Frequently Asked Questions

<A> iProcurement

1. How do we access to the new FIS?

The new FIS can be accessed thru BUniPort (https://buniport.hkbu.edu.hk/). Similar to the old FIS, please click on the hyperlink under Works > Finance > New Financial Information System (Oracle EBS) to access the new FIS.

2. Can I view historical data in the new FIS?

Only outstanding PO and PO issued on or after 1 July 2017 can be found in the new FIS. Historical data in the old FIS can still be accessed via the hyperlink 'Financial Information System (Retained Modules)' thru BUniPort.

3. Do I need to perform goods receipt for POs migrated from the old FIS to the new FIS?

Goods receiving apply to all POs issued via the new FIS. It is not necessary for user to perform goods receiving for PO migrated from the old FIS.

4. Can we issue Request for Reimbursement via the new FIS?

The existing paper Request for Reimbursement Form remains unchanged. However, the new FIS provides an upload function for handling bulk Requests. For details, please contact colleagues of our Accounting and Budgeting Section.

5. Can we apply a waiver of tender via the new FIS?

If you would like to apply for a waiver of tender, please complete the tender wavier form and upload it to the PR as attachment. The tender waiver form can be obtained via the download centre of FO website http://fohome.hkbu.edu.hk

6. Can we issue a PR charging to cross-departmental budget accounts via the new FIS?

Yes, the new FIS supports a PR charging to multiple departmental budget accounts. Before preparing the PR, it is suggested that the PR preparer coordinates with the relevant departments for the info of budget accounts and budget controllers. The PR preparation process is the same as that of the normal PR as long as the info of budget accounts and budget controllers is input correctly.

7. How do we issue a PR charging to U-wide account?

The new FIS supports a PR charging to other departmental accounts like U-wide account. Before preparing the PR, it is suggested that the PR preparer coordinate with the relevant department for the info of budget account and budget controller.

8. Can the reviewer/approver edit the PR before approval?

The reviewer/approver along the PR approval path can edit any info in the PR before approval. After the editing, the new FIS will release all funds reserved for that PR until it is approved by all parties in the approval path.

9. Are there any reminders to the reviewer/approver for PR approval?

Yes, only one reminder will be sent to the reviewer/approver at that time after seven calendar days. The PR preparer may need to follow up directly with the reviewer/approver if necessary.

10. How do we issue a PR if there is insufficient budget?

Please contact colleagues of our Accounting and Budgeting Section for assistance.

11. When I create my PR near month end and submit to FO for approval in next month, my account code combination is changed automatically, why?

This is because of the system's workflow control on GL date of PR. Please refer to FAQ - PR month-end closing workflow.docx for more details.

12. What is the GL Date I should input for Cross Year PR?

Please insert any day in July of the future PR year you want. For example, for FY 2020-21 enter the GL date as 01-JUL-2020. The rationale behind is that the budget of future financial year is allocated in July of that financial year.

13. When I perform PR Approval via Email, can I cc or bcc to others? Can I add a note to my colleagues?

The email function is programmed and may fail to send out the email if the recipients / subject / etc. are edited.
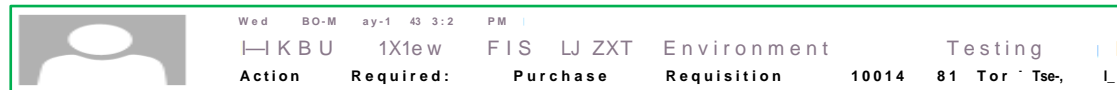
If you need to add notes in the email, you must add them between the quotation marks as shown below or otherwise, the email will not be sent out.

14. I receive an email notification to approve PR but the link is expired when I click on it. Why?

You may choose the outdated email for your approval.

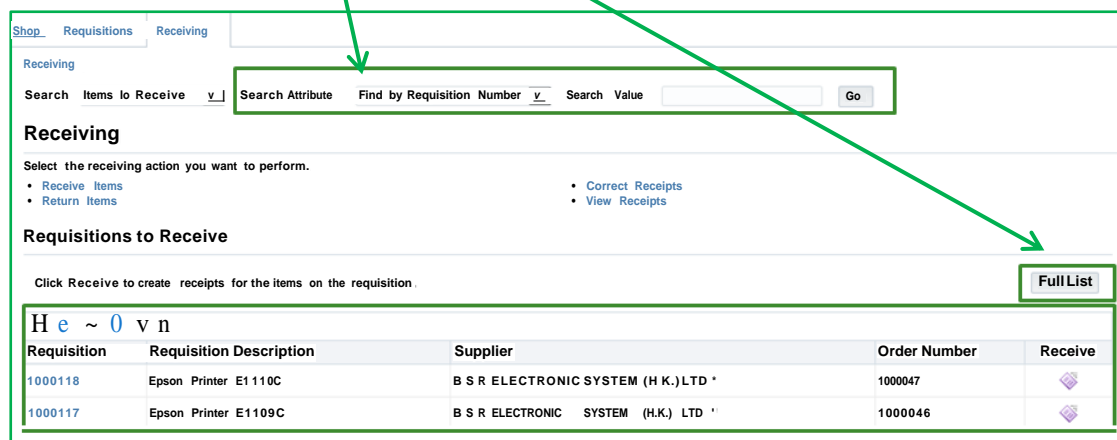When PR is submitted, an email notification will be sent to the approver.

```
Wed     BO-M    ay-1  43 3:2    PM
⊢ K B U    1X1ew    F I S    LJ ZXT    E n v i r o n m e n t           T e s t i n g
Action      Required:        Purchase      Requisition      10014    81  T o r    Tse-,      I_
```

After 7 days, a **reminder** email notification will be sent. The original email notification is expired and action will be **ignored** by system.

```
Wed    O6-Jun-13    3:29   PM
⊢ K B U    N e w    F I S  U A T    E n v i r o n m e n t           T e s t i n g    M a i l   < i
Action     Required:      First  reminder:     Purchase    Requisition    1001481    for
```

Therefore, please choose the latest email notification for your approval.

15. I want to perform "Goods receipt" but I cannot find my PR from "Requisitions to Receive", why?

It is because "Requisitions to Receive" display the latest 60 PRs only. You can search the PR by "Search Attribute", or click to "Full List" if you still cannot find it.

Shop	Requisitions	Receiving				

Receiving

Search   Items lo Receive   v | Search Attribute   Find by Requisition Number v   Search Value   [_____]   Go

Receiving

Select the receiving action you want to perform.
- Receive Items
- Return Items
- Correct Receipts
- View Receipts

Requisitions to Receive

Click Receive to create receipts for the items on the requisition .   **Full List**

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Requisition	Requisition Description	Supplier	Order Number	Receive
1000118	Epson Printer E1 110C	B S R ELECTRONIC SYSTEM (H K.)LTD '	1000047	◈
1000117	Epson Printer E1109C	B S R ELECTRONIC SYSTEM (H.K.) LTD '	1000046	◈

<B> Reports

16. I have to view many reports but it is time-consuming to generate them every time. Is there any method to save my time?

Yes. You can let the system to generate the reports for you by the Report Scheduler function. Please refer to **"How to set Scheduler for Oracle Report"** from Menu – **Training and Materials** of our website

17. I cannot view the report of my department, why?

Please ensure you have chosen the appropriate responsibility under Navigate menu if you may have more than 1 responsibility to view reports. There is also an occasion where you may have sub section of the department (e.g. FO's subsection = AC Hall).

▶EI   HKBU PHYS Financial Reports

▶£□   HKBU FO Financial Reports

▶EZI HKBU FO {All Offices} Financial

    Reports

18. As a budget controller, can I have the option to limit the access rights of a staff or delegate to financial reports without staff costs?

Yes. Please send a written request to Financial Systems Section of FO (fosys@hkbu.edu.hk) and FO will limit the access rights for such staff or delegate accordingly (i.e. Oracle responsibility name under Financial Reports / Inquiry (exclude SC)).