

The NPD Washington Post Online Feature

This document describes how to use NPD to synchronize your database with The Washington Post's database. Once the two databases are in agreement, you can use the on-line Daily Transactions to process changes in a semi-automated way. For the most part, NPD's Washington Post Online feature relates to the **Central Records** project at the Washington Post.

1. Getting Started

To use these functions you must have an internet account and install the **AcornFTP** program. Almost any internet account will work. Depending on your ISP and how you have things configured, you may need to be connected to the internet for AcornFTP to work. With some configurations, AcornFTP can automatically connect for you.

The following logon information is needed to access your drop box on the Washington Post web site. Note, the logon codes are subject to change. These values are case sensitive. The **nnnn** is your agent number. NPD will prompt for the logon information each time you are about to initiate a download or an upload. The Host Name and User Name are automatically remembered. If you want NPD to remember the password, turn on the *Remember Password* check box. Contact the Post if you wish to change your password.

Host Name: dropbox.washpost.com

User Name: nnnn@circulation

Password: nnnn

2. The Washington Post Online Switchboard

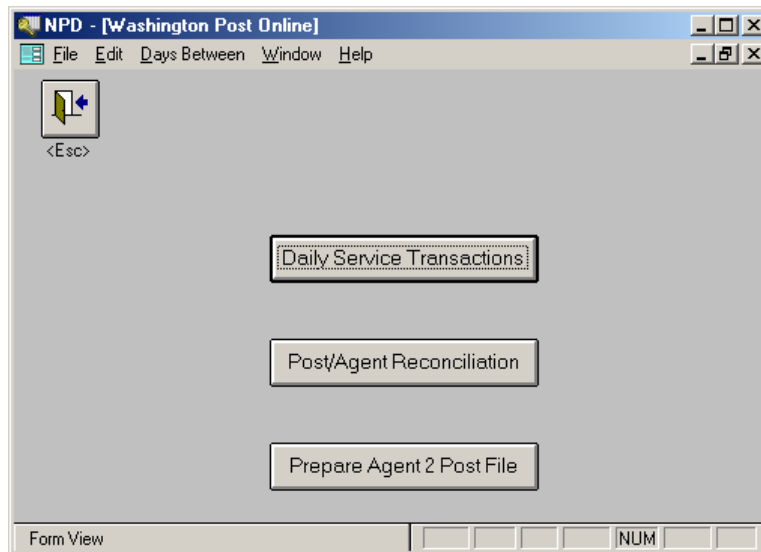
The **Washington Post Online** button on the NPD Main Switchboard opens the Washington Post Online switchboard, which has three buttons:

Daily Service Transactions

Post/Agent Reconciliation

Prepare Agent 2 Post File

First, we will discuss the Post/Agent Reconciliation, as that is the first step in getting the two databases in agreement. Next, we will describe the Agent 2 Post file. As of this writing, the Post requires you to successfully complete those two steps before it activates the online Daily Transactions.



3. Post/Agent Reconciliation

The Post/Agent Reconciliation function downloads the Washington Post's version of your database (the P2A file), compares it with your data, and prepares four reports on the results. In addition, this function can match the subscribers by name and address and fill in missing PANs for you.

See the Reconciliation Checklist at the end of this document for a step by step guide to the reconciliation process.

The Washington Post places a new copy of the P2A file in your drop box each day. You should perform the reconciliation daily, or as frequently as possible, until the two databases are in agreement. Thereafter, performing the reconciliation once or twice a week should be sufficient.

Following are the steps you need to perform to reconcile the two databases.

1) Download the P2A File

This function downloads the agent.p2a file from the Post's web site.

Click the **Download** button to initiate the download. NPD will use AcornFTP to perform the download. The download will take a couple of minutes. AcornFTP will display a progress meter to help you estimate when it will complete. If downloading appears stalled, you may click the Close button on the AcornFTP screen, or simply let AcornFTP time out. If there is a problem AcornFTP will give you a Retry/Cancel choice. Select Cancel if the first retry is not successful. Additional retries will most likely fail also.

NPD - [Get Agent.A2P File From Washington Post]

File Edit Days Between Help

This function downloads the AGENT.ZIP file from the Washington Post, performs the reconciliation, and prints the reports. Optionally, it can attempt to determine the PANs for accounts with a blank PAN. The Download function requires that AcornFTP is installed.

The Host Name, User Name and Password are needed by AcornFTP for the Download.

Host Name: dropbox.washpost.com

User Name: 0000@circulation

Password: *****

Remember Password

Reconciliation Options

Ignore Periods in Name Compare

Ignore Work Phone Differences

Download

Perform Reconciliation

Form View NUM

AcornFTP Version 1.02 10/08/00

NPD FTP Program by Acorn Data Systems, Inc.

Download File.

```
220-dropbox.washpost.com X2 WS_FTP Server 1.0.5 (4188023608)
220-WARNING
220-Access to this site is being monitored
220 dropbox.washpost.com X2 WS_FTP Server 1.0.5 (4188023608)
331 Password required
530 Not in authorization state
530 Not in authorization state
530 Not in authorization state
230 user logged in
200 Type set to IMAGE.
227 Entering Passive Mode (151,200,109,211,14,23).
Data connection established: 156
Passive Mode Connect Successful. Port:3607 Address: 151.200.109.211
Bytes = 61021
150 Opening BINARY data connection for agent.zip (61021 bytes)
```

Close

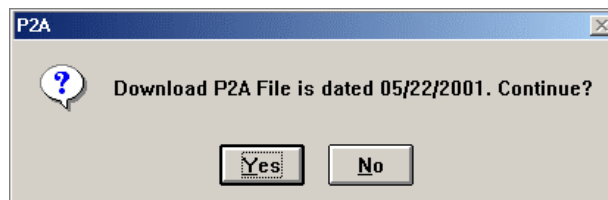
If you get the **Download Failed** message, check your internet connection. Also, any error message from AcornFTP may give a clue. For example, "log on failed" probably means the Host name, User Name or Password are incorrect. If everything seems correct, wait 15 minutes and try again. You may have had a bad connection or the internet was too busy to process the download.

If the download was successful, you will receive the message:



2) Perform Reconciliation

This function compares your database with the P2A file you downloaded. When you press the Perform Reconciliation button, you will be asked to confirm you are using the latest download:



If this is an old download date, click NO and download the latest A2P file.

- You may wish to turn on the *Ignore Periods in Name Compare* option. Then “John Q Adams” and “John Q. Adams” will be considered to be the same.
- You may wish to turn on the *Ignore Work Phone Differences* option. Then differences in work phones are shown only when there is some other difference as well.

The PAN is used to link the P2A data with the NPD data. It is important that you have entered the PANs for as many accounts as possible before you attempt a reconciliation. See *Determine Missing PANs* below.

After the reconciliation process completes, these buttons will appear:

Reconciliation Reports
Determine Missing PANs
Subscriber Name Fixup
Subscriber Phone Fixup
P2A Serve Report

3) Reconciliation Reports

There are four reconciliation reports. You may print or preview any report or print all four together.

Accounts with Key Field Differences

This report lists all accounts (subscribers) where the two databases do not match in some key field. There are two lines per account. The first line displays the NPD data. The second line displays any P2A (Washington Post) data that is different. The P2A line will be blank if there is no difference. This makes it easy to see which fields contain a difference. If the difference is that the P2A field is blank, a will be displayed.

For each difference, you have three choices: (1) Update NPD, (2) Update the Washington Post database, or (3) Ignore the difference because it is too minor to correct. Differences in service, e.g. Sunday Only instead of Daily & Sunday, must be corrected.

NOTE: The Washington Post database codes subscribers on vacation as Inactive. This will cause a difference with your NPD database. NPD places a V next to the Active/Inactive code to indicate the subscriber is on vacation.

Duplicate PANs

This report lists accounts where you have assigned the same PAN to two or more accounts. You must determine the correct PAN and update NPD.

Agent Accounts not in Washington Post Database

This report lists all NPD accounts that are not in the P2A file. **In most cases, the PAN number is blank or invalid.** You must determine the correct PAN for these accounts and update NPD accordingly. If necessary, add the customer to the Washington Post database.

Washington Post Accounts not in Agent Database

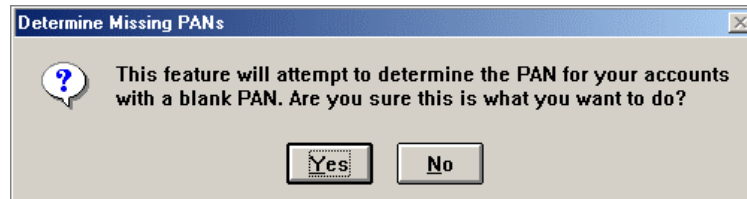
This report lists all accounts in the P2A file that do not have a corresponding entry in the NPD database. Examine the *Agent Accounts not in Washington Post Database* report to see if you can match some accounts. For accounts you match this way, update the NPD PAN.

You must update NPD or the Washington Post until the *Washington Post Accounts not in Agent Database* report is empty.

4) Determine Missing PANs

This function matches the downloaded P2A file and your database to automatically assign the PAN where there is a match. Only NPD accounts without a PAN are considered. The match requires an exact address and type of service match, plus a partial name match. The partial name match looks at the first letter of the first name and the first three letters of the last name. It also looks for swapped first and last names.

If your database has a number of missing PANs you should run this function before attempting the reconciliation described above. Also, use the *Paper Account Numbers* button on the Subscribers switchboard to fill in missing PANs from a Router or similar report.



5) Subscriber Name Fixup

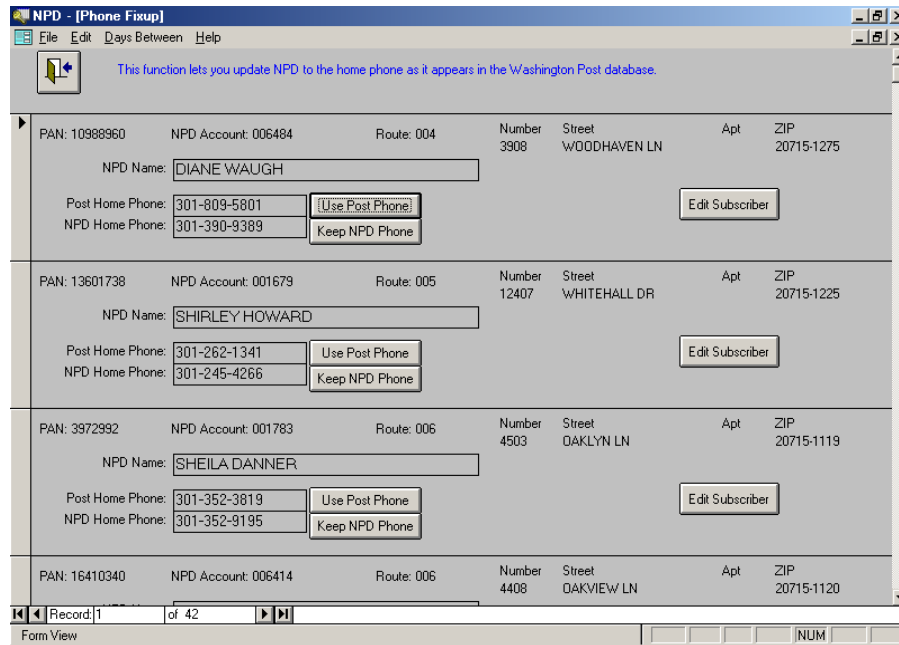
This function displays all accounts from the Accounts with Key Field Differences report where the subscriber names are different. You can elect to keep the NPD version of the name or to replace it with the Washington Post's version. Once you click a choice the system advances to the next account. You can use the Subscriber Edit button to manually edit the name or other information.

PAN	NPD Account	Route	Number	Street	Apt	ZIP
14643344	001772	005	12537	WINDOVER TURN		20715-1240
16197795	006082	006	4400	OLANDO LN		20715-1127
8498898	006240	007	8001	OVERFIELD CT		20715-4625
7249587	002285	012	12311	MANSHIP LN		20715-2933

NOTE: Before using this function, you may wish to go to the Subscriber switchboard and use the Subscriber Name in CAPS button to convert all subscriber names to upper case and optionally remove periods and commas.

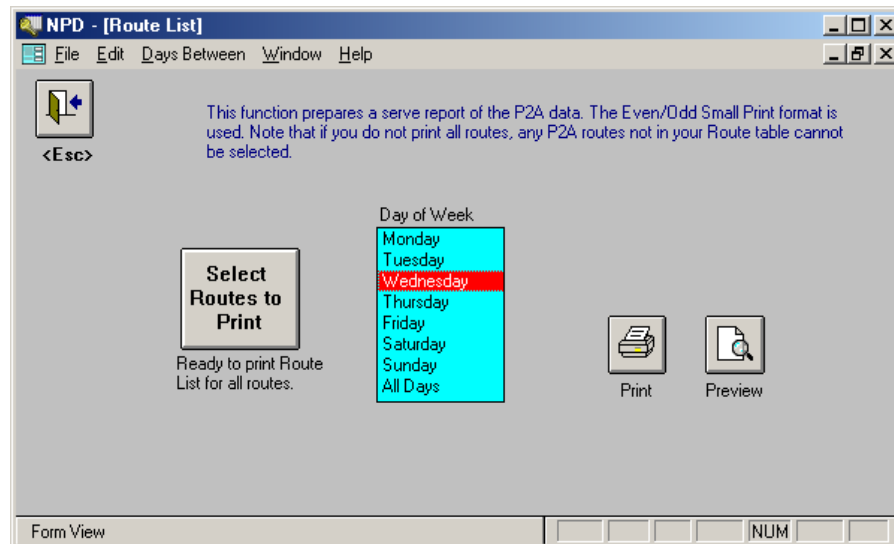
6) Subscriber Phone Fixup

This function displays all accounts from the Accounts with Key Field Differences report where the home phones are different. You can elect to keep the NPD version of the home phone or to replace it with the Washington Post's version. Once you click a choice the system advances to the next account. You can use the Subscriber Edit button to manually edit the phone or other information.



7) P2A Serve Report

The P2A Serve report prepares a serve report based on the P2A data. You may select which routes are to be included. Also, you may select the day of the week to be reported. The report format resembles the Even/Odd Serve Report. Note that the report only counts subscribers, not number of papers.



4. Prepare Agent 2 Post File

The Agent to Post (A2P) file is the opposite of the P2A file. Here, you upload your subscriber information to the Post's web site. The A2P file contains name, address, phone, and type of service. It does not include any balance information. Subscribers with a Pay Type of NS or NC are excluded, as are inactive subscribers. You prepare the A2P file only when requested by the Washington Post.

Telephone numbers prefixed with an asterisk (*) are not uploaded. The * prefix is used to denote unlisted telephone numbers that the customer has requested you not disclose to anyone, including the Washington Post.

NPD - [Send Agent.A2P File to Washington Post]

File Edit Days Between Window Help

This function creates an export of subscriber data for transmission to the Washington Post. The file is named AGTnnnn.A2P and will be placed in a compressed file named a2pnnnn.zip. (The nnnn will be replaced with your distributor number.)

The a2pnnnn.zip will be placed in a WASHPOST folder below your NPD folder. Usually this will be C:\NPD01\WASHPOST\a2pnnnn.zip. If AcornFTP is installed on your computer, it will be used to perform the upload; otherwise, you will need to upload it some other way.

Customer balances are not included. In addition, Inactive Subscribers and Subscribers with Pay Type of NS or NC are omitted.

The Host Name, User Name and Password are needed only if AcornFTP is installed.

Host Name:

User Name:

Password:

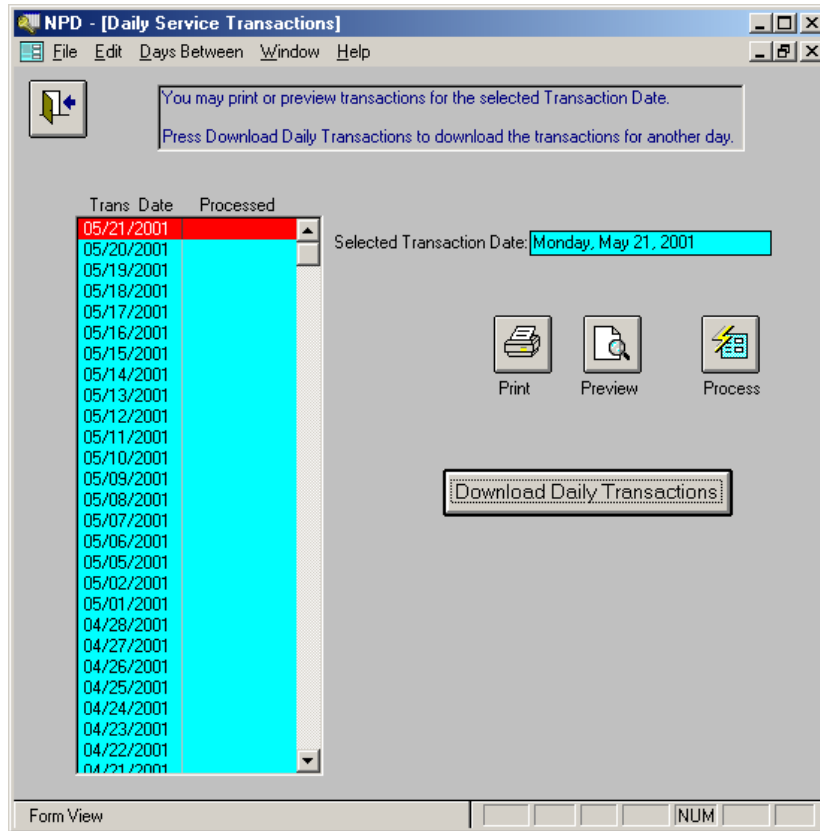
Remember Password

Form View | NUM

5. Daily Service Transactions

The Daily Service Transactions function downloads the transactions for a day. You may print the transactions and use them in NPD in the usual way. Also, you may process them in a semi-automated fashion. By semi-automated, we mean that many keystrokes are done for you. Over time, additional automation will be added.

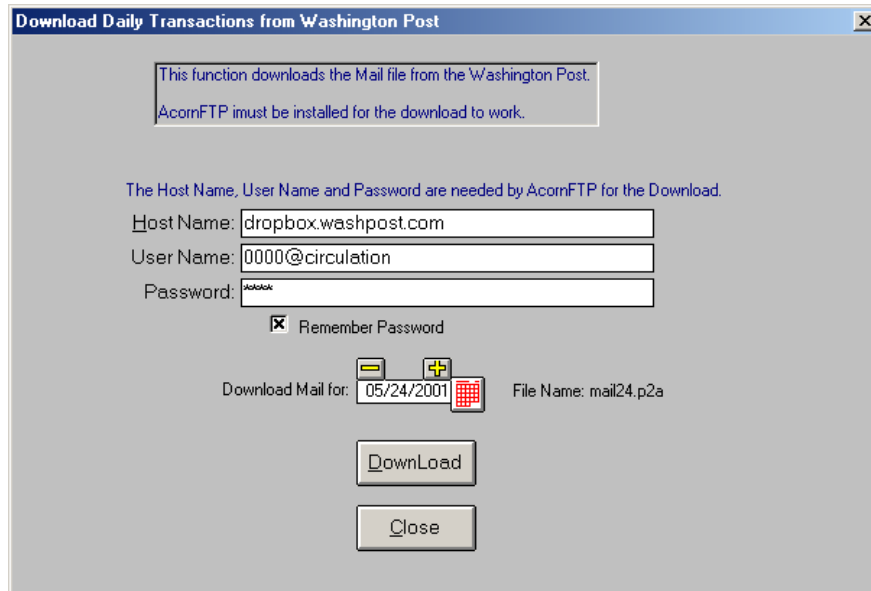
The Daily Service Transactions screen contains a list of the dates downloaded. Click on the date to select it for printing or processing. Click the **Download Daily Transactions** button to download new transactions. The **Print** and **Preview** buttons are used to print or preview the transactions for the selected date. The **Process** button is used to process transactions for the selected date.



The Washington Post's web site holds the last 30 days of transaction files. NPD retains the last 90 days. This allows you to review transactions up to 90 days old.

1) Download Daily Transactions Button

This function downloads the mail file for the specified date. The file for today is usually not available until early evening. If you attempt to download a file before it is available the download will fail.



2) Print and Preview Transactions Buttons

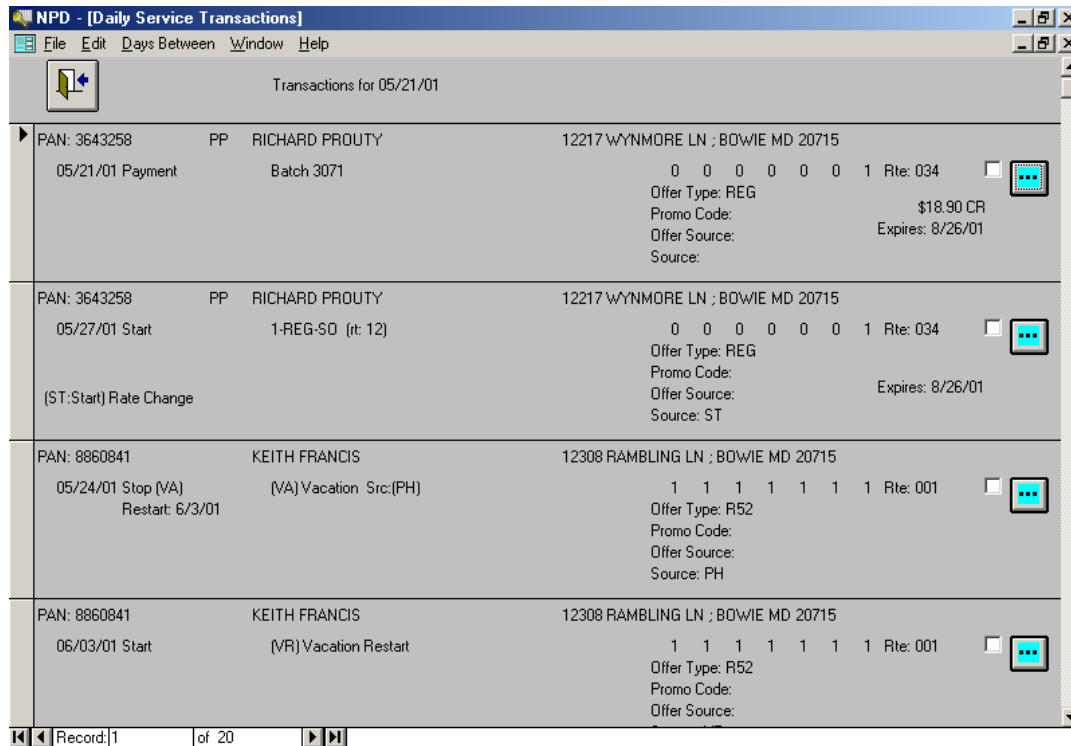
The Print and Preview buttons prepare the *Daily Service Transactions* report of the selected date.

3) Process Button

The Process button is used to process the transactions for the selected date. When clicked, the list of transactions will appear on the screen. Click the blue explode button for each transaction you wish to process.

Notes:

- (1) You may not need to process each one. For example, a vacation stop gives both the stop and restart dates. The vacation start transaction that usually immediately follows the stop provides redundant information.
- (2) The Process Transactions function requires a screen resolution of at least 800 x 600.



When you click the explode button for a transaction, the Process Transaction screen is opened. This screen has the following layout:

- The top area of the screen displays the transaction. This area is keep visible whenever possible.
- The middle area displays the NPD data for the subscriber. This will be blank for new subscribers. If you have more than one account for the same PAN, the multiple NPD account numbers are listed. (You should have only one account per PAN.)
 The **New Subscriber** button is active if you don't have a subscriber for the transaction's PAN. Click it to add a new subscriber. NPD will automatically fill in name and address information about the new subscriber. In most cases all you have to do is select the edition. If the address does not exist, NPD will volunteer to create the address for you.
 The **Daily Mail** button takes you to the *Daily Mail* screen. All Daily Mail functions are available to you: You can pull up other accounts, add subscribers, etc.
- The lower area displays a history for the subscriber. Which history is displayed depends on the type of transaction. The three possibilities are
 - Service Changes
 - Vacations
 - Complaints

Use the **Add** button to add a new Service Change, Vacation or Complaint, as appropriate. Use the **Close** button to end processing of this transaction. This will return you to the list of transactions you are processing. As each transaction is processed the check box next to the explode button is checked. This check helps you see which ones you have processed. It is not retained, and you may reprocess checked transactions.

NPD - [Process Transaction]

File Edit Days Between Window Help

PAN: 8860841 KEITH FRANCIS 12308 RAMBLING LN ; BOWIE MD 20715

Home Phone: 301-461-6989 Work Phone: Route: 001

05/24/01 Stop (VA) (VA) Vacation Src:(PH) 1 1 1 1 1 1 1

Restart: 6/3/01 Offer Type: R52
Promo Code:
Offer Source:
Source: PH

Click Account to Use

Account: 006007 PAN: 8860841

Sort Name: Francis Keith Apt

Street Address: 12308 RAMBLING LN

City-State-Zip: BOWIE 20715-3209

Home Phone: 301-461-6989 Work Phone:

Billed Thru: 05/20/2001 Route: 001

Balance at Last Bill: \$18.90 Copies: 1 Bill Type: 12W

Current Balance: \$18.90 Edition: DS Pay Type: BR

Delivery Instructions:

New Subscriber

Daily Mail

Add Vacation Stop

Stop Date	Resume	Credit Due	Credit Applied	Applied Thru	Completed		
05/24/2001	06/03/2001	3.72	0.00	05/23/01		...	✗
12/21/2000	12/29/2000	1.50	1.50	12/28/00	✓	...	✗
10/13/2000	10/15/2000	0.00	0.00	10/14/00	✓	...	✗
05/26/2000	06/04/2000	1.50	1.50	06/03/00	✓	...	✗

Record: 1 of 4

Form View FLTR NUM

Add Vacation Stop

Enter the STOP and RESUME dates. Then, click on SAVE

Copies: 1 Edition: DS Billed Thru: 05/20/2001

Stop: 05/24/2001 Days 1

Resume: 06/03/2001

Donate Credits to NIE

Comments:

Cancel <Esc> Save

6. Reconciliation Checklist

Use this handy step by step checklist to help you get through your first reconciliation.

1. Download the P2A file
2. Perform Reconciliation (Turn on Ignore Periods in Name and Ignore Work Phones)
3. Click the **Determine Missing PANs** button.
4. Perform the Reconciliation again.
5. Examine the **Duplicate PAN** report and correct the NPD account with the incorrect PAN. (You can blank the account with a bad PAN and run the Determine Missing PANs function again to hopefully link to the correct PAN.)
6. If you had to correct many duplicates, you may want to run the Reconciliation again. This might help clear up things in the other three reports.
7. Compare the **Agent Accounts not in Washington Post Database** and the **Washington Post Accounts not in the Agent Database**. Attempt to find the same account in both. When you do, use NPD to enter the correct PAN.
8. Your priority at this point is
 - a. No duplicate PANs
 - b. A substantially clear **Agent Accounts not in Washington Post Database** report
 - c. A substantially clear **Washington Post Accounts not in the Agent Database** report.

By a *substantially clear* report, we mean a report that is less than a page and you need some additional time to resolve the remaining problems.
9. Once the other three reports are empty, or nearly so, tackle the **Accounts with Key Field Differences** report. Depending on the number of pages (150 pages seems to be the norm for the first time), you may need one to three weeks to get the report down to just a few pages. Give priority to customer status and paper counts. Hold off on names and phone numbers until most everything else is in agreement.