



SFS Analytics Reports to Support Project Management in SFS

Agenda

- Introduction to SFS Analytics
- DW905 – Billable Project Activity
- DW706 – Capital Project Transactions with Supplemental Data
- Questions and Answers

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

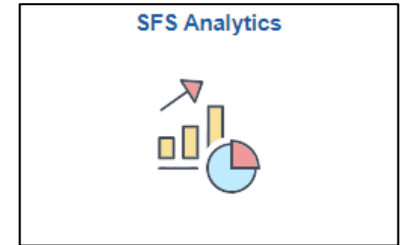


Introduction to SFS Analytics

Speaker Name

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



Welcome to SFS Analytics

Data loaded as of **June 29, 2023 1:24 AM**

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

SFS Analytics landing page



DW905 – Billable Project Activity

DW905 – Billable Project Activity

- Available under the Project Costing Reports section of SFS Analytics.
- Supports agency projects with the agency Project Costing Business Unit (PCBU) and their associations to the federal grant/customer contract.
- Provides data enabling agencies to analyze their federal grants and other billable projects, regardless of funding source.
- Report User Guide available on the Help tab.

The screenshot shows the 'DW905 - Billable Project Activity' report interface. At the top, there is a navigation bar with 'Catalog', 'Dashboards', and 'Signed In As'. Below this, the report title 'DW905 - Billable Project Activity' and a 'Help' tab are visible. The main content area is titled 'Project Financial Activity' and includes a timestamp '6/29/2023 2:47:40 PM DW905' and a 'SFS Analytics Home' button. A message states: 'At least one of the following must be selected to run the report: Award Number, Contract Number, Customer ID, CFDA, Project ID'. Below this, there are several dropdown menus for selection: 'Award Number', 'Project ID', 'Selected Periods - Start' (set to '2024 - Period 01 - April'), 'CFDA', 'Activity ID', 'Selected Periods - End' (set to '2024 - Period 03 - June'), 'Customer ID', 'Project Business Unit', 'Contract ID', and 'GL Business Unit'. 'Apply' and 'Reset' buttons are located at the bottom right. A second message at the bottom of the form reads: 'At least one of the following must be selected to run the report: Award Number, Contract ID, Customer ID, CFDA, Project ID'.

Demonstration: Using the DW905



DW706 – Capital Project Transactions with Supplemental Data

DW706 – Capital Project Transactions with Supplemental Data

- Available under the Project Costing Reports section of SFS Analytics.
- Shows capital and non-capital projects including activities, locations, supplemental data, and bonding information needed for financial reporting.
- Report User Guide available on the Help tab.

DW706 - Capital Project Transactions with Supplemental Data

Project Header Statewide Help

6/29/2023 3:25:28 PM DW706

Capital Project Transactions with Supplemental Data

SFS Analytics Home

At least one of the following must be selected to run the report along with Business Unit: Project ID, Activity ID, Project Type, Agency Project Reference, Accounting Date From and Accounting Date To

* Project Business Unit --Select Value--	Accounting Date From >= 04/01/2022	Bonding Scope --Select Value--	* Department Tree KK_SW_DEPT - KK Department Tree	* Fund Tree RPT_SW_FUND_BUDG - SW Budget Fi	* Program Tree KK_SW_PRGM - KK Program Tree	* Account Tree KK_SW_ACCT - KK Account Tree
Project ID --Select Value--	Accounting Date To <= 03/31/2023	Useful Life --Select Value--	Department Level 2 --Select Value--	Fund Level 2 --Select Value--	Program Level 2 --Select Value--	Account Level 1 --Select Value--
Activity ID --Select Value--	Obligation Date Between	Bond Eligibility --Select Value--	Transactional Department --Select Value--	Fund Level 3 --Select Value--	Program Level 3 --Select Value--	Account Level 2 --Select Value--
Project Type --Select Value--	Payment Date From >=	REDC Region --Select Value--	Project Location --Select Value--	Fund Level 4 --Select Value--	Program Level 4 --Select Value--	Account Level 3 --Select Value--
Project Category --Select Value--	Payment Date To <=	Facility/Campus --Select Value--	City --Select Value--	Fund Level 5 --Select Value--	Program Level 5 --Select Value--	Account Level 4 --Select Value--
Agency Project Reference --Select Value--	Checkbox valid when using Payment Date <input type="checkbox"/> Include GL Journals by Posted Date	Climate Change Project --Select Value--	County --Select Value--	Transactional Fund --Select Value--	Transactional Program --Select Value--	Account Level 5 --Select Value--
Project Group --Select Value--	GL Business Unit --Select Value--	Capital Purpose Key --Select Value--	Zip Code --Select Value--			Account Level 6 --Select Value--
Project Status Active	Budget Reference --Select Value--	Bond Reimbursement Status --Select Value--	Region 1 --Select Value--			Account Level 7 --Select Value--
	DOB Bonding Program --Select Value--		Region 2 --Select Value--			Transactional Account --Select Value--

Apply Reset

At least one of the following must be selected to run the report along with Business Unit and Accounting Date Range : Project ID, Activity ID, Project Type, Agency Project Reference

Demonstration: Using the DW706

Resources and Support

- SFS Analytics Resources

- Videos
- User Guides
- Report Catalog

- SFS Help Desk

- helpdesk@sfs.ny.gov
- SFS Support Tile
- 518-457-7737 or 877-737-4185 (toll-free)

The screenshot displays the SFS Analytics dashboard interface. At the top, it says "Welcome to SFS Analytics" and "Data loaded as of June 29, 2023 1:24 AM". Below this, there is a notification: "Please subscribe to our [Data Analysis Customer Community](#) to receive important reporting updates and announcements!". The dashboard is organized into a grid of report categories and support resources. The report categories include: General Ledger Reports, Budget Reports, Project Costing Reports, Document Listing Reports, Contract Reports, and Agency Specific Reports. At the bottom of the grid are three action buttons: "Go to SFS Financials", "Submit a Request", and "Help and Updates". To the right of the grid, there is a "Help and Updates" section with links to "User Resources", "SFS Analytics User Guide", "Report User Guides", "Report Catalog", and "Chart of Accounts Handbook". At the bottom of this section, it says "For report assistance or feedback, email HelpDesk@sfs.ny.gov".

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.

SFS

User Resources

Click on a link to view the video/training.

Before using these videos, [click here](#)

Video Walkthroughs

Reports

[DW620 Lapsing Appropriations and Carryout Spending \[05:08\]](#)
Find lapsing appropriations and carryout spending.

[DW128 - Contract Dashboard \[06:46\]](#)
Contract disbursements, encumbrances, and vouchers.

SFS Analytics Basics

[Introduction to SFS Analytics \[07:35\]](#)
How to use SFS Analytics.

[SFS Analytics Help Overview \[03:30\]](#)
Using SFS Analytics help.

Tips and Tricks Series

[Running a Report - Prompts, View, Drill-downs \[05:29\]](#)

[Adding, Moving, and Deleting Columns \[02:15\]](#)

[Working With Customizations \[04:57\]](#)

[Printing, Saving and Exporting \[04:01\]](#)

Self-Paced Trainings

[SFS220 - Getting Started with SFS Analytics](#)
How to use SFS Analytics

Recorded Workshops

[Workshop - February 6, 2019 \[01:09:58\]](#)

[Workshop - December 11, 2019 \[01:16:19\]](#)

Questions and Answers