



SFS Coach Training and Support

Agenda

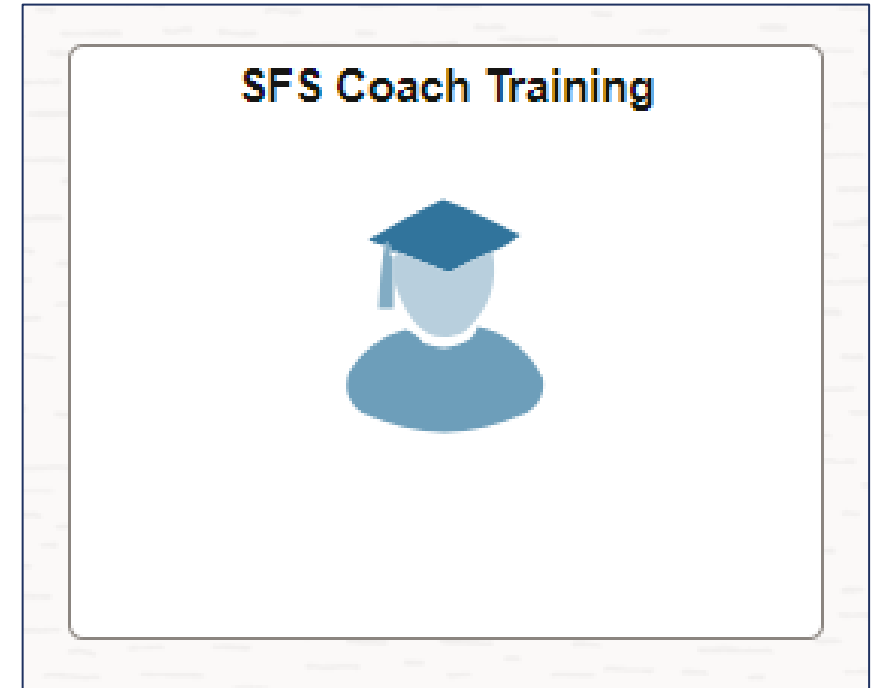
- SFS Coach Training
- SFS Support
- Live Demonstrations



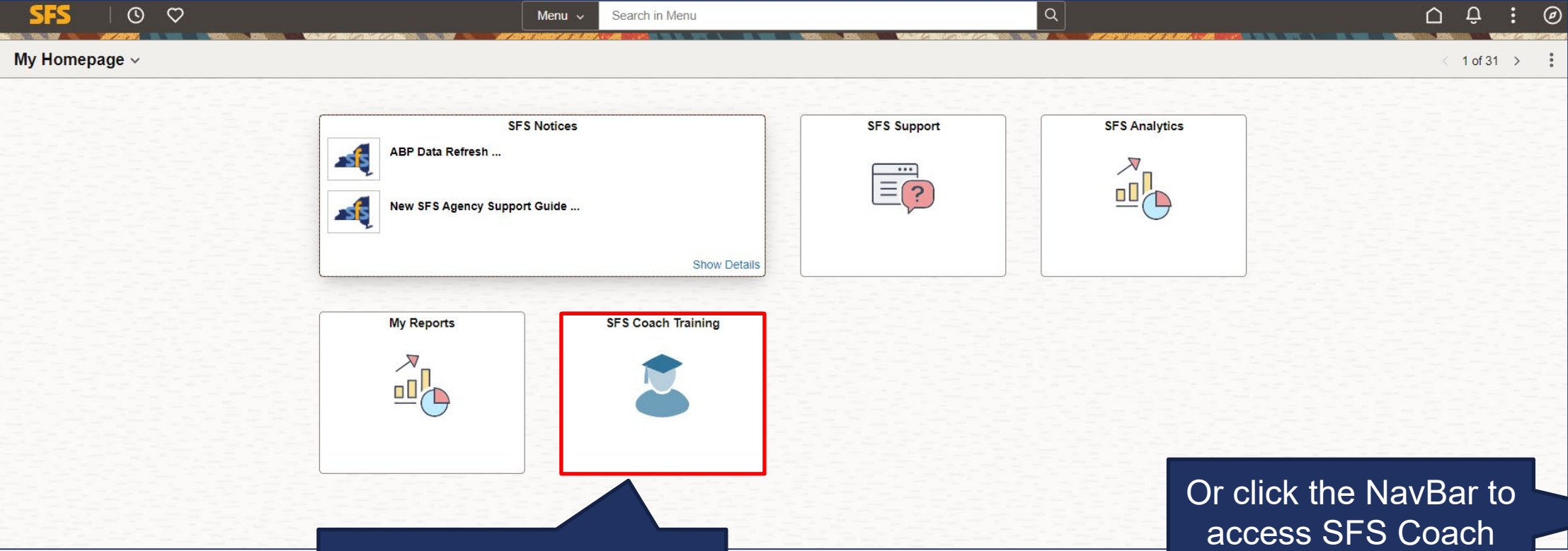
SFS Coach Training

SFS Coach Training – Overview

- SFS Coach Training contains the core, foundational training for new and experienced SFS users.
- SFS Coach Training is available to all individuals with an SFS Agency Portal login.
- Train while you work:
 - SFS Coach Training will open in a separate tab while you continue your work in SFS.
- The SFS Coach Training repository includes over 1,000 topics and materials.

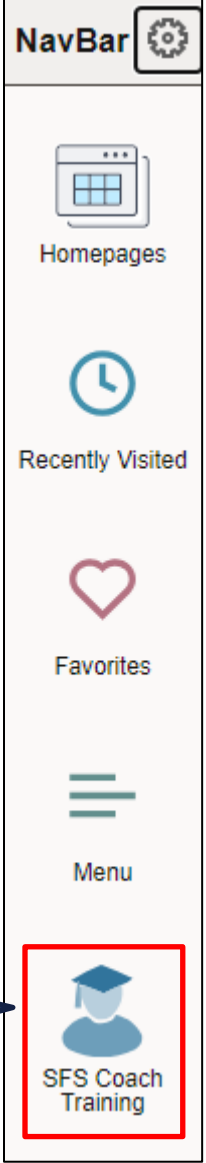


SFS Coach Training – Available from Anywhere in SFS



Look for the graduate when you log in to SFS.

Or click the NavBar to access SFS Coach Training from any page in SFS.

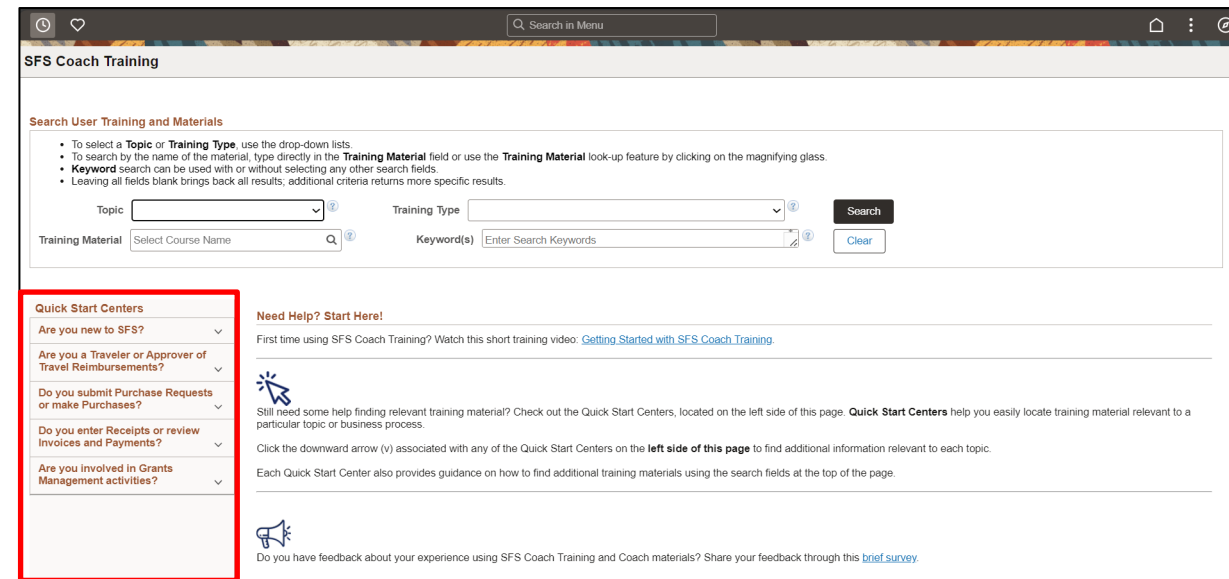


SFS Coach Training

- Search instructions are available in the SFS Coach Training Search section to provide clear direction on how to search for training material.
- There are four different ways to search for training:
 - Topic
 - Training Material
 - Training Type
 - Keyword(s)
- Different training material formats are available, including Handbooks and Presentations.
 - SFS Coach Training also contains job aids, tools and templates to process transactions, quick reference guides, videos, and featured queries and report listings.

Quick Start Centers in SFS Coach Training

- Quick Start Centers (QSCs) organize popular training material in an approachable and intuitive way to help users quickly and easily find materials they need to perform their work in SFS.
- There are five QSCs, each focused on a different topic:
 - New to SFS
 - Travel and Expense
 - Payment Processing
 - Receipts and Invoices
 - Grants Management
- Each QSC includes introductory information about the topic and links to Featured Trainings, such as handbooks, job aids, and videos.
 - Each QSC also provides guidance on how to find additional training materials using the search fields in SFS Coach Training.



SFS Coach Training – A Multimedia Resource

- Did you know that SFS Coach Training includes SFS Handbooks, job aids, training videos, presentations, reference materials, resource tools, and Report and Query guides?
- Once you search, keep an eye on the training type, as well as the description for detailed information about that particular resource.

Search Results 137 rows

Topic	Popularity	Training Material	Notes	Training Type
1 Statewide Financial System	SFS	! Managed Access Reference Guide	This reference guide provides a list of the specific business functions that can continue to be performed in SFS during	Reference Guide
2 Statewide Financial System	57.9%	+ Orientation_to_SFS	This orientation session will familiarize users with SFS resources, support options, and show them how to stay	SFS Event
3 Statewide Financial System	52.1%	+ Coronavirus_COVID-19_FAQs	Coronavirus 2019 (COVID-19) Frequently Asked Questions	SFS Event
4 Statewide Financial System	51.2%	+ Training_for_Invoice_Reviewers	This presentation from the 6/9/22 and 6/15/22 Invoice Reviewer training session, includes the following topics:	SFS Event
5 Statewide Financial System	52.9%	+ Getting Started in the Statewide Financial System	The Statewide Financial System (SFS) is an online application, utilizing PeopleSoft as its foundational software platform, and	

A description of the resource

The type of material



SFS Support

SFS Help Desk

- Provides the first level of SFS user support to Agency staff.
- Single point of contact for:
 - NYS Agencies, and their technical team members
 - New York State vendors and businesses seeking to become vendors
- Help Desk ticket responses will come from nyoscprod@service-now.com.

Open Mon-Fri
8:00 AM - 5:00 PM

Call (518) 457-7737

helpdesk@sfs.ny.gov

SFS Support



Contacting the SFS Help Desk

- Please include as many details as possible when contacting the Help Desk:
 - A detailed description of the issue.
 - The SFS User ID you were using when you encountered the issue.
 - The date and time you encountered the issue.
 - The name of the job aid or reference material that you were following when you encountered the issue (if applicable).
 - The name of the page you were on when encountering the issue.
 - Impacted transaction IDs (if applicable).
 - Screenshots of the entire page where you are experiencing trouble, including the URL and any error messages you are receiving (if applicable).
- As a reminder, the [Troubleshooting Tips for SFS Users](#) guide provides a list of basic troubleshooting tips, reminders, and contact information for users who are unable to log in to the system or need assistance with the system.

Getting Help

The screenshot shows the SFS My Homepage dashboard. At the top, there is a navigation bar with the SFS logo, a clock icon, a heart icon, a 'Menu' dropdown, a search bar labeled 'Search in Menu', and icons for home, notifications, and user profile. Below the navigation bar is a 'My Homepage' dropdown menu and a pagination indicator showing '1 of 31'. The main content area features five widgets: 'SFS Notices' (containing 'Grants Management FAQs ...' and 'SFS Forgotten Password Help ...' with a 'Show Details' link), 'SFS Support' (highlighted with a red border and containing a help icon), 'SFS Analytics' (containing a bar and pie chart icon), 'My Reports' (containing a bar and pie chart icon), and 'SFS Coach Training' (containing a graduation cap icon).



SFS Coach Training & SFS Support Tile Demonstrations

Questions and Answers