



SFS Coach Training and Support

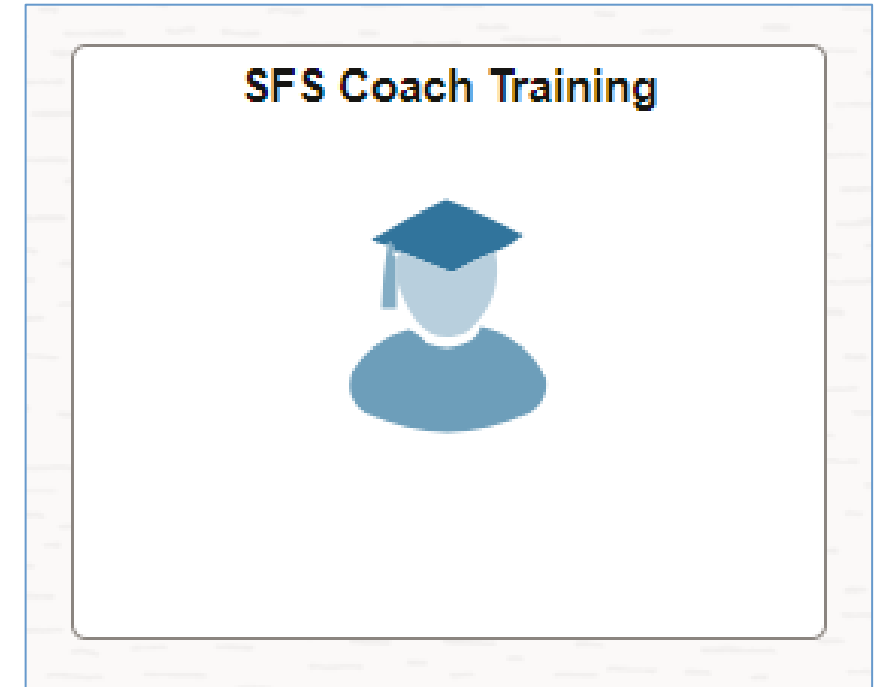
Agenda

- SFS Coach Training
- SFS Support
- Live Demonstrations

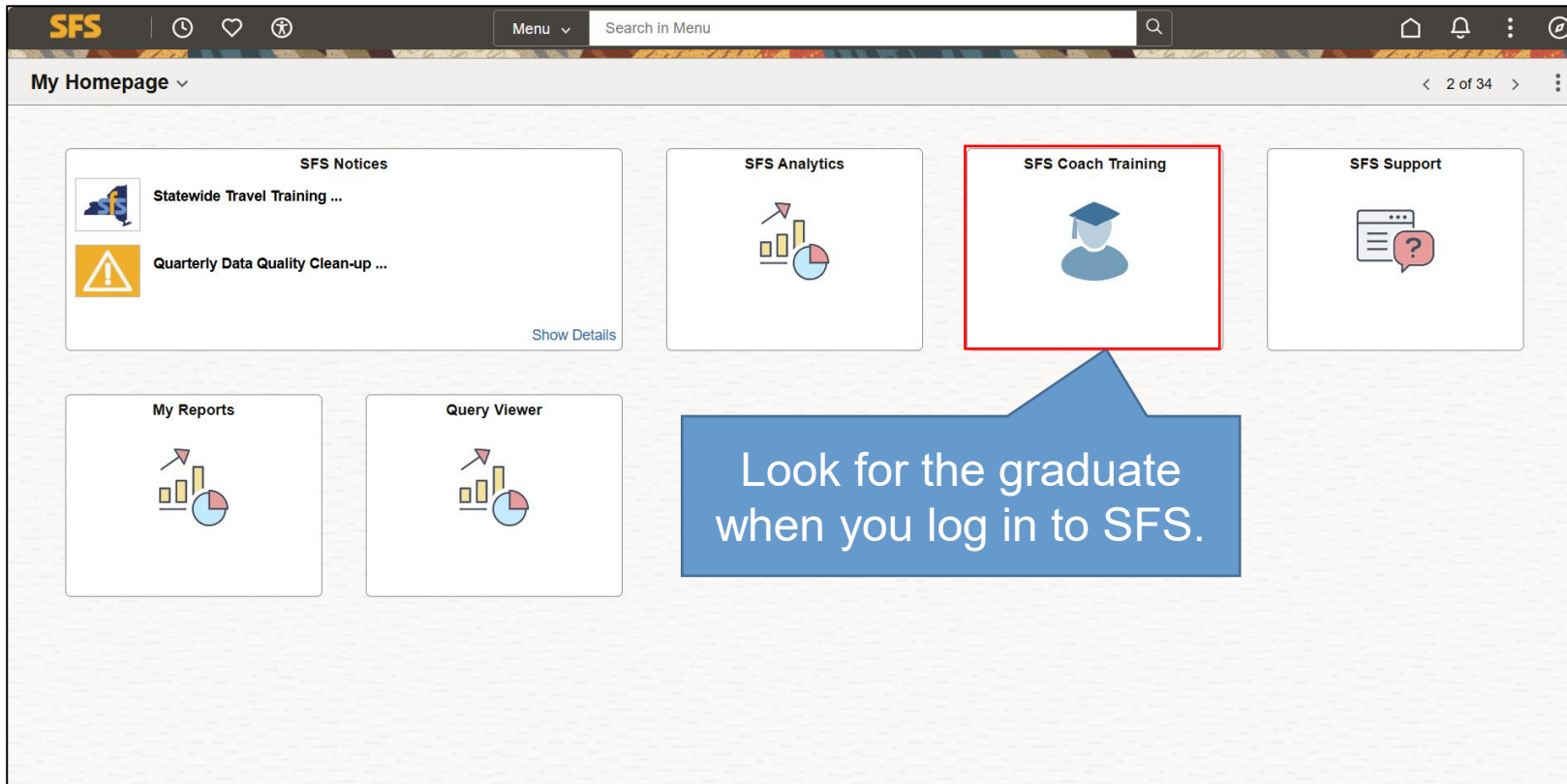
SFS Coach Training

SFS Coach Training – Overview

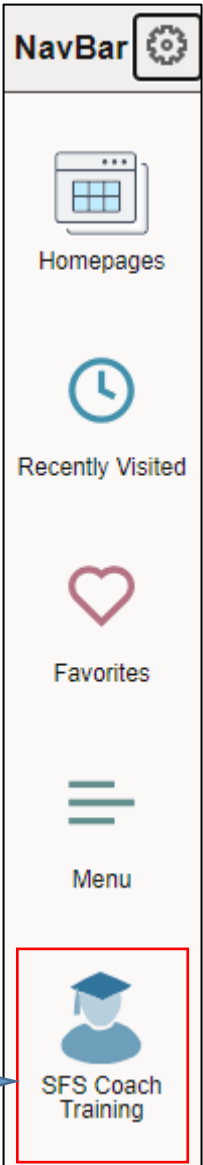
- SFS Coach Training contains the core, foundational training for new and experienced SFS users.
- SFS Coach Training is available to all individuals with an SFS Agency Portal login.
- Train while you work:
 - SFS Coach Training will open in a separate tab while you continue your work in SFS.
- The SFS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



SFS Coach Training – Available from Anywhere in SFS



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

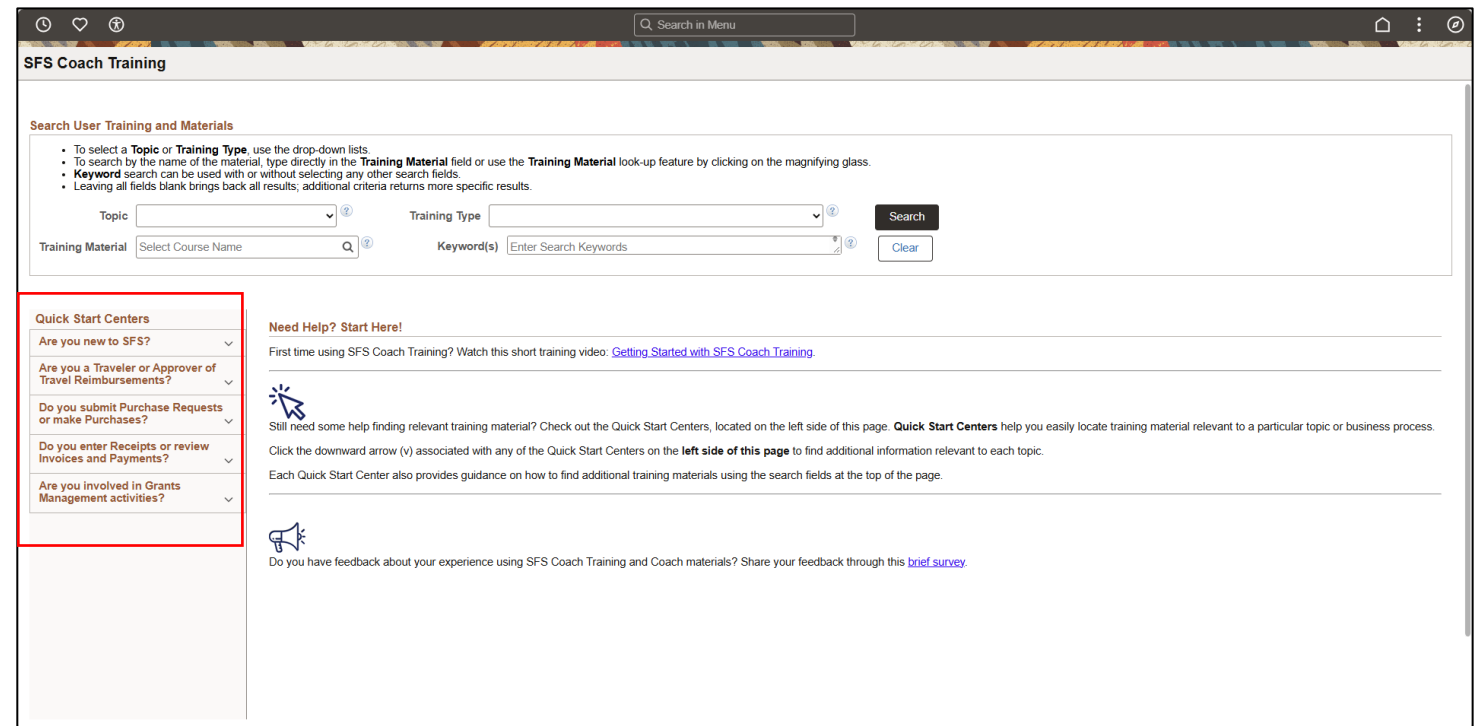


SFS Coach Training

- The SFS Coach Training Search section includes tips on how to use the search criteria to find what you are looking for.
- There are four different ways to search for training:
 - Topic
 - Training Material
 - Training Type
 - Keyword(s)
- You can use more than one search field to narrow down the results displayed in SFS Coach Training (i.e., selecting the Accounts Payable Topic **and** the Job Aid Training Type).
- Different training material formats are available.

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.



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.

Topic ↑↓	Popularity ↑↓	Training Material ↑↓	Notes ↑↓	Training Type ↑↓
Accounts Payable	NR	Vouchers Built By SFS	Voucher Build is a nightly batch process within the SFS which automatically creates vouchers originating from transactions entered into other SFS modules. Vouchers built	Presentation
Accounts Payable	NR	1099 Withholding Changes - Webex	Recorded Presentation of the 1099 Withholding Changes.	Video
Accounts Payable	NR	NYS Agency Vendor Information Session Recording	This recording from the 2025 NYS Agency Information Session covers topics such as vendor functionality in the SFS Vendor Portal and agency best practices for vendor support.	Video
Accounts Payable	NR	P2P Process Overview Video	This video provides an overview of the Procure-to-Pay (P2P) process that is applicable to agencies statewide.	The type of material
Accounts Payable	NR	Automated Debt Service Upload Template	Used to stage Recurring Voucher Contract payments. Specific to automated debt service payments only. Users populate the file and upload into the SFS.	Resource Tool
Accounts Payable	NR	Vendor Multiple Payment Reconciliation	A description of the resource on how to reconcile multiple vendor payments using check or EFT.	Reference Guide

SFS Support

SFS Help Desk

- The Help Desk is a single point of contact for:
 - NYS agencies and their technical team members
 - NYS vendors
- The Help Desk can provide assistance with issues such as:
 - SFS transaction processing assistance or errors
 - SFS system or functional issues
- The Help Desk **cannot** provide assistance with issues such as:
 - Roles, login access, password resets (work with your ASA)
 - Address and supervisor changes (work with your EDA)
 - Policy or agency-specific procedure (refer to the GFO, OSC Travel Manual, Budget Bulletins, or your supervisor)
- Help Desk incident responses will come from nyoscprod@service-now.com.

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

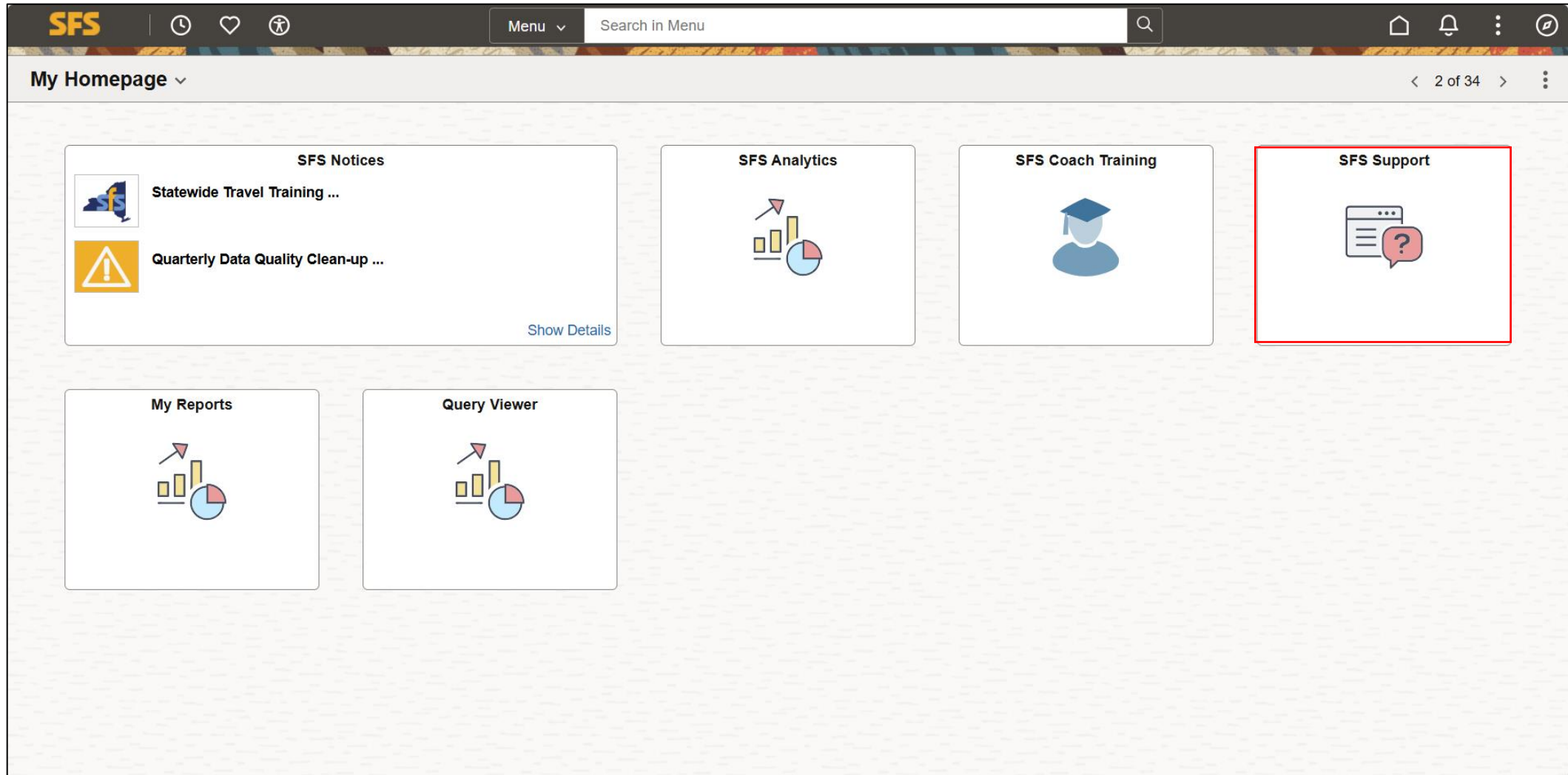
Call (518) 457-7737

helpdesk@sfs.ny.gov

SFS Support



Getting Help



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.

SFS Help Desk Phone Menu

- The SFS Help Desk has updated the phone menu to include more specific options to provide proper assistance.

- What you need to know:
 - The Help Desk phone number has not changed.
 - New menu options are available, for vendors, agencies, and individuals with questions about 1099s.
 - Press 2 to identify yourself as someone calling from an agency.
 - After pressing 2, listen for additional options to get you routed to the right person to assist.
 - A new callback feature allows you to provide your phone number and hang up, while keeping your spot in line.

Customer Communities

- To stay connected with us, subscribe to a Customer Community.
- Customer Communities are self-identified SFS users who work with one or more transaction areas in SFS, who sign up for email updates related to their SFS work, including:
 - System updates
 - Training updates
 - Invites to workshops/WebEx calls
- [Subscribe to SFS Communications](#)

SFS Orientation

- SFS hosts a live, virtual Orientation session every month. The session is intended for individuals who are newer to SFS and focuses on SFS resources and support options. In the session, participants will learn:
 - What resources are available
 - Where to access module specific training
 - Who to contact for system-related questions
 - How to stay connected with SFS communications
- Details about each monthly Orientation session are published at least one week before the session, on the Notices tile on My Homepage.
- The Orientation presentation and video recording are also available in SFS Coach.

SFS Coach Training & SFS Support Tile Demonstrations

Questions and Answers