# SFS Analytics Reports to Monitor Budgets and Disbursements

November 2, 2022

# Agenda

- Introduction to SFS Analytics

- DW620 - Appropriation Budget Overview

- DW809 - Documents Posted to General Ledger

- Questions & Answers

**Note:** Please type questions into the Webex chat window at any time during today's presentation.
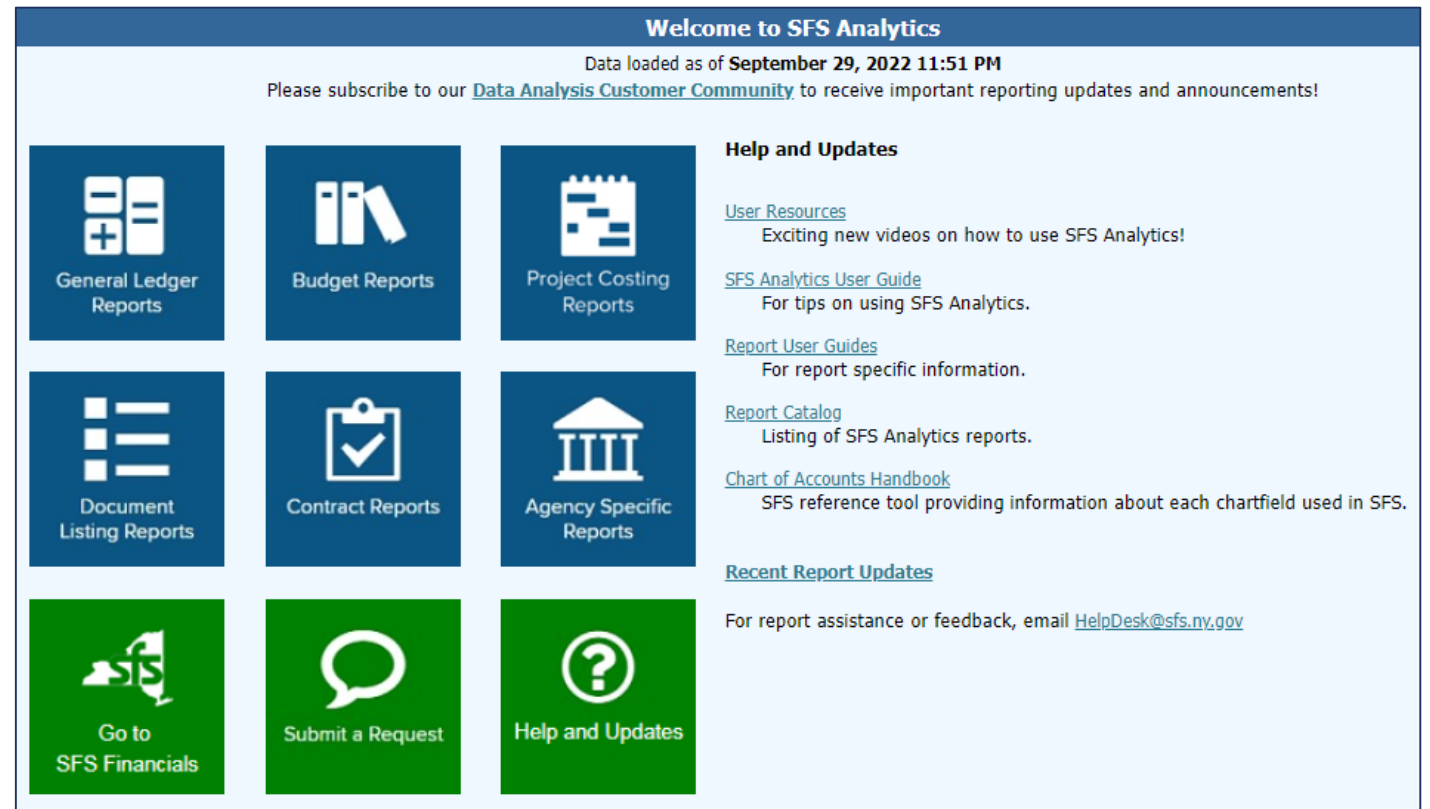
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# Introduction to SFS Analytics

# 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 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

*SFS Analytics landing page*

# DW620 - Appropriation Budget Overview

# DW620 - Appropriation Budget Overview

- Available under the **Budget Reports** section of SFS Analytics.

- Used to monitor Appropriation Activity, including encumbrances, expenditures, cash ledger disbursements, and more.

- Report User Guide available on the Help tab.

Demonstration:

Using the DW620

Contents subject to change.

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# DW809 - Documents Posted to General Ledger

# DW809 - Documents Posted to General Ledger

- Available under the **Document Listing Reports** section of SFS Analytics.

- Used to view transactions posted to the General Ledger for any range of dates.

- Report User Guide available on the Help tab.

# Demonstration:

# Using the DW809

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# Resources & Support

- **SFS Analytics Resources**
  - Videos
  - User Guides
  - Report Catalog

- **SFS Help Desk**
  - [helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov)
  - SFS Support tile
  - 518-457-7737 or 877-737-4185 (toll-free)



**Welcome to SFS Analytics**
Data loaded as of **September 29, 2022 11:51 PM**
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.ny.gov

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# 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.

# Questions and Answers

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