

SFS Analytics for Advanced Users: Using Statewide Financial System (SFS) data to analyze spending

October 28, 9:00 a.m. – 10:00 a.m.

Agenda

- Intro to SFS Analytics
- DW470 Vouchers Posted to Cash Ledger
- DW426 P-Card/NET Card Analysis
- Questions & Answers

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





Intro to SFS Analytics

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 the SFS Analytics (NYF_AGY_SFS_ANALYTICS) functional role
- 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



SFS Analytics landing page



Common Reports Used to Analyze Spending

- DW557 Expense Report Listing
- DW438 Ad Hoc General Ledger Report
- DW951 Purchase Order Listing
- DW128 Contract Dashboard
- DW470 Vouchers Posted to Cash Ledger
- *New!* DW426 P-Card/NET Card Analysis

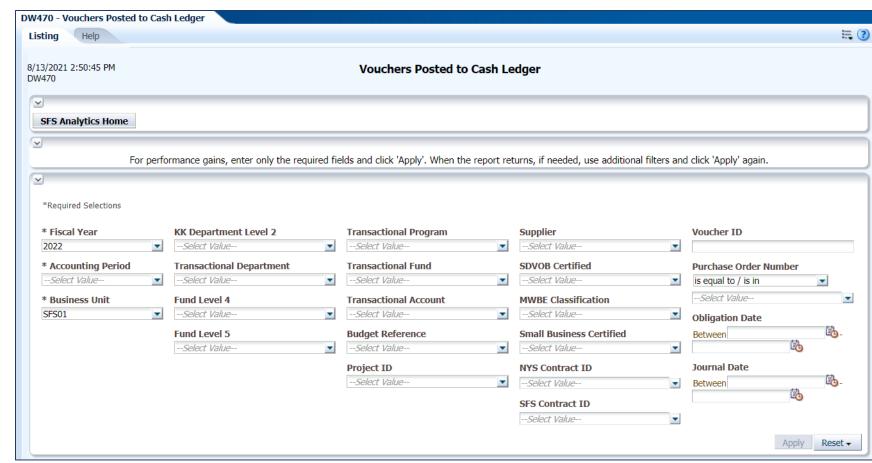




DW470 – Vouchers Posted to Cash Ledger

DW470 – Vouchers Posted to Cash Ledger

- Available under the Document Listing Reports section of SFS Analytics
- Used to view all vouchers that have posted to the cash ledger for the selected accounting period
- The Journal Date represents the date of disbursements
- There is also the ability to drill down to initiating documents



Report User Guide available on the Help tab

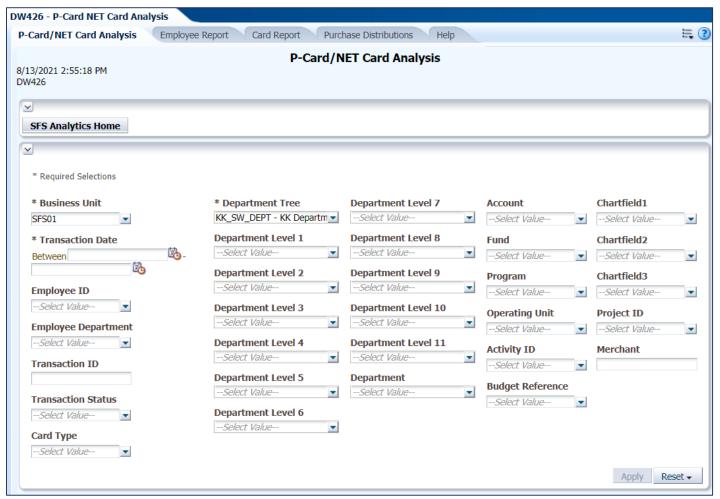




DW426 – P-Card/NET Card Analysis

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- New report added in April 2021
- Available under the **Document Listing Reports** section of SFS
 Analytics
- Used to view PCard and NET Card information in a variety of ways including by employee, by card, and by timeframe
- Report User Guide available on the Help tab





Questions and Answers

