

PLAIN DEALER PUBLISHING COMPANY

The Plain Dealer Publishing Company, headquartered in Cleveland, Ohio, owns and produces The Plain Dealer, the largest daily newspaper in the state of Ohio. With more than 250,000 subscribers and 5,000 contract advertisers, the Plain Dealer Publishing Company demands prompt and intelligent customer service, and it needs a document management system that allows company representatives to retrieve information instantly upon request.

THE SITUATION

Prior to 2000, Plain Dealer Publishing utilized microfiche and printed reports to manage its credit, accounting and customer service documents, with files dating back to 1993. Company representatives accessed these documents to verify customer information, including subscription, payment and advertising history, so quick and easy access – and therefore a quick response – was paramount to increased customer satisfaction.

Plain Dealer Publishing's microfiche- and paper-based systems were using \$85,000 of fiche and paper per year and filling almost 1,500 square feet in the company's offices. Employees could not effectively retrieve information when needed because a typical request included physically going to the document area of the microfiche reader and searching for the document. Gathering the needed information often amounted to hours or even days. As a result, newspaper subscribers and advertisers were losing faith in the company, and in some cases, were terminating relationships.

THE SOLUTION

Focusing on ease-of-use and reducing costs, Plain Dealer Publishing began its evaluation of document management systems. According to Terry Kozak, manager of Information Services for Plain Dealer Publishing, "The publishing industry's use of paper and microfiche for document management is very common, and therefore, very accepted as the norm. However, we have such an extensive history in publishing that our records were literally forcing us out of house and home, with more than 1,500 square feet dedicated to storing records. Also, we were moving to a new building and management wanted everything to be state-of-the-art. I think we were all tired of seeing boxes and boxes of stored reports, and we didn't want to take them with us into our new era of publishing."

After evaluating several vendors, the project was awarded to Imaging Solutions Group, a systems integrator with extensive experience in providing document management systems and a solution consisting of OnBase integrated document management software from Hyland Software. OnBase was

the software of choice because, according to Kozak, "it was the best document management product" he and his team evaluated.

Knowing the elimination of microfiche was the number one goal in the implementation of a document management system, Kozak chose OnBase COLD as the solution that would take Plain Dealer Publishing into the next century. OnBase COLD eliminates the need to store and distribute computer-generated reports on paper, microfilm or microfiche, and it automatically identifies, compresses and indexes reports and statements that are output from the publishing company's mainframe computer.

Building on a system that consisted of a Dell Power Edge 4300 server, three 36GB LVD SCSI hard drives, a CD-R and a flexible array storage tool, Imaging Solutions Group installed the OnBase COLD solution in July of 1999, and things have not been the same since.

"With the old system," says Kozak, "we had to create invoices in-house and then produce magnetic tape so we could utilize microfiche to store the invoices and copies of display and classified advertisements. When an advertiser needed to see an old invoice and/or an ad that ran a week, month or several months ago, our customer service representatives would search manually through files of information, cross-referencing ad run dates with invoice dates to pull the right microfiche files. They then had to print hard copies of the requested information, which in turn was faxed or mailed to the requesting party. And the customer service reps also had to keep a file of the sent information so they would not have to go through the retrieval process when the customer called back to discuss the invoice after they received hard copies of the information."

With the implementation of the OnBase solution, Plain Dealer Publishing is able to use their mainframe computer to create invoices and then immediately after creation, send the invoices to a network location. OnBase is set-up to automatically "pull" and store those documents in the system

at scheduled times: every Friday for retail advertising invoices and every Wednesday for classified invoices. In addition to the invoices, images of the corresponding advertisements also are placed on the system. While viewing a customer invoice in OnBase, customer service representatives can instantly retrieve the associated advertisement using OnBase's powerful cross-referencing feature – the ability to double-click on a document and automatically retrieve any or all related information. The OnBase configuration allows customer service representatives to e-mail copies of the invoices and/or advertisements; and because many of their customers want to see "hard copies," the reps can fax the information right from their desktops. Quite a change from the system that included manual look-up of information stored on microfiche.

THE RESULT

Plain Dealer Publishing has 25 different advertising and circulation document types in use with the OnBase solution. The new system provides more than 200 users with instant access to the information they need to keep the customer informed and happy and, ultimately, Plain Dealer Publishing with current information on its customer accounts.

According to Carmen McGhee, a credit collector with the publishing company, it is much easier to collect unpaid bills with the new system because customer service representatives have immediate access to past invoices and can get the information to the customer while the customer is on the phone with the rep. Says McGhee, "The

key to collecting unpaid invoices is the ability to get the customer a copy of the invoice in question. Our old system allowed us to do that, but not without a lot of manual research that may have been pushed aside for a day or two while the reps took phone calls and solved other problems. Now, we can instantly produce copies of invoices in question, cross-reference the corresponding ads, and provide the customer with the requested information right away. And that's the key to getting paid – knowing where the invoice is and getting it to the customer so they can pay the bill."

As for cost savings, the main factor of the initial evaluation of document management systems, the OnBase solution has paid for itself because its implementation resulted in the elimination of microfiche, a major expense for the company. Near-term plans include expanding the system with OnBase Document Imaging, which will allow the company to capture and store paper-centric documents that come into the company further eliminating their physical storage costs and enabling documents to be electronically utilized and shared. Since all OnBase modules are seamlessly integrated with one another, scanned images can be cross-referenced with existing and future COLD documents. Concludes Kozak, "I consider the implementation of OnBase a huge success for Plain Dealer Publishing because it allows us to keep our customers happier at a reduced cost. However, the real test of success can be seen internally, where the users, the ultimate acid test, have embraced the system and can't imagine doing their jobs without OnBase."

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