



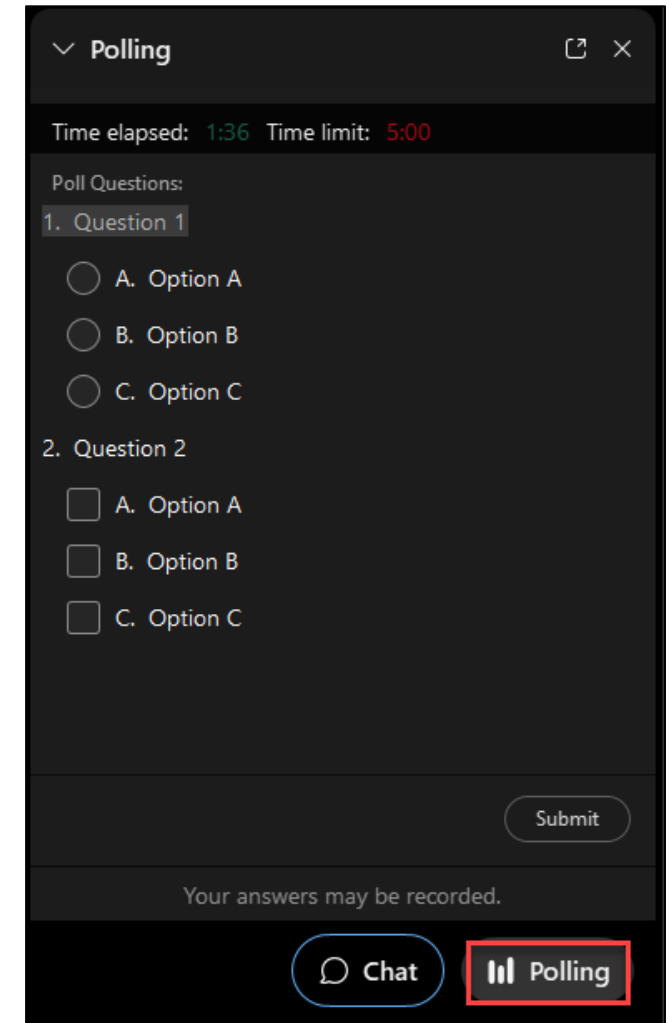
# SFS Coach Training and Support

# Agenda

- SFS Coach Training
- SFS Support
- Live Demonstrations

# Preliminary Polling Question

- A polling section displays within your Webex window. Answer the provided question and click the **Submit** button. If you are unable to view the polling section, select the **Polling** icon in the bottom right corner of the screen.

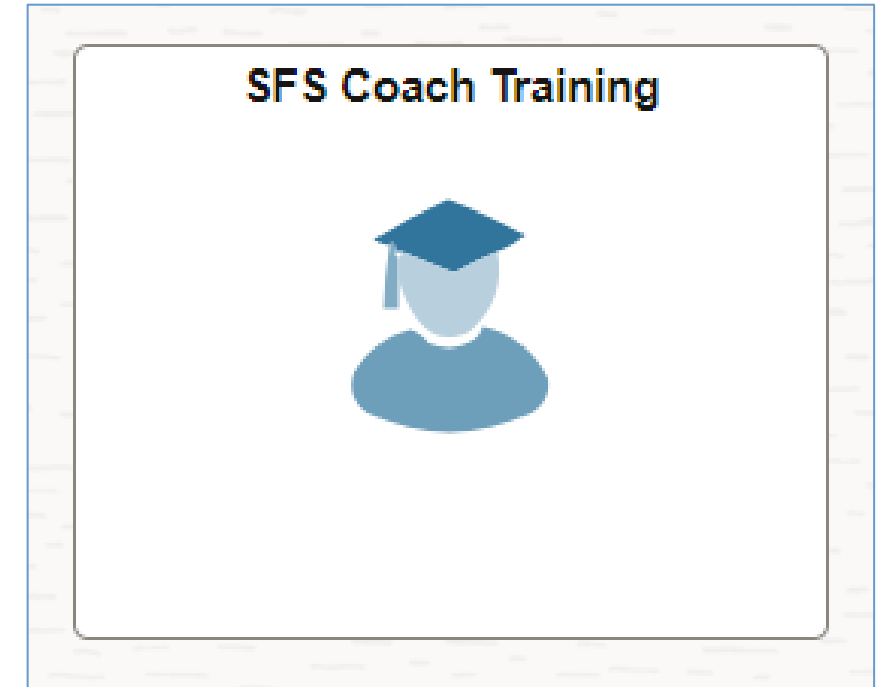


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# SFS Coach Training

# 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 topics and materials.



# SFS Coach Training – Available from Anywhere in SFS

The screenshot displays the SFS homepage interface. At the top, there is a header bar with the SFS logo, a clock icon, a heart icon, a 'Menu' dropdown, a search bar labeled 'Search in Menu', and navigation icons for home, notifications, and user profile. Below the header, the main content area is titled 'My Homepage' and contains several widget tiles: 'SFS Notices' (listing 'ABP Data Refresh ...' and 'New SFS Agency Support Guide ...' with a 'Show Details' link), 'SFS Support' (with a question mark icon), 'SFS Analytics' (with a bar and pie chart icon), 'My Reports' (with a bar and pie chart icon), and 'SFS Coach Training' (with a graduate icon, highlighted by a red border). A blue callout box points to the 'SFS Coach Training' tile with the text: 'Look for the graduate when you log in to SFS.' To the right of the main content is a vertical 'NavBar' containing icons for 'Homepages', 'Recently Visited', 'Favorites', 'Menu', and 'SFS Coach Training' (the latter highlighted with a red border). A second blue callout box points to the 'SFS Coach Training' icon in the NavBar with the text: 'Or click the NavBar to access SFS Coach Training from any page in SFS.'

# SFS Coach Training

- Search instructions are available in the SFS Coach Training Search section to provide clear direction on how to search for training material.
- 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, including Handbooks and Presentations.
  - SFS Coach Training also contains job aids, tools and templates to process transactions, quick reference guides, videos, and featured queries and report listings.

# 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, such as handbooks, job aids, and videos.
  - Each QSC also provides guidance on how to find additional training materials using the search fields in SFS Coach Training.

The screenshot displays the SFS Coach Training web application. At the top, there is a search bar labeled "Search in Menu". Below this, the page title "SFS Coach Training" is visible. The main section is titled "Search User Training and Materials" and contains instructions for using the search fields. Below the instructions are four search fields: "Topic" (a dropdown menu), "Training Type" (a dropdown menu), "Training Material" (a text field with a magnifying glass icon), and "Keyword(s)" (a text field with a magnifying glass icon). To the right of these fields are "Search" and "Clear" buttons. On the left side of the page, there is a sidebar titled "Quick Start Centers" which contains five links: "Are you new to SFS?", "Are you a Traveler or Approver of Travel Reimbursements?", "Do you submit Purchase Requests or make Purchases?", "Do you enter Receipts or review Invoices and Payments?", and "Are you involved in Grants Management activities?". Each link has a downward arrow icon. To the right of the sidebar, there is a section titled "Need Help? Start Here!" which includes a link to a training video, a link to a handbook, and a link to a survey.



# 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.

Search Results 137 rows

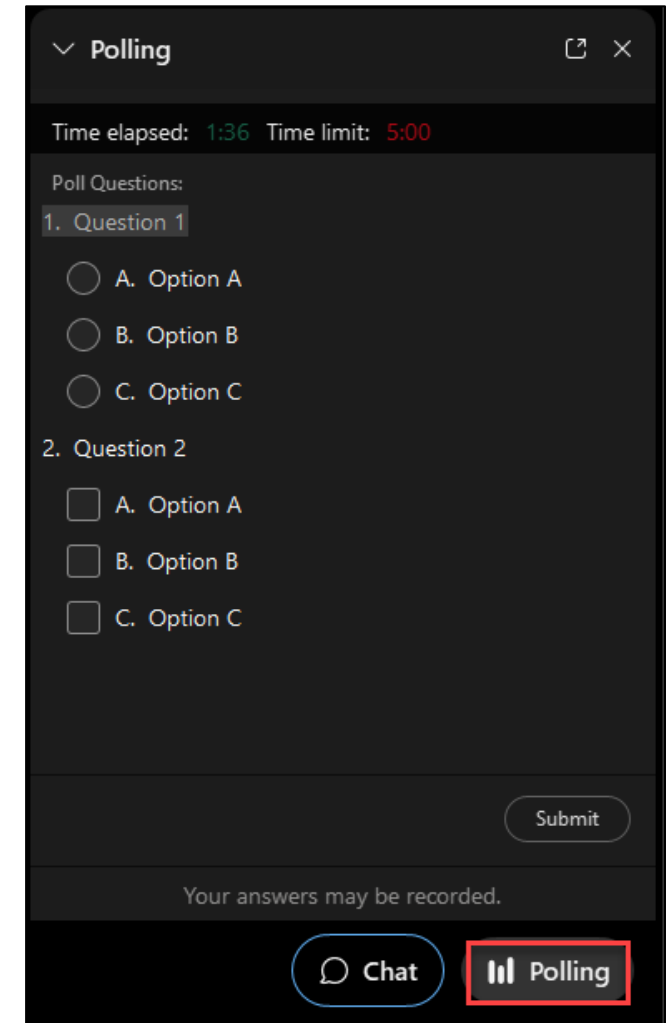
	Topic ↑↓	Popularity ↑↓	Training Material ↑↓	Notes ↑↓	Training Type ↑↓
1	Statewide Financial System	SFS	<a href="#">I Managed Access Reference Guide</a>	This reference guide provides a list of the specific business functions that can continue to be performed in SFS during <a href="#">Managed Access</a>	Reference Guide
2	Statewide Financial System	57.9%	<a href="#">+ Orientation_to_SFS</a>	This orientation session will familiarize users with SFS resources, support options, and show them how to stay <a href="#">SFS Coach Training</a>	SFS Event
3	Statewide Financial System	52.1%	<a href="#">+ Coronavirus_COVID-19_FAQs</a>	Coronavirus 2019 (COVID-19) Frequently Asked Questions	SFS Event
4	Statewide Financial System	51.2%	<a href="#">+ Training_for_Invoice_Reviewers</a>	This presentation from the 6/9/22 and 6/15/22 Invoice Reviewer training session, includes the following topics: <a href="#">Invoice Reviewer Training</a>	SFS Event
5	Statewide Financial System	52.9%	<a href="#">+ Getting Started in the Statewide Financial Syste</a>	The Statewide Financial System (SFS) is an online application, utilizing PeopleSoft as its foundational software platform, and <a href="#">Getting Started in the Statewide Financial System</a>	Handbook

A description of the resource

The type of material

# SFS Coach Training Polling Question

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# SFS Support

# SFS Help Desk

- Provides the first level of SFS user support to Agency staff.
- Single point of contact for:
  - New York State agencies, and their technical team members
  - New York State vendors and businesses seeking to become vendors
- Help Desk ticket responses will come from [nyoscprod@service-now.com](mailto:nyoscprod@service-now.com).

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

Call (518) 457-7737

[helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov)

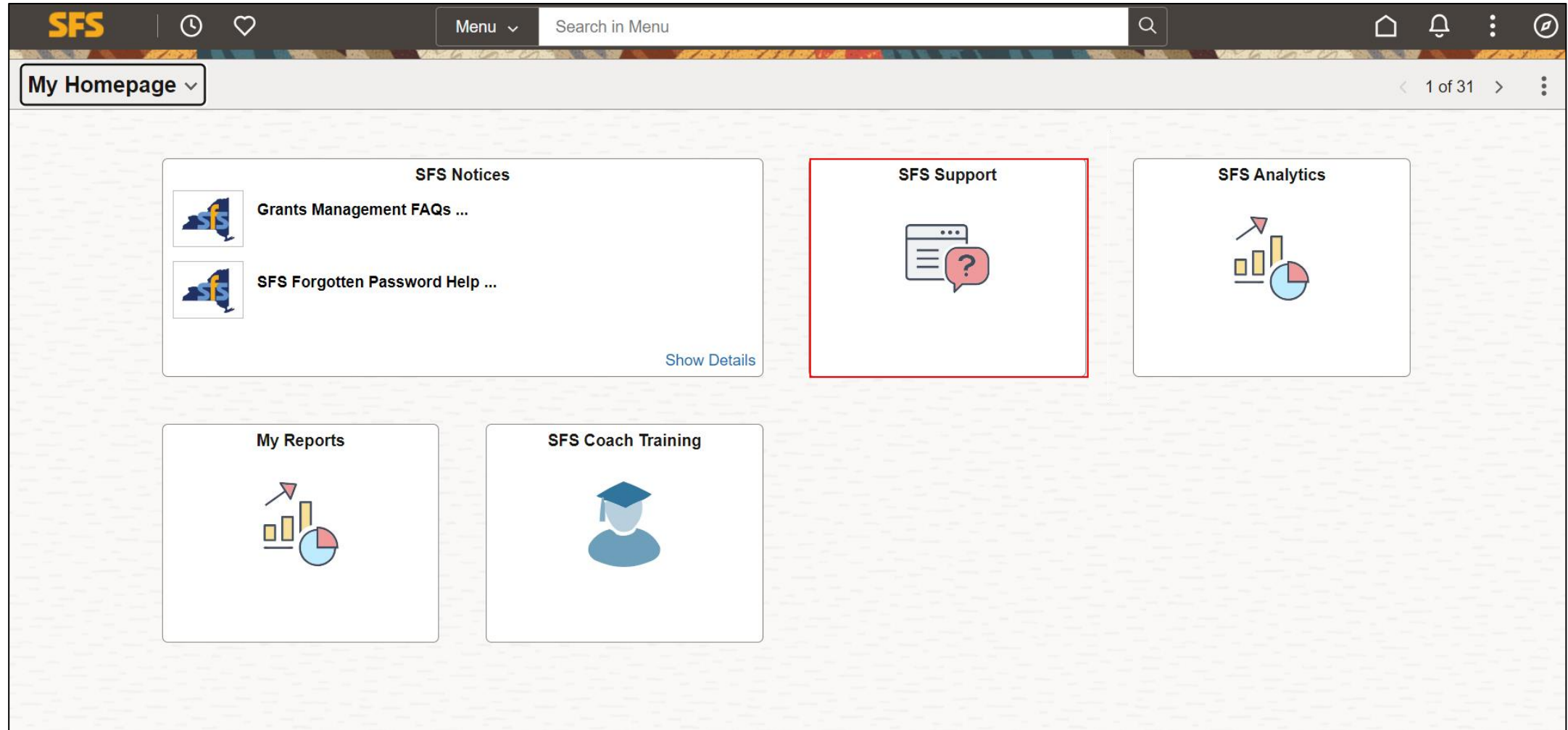
SFS Support



# 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.

# Getting Help



# 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

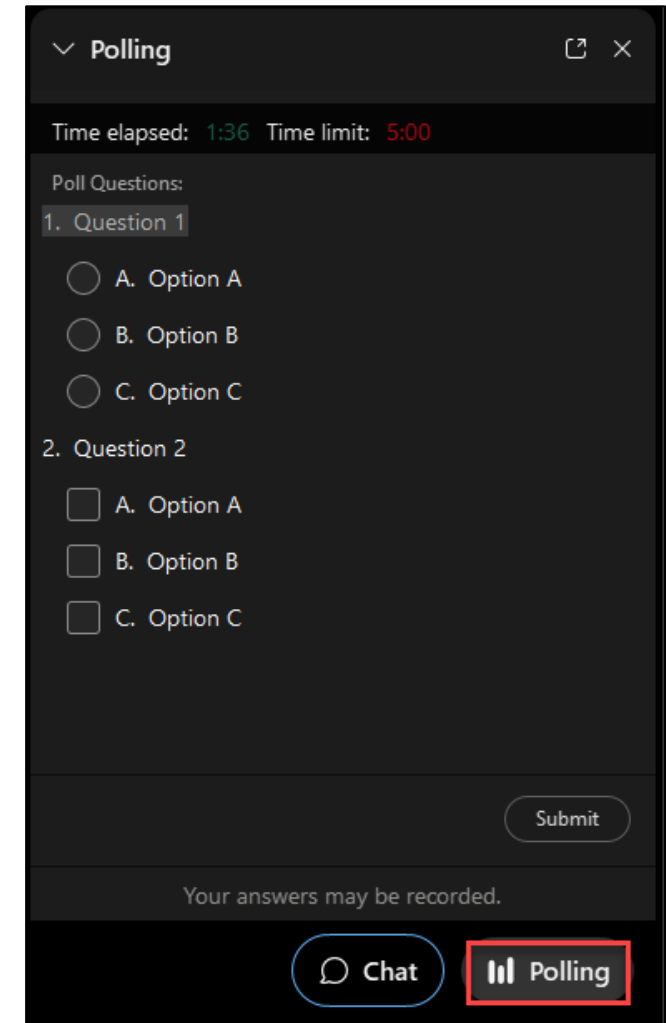
- SFS hosts a live, virtual Orientation session every month. The session is intended for individuals who are newer to SFS and focuses on SFS resources and support options. In the session, participants will learn:
  - What resources are available
  - Where to access module specific training
  - Who to 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

# Session Wrap Up Polling Questions

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# Questions and Answers