# 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.

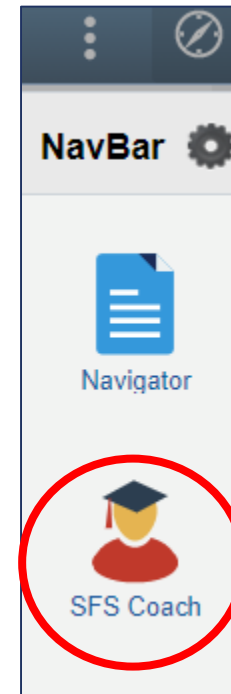- The SFS Coach repository includes over 1000 topics and materials.

SFS Coach

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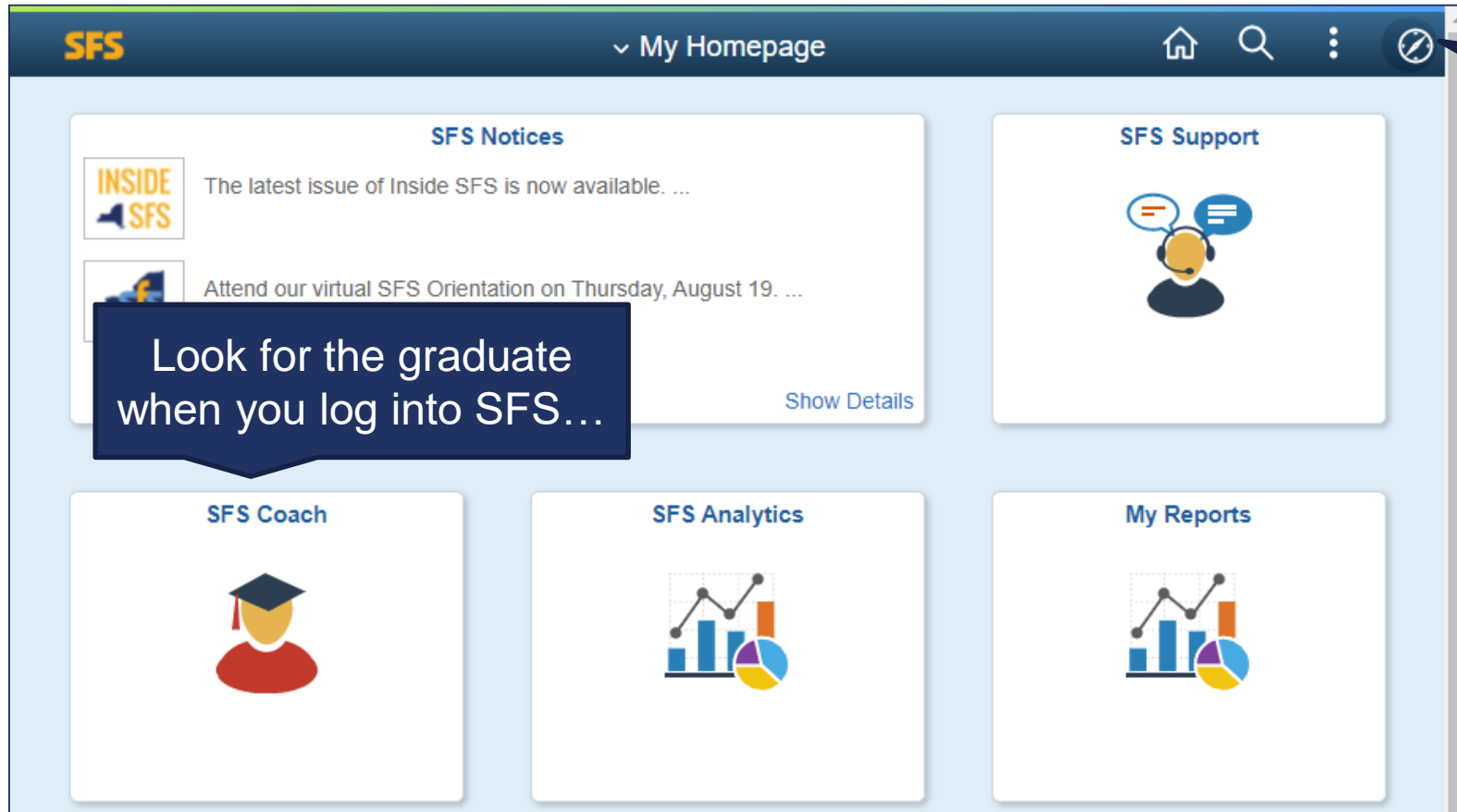
Or, click the NavBar to access Coach from any page in SFS.

Look for the graduate when you log into SFS…

SFS Coach – Search Page

SFS Coach Search

New Window | Personalize Page

Click this link to watch a video about SFS Coach

SFS Coach - User Learning Center

Getting Started with SFS Coach

Search Trainings - Access SFS user training and materials

Keyword(s) ⓘ

Process Area ⓘ 🔍

Training Material ⓘ 🔍

Training Type ⓘ 🔍

ⓘ Search

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

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
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	REPOR
10	SFS	57.1%	+ Orientation_to_SFS	ort options,	SFS EV

A description of the resource

The training type (or type of material)

Contents subject to change.

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

Contents subject to change.

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.

Contents subject to change.

SFS Coach Demonstration

SFS Support

SFS Support: Help Desk

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

- **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.**

SFS Support

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

Contents subject to change.

SFS Ticket Request Wizard Demonstration

Questions and Answers

Contents subject to change.
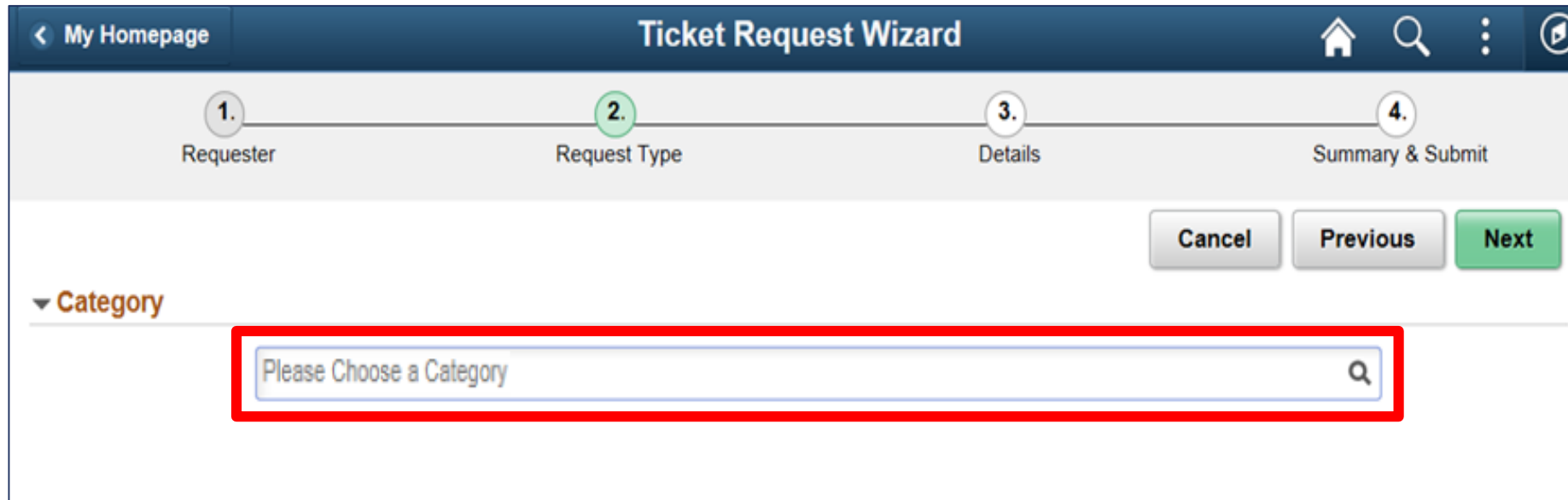
STATEWIDE
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SYSTEM

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.

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.

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.

Contents subject to change.

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.