



Financial Information System (FIS) – Countdown to i-Expense Rollout

Welcome to the fourteenth issue of our newsletter! We are pleased to share with you the latest project progress in the last few months.

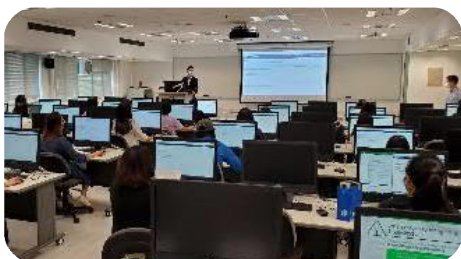
i-Expense Module - Project Progress

Completion of Configuration & Build Phase

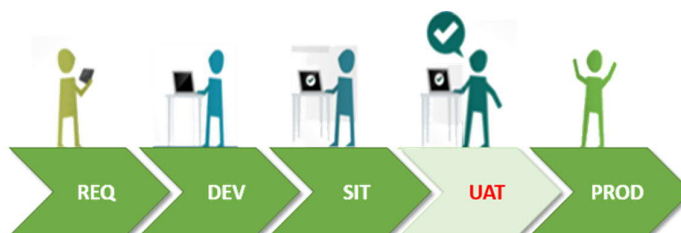
- ◆ Through close collaboration among the Finance Office (FO), Deloitte and the Office of Information Technology, the configuration and build phase including system integration testing (SIT) has been completed on schedule in mid-November 2020.



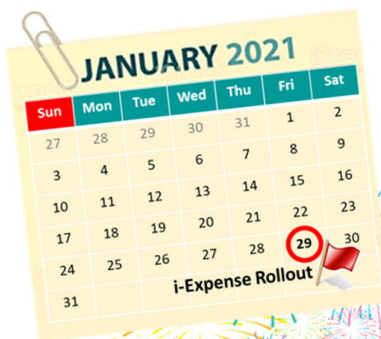
Completion of User Acceptance Testing (UAT)




- ◆ Before commencing UAT, FO organised 9 half-day hands-on training sessions for user representatives from the faculties and administrative offices in November and early December 2020. For users to have a better understanding of the workflow and functions of the new i-Expense module, university-specific business scenarios and data were used for UAT demonstration.
- ◆ More than 180 user representatives from faculties and administrative offices participated in the UAT. FO would like to express its deepest appreciation for the users' participation and keen support to complete the UAT, a key milestone, on time by end-December 2020.
- ◆ Valuable feedbacks and suggestions on system refinements were received from users during the UAT. Our project team has studied the feedbacks thoroughly and made enhancements to the system as appropriate. One key feedback is to provide department administrative staff, reviewers and approvers with the flexibility to edit staff expense claims. This flexibility could enhance expediency to correct unintended input errors in the expense claims. The Finance Systems Sub-committee under the Digital Transformation Steering Committee approved the customisation which has been incorporated into the system while keeping the project schedule unchanged.



What's Next?



Rollout of i-Expense Module

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 - ◆ We are very pleased to inform that after 11 months' hard work by the project team and keen support from user departments, the implementation of the new i-Expense module is now in its final stage. The module is scheduled to rollout on **29 January 2021** according to the original plan.
 - ◆ Details of revised procedures, cut-off and transition arrangements of Request for Reimbursement (RR) will be communicated in early January 2021.
 - ◆ The project team is now preparing Oracle FIS user accounts for the two new functions of i-Expense module:
 - i) **Staff Expense Claims (i-Expense)** - all full-time staff will have user license to access Oracle FIS for submitting his/her own expense claims;
 - ii) **Payment Requisition to Vendors (PRV)** - the new PRV module requires the same user license as the existing Purchase Requisition (PR) module. Additional PR licenses will be allocated to faculties and administrative offices based on the number of budget controllers /project investigators and the number of RR for payment to suppliers in past two financial years. Details on user licenses allocation will be sent to faculty deans and department heads in early January 2021.

End-user Training

- ◆ A series of on-line end-user training sessions will be arranged in January 2021 to help department users understand and get familiar with the new workflow, system features and input screens of the i-Expense module.
- ◆ Additional e-learning materials will be available on FO website for users' reference anytime.



YOUR QUESTIONS / FEEDBACKS ARE WELCOME

Project materials and contact list are available under the menu - "Training and Materials" section, "New FIS Project" of the Finance Office website (<http://fohome.hkbu.edu.hk/fopage.html>).

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

We will share the latest developments with you in the next newsletter. Once again, we are deeply grateful for your opinions and kind support.

We need your Support & Cooperation
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