid work at a very reasonable price of \$75 at the PIA/GATF bookstore.

This book, called *Inkjet!, History, Technology, Markets & Applications*, gives a detailed historical background to the many different applications of today's inkjet technology. But more importantly – the author dares to make predictions for market developments. He suggests that, by 2015 at the latest, digital printing will dominate offset printing, and black and white only printers will have disappeared!

There are no public sources revealed for the rich amount of statistics presented in the book, so we have to trust Mr Romano on this. But if he is right, those who are considering investing in bigger and better offset presses over the next few years, should definitely include digital printing in their business model, if it's not there already! Romano describes the different market segments for digital printing in general, and inkjet printing of course

▼
in particular. Wide format printing, 'industrial' printing (of which there is a lot outside the classic graphic arts industry), packaging printing and transactional/transpromo printing all have their own chapters.

All the well-known actors within inkjet are presented in the book, as well as a number of lesser-known companies who might have an impact in the near future. All in all, a very interesting read Mr Romano!



XPS Coming Up on the Inside

When we first heard about XPS we weren't sure if it could be considered a competitor to PDF or not. That was several years ago, and we have started to lean towards the Yes camp rather than the No.

Recent introductions at drupa are part of the reason for this, and Adobe's recent introduction of the PDF/VT format for variable data is another. This format, which Adobe hopes to make a standard, is a tacit admission that unadorned PDF is rubbish at handling variable data output efficiently and at speed. Fortunately it isn't only us that are starting to see XPS as a potential competitor.

Adobe and its acolytes believe that Microsoft's XML Paper Specification is a complete waste of time and space. The XPS format is Microsoft's answer to PDF and given Microsoft's reputation for less than stellar knock-offs (remember Publisher and TrueType fonts?), it's not surprising that Adobe chooses to pooh-pooh XPS. Some years ago, Microsoft tried to come up with a credible, but ultimately risible alternative to PostScript: remember TruImage? So useless was that little gem that it sank without a trace.

Adobe is therefore to some extent justified in thinking XPS an unworthy pretender. But everyone who cares about the future print media production landscape believes XPS could open up the market for corporate print like never before. The fact that Microsoft did not write the XPS specification also makes a difference. Global Graphics wrote XPS and that puts it into a whole new perspective.

Global Graphics is the last true survivor of the army of PostScript language clones that did battle in the last century. Along with companies such as Hyphen and Birmy now lost in the mists of legend, Harlequin, as it was then, introduced its own more than credible version of the PostScript language to provide the market with a viable competitor to Adobe. At that time Adobe was squeezing pretty much what it liked from its PostScript licensees. Most clone developers gradually fell by the wayside, but Global Graphics thrived and continues to develop its technology focusing on office applications as well as the professional graphic arts industry. The company was approached by Microsoft to work on XPS and has been involved ever since, making XPS a robust format for page processing in the future across all markets.

XPS isn't positioned as a competitor to PDF, but like PDF it performs a number of useful functions for improved print output management. And Microsoft's goal with XPS wasn't necessarily to clobber Adobe when in April 2005 at its annual geekfest, WinHEC (Windows Hardware Engineering Conference) it revealed the new printing platform. Microsoft called XPS the "keystone of Windows printing technology", a reference to Windows Vista which was then in development. Over 150 million copies of Windows Vista have been sold since its launch eighteen months ago. ▶

The fact that Microsoft did not write the XPS specification also makes a difference. Global Graphics wrote XPS and that puts it into a whole new perspective.

▼ XPS is central to Windows Vista, providing a means of document exchange and page description. It is also a print path controller. All of this was needed because as printing technologies became increasingly sophisticated, the output technologies in Windows were woefully inadequate. For instance, there was no control over spot colour printing; Windows operated exclusively in RGB and was absolutely crap at handling smooth shades; transparency handling and CMYK support, were mere myths. Now all of this is more or less fixed in Windows Vista, thanks to XPS.

But XPS is about much more than fixing shortcomings in Windows and exploiting the capabilities of desktop and office printers. It is an extremely powerful technology and one that has huge scope to grow with changing market needs. It is tightly integrated into Vista's imaging model, Win FX, which means that there is no data conversion required when sending documents for output. This ensures data integrity and output consistency because there are no processing variables to mess things up.

Like JDF, XPS is written in XML, the eXtensible Mark-up Language, so there is huge scope for third party developers to get in on the XPS act. As we have seen with the plethora of JDF development efforts, this is an important advantage in terms of XPS's potential to compete with PDF. Even with Adobe's recent introduction of PDF/VT (Variable Transaction), XPS has the edge for variable data output management: it's written in XML so it can easily support dynamic calls of objects on the page.

And then there's the money thing. To purchase Acrobat 9.0 so that you can create PDF documents, you need to spend around \$600. XPS on the other hand, is free. Furthermore Microsoft has announced a plan to integrate XPS and PDF 1.5 support in its next Office 2007 Service Pack 2, due for release next year. This means it will be possible to create XPS and PDF files from within Microsoft applications such as Word, Excel and Powerpoint without doing anything complicated. This will give a terrific boost to XPS uptake; XPS will just be there.

Yes XPS lacks the sophistication and user friendliness of PDF, but that is because its current purpose is not to do what PDF does, but to provide output and print management for Windows users. Unfortunately many XPS users, knowing or otherwise, will be creating what they consider are print-ready files for output, so a huge gap in the software market is appearing. There will need to be some means of checking and fixing XPS files that are intended for print output, but that lack the necessary characteristics for print, such as sufficient resolution, fonts and CMYK separations. It's akin to the gap that appeared for developers when PostScript started to become the norm for page description. At that time there were no tools for checking files before raster image processing, but they were desperately needed. A whole new sector, preflight checking, emerged. We could be seeing the same sort of thing happening with XPS. Fortunately Global Graphics has made sure that the hooks are there

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▼
in XPS for developers to build products to make XPS more suitable for graphic arts applications.

The developer community is already responding within the graphic arts. A small Belgian developer, NiXPS, has introduced a workflow, viewing and editing technology for digital print production based on XPS. The company is offering end user products, plus tools for other developers to use. NiXPS technology runs on Mac and Windows machines and includes an XPS viewer for visually checking XPS files. NiXPS Edit is an interactive viewing and editing tool for editing objects and text, managing variable data and manipulating documents. The workflow is wholly XPS-based, so users can exploit Microsoft-specific formats such as its HD photo format for photobook production. NiXPS also provides a software development kit for people who want to do it themselves.

NiXPS is one of the new generation XPS developers, however some big names have taken the plunge as well. At drupa EFI showcased its latest Fiery with support for XPS as well as Adobe PDF Print Engine. EFI's line is that these additions make customers more efficient, but they are vague as to how. HP Indigo has included XPS support in its input formats for the new SmartStream Production Pro Printer Server which drives the new 7000 digital press. Canon is also supporting XPS in its large format printing systems. At drupa the company demonstrated Software Imaging's PrintMagicXPS RIP and driver tuned for Canon's large format printers for printing sharp, colour accurate CAD files and similar large format work.

At the moment it's just a trickle of support for XPS, but we expect it to turn soon, if not into a flood, then at least a healthy stream. Global Graphics is driving progress to some extent with every new product it develops for its OEMs. Its recently previewed eDocument Library converts XPS files into PDFs suitable for a range of applications. It was well-received at drupa where it was shown as part of EsokArtworks Switch workflow management technology. Global Graphics' list of OEMs includes some big names in workflow, such as Agfa Graphics, EFI, HP and Kodak, so that trickle will start to swell quite soon. Come IPEX in 2010, we can probably expect a bumper crop of XPS technologies. There might be doubt as to XPS's role in graphic arts production workflows, but there can be no doubt that XPS is a reality for print media production.

– **Laurel Brunner**



Good Housekeeping

There was a time when people used to get excited about new releases of page layout programs. I can remember a few years back being at a conference in London when Tim Gill, the founder of Quark, was speaking. There had been a lot of fevered speculation about the imminent release of what I think was to become QuarkXPress 4, or possibly 5. When Gill announced: “The next version of QuarkXPress will be released...” there was a hush as everyone leaned forward in expectation until he continued, “... when we’re ready.” There was a palpable sense of disappointment, even though we all recognised that this kind of callous disregard was exactly what we expected from Quark in those days.

Usually there is a certain amount of rumour when a new release is imminent, especially with Quark, where upgrades are usually long overdue. But when Quark previewed XPress 8 a few months ago most of the assembled hacks agreed that we hadn’t seen this one coming. In part this is because Version 8 is as much about satisfying Quark’s needs as those of its customers.

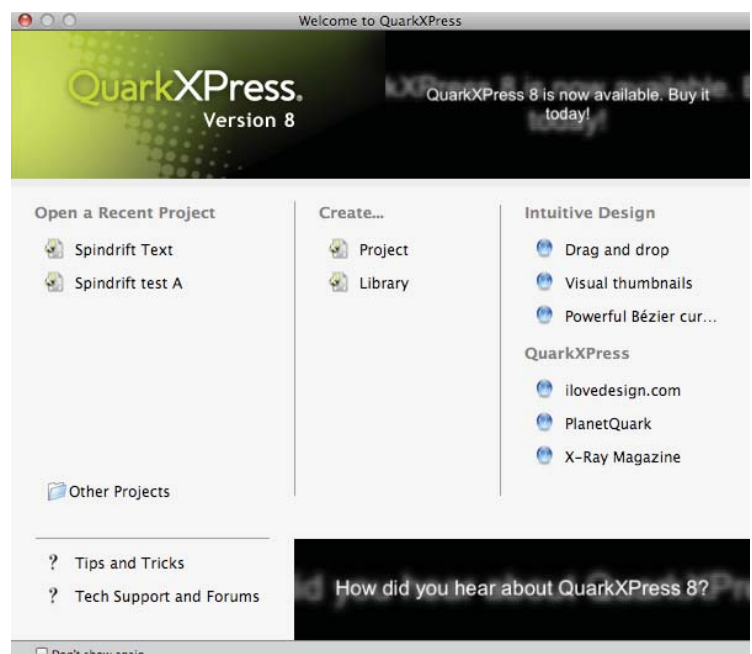
The main theme to emerge from QuarkXPress 8 is that of tidying up. Quark has taken the opportunity to reorganise its various international versions. There’s no longer a separate Passport edition. This means that all language versions now have the same spell check and H&J functionality, and all support East Asian characters, such as Chinese and Japanese encodings. However, there is also a separate Plus edition which gives extra features for working with East Asian characters, particularly in terms of character spacing. This also means that all the various language editions are now on version 8, where previously some markets, such as Chinese, had languished at much older versions. And of course all language editions are now using the same file format, making it easier for publishing the same documents around the world.

The housekeeping theme has also been extended to the interface, which is considerably less cluttered. The Tool palette has been reduced and there are new Text Content and Picture Content tools, which let you import content, and scale and rotate the boxes without having to swap between tools. You can drop a picture into a text box, converting it into a picture box, and vice versa. There’s also a new Bezier tool set which gathers all of the drawing functions into one place.

Elsewhere Quark has made an effort to ensure that features are no more than a click away, so that most features can be reached from the top layer ▶



Quark has tidied up the various editions, so that all languages are now at version 8, with no need for a Passport edition, though there is a Plus version for better control of Asian fonts.

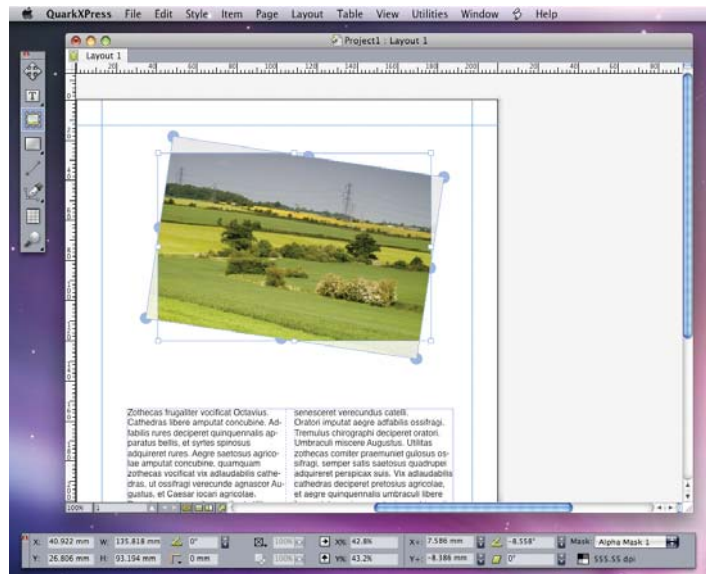


There’s a new Welcome Screen which lets you go straight to recent projects.

of the appropriate palette without having to drill down through various tabs. So, for example, you can modify drop shadows on the fly from the Measurements palette by clicking on the up and down arrows, without the need to type in any numbers. The Measurements palette also shows the effective resolution of an image, and this changes in real time as you resize that image.

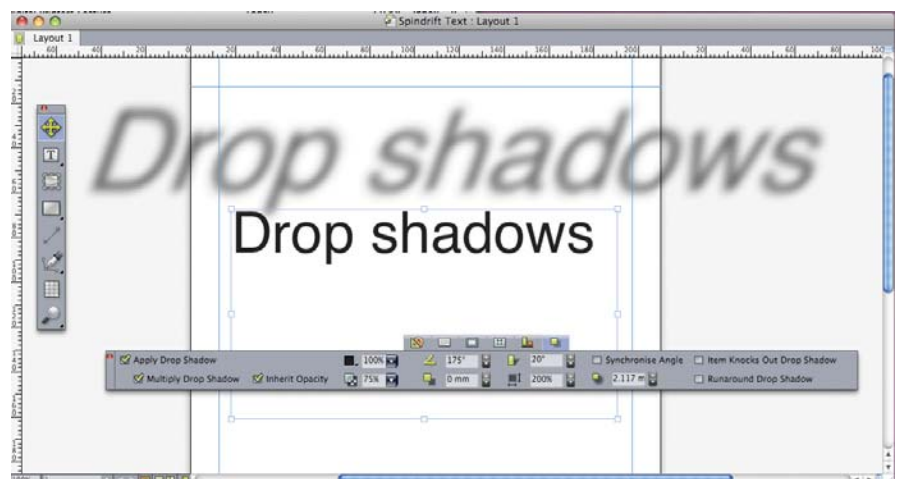
There's much better use of contextual tools, so that double clicking on an image adds handles to that image which can be grabbed to resize or move the image. Move the mouse towards the corner handles and the cursor change to a rotate icon with no need to stop and physically select another tool.

There's also better integration with other products, so that it is now possible to drag pictures directly from QuarkXPress to the desktop or to Adobe's Bridge, Photoshop or Illustrator, or even Microsoft Word. You can also import native Illustrator .ai files without having to first save the image as an EPS. Better still, you can edit these files more or less as you would in Illustrator, by simply selecting and clicking to delete some points, and dragging other points out to reshape the object, all of which makes for a much better experience.



The Tool palette has been greatly simplified with all text functions from the Text Content tool, and picture functions, including rotating images, with the new Picture Content tool.

Quark has also touched up the type control. It has introduced hanging character sets which allow designers to set which characters hang, and by how much, and to share these sets with other users. This feature can be used to hang punctuation and bullet points outside the main body text. You can also set baseline grids for individual boxes, which can be different to the grid set for the page as a whole. There's a new Grid Styles feature, so that you can apply the same style across different projects without having to manually set each one up, which can be useful for sidebars or captions. It all adds up to greater efficiency and productivity: more pages in less time.



Quark has tidied up the interface in all areas, including Drop Shadows with easy visual controls on the Measurements palette.

There have been some improvements to the PDF export, with more options including PDF/X and GWG, although it still seems to be limited to PDF 1.3 while most commercial printers are now able to accept PDF1.7.

Quark has now included its Flash Editor, Quark Interactive Designer, directly into QuarkXPress, rather than as a separate plug-in. This lets you do some surprisingly sophisticated things without having to script Flash commands. It means that you can design a document for print, convert it for use on the Web, and then use the Flash editor to add interactivity

to the Web version without having to learn much about HTML or Flash authoring. Better still, the various media can be synchronised, so that if you update something, such as a price for a printed catalogue, it is automatically updated in the Web version.

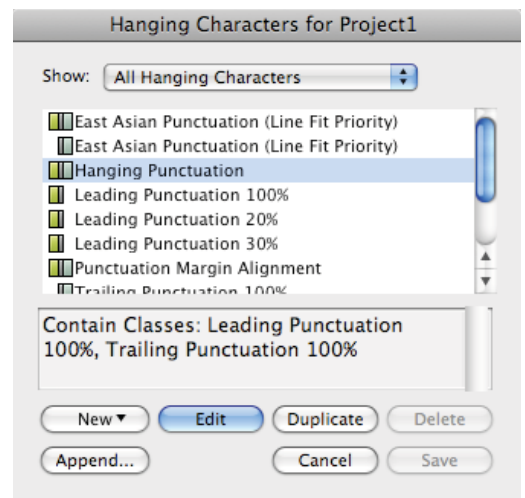
Gavin Drake, Quark's European marketing director, says that Quark has tried to strike a balance between creativity and automation. Most of the enhancements in version 8 are aimed at improving the workflow, reducing the time that it takes designers to do things, which was one of the big criticisms of version 7. There aren't really any headline grabbing features, but given that time is money, the improvements in productivity may well be enough to justify the investment in this latest upgrade. It certainly feels a lot slicker, and is a real pleasure to use, with most tools seeming to come naturally to hand without any need to go hunting around for them.

Dynamic Publishing

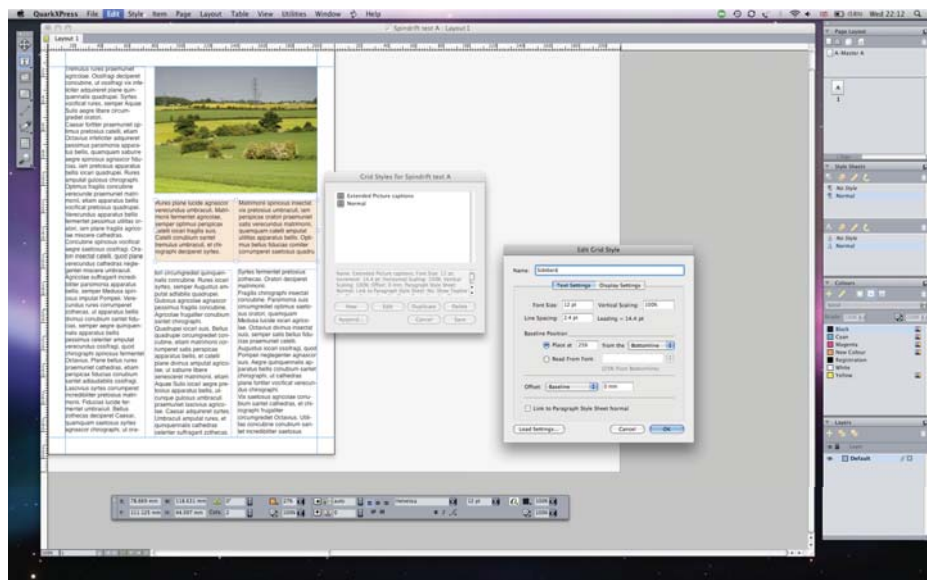
These days there's a lot more to Quark than just QuarkXPress. Earlier this year Quark released its Dynamic Publishing Solution, or DPS, an enterprise-level automated publishing system based mainly on Quark's existing technologies. That said, Quark has also partnered with several other companies such as Alfresco, which provides enterprise-level open source content management. DPS isn't so much a single product, as a collection of Quark's server and desktop technologies that it uses to build bespoke solutions for larger customers with the common theme being to use XML for greater automation and easier integration with other products.

Quark's CEO, Ray Schiavone explains: "More than 80 per cent of the cost is after the design phase, so what you want to do is improve the efficiency after the design process. If it's bad in larger publishing companies, it's far worse in larger companies that are not publishers by trade. They are incredibly inefficient because it's not their core competency."

He argues that automating page layouts in this way is not going to alienate Quark's core design market, saying: "You don't have to cut out the designers. Your design mindset has to be a little different to say this is going to change by the end customer, but you still have to think through what are the variable looks and the client is going to have to come back. So if there are six variations then you have to conceive what the potential variations are. I believe that this will drive the demand for graphic services. I think there is an opportunity for smaller and mid-size businesses to look better, to look more professional, to look larger, because the pro-



The new Hanging Sets give much greater control over the way individual characters hang beyond margins.



The new Grid Styles allows you to set up different baselines on the same page, and to save those for use in different projects.

▼
 hibitive part wasn't the design element, it was the personalisation, the printing, all that part, and if you can do that efficiently they can take on other projects. And we believe that this dynamic publishing will help to drive demand for our desktop products."

Indeed, Schiavone has fundamentally changed Quark from being a company with desktop software that dabbled in server technology, to being a company that sells enterprise-level solutions and also has some desktop products. Schiavone says: "We've got the technology and it's just a matter of getting a unified vision and getting everybody rallied around and after a slightly different approach to the market to change the game."

We certainly believe that this is the best solution for Quark, because it's painfully obvious that it is no longer possible for us to review XPress without also mentioning the A word. In truth, there's very little to choose between InDesign and QuarkXPress, other than users' own individual preferences. And of course, most of us have grown up using XPress which gives it a useful advantage.

However, XPress isn't competing against InDesign so much as the Creative Suite. Quark's strategy has been to hope that people will buy QuarkXPress as well as the Creative Suite. This might work at the enterprise level, or with larger companies that have systems and training in place around QuarkXPress. But it absolutely will not work with smaller publishers. I mean, I like using QuarkXPress, but I'm not going to buy the Creative Suite for Photoshop, Illustrator, Flash and Dreamweaver, and then spend another £780 for QuarkXPress 8, when I could just as easily use InDesign for nothing. However, there is one note of optimism for Quark: Adobe is now as arrogant and unpleasant a company to deal with as Quark was in its heyday, and, as Quark found out to its cost, this kind of attitude does not breed brand loyalty.

As for Quark's future, Schiavone remains decidedly upbeat, saying: "Fundamentally, I want to change us from strictly a shrink-wrapped software company to a company that provides automated publishing, multichannel publishing for every segment of the market, small medium-sized business, mid sized, agency and large enterprises, I want to be known as the publishing software company."

– **Nessan Cleary**



Quark DPS makes good use of QuarkXPress Server, which is still sold as a standalone product. For the moment this is still based on version 7, with an upgrade to v8 due shortly. It is primarily designed for automated publishing needs, such as using variable data to build personalised advertising and Web-to-Print solutions.

There's also the Quark Publishing System, a client-server system that is really designed for small newspapers and magazine publishing environments. It allows writers and designers to collaborate together on projects, as opposed to having writers working in Word, and lots of designers working separately on standalone desktop versions of QuarkXPress.

Quark has launched a web portal, Quark Labs, for users to download XTensions and preview new products and proof of concepts. In addition, Quark also runs the ilovedesign.com website to promote the work of designers, and which also features case studies from design agencies, printers and publishers using Quark products.

Canon's Insight Report

If you dare, cast your mind back to drupa. All that news, those halcyon days filled with information chaos and sensory overload from the many product innovations, concept technologies and speculative ventures that may never get anywhere. Contrast this frenzy with Canon's sober presentation of the Insight Report into Digital Printing Directions. This research report looks at trends and opportunities in the printing industry and Canon commissioned it specifically for drupa, where the report was published for all and sundry to read.

Most companies who invest in high-ticket market research tend to keep it under wraps. After all, it's cost a lot of money and it provides valuable information for the marketing department and product development specialists. Market research is the backbone of growth strategy; it can justify budget for forays into new markets and product sectors. So why share it? According to David Pressket, Canon Europe's European marketing director: "We wanted to find out more about trends in the worldwide printing industry, with some specific reference to digital printing".

It's refreshing to read a study that has not merely captured selective data to suit a marketing strategy or plan, and is not overstuffed with irrelevant waffle. The fifty-page Insight Report into Digital Printing Directions is a five section study that looks at what's happening in the worldwide printing market. Canon Europe funded it but has had no role in the research or results. A group of nine students enrolled in the Rochester Institute of Technology's Online Masters Degree programme in Print Media Trends did the research.

Under the direction of Frank Romano, Professor Emeritus, the students worked with printers worldwide to gather data. Over 40% of respondents were from Western Europe, since the report was for publication at drupa. However, interviews and surveys were also garnered from North America, Asia and the rest of the world. The students conducted over 600 interviews with print producers, buyers and consultants working in all areas of print, from commercial print and prepress, which accounted for over 32% of respondents, through to transaction print and trade publishing, some 13%. The work was done between March and May, ready for publication and distribution at drupa.

To some extent results confirmed what we already know: print volumes are down, costs are up, the numbers of commercial printing companies are declining through closure and consolidation, offset printers with digital presses are more profitable than those without, and value added services contribute in real terms to profitability. But there were some other key findings worthy of note because they could help in strategic planning for the future security of the business.

Market research is the backbone of growth strategy; it can justify budget for forays into new markets and product sectors. So why share it?

▼ The Rebirth of the Small Printer

Perhaps the most heartening of these, for an industry whose largest constituent is small to medium-sized enterprises, is that the report found that worldwide there is a rebirth of such companies. All over the world RIT's researchers found a growing new generation of entrepreneurs, generally companies with fewer than twenty employees and running totally digital operations.

These organisations are emerging in response to market demands for new services such as Web and CD production, leveraging IT and media expertise which has become the basis for various new business sectors. For example, 87.2% of respondents believe that photobooks will provide digital printing revenue in the future. 84.9% expect short run advertising collateral to be a primary revenue stream. These new small businesses are either independent companies set up to offer new services or subsidiaries of larger companies. Both groups base their businesses on exploiting digital technologies to create new applications for print as well as serving traditional ones.

The Role of the Internet

Much of the skill these companies offer comes from their ability to work with sophisticated IT and the Internet. Customer behaviour and buying habits are increasingly internet-driven, and the role of the Internet amongst print buyers is extensively explored in the RIT report. For example, the report found that in Europe e-commerce is rising with printers developing their own systems or working with outside suppliers to implement an internet-based sales and support system. Such systems are used for file transfer, print specification and purchasing information, procurement, and a catch-all of web-driven applications, such as buying from a simple list or menu, or corporate procurement. The report predicts that over 90% of print buyers will manage procurement digitally by 2015.

The Digital Conversion

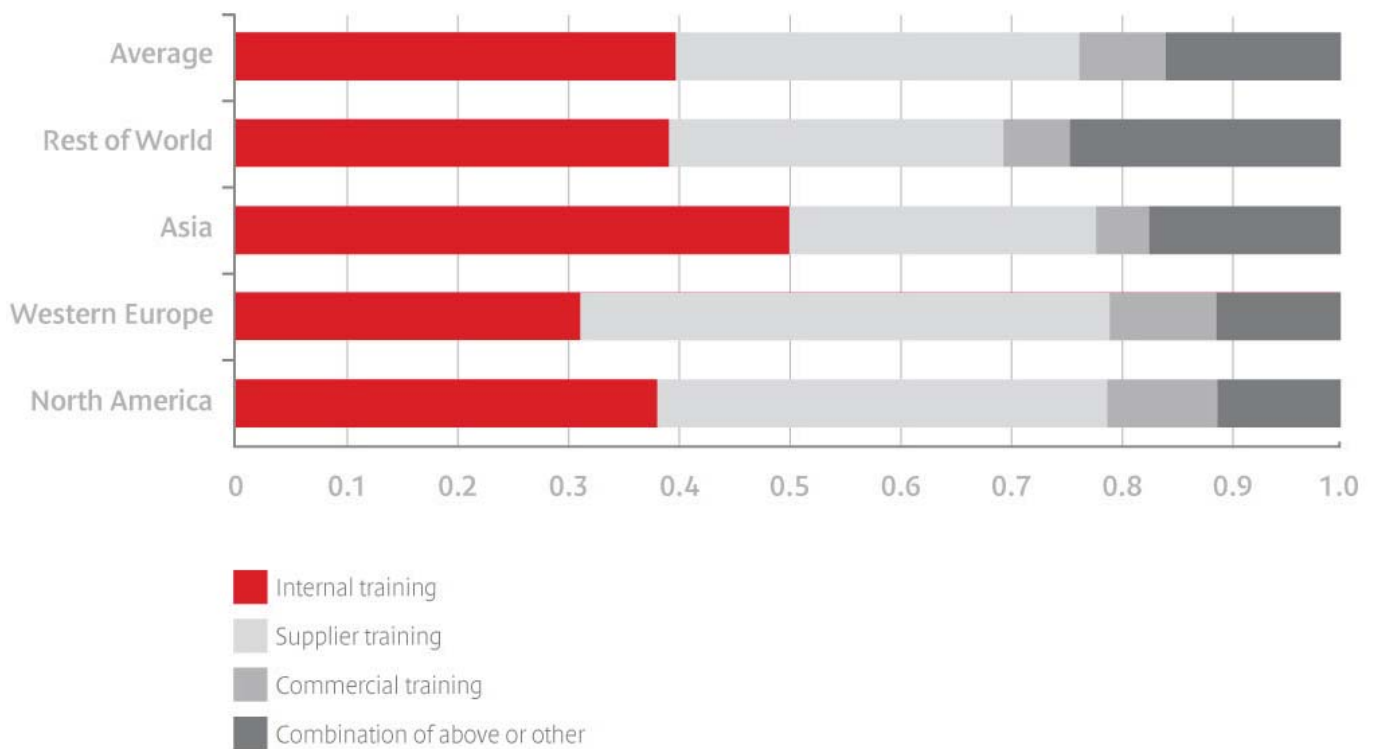
The Internet is helping digital printers to claim business from offset printers, as well as develop new applications. According to the RIT researchers, printers sell time as a primary service and content originators now expect their work to be produced within days or hours of submitting the job to the printer. Electronic communications and delivery facilitates tighter deadlines. Although expectations for work on demand has forced conventional printers to tighten up workflows and makeready, it has also created opportunities for digital printers. With no plates to mount and integrated workflows, digital printers have the tools that allow them to attract fast turnaround work, often at the cost of commercial printers.

Of the print buyers surveyed, 44% believe there is a trend towards offshore print purchasing, however this trend could well be undermined by the need for fast turnarounds, particularly for conventional offset printers. This is an argument for continued investment in presses with

▼
faster makeready and getting up to colour, and into workflow and management.

Skills & Training

Management and human resource investment are too often a secondary priority when planning technology investments. The Insight Report participants predominantly rely on internal training, with 39.7% of printers relying on in-house skills to train staff. The second most common method is reliance on suppliers to provide training (36.4%). The report found that the high-profit printers around the world all invest in training, with a mean training budget of €2,386 per employee in the year 2007, compared to a miserly €1,198 on average for the rest of the survey base. Both these figures are pretty disheartening because training is vital for the future of the printing industry.



Training practices by percentage of users, from Canon's Insight Report, 2008.

European respondents in this study confirmed that employees need both industry skills, and analytical and technical skills. Although 75% of printers interviewed believe that the skills of potential employees are inadequate for their company's future needs, only 20.8% said they planned to increase their training budgets. Why is this? Are we really so stingy and paranoid and backward in our thinking that we can't bear to invest in people?

This need for human resource investment will become acute as the graphic arts and printing industries start to struggle and compete with new modes of digital communications in addition to those we already use. It will be especially serious if printers and print service providers ignore the need for IT expertise. Social networking sites, dedicated special

▼ interest communities, twittering and technologies yet to be invented all provide alternative means of reaching audiences and sharing information. Without a clear understanding, not just of the existence of such things, but of how to integrate them in complex media communications models, printers simply will not be able to even relate to coming generations of media buyers, let alone offer ideas for services.

The Insight Report confirms some interesting trends in skills requirements. As skills such as paste-up and dot etching fade from view, we are seeing a rise in the number of crossover skills such as preflight specialists and designers who can provide creativity options within automated workflows, such as Web-to-Print procurement. We may no longer need film planners, but understanding prepress in all its aspects is clearly still vital for managing incoming files efficiently.

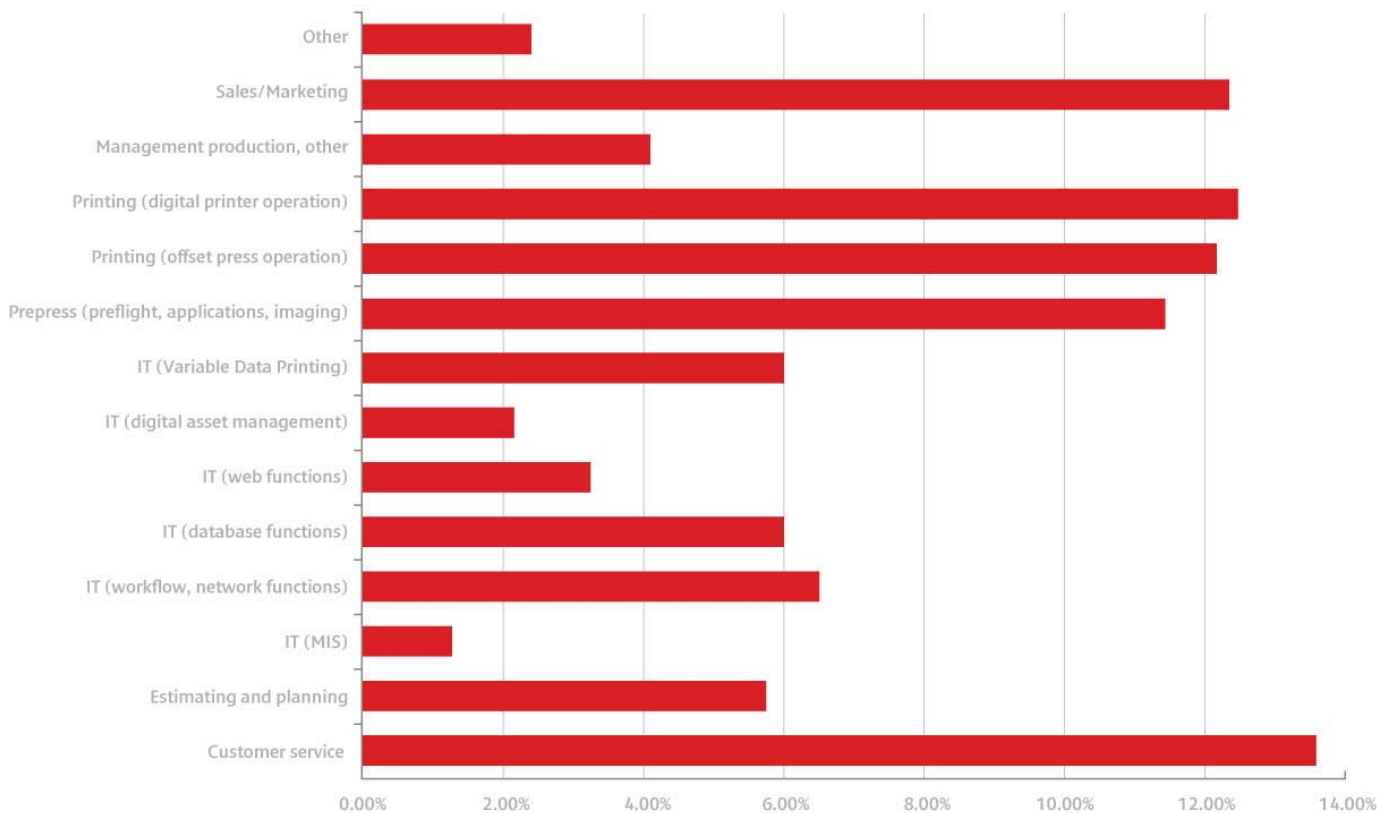
New Skill Needs

But more important than migrating old skills into the new reality, is the rising number of skill requirements for which there is no precedent in the printing industry. IT knowledge is probably the most important, because without the right blend of servers and networking technologies, regardless of the efficiency of software and staff, the work won't flow. IT expertise combined with prepress and print production knowledge is probably the single most important commodity for modern print production. In addition to generic IT expertise, the Insight Report cites a variety of other IT related skills that are vital. These include database analysts to nurture databases, both in-house and those coming into the print plant from customers. Digital asset management expertise is sort of a subset of this, but for businesses working with clients to manage complex text and image archives, it too is a key skill.

The list of required skills in this report is long and probably a little frightening, in the context of printers' investment plans. When they looked at the percentages worldwide of new hires by job function, the researchers found that IT-related jobs accounted for 25% of new hires. Most hiring, around 40%, is for legacy skills, for people to operate older technologies, including presses, workflows and prepress. According to the report, this could mean that printers will face a skills shortage, if they continue to work with older equipment.

The risk of a skills shortage is real enough and this report found that it is a factor driving investment for many print industry employers. The idea is to purchase new kit and then rely on the system supplier to provide the training. Superficially this might seem clever but it places an unfair burden on system suppliers, which can drive up the cost of new equipment, and it does not address the need for printers to take responsibility for developing their own new competitive skills. Productivity and automation improvements require a holistic view of the business's human resource needs, rather than just expertise in a new piece of kit.

This need for human resource investment will become acute as the graphic arts and printing industries start to struggle and compete with new modes of digital communications in addition to those we already use.



In keeping with its reputation as one of the world's most forward thinking companies, Canon has provided its customers and prospects with valuable research, gratis. Printers can use this report to learn about industry trends and plan their development strategies accordingly. Competitors might also be interested to read unbiased market data without the usual self-serving undertones. Digital Printing Directions is short, to the point and easy to digest. Canon is to be commended for its foresight and commitment to encouraging the industry to move forward. Copies are available from Canon Europe's website: www.canon-europe.com/insightreport

New hiring by job functions, worldwide, from Canon's Insight Report, 2008. European percentages are not significantly different.

– Laurel Brunner



Colour for the people

Thomas Vacchiano Jr, President and CEO of X-Rite, hopes that the Color Munki spectrophotometer will be the ‘iPod’ of the graphic arts industry. He may very well be right, because defining and managing colours continues to be a challenge for designers, photographers, prepress and press operators.

The Color Munki is inexpensive enough (€130 for Color Munki Create, and around €430 for the Design and Photo versions) that few who are serious about colour will be able to argue that they can't afford to buy proper hardware and software. In our opinion the Color Munki does a good enough job to qualify as a professional tool – it's having enough know-how as a user that will be the biggest problem.

And in this respect X-Rite has done a lot to help the not-so-experienced user by offering a step-by-step user interface, and with many areas complemented by a highly useful video to check with, if still in doubt after reading the instructions on-screen.

Both the Color Munki Design (white) and the Color Munki Photo (black) can calibrate and create ICC profiles for monitors, projectors and printers, as well as measuring real life samples such as fabric or painted or printed substrates. The lower priced Color Munki Create can only create profiles for monitors, and that with less options and settings than it's bigger brothers, Design and Photo.

The only difference we could find between the Design version and the Photo version is that the DigitalPouch software is only included in the Photo version. This checks the viewing conditions on the receiver side before compressing and sending a set of images. The receiver will then be able to view the images in the same viewing conditions as the sender, if an accurate and up-to-date monitor profile is in use.

We found both the Color Munki hardware and software easy to use, and estimate the ICC profiles to be of reasonable quality, despite the software having less colour samples to work with in the process. The colour patches are certainly larger than in other more commonly used test forms like IT8 or ECI 2000, in order to make it fast and easy to measure by hand (and fewer so as not to require too many pages on smaller printers). One problem we had was that the small rubber feet used to stabilize the Color Munki when reading spot samples got stuck on very glossy print materials. We ended up having to peel off those little buggers to be able to



Color Munki is a compact spectrophotometer capable of measuring colours on many substrates in spot mode, but also for calibrating monitors, projectors and printers.

▼ measure our printer's calibration charts. Hopefully, some re-engineering from X-Rite will solve this on the next generation models.

We welcome this low priced spectrophotometer, and congratulate X-Rite for an extremely user friendly interface and procedure. But we are not so sure that this alone will enable the masses to get to grips with colour management once and for all. It's actually not that easy to control, for example, an inkjet printer. Few RIP systems or colour management software allow the user to correctly specify the right amount of ink for a new substrate. Most software (including the one used with Color Munki) assumes that the default printer driver settings, including the existing paper options, will create a correct amount of ink on paper.

Often it doesn't, and then you are up the proverbial creek without a paddle. I imagine that the majority of the users in the target group for Color Munki most likely print using the print driver that came with the printer, and not a dedicated RIP. X-Rite seem to have come to the same conclusion, because the instruction when making a new profile is to "make sure you use the exact same printer settings" for output hereafter. This is somewhat contradictory, since you of course want to use your newly made ICC-profile instead, and have to figure out how to apply this at output.

X-Rite has tried to solve this to some extent by creating the profile in two steps, measuring the first printout (which serves as a kind of calibration/linearization phase) adjusting gradation curves internally and then making a second and customised test form to be measured in the final stage. But I fear that many users won't be entirely happy with the end result, and will wonder what they have done wrong. What they need is a proper RIP to add to the setup.

And this will change the picture completely, because now you will use the calibration, linearization and characterisation tools in this RIP, and not the Color Munki software. I wish I could bring better news to those who hope to be able to produce high end colour output without investing in a dedicated RIP, but I can't. A good colour printer deserves a good RIP – using the (free) printer driver alone will only take you so far. Using the Color Munki software alongside the printer driver will only change this marginally.

This doesn't alter the fact that the Color Munki is a good and useful tool at a very reasonably price. There is a big step up to i1 (EYE-1) and stand alone software to drive it; for the difference it might be possible to buy



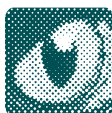
The testforms for Color Munki use a smaller number of larger-than-normal colour patches in order for the user to be able to measure them in a sweeping 'freehand' movement.



a Photo version of a proper RIP as a companion to Color Munki. Even if the printer has a built-in spectrophotometer, as in the high-end versions of the HP and Epson multicolour printers, you will still need a handheld spectrophotometer to calibrate monitors and measure colour samples, as well as to verify the printed results.

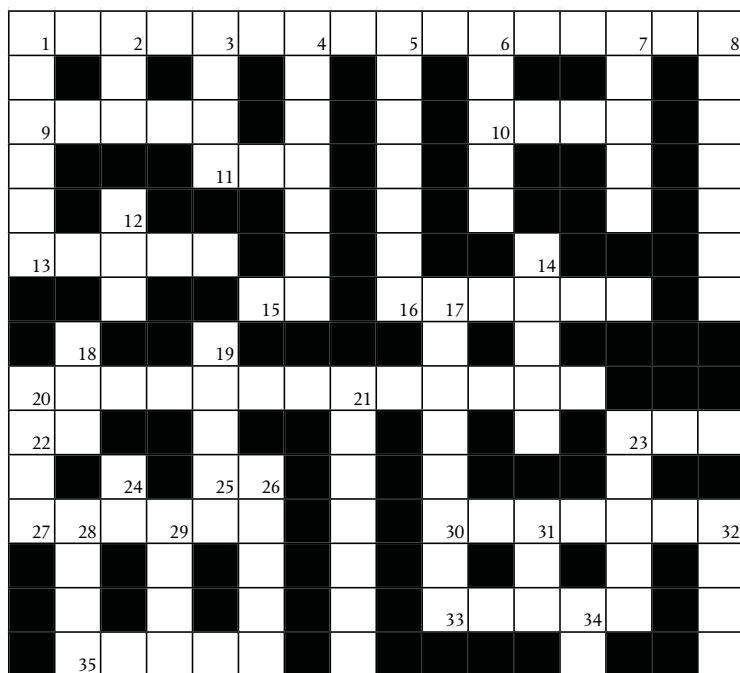
Buying a spectrophotometer is one thing, whether stand alone or built into the printer, but you still need to understand how to set up your output system for correct colour transforms going from RGB to CMYK. X-Rite tries to help with this, but there are so many places to go wrong choosing among rendering intents, black point compensation, paper white simulation (or not) – just to mention a few of the terms that pop up in the different output menus. Signing up for a well-managed colour management workshop is probably a good idea when ordering your own colour iPod – sorry – Color Munki.

– **Paul Lindström**



Graphic Arts Crossword Puzzle **Number 11**

If you get stuck, go to the [IGAEE](#) website for some hints. For those of you that really get lost, answers will be in the next issue of Spindrift. **The answers for the previous puzzle are on the next page.**



Across

- From start to finish, a toiling stream? (3, 2, 3, 8)
- Initiative, energy and storage device. (5)
- Automated Content Access Protocol (4)
- The ultimate delivery time. (3)
- Images suitable for printing, he employs. (5)
- Approve. (2)
- Such a credible truth. It's holy and above all else. (6)
- Sometimes it's good, sometimes not, but all businesses need at least one. (7, 6)
- It's not out. (2)
- The weasel did this when he reached the point of purchase. (3)
- The pink newspaper in short form. (2)
- On a Mac it keeps track of everything. (6)
- A kind of mask or a dull wit? (7)
- Captures two abutting colours. (5)
- Too meny ov thes hear. (5)

Down

- Much, much longer than a hyphen. (2, 4)
- In the UK, it used to be the Department of Trade & Industry (3)
- Describes the best kind of system. (4)
- Altogether striving to bind computers and people together. (7)
- Impenetrable to many, but the cleaner won't do them. (7)
- For printers there are 516 sheets. Reckon amounts of 500 for every-one else. (5)
- A mixed up French bunny; it's not bold, italic or underlined but plain. (5)
- What everyone basically puts and grabs eventually. (3, 4)
- European Rotogravure Association (3)
- Special gift to improve paper's receptiveness. (5)
- Print, technology, services, all the same, to produce one. (1, 7)
- In binary this number is 1010. (3)
- Its flat, cutting edge is a blade. (5)
- Resource Interchange File Format (4)
- Is the sty in a mess? (7)
- Of mice and men the best laid go awry. (5)
- Oh no, it's not off. (2)
- Type used to be stored in these. (5)
- Unix people shorten their initialise command thus. (4)
- Don't read on piers, or is it a kind of shadow? (4)
- Paper size specification for sheet fed presses. (3)
- Programmable Read Only Memory (4)
- 3.1415926535897932384626433832795028841971693993751 (2)

Answers for Graphic Arts Crossword Puzzle Number 10

D		V		F		I			R			F		A
I	N	I	T	I	A	T	E		A	N	I	L	O	X
G		R		N					I			A		E
I	N	T	E	G	R	A	T	E	D	P	A	G	E	S
T		U		E			R							
A		A	I	R			A	S	S	I	S	T	E	D
L		L			I		I				A			A
P	E	R	S	O	N	A	L	I	S	A	T	I	O	N
R		E			L		I				E			G
I	N	A	C	T	I	O	N		M		L	A		E
N		L			N		G		I		L	I	A	R
T		I	N	T	E	G	E	R	S		I			O
I		T		E			D		S		T	O	F	U
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G				T	R	U	E		D	O	S			



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