



SFS Analytics Reports to Monitor Procurement Activity

Agenda

- Introduction to SFS Analytics
- DW268 – Encumbrances by Purchase Order
- DW426 – P-Card/NET Card Analysis
- Questions and Answers

Note: Please type questions into the Webex chat window at any time during today's presentation.

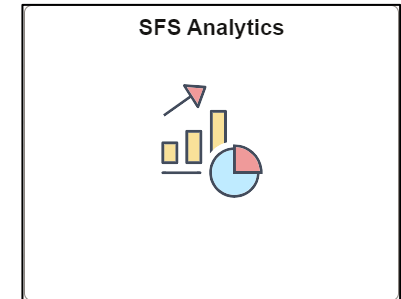


Introduction to SFS Analytics










Speaker Name

SFS Analytics

- A powerful and flexible interactive reporting tool, to assist agencies with reporting and data analysis needs.
- Accessible from the SFS Homepage, through the SFS Analytics tile, for users provisioned a reporting role in SFS.
- Data is sourced from the SFS Production environment as of the close of business one day prior.
- Landing page provides quick access to:
 - Different types of reports
 - User Resources and Guides
 - Report Catalog



Welcome to SFS Analytics
Data loaded as of **June 29, 2023 1:24 AM**
Please subscribe to our [Data Analysis Customer Community](#) to receive important reporting updates and announcements!

 General Ledger Reports	 Budget Reports	 Project Costing Reports
 Document Listing Reports	 Contract Reports	 Agency Specific Reports
 Go to SFS Financials	 Submit a Request	 Help and Updates

Help and Updates

[User Resources](#)
Exciting new videos on how to use SFS Analytics!

[SFS Analytics User Guide](#)
For tips on using SFS Analytics.

[Report User Guides](#)
For report specific information.

[Report Catalog](#)
Listing of SFS Analytics reports.

[Chart of Accounts Handbook](#)
SFS reference tool providing information about each chartfield used in SFS.

[Recent Report Updates](#)

For report assistance or feedback, email HelpDesk@sfs.nv.gov

SFS Analytics landing page



DW268 – Encumbrances by Purchase Order

DW268 – Encumbrances by Purchase Order

- Available under the Budget Reports section of SFS Analytics.
- Used to monitor encumbrances by information, including purchase order, supplier, and contract.
- Each purchase order can be viewed by encumbered, liquidated, and remaining encumbrance amounts.
- Report User Guide available on the Help tab.

DW268 - Encumbrances by Purchase Order

Encumbrances by Purchase Order Monthly Encumbrances by Purchase Order Help

9/9/2024 3:12:58 PM
DW268

SFS Analytics Home

* Required Selections

* Fiscal Year 2025	* Department Tree KK_SW_DEPT - KK Department Tree	* Fund Tree RPT_SW_FUND_BUDG - SW Budget Fund Tr	* Program Tree KK_SW_PRGM - KK Program Tree	* Account Tree KK_SW_ACCT - KK Account Tree	Budget Reference --Select Value--
* through --Select Value--	Department Level 1 --Select Value--	Fund Level 2 --Select Value--	Program Level 2 --Select Value--	Account Level 1 --Select Value--	Operating Unit --Select Value--
* Business Unit --Select Value--	Department Level 2 --Select Value--	Fund Level 3 --Select Value--	Program Level 3 --Select Value--	Account Level 2 --Select Value--	Product Code --Select Value--
Purchase Order Number --Select Value--	Department Level 3 --Select Value--	Fund Level 4 --Select Value--	Program Level 4 --Select Value--	Account Level 3 --Select Value--	Project ID --Select Value--
NYS Contract ID --Select Value--	Department Level 4 --Select Value--	Fund Level 5 --Select Value--	Program Level 5 --Select Value--	Account Level 4 --Select Value--	Activity ID --Select Value--
SFS Contract ID --Select Value--	Department Level 5 --Select Value--	Transactional Fund --Select Value--	Transactional Program --Select Value--	Account Level 5 --Select Value--	Chartfield1 --Select Value--
	Department Level 6 --Select Value--			Account Level 6 --Select Value--	Chartfield2 --Select Value--
	Department Level 7 --Select Value--			Account Level 7 --Select Value--	Chartfield3 --Select Value--
	Department Level 8 --Select Value--			Transactional Account --Select Value--	Class Field --Select Value--
	Department Level 9 --Select Value--				
	Department Level 10 --Select Value--				
	Department Level 11 --Select Value--				
	Transactional Department --Select Value--				

Demonstration: Using the DW268



DW426 – P-Card/NET Card Analysis

DW426 – P-Card/NET Card Analysis

- Available under the Document Listing Reports section of SFS Analytics.
- Provides a wide variety of information related to Procurement and NET card activity, including data based on employee, card, and department or region.
- Report User Guide available on the Help tab.

The screenshot displays the 'DW426 - P-Card NET Card Analysis' web application. The interface includes a navigation bar with tabs for 'P-Card/NET Card Analysis', 'Employee Report', 'Card Report', 'Purchase Distributions', and 'Help'. The main content area is titled 'P-Card/NET Card Analysis Card Report' and shows a timestamp of '9/24/2024 1:19:50 PM DW426'. Below the timestamp is a search bar with a dropdown arrow and a button labeled 'SFS Analytics Home'. The main section contains a form with the following fields:

- * Required Selections**
- * Business Unit**: SFS01
- * Transaction Date**: Between [] - []
- Employee ID**: --Select Value--
- Employee Department**: --Select Value--
- Transaction ID**: []
- Card Issuer**: --Select Value--
- * Department Tree**: KK_SW_DEPT - KK Departm
- Department Level 1**: --Select Value--
- Department Level 2**: --Select Value--
- Department Level 3**: --Select Value--
- Department Level 4**: --Select Value--
- Department Level 5**: --Select Value--
- Department Level 6**: --Select Value--
- Department Level 7**: --Select Value--
- Department Level 8**: --Select Value--
- Department Level 9**: --Select Value--
- Department Level 10**: --Select Value--
- Department Level 11**: --Select Value--
- Department**: --Select Value--

At the bottom right of the form are 'Apply' and 'Reset' buttons.

Demonstration: Using the DW426

Resources and Support

- SFS Analytics Resources

- Videos
- User Guides
- Report Catalog

- SFS Help Desk

- helpdesk@sfs.ny.gov
- SFS Support Tile
- 518-457-7737 or 877-737-4185 (toll-free)

The screenshot displays the SFS Analytics dashboard interface. At the top, it says "Welcome to SFS Analytics" and "Data loaded as of June 29, 2023 1:24 AM". Below this, there is a notification: "Please subscribe to our [Data Analysis Customer Community](#) to receive important reporting updates and announcements!". The dashboard is organized into a grid of report categories and support resources. The report categories include: General Ledger Reports, Budget Reports, Project Costing Reports, Document Listing Reports, Contract Reports, and Agency Specific Reports. At the bottom of the grid are three action buttons: "Go to SFS Financials", "Submit a Request", and "Help and Updates". To the right of the grid, there is a "Help and Updates" section with links to "User Resources", "SFS Analytics User Guide", "Report User Guides", "Report Catalog", and "Chart of Accounts Handbook". At the bottom of this section, it says "Recent Report Updates" and provides an email address for assistance: HelpDesk@sfs.ny.gov.

User Resources Page

- Includes quick videos, recorded workshops, and step-by-step training focused on SFS Analytics.
- Hover your mouse over each workshop hyperlink to view timestamps for each topic.
- First time using these videos? Check out the Tips Guide hyperlinked at the top of the page.

SFS

User Resources

Click on a link to view the video/training.

Before using these videos, [click here](#)

Video Walkthroughs

Reports

[DW620 Lapsing Appropriations and Carryout Spending \[05:08\]](#)
Find lapsing appropriations and carryout spending.

[DW128 - Contract Dashboard \[06:46\]](#)
Contract disbursements, encumbrances, and vouchers.

SFS Analytics Basics

[Introduction to SFS Analytics \[07:35\]](#)
How to use SFS Analytics.

[SFS Analytics Help Overview \[03:30\]](#)
Using SFS Analytics help.

Tips and Tricks Series

[Running a Report - Prompts, View, Drill-downs \[05:29\]](#)

[Adding, Moving, and Deleting Columns \[02:15\]](#)

[Working With Customizations \[04:57\]](#)

[Printing, Saving and Exporting \[04:01\]](#)

Self-Paced Trainings

[SFS220 - Getting Started with SFS Analytics](#)
How to use SFS Analytics

Recorded Workshops

[Workshop - February 6, 2019 \[01:09:58\]](#)

[Workshop - December 11, 2019 \[01:16:19\]](#)

Questions and Answers