

Electronic Newsletter
Mike Glisson
Executive Director, Finance
University of Houston

Abstract

The University of Houston Finance Division publishes a monthly electronic newsletter for UH financial system users and business administrators. Originally intended to aid users of a recently installed financial system, the focus of the newsletter has expanded to include other operational areas and supplement formal business training. Several benefits have resulted from the newsletter, both for users and for Finance, with no additional costs.

Introduction to the University of Houston

The University of Houston is an urban research university with over 34,000 students and 5,000 faculty and staff, who work in about 200 departments in 18 colleges and divisions. UH, and the other campuses in the UH System, replaced its legacy accounting systems with the PeopleSoft General Ledger, Purchasing, and Accounts Payable modules in September 2001. With the implementation of PeopleSoft, department administrators were given greater responsibility for entering financial information directly into the system and greater access to financial reports and queries.

Statement of the Problem

Our greatest challenge in using a new financial system was to effectively communicate system and business process changes to approximately 2,000 system users. We offered many hands-on training classes before and after implementation, auditorium training to reach larger audiences, and an email listserv for communicating quickly and directly to system users. However, people still complained that there was no cohesive method of communication that pulled all of the strings of information together into an easy-to-follow format that could also serve as a reference for future use.

Design

Emily Messa, Staff Associate in the Associate Vice Chancellor/Associate Vice President of Finance Office, suggested that we create a monthly newsletter to highlight

system changes, training opportunities, and other information useful to financial system users. Individuals in the Finance departments, who provided training for the new system, would write the articles, and Emily would use Microsoft Publisher to put the articles together into a newsletter format. At first, we thought we would publish and distribute a hardcopy newsletter. However, the estimated printing cost of \$2,000 per month made it cost prohibitive. Finally, we decided to issue an electronic newsletter instead because it would be easier and faster to distribute at zero cost.

Implementation

In March 2002, we issued our first electronic newsletter and called it *PeopleSoft Notes and News*. We distributed the newsletter through our financial system listserv, and it focused on issues directly related to the PeopleSoft implementation – training, reports, and system updates. It also addressed concerns about the PeopleSoft system raised in a University survey. Reaction from the University community was immediate and positive.

By September 2002, the PeopleSoft system had been in use for one year and we felt it was time to expand the content of the newsletter to include more operational issues, such as policy and procedure updates, business process changes, and best practice suggestions. We renamed the newsletter *Finance Notes and News* to reflect this expanded focus. In the meantime, other electronic newsletters had been created by Purchasing, Budget, and Accounts Payable to communicate procedural and operational issues related to their department. However, these newsletters were abandoned in favor of using *Finance Notes and News* as a consolidated vehicle of communication.

To compile the newsletter each month, Emily sends an email to the Finance department heads about 10 days prior to the end of the month requesting articles for next month's newsletter. The Finance departments write brief articles (usually one page or less) about topics that relate to their operation or area of expertise and that would be helpful to financial system users and business administrators. Writers are encouraged to incorporate tables, images, frequently asked questions, and bullets into their articles to make them easier to read and understand.

Emily spends three or four hours each month creating the newsletter in Microsoft Publisher from the articles submitted. (Microsoft Publisher was delivered with the MS Office Suite software.) When the newsletter is complete, Emily emails a draft to the Finance department heads for review. The department heads notify Emily of any changes and the final version is emailed as an Adobe Acrobat document to the financial system listserv. The newsletters are also saved on the Finance department web site (www.uh.edu/finance) for future reference.

Benefits

The electronic newsletter has produced several benefits over the past year and one-half. First, it gave us a forum for addressing issues related to our new financial system. Users were both informed and relieved to understand the system better, which increased productivity and improved attitudes. Second, the newsletter provided a regular format for announcing upcoming events (business-related), deadlines, training opportunities, and other date-specific information. This helps administrators plan their work and organize their schedules. Non-business announcements and events (birthdays, etc.) are not included in the newsletter, which help keep it concise and relevant. Third,

the newsletter supplements formal training by explaining frequently misunderstood concepts or new procedures. As a result, Finance departments can communicate new procedures much faster than if they had to rely only on formal training. Fourth, writing a newsletter each month keeps the Finance departments in touch with the needs of the campus community. Since the newsletter is designed to help financial system users and administrators do their jobs better, Finance must first try to understand their needs and concerns. Therefore, Finance is more proactive in anticipating problems and implementing solutions, which improves customer service. Fifth, the popularity of the newsletter has resulted in unanticipated benefits, such as more people signing up for the financial system listserv in order to receive the newsletter. Not only do they receive the newsletter, but they also receive timely announcements throughout the month that are important to system users. In addition, it has influenced another university in the UH System to start its own newsletter. UH Clear Lake plans to model their newsletter after *Finance Notes and News*, and to include some of the UH newsletter articles that are not campus specific.

Retrospect

The only thing I would do differently in retrospect is start the newsletter sooner, perhaps six months before the implementation of PeopleSoft instead of six months after. We might have saved system users some of the agony associated with adapting to a new financial system. Though it would not have solved all of our problems, it would have made the transition a lot smoother.