



SFS Training and Support

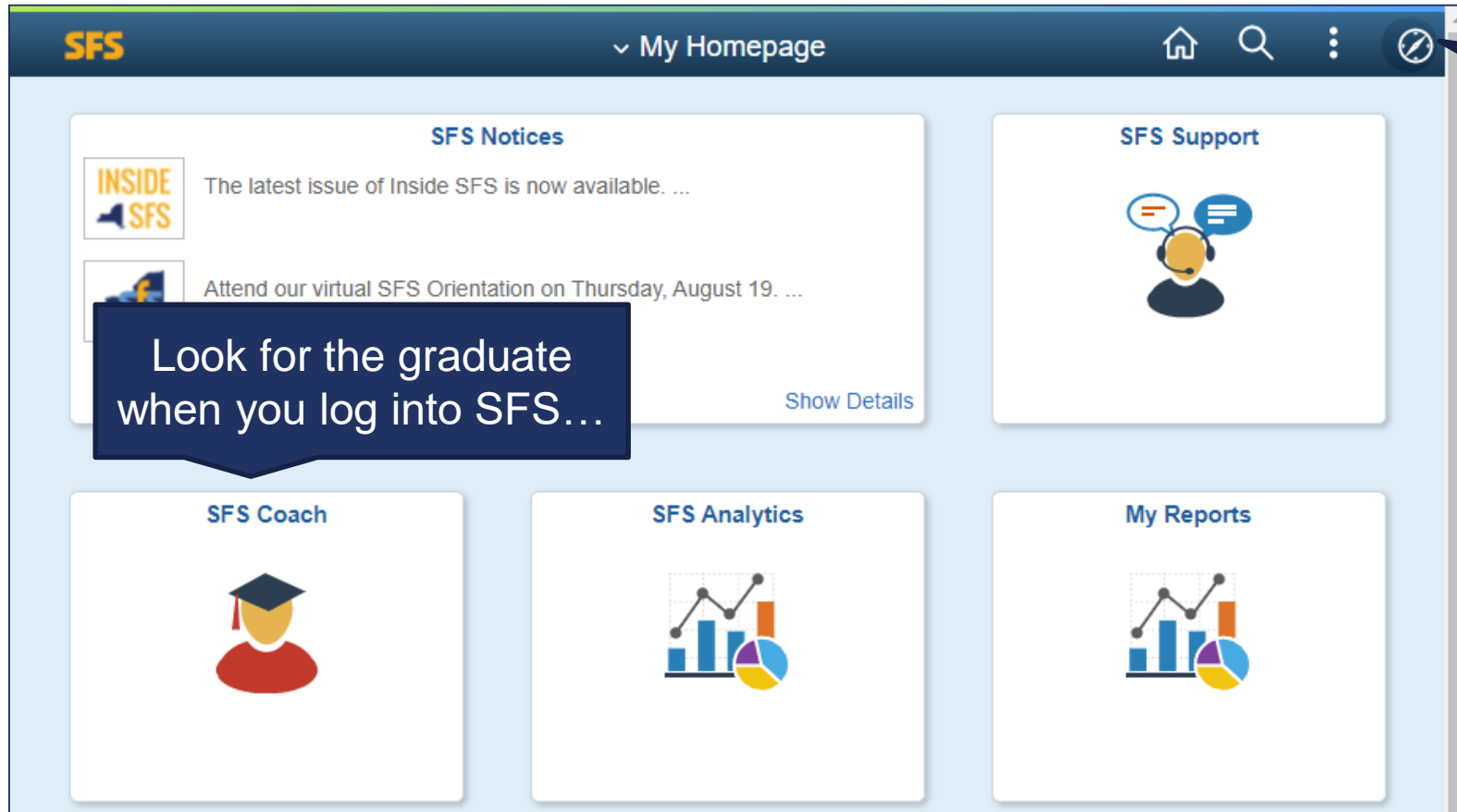
Help When You Need It

SFS Coach – Overview

- SFS Coach contains the core, foundational training for new and experienced SFS users.
- SFS Coach is available to all individuals with an SFS agency portal login.
- Train while you work:
 - Keep SFS Coach open in a separate tab while you continue your work in SFS.
- The SFS Coach repository includes over 1000 topics and materials.

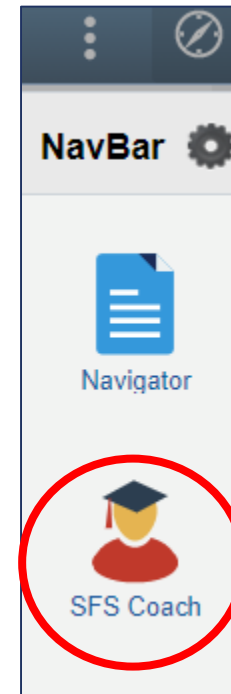


SFS Coach – Available from Anywhere in SFS



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

Look for the graduate when you log into SFS...



SFS Coach – Search Page

The screenshot shows the SFS Coach Search interface. At the top, there is a dark blue header with the text "SFS Coach Search" and navigation icons for home, search, menu, and refresh. Below the header, there are links for "New Window" and "Personalize Page". The main content area is titled "SFS Coach - User Learning Center" and contains a link for "Getting Started with SFS Coach". Below this is a section titled "Search Trainings - Access SFS user training and materials". This section contains three search filters: "Process Area", "Training Material", and "Training Type", each with an information icon (i) and a search icon (magnifying glass). To the right of these filters is a "Keyword(s)" search field with an information icon (i) and a "Search" button with an information icon (i). A callout box points to the "Search" button, stating "Click the magnifying glass for a list of options to search by." Another callout box points to the information icons on the filters, stating "Not sure how to get started? Click the blue 'i' information button for a description of the search field." A third callout box points to the "Getting Started with SFS Coach" link, stating "Click this link to watch a video about SFS Coach".

SFS Coach Search

New Window | Personalize Page

SFS Coach - User Learning Center

Getting Started with SFS Coach

Search Trainings - Access SFS user training and materials

Process Area *i* [Search Icon]

Training Material *i* [Search Icon]

Training Type *i* [Search Icon]

Keyword(s) *i* [Search Icon]

Search *i*

Leaving all fields blank brings back all results; additional criteria returns more specific results











Click this link to watch a video about SFS Coach

Click the magnifying glass for a list of options to search by.

Not sure how to get started? Click the blue "i" information button for a description of the search field.

SFS Coach – A Multimedia Resource

- Did you know that SFS Coach includes job aids, training videos, PowerPoint presentations, reference materials, 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.

| | Process Area | Popularity | Training Material | Notes | Trn Type |
|----|--------------|------------|--|--|---------------------|
| 1 | SFS | SFS | ! SFS_Newsletter_2022_February | SFS Newsletter - February 2022  | SFS EVENT |
| 2 | SFS | 68.4% | + Statewide Financial System 205 | Information that will enable you to sign in and sign out of SFS. Once signed in to  | SELF-PACED TRAINING |
| 3 | SFS | 62.1% | + Statewide Financial System 101 | Foundational understanding of the Statewide Financial System (SFS). This course  | SELF-PACED TRAINING |
| 4 | SFS | 64.0% | + JAA-SFS205-007 | Changing Your Password  | JOB AID |
| 5 | SFS | 53.9% | + JAA-SFS205-012 | Accessing SFS Analytics from the SFS Homepage  | JOB AID |
| 6 | SFS | 52.7% | + JAA-SFS205-002 | Personalizing Your SFS Homepage  | JOB AID |
| 7 | SFS | 52.3% | + JAA-SFS205-001 | Using the SFS Homepage and Features  | JOB AID |
| 8 | SFS | 51.7% | + JAA-SFS205-011 | Using Worklists  | JOB AID |
| 9 | SFS | 53.3% | + Featured_Reports_Listing | This document provides a listing of commonly used SFS reports which are grouped  | REPORT |
| 10 | SFS | 57.1% | + Orientation_to_SFS | ...ort options,  | SFS EV |

A description of the resource

The training type (or type of material)

SFS Coach – Excel Tools & Templates

- Excel tools and templates are available directly in SFS Coach.
 - This includes Excel-to-CIs, Excel Uploads, and Excel Templates.
- These tools and templates are all associated with the **Training Type of Resource Tool.**

Search Trainings - Access SFS user training and materials

| | | |
|-------------------|----------------------|----------------------|
| Process Area | <input type="text"/> | <input type="text"/> |
| Training Material | <input type="text"/> | <input type="text"/> |
| Training Type | RESOURCE TOOL | |

Search the **Resource Tool** Training Type for Excel Tools & Templates

New to SFS Coach: Search Enhancements

- Improvements have been made to the SFS Coach Search page:
 - Keyword searches will be more efficient, reducing the amount of time needed to find training and reference materials.
 - Key training and reference material relevant to your search will be promoted to the top of the search results with an exclamation point (!) in front of the title.

! SFS_Newsletter_2022_February

- Popular training and reference material relevant to your search results will be designated with a plus sign (+) in front of the title.

+ Statewide Financial System 205

- The list of promoted (!) and popular (+) training and reference materials will be kept current as new or updated materials are published and searches are performed by other users.



SFS Coach Demonstration



SFS Support

SFS Support: Help Desk

- **The SFS Help Desk provides SFS user support to Agency staff.**
 - Personalized support and answers to agency questions.
 - Ready to provide immediate support or, when issues are complex, research questions through subject matter experts.

- **Single point of contact for:**
 - NYS Agencies, and their technical team members.
 - New York State vendors enrolled in the SFS.

- **Contact the Help Desk by phone, email, or directly through SFS, using the SFS Support tile.**

**The SFS Help Desk is
Open Monday-Friday**

8:00AM - 5:00PM

**Call (518) 457-7737 or
(877) 737-4185 toll-free**

helpdesk@sfs.ny.gov



Help Desk Communication and Responses

- Communicating with the SFS Help Desk
 - Please remember to provide all updated contact information in the original Ticket Request Wizard through SFS, or via email, so the Help Desk can contact you.
 - Please include as many details in your ticket as possible, including:
 - SFS User ID
 - Name of the page you were on when encountering the issue
 - Impacted transaction IDs
 - Screenshots of the page you are experiencing trouble
 - Updated user contact information to ensure the SFS Help Desk has the information required to assist you
 - After contacting the Help Desk by phone or email, you will receive a response from “nyoscprod@service-now.com”.

Getting Help – Using the SFS Support Tile

The screenshot shows the SFS My Homepage dashboard. At the top left is the SFS logo. The main navigation bar includes a dropdown menu for "My Homepage" and utility icons for home, search, and user profile. The dashboard features several tiles: "SFS Notices" with a warning icon and text about COVID-19 and a newsletter; "SFS Analytics" with a bar and line chart icon; "SFS Coach" with a graduation cap icon; "SFS Support" with a headset icon, which is highlighted with a red border; and "My Reports" with a bar and line chart icon. A "Show Details" link is located below the SFS Notices tile.



SFS Ticket Request Wizard Demonstration

Questions and Answers



Appendix

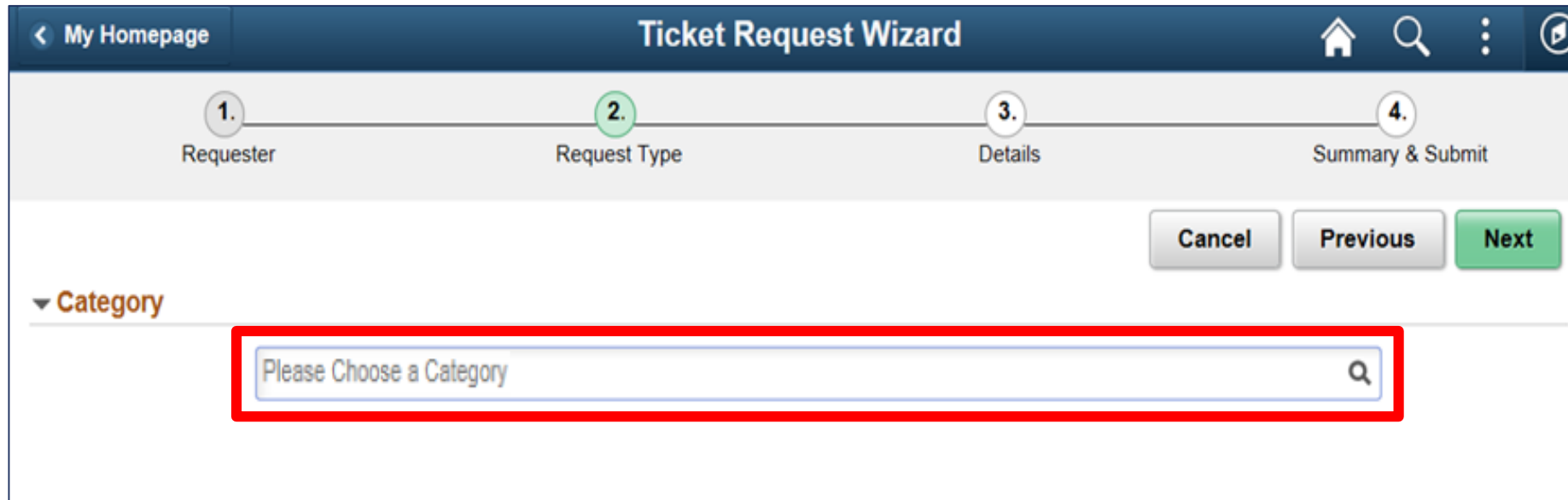
Getting Help – Ticket Request Wizard

- The Ticket Request Wizard will automatically populate your name, phone number, and email (if it exists) in the user profile.
- Once entered or confirmed, click **Next**.
- If the contact information that auto-populates is incorrect, please note the correct information in the Description on the subsequent Details page.

The screenshot displays the 'Ticket Request Wizard' interface. At the top, there is a navigation bar with a back arrow, 'My Homepage', the title 'Ticket Request Wizard', and icons for home, search, and a menu. Below the navigation bar is a progress indicator with four steps: 1. Requester (highlighted in green), 2. Request Type, 3. Details, and 4. Summary & Submit. A green 'Next' button is highlighted with a red border. Below the progress indicator, the 'Requested By' section contains three input fields: 'Name' with the placeholder 'Last Name, First Name', '*Phone' with an empty field, and '*Email ID' with the placeholder 'Your Email Address'.

Getting Help – Ticket Request Wizard

- The **Request Type** page will provide users with the ability to choose a category for the request.
- Some categories have Sub-category options.



The screenshot displays the 'Ticket Request Wizard' interface. At the top, there is a navigation bar with a back arrow, 'My Homepage', the title 'Ticket Request Wizard', and icons for home, search, and a menu. Below the navigation bar is a progress indicator with four steps: 1. Requester, 2. Request Type (highlighted with a green circle), 3. Details, and 4. Summary & Submit. To the right of the progress indicator are three buttons: 'Cancel', 'Previous', and 'Next'. Below the progress indicator, there is a dropdown menu labeled 'Category' with a downward arrow. Below the dropdown menu is a search input field with the placeholder text 'Please Choose a Category' and a search icon on the right. The search input field is highlighted with a red border.

Getting Help – Ticket Request Wizard

The **Details** page provides space to enter a description, select the impact and urgency of your request, and add an attachment.

Include important information in the description:

- SFS User ID,
- Name of the page you were on when encountering the issue,
- Impacted transaction IDs, or
- Updated user contact information to ensure the SFS Help Desk has the information required to assist you.

The screenshot displays the 'Ticket Request Wizard' interface. At the top, there's a navigation bar with 'My Homepage' and 'Ticket Request Wizard'. Below it, a progress indicator shows four steps: 1. Requester, 2. Request Type, 3. Details (highlighted), and 4. Summary & Submit. Navigation buttons 'Cancel', 'Previous', and 'Next' are visible. The 'Details' section includes a text area for the description, 'Impact' and 'Urgency' dropdown menus, and an 'Add Attachments' button. The 'Attachments' section shows '1 row' and '+' and '-' buttons.

Getting Help – Ticket Request Wizard

The **Summary and Submit** page allows users to verify the information and attachments entered, and to click the **Submit** button.

The screenshot displays the 'Ticket Request Wizard' interface, specifically the 'Summary & Submit' step. The progress bar at the top shows four steps: 1. Requester, 2. Request Type, 3. Details, and 4. Summary & Submit. The 'Submit' button is highlighted with a red box. The form contains the following information:

- Requester Information:**
 - Name 1: Doe, Jane
 - Email ID: test123@sfs.ny.gov
 - Phone: 518/555-5555
- Request Summary:**
 - Category: I'm having trouble with a transaction or system function
 - Sub Category: Requisition or Purchase Order
 - Urgency: Low
 - Impact: Single User
 - Description: This is a test - no need to create an incident
- Attachments:**
 - 1 row
 - View Attachment