



## Forging Ahead with the New Financial Information System (FIS)

Welcome to the second issue of our newsletter. We are pleased to share with you the latest project progress in the last 2 months, together with some highlights of the key changes in future business processes.

### Project Progress



#### User Communication Activities

- ◆ Conducted over 100 interviews, workshops, prototype sessions and 16 focus groups with more than 180 representatives from various faculties, departments and administrative offices to exchange views on the design and requirements of new FIS.
- ◆ Held a sharing session on the new FIS with the Deans and Heads on 9 Nov 2016.
- ◆ We would like to express our deep gratitude for all user feedbacks which have contributed tremendously to the design and implementation of the new FIS.

#### Successful Completion of System Design Phase

- ◆ The design phase of the core financial and procurement functions in the new FIS was completed.
- ◆ Streamlined business processes and system design were endorsed by the Project Steering Committee (PSC) on 23 Jan 2017, under the guiding principle of minimal customization on the Oracle EBS package.

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### Highlight of Key Changes



#### New Chart of Account (COA)

- ◆ To meet multi-faceted management information and UGC reporting requirements, the COA has been redesigned and expanded from current 2 account coding segments to 5 clearly defined segments in future.

**Entity**

**2 digits**

**Funding  
Source**  
**2 digits**

**Unit**

**4 digits**

**Account**

**6 digits**

**Project**

**6 digits**



#### Fully Automated Procurement Workflow

- ◆ To streamline operational process, purchase requisition (PR) will be fully automated and no hardcopy PR will be used in future. The new FIS will provide instant fund checking mechanism for users to ensure sufficiency of funds for procurement.
- ◆ Receipt of goods and services will be electronically recorded by the user departments to enhance control and facilitate a more up-to-date financial status.



### Timesheet

- ◆ To meet the UGC requirements on Cost Allocation Guidelines (CAG), academic staff will be invited to fill in timesheets (2-week duration), by a sampling and rotation basis, for recording their time spent on teaching, research and servicing activities.
- ◆ A new web-based timesheet system is being developed by ITO with linkage to class time-tabling information to facilitate ease of input by academics.



### Premises Booking Records

- ◆ Room usage data and booking records are required by CAG for allocation of premises costs.
- ◆ We are now working with representatives from Faculties / Schools / AVA / Offices to identify efficient ways to integrate their respective premises booking records into EO's Premises Booking System, which will be further enhanced.

### Upcoming Communication Activities

- ◆ We are planning to conduct a series of information sharing sessions for the University community in the coming months with a view to providing interactive forums on the new FIS including an overview of the key process design and changes, new COA and system functionalities, etc.
- ◆ Invitation will be issued once the schedule is firmed up.



### What's Next?

- ◆ The project team is now working on the data conversion approach and mapping as well as functional specifications to determine how the new FIS is built and configured.
- ◆ We will share the latest developments with you in the next newsletter. Once again, we are deeply grateful for your opinions and kind support.

What's  
Next?

## YOUR QUESTIONS / FEEDBACKS ARE WELCOME

Project materials and contact list are available on the project website at (<http://fohome.hkbu.edu.hk/hkbufoproj/index.htm>)

We welcome your feedbacks, comments and questions on the project. Please email them to our designated project email address ([fosys@hkbu.edu.hk](mailto:fosys@hkbu.edu.hk)) or contact our project team members directly.

攜手迎挑戰，邁步齊向前  
*We need your Support & Cooperation*