



SFS Reporting Tools

OSC Fall Conference 2025

Agenda

- SFS Financial Reports
- SFS Queries
- SFS Analytics
- Resources
- Questions and Answers

Session Objectives

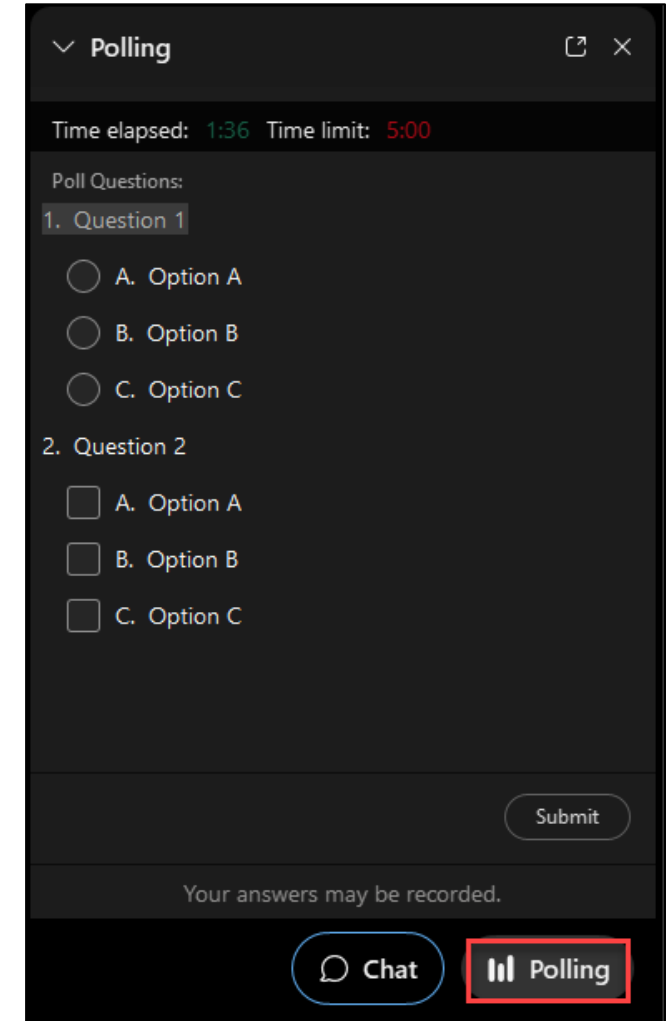
- In today's session, we will discuss the three tools to support your reporting needs in SFS:
 - SFS Financials Reports
 - SFS Queries
 - SFS Analytics
- After the session, attendees should understand the business purpose of each reporting tool, and when a specific tool could be most applicable.
- This session will also include live demonstrations of each reporting tool, including tips for using and running the tool.

SFS Reporting Tools

- SFS provides staff with the tools to support both day-to-day reporting needs and historical trends, and to assist with the maintenance and monitoring of your agency's finances and administrative duties.
- SFS reports and queries are resources to help staff use SFS efficiently and effectively, by giving insight and visibility on an agency's payments, expenditures, transaction workflow, and more.

Preliminary Polling Questions

- A polling section displays within your Webex window. Answer the provided questions 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.



The screenshot shows a 'Polling' window with a dark background. At the top, it says 'Polling' with a dropdown arrow and a close button. Below that, it shows 'Time elapsed: 1:36' and 'Time limit: 5:00'. The section is titled 'Poll Questions:' and contains two questions. 'Question 1' has three radio button options: 'A. Option A', 'B. Option B', and 'C. Option C'. 'Question 2' has three checkbox options: 'A. Option A', 'B. Option B', and 'C. Option C'. At the bottom right of the question area is a 'Submit' button. Below the questions, it says 'Your answers may be recorded.' At the very bottom, there are two buttons: 'Chat' with a speech bubble icon and 'Polling' with a bar chart icon. The 'Polling' button is highlighted with a red rectangle.



SFS Financials Reporting

Why use SFS Financials Reports?

- SFS Financials reports provide insight on operational activity with real-time data sets (e.g., vouchers for a specific Business Unit over a period of time) to assist with the monitoring and maintenance of budgets, payments, expenditures, workflow, and more.
- Staff can run reports in SFS Financials to support the day-to-day business activities of their agency.
- Reports in SFS are designed to create formatted and presentable documents retrieved from raw data.
- They can be used to present information to an audience in a meaningful format.
 - Examples of reports could include operational summaries or financial statements.

Running a Report in SFS

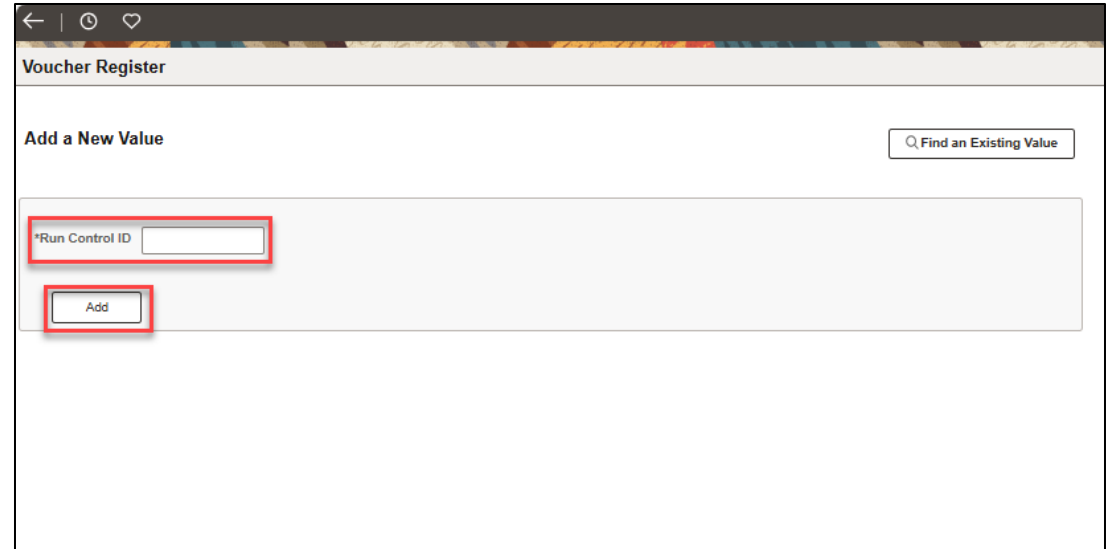
- To access an SFS Financials Report, you will need to be provisioned with the correct module-specific reporting role (e.g., NYF_AGY_BI_REPORTS; NYF_AGY_AP_REPORTS).
- The navigation to a report in SFS is dependent on the report's associated business area.
- Most reports in SFS Financials prompt you to establish a **Run Control ID** to run and view a report for the first time.

What is a Run Control ID?

- A **Run Control ID** is a unique name used to save the parameters for a report so you can access and reuse the Run Control ID each time you run that report without having to re-enter the saved search criteria.
 - Run Control IDs have a maximum of 30 characters and cannot include spaces, but can include underscores (e.g., SUPPLIER_PAYMENTS).
 - An individual Run Control ID is available only to the person who created it.
 - After the initial setup of a Run Control ID, you can then search for the ID within the **Find an Existing Value** section of the report page in SFS to include the previously defined search parameters and run the report to receive real-time data.

Adding a New Run Control ID

- By selecting the **Add a New Value** button, the Run Control ID field can be filled in with a unique name to save the search parameters of a report.
- After filling in the Run Control ID field, click the **Add** button.
- For complete details on using a Run Control ID, please refer to the [Run Control ID Reference Guide](#) in SFS Coach Training.



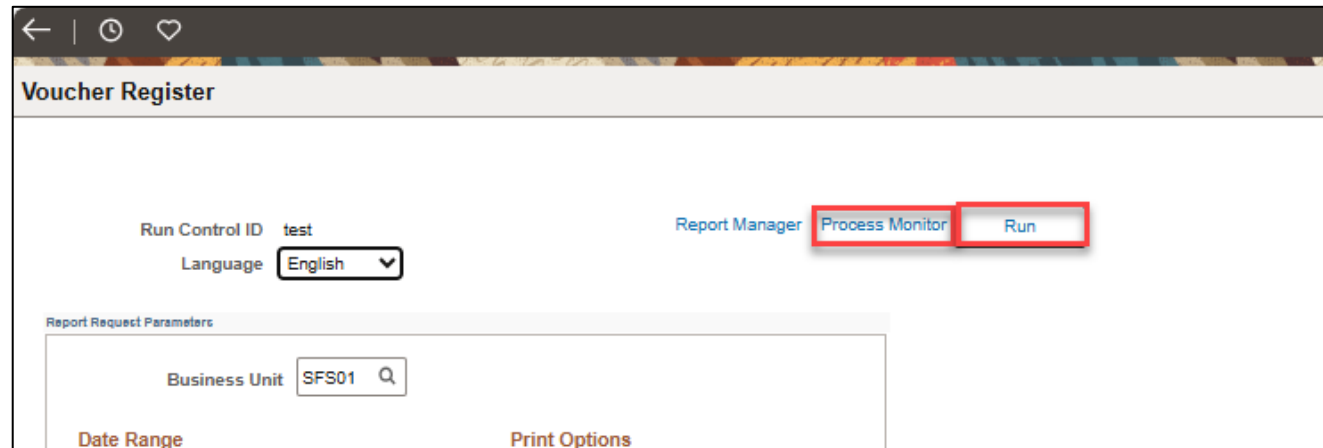
The screenshot displays the 'Voucher Register' interface. At the top, there is a navigation bar with a back arrow, a clock icon, and a heart icon. Below this, the title 'Voucher Register' is visible. The main section is titled 'Add a New Value'. On the right side of this section, there is a search button labeled 'Find an Existing Value'. Below the title, there is a large text input field labeled '*Run Control ID'. A red rectangular box highlights this input field. Below the input field, there is a button labeled 'Add', which is also highlighted with a red rectangular box.

Report Formats

- Based on the type of report that is being run, there may be one or more formats available for display (e.g., PDF, CSV, XLS).
 - If you would like to organize or filter the report data, it is recommended to run the output results to Excel.
 - You can set a specific Run Date/Time to schedule when the report will be run.

Running a Report

- Once you have defined the search parameters and established how and when you would like to view the results, complete the following steps:
 - Click the **Run** button.
 - Click the **Process Monitor** link.



The screenshot shows a web application interface for a 'Voucher Register'. At the top, there is a navigation bar with a back arrow, a clock icon, and a heart icon. Below this, the title 'Voucher Register' is displayed. The main content area contains several input fields and buttons. On the left, there is a 'Run Control ID' field with the value 'test' and a 'Language' dropdown menu set to 'English'. To the right of these fields, there is a 'Report Manager' section with two buttons: 'Process Monitor' and 'Run'. Both buttons are highlighted with red rectangular boxes. Below the 'Run Control ID' and 'Language' fields, there is a 'Report Request Parameters' section. This section contains a 'Business Unit' field with the value 'SFS01' and a search icon. At the bottom of the form, there are two labels: 'Date Range' and 'Print Options'.

Running a Report (cont'd)

- On the Process Monitor page, click the **Refresh** button until the **Run Status** is **Success** and the **Distribution Status** is **Posted**.

The screenshot shows the 'Process Monitor' interface. At the top, there's a navigation bar with a search bar and icons. Below it, the 'Process Monitor' title is followed by tabs for 'Process List' (selected) and 'Server List'. The 'View Process Requests' section contains several filters: 'User ID' (text input), 'Type' (dropdown), 'Last' (dropdown), 'Days' (dropdown), 'Server' (dropdown), 'Name' (text input), 'Instance' (text input), 'Run Status' (dropdown), and 'Distribution Status' (dropdown). There are also buttons for 'Refresh', 'Clear', and 'Reset', and a checkbox for 'Save On Refresh'. Below the filters is a table titled 'Process List' with columns: 'Select', 'Instance', 'Seq.', 'Run Control ID', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', 'Details', and 'Actions'. The table has one row with the following data: '30353864', 'runtest', 'BI Publisher', 'NYAP0066', '09/03/2025 9:10:35AM EDT', 'Success', 'Posted'. The 'Run Status' and 'Distribution Status' columns are highlighted with red boxes. At the bottom, there are links for 'Go back to Invoices Not Built into Vchrs', 'Save', 'Notify', and 'Process List | Server List'.

Process Monitor

Process List Server List

View Process Requests

User ID Type Last Days Refresh

Server Name Instance Range Clear

Run Status Distribution Status Save On Refresh Report Manager Reset

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	30353864		runtest	BI Publisher	NYAP0066		09/03/2025 9:10:35AM EDT	Success	Posted	Details	Actions

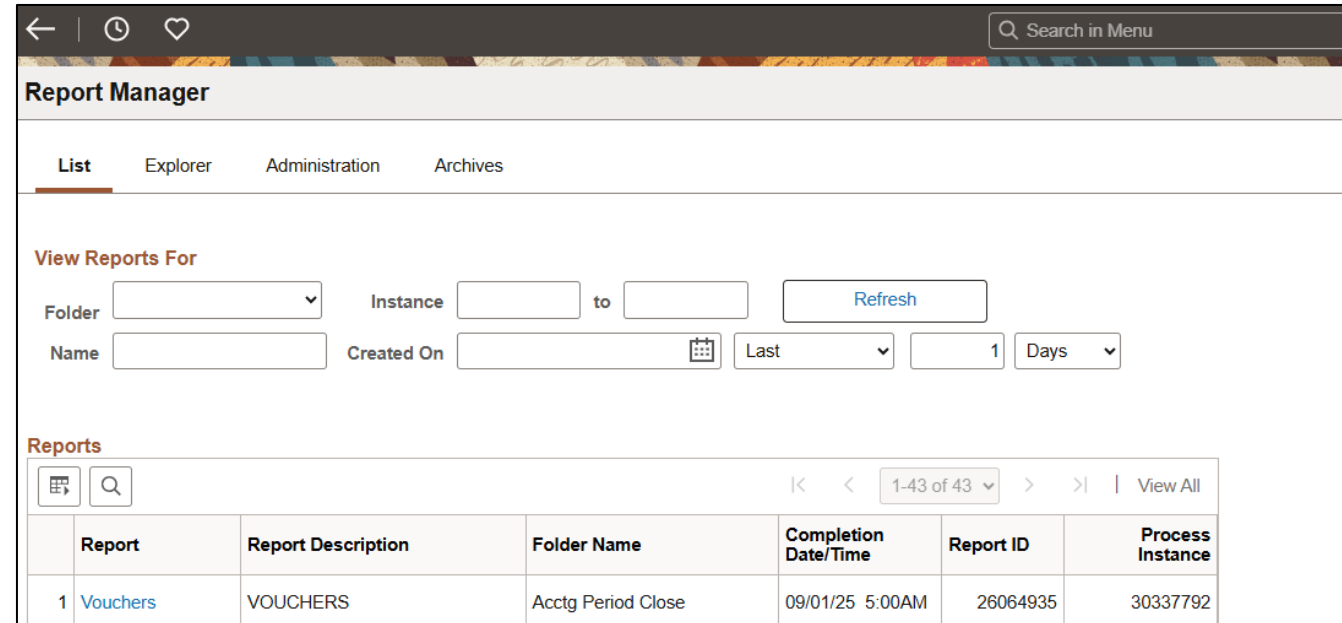
Go back to Invoices Not Built into Vchrs

Save Notify

Process List | Server List

Report Manager

- Once a report has successfully been run, it will appear in Report Manager, accessible from the My Reports tile on My Homepage.
 - The Report Manager or Process Monitor link can be used to open the report in the selected format for viewing.
 - Results will be emailed directly to you if the email type is selected.



The screenshot shows the 'Report Manager' web interface. At the top, there's a navigation bar with a search box labeled 'Search in Menu'. Below the navigation bar, there are tabs: 'List' (selected), 'Explorer', 'Administration', and 'Archives'. The main content area is titled 'View Reports For' and contains several filters: 'Folder' (a dropdown menu), 'Instance' (a text input), 'to' (a text input), a 'Refresh' button, 'Name' (a text input), 'Created On' (a date picker), 'Last' (a dropdown menu), '1' (a text input), and 'Days' (a dropdown menu). Below the filters, there's a section titled 'Reports' with a table. The table has columns: 'Report', 'Report Description', 'Folder Name', 'Completion Date/Time', 'Report ID', and 'Process Instance'. The first row of the table shows a report named 'Vouchers' with a description of 'VOUCHERS', folder name 'Acctg Period Close', completion date/time '09/01/25 5:00AM', report ID '26064935', and process instance '30337792'. Above the table, there are icons for a grid and a search, and a pagination bar showing '1-43 of 43' and a 'View All' link.

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	Vouchers	VOUCHERS	Acctg Period Close	09/01/25 5:00AM	26064935	30337792

SFS Financials Report Navigation Tip

- You can add a report as a Favorite using the **Favorites** (Heart) icon, available on the top left of every page in SFS, for quicker navigation to the report.

The screenshot shows the SFS Financials interface for the report "Invoices Not Built into Vchrs". At the top, a navigation bar contains a back arrow, a clock icon, and a heart icon (highlighted with a red box). A search bar labeled "Search in Menu" is on the right. Below the navigation bar, the report title "Invoices Not Built into Vchrs" is displayed. The main content area includes a "Run Control ID" field with the value "rntest", and links for "Report Manager", "Process Monitor", and a "Run" button. Under the "BU Options" section, there are two radio buttons: "All BUs" (selected) and "Specific BU/Multiple BUs". Below this, there are input fields for "Supplier" (with a search icon), "Voucher Source" (a dropdown menu), "Date From" (with a calendar icon), and "Date To" (with a calendar icon). At the bottom, there are buttons for "Save", "Notify", "Add", and "Update/Display".

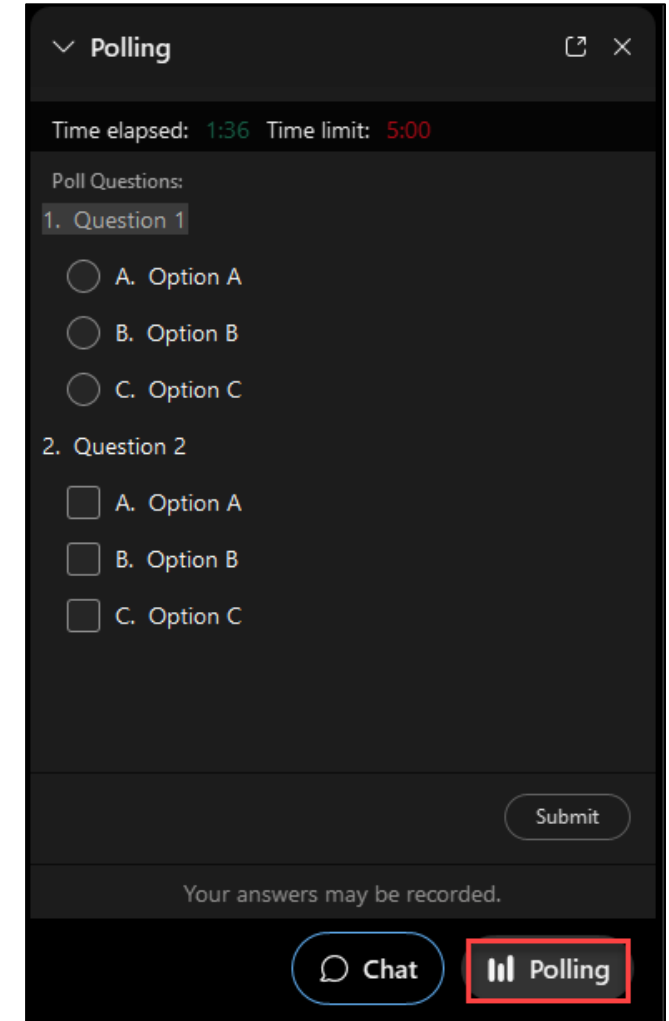
Common SFS Financials Reports

- NYAP0541 – Voucher Appropriation Report
 - This report provides agencies with the ability to monitor voucher appropriations.
- NYKK0043 – Budget Inquiry Report
 - This report provides a budget snapshot as of a certain date, with Adjusted Amount, Expended Amount, Encumbrance Amount, and Remaining Amount.
- NYKK4000 – KK Financial Plan Status
 - This report provides agencies the ability to view the status of their KK Financial Plan Budgets.
- NYPO3144 – PO Activity Detail
 - This report facilitates the tracking of purchase orders within your agency by contract, vendor, category code, dollar amount, and date.

SFS Financials Report Demonstration: Budget Inquiry Report

SFS Financials Reports Polling Questions

- A polling section displays within your Webex window. Answer the provided questions 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.



The screenshot shows a 'Polling' window with a dark background. At the top, it says 'Polling' with a dropdown arrow and a close button. Below that, it shows 'Time elapsed: 1:36' and 'Time limit: 5:00'. The section is titled 'Poll Questions:'. There are two questions: '1. Question 1' and '2. Question 2'. Each question has three options: 'A. Option A', 'B. Option B', and 'C. Option C'. For 'Question 1', the options are radio buttons. For 'Question 2', the options are checkboxes. At the bottom right of the question area is a 'Submit' button. Below the questions, it says 'Your answers may be recorded.' At the very bottom, there are two buttons: 'Chat' and 'Polling'. The 'Polling' button is highlighted with a red rectangle.



SFS Queries

What Is a Query?

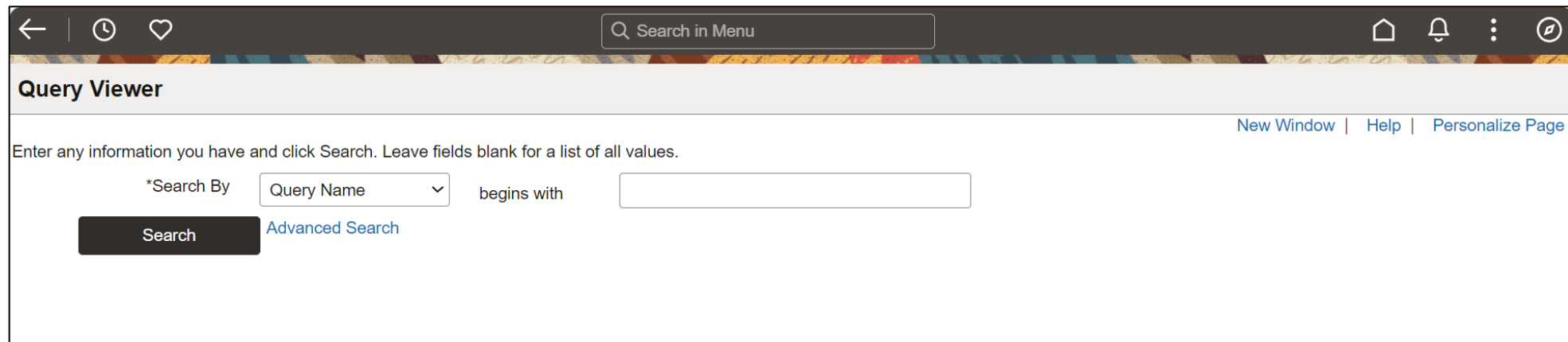
- A **Query** is a reporting tool used to extract real-time data from SFS.
- **Query Viewer** is used to run a pre-defined query against the SFS Database.
- A query may be scheduled to run for a future date and time, enabling you to retrieve the results at that scheduled time.
- Queries in SFS retrieve raw data, presented in rows and columns.
 - SFS Queries differ from SFS Financials Reports in that the raw data is the only option for displaying the query results, whereas SFS Financials Reports can be generated in a formatted structure that is easily presented and shared with an intended audience.
 - If exported to Excel, query results can be filtered and manipulated based on your reporting needs.

Why Use SFS Query Viewer?

- Queries offer agencies real-time data in SFS.
- Examples of when to use queries include:
 - Purchasing staff inquiring on the status of requisitions or to identify a list of purchase orders with budget exceptions that need correction.
 - Invoice reviewers inquiring on which invoices in their agency are awaiting agency review.
 - Agency Security Administrators inquiring on security roles assigned to their agency staff.

SFS Query Viewer

- Staff with Query Viewer access cannot change the queries, nor can they create new queries.
- Staff with the Query Viewer role may only search for and run queries that include data they are authorized to see.
- Navigation to Query Viewer: NavBar > Menu > Reporting Tools > Query > Query Viewer



The screenshot shows the SFS Query Viewer web application. At the top is a dark navigation bar with a search box labeled "Search in Menu" and icons for back, home, and notifications. Below the navigation bar is a header section titled "Query Viewer" with links for "New Window", "Help", and "Personalize Page". The main content area contains a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this is a search form with a label "*Search By", a dropdown menu currently set to "Query Name", and a text input field labeled "begins with". A dark "Search" button is positioned to the left of the "Advanced Search" link.

Searching for Queries in SFS: Basic Search and Advanced Search

- Query Viewer enables you to search for a query using the **Basic** or **Advanced** search functions.
 - Advanced search can be used by selecting the **Advanced Search** hyperlink.

The screenshot shows the 'Query Viewer' header. Below it, a text prompt reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria are set to '*Search By' with a dropdown menu showing 'Query Name' and a 'begins with' condition. A text input field is empty. At the bottom, there is a dark 'Search' button and a blue 'Advanced Search' link.

The **Basic search** allows you to search using only the 'begins with' condition. You can also leave the field blank to return all the queries that may be available to you.

The screenshot shows the 'Query Viewer' header. Below it, a text prompt reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria are set to 'Query Name' with a 'begins with' condition. Below this, there are several other criteria: 'Description', 'Uses Record Name', 'Uses Field Name', 'Access Group Name', and 'Folder Name', each with a 'begins with' dropdown and an empty text input field. The 'Owner' field has a dropdown menu. At the bottom, there is a dark 'Search' button, a light 'Clear' button, and a blue 'Basic Search' link. Below the search buttons, it says 'Search Results' and 'No matching values were found'.

The **Advanced search** allows you to perform a progressively narrower search by using one or more 'search by' criteria.

Query Viewer Output Format and Feature

The screenshot shows the 'Query Viewer' interface. At the top, there's a navigation bar with a back arrow, a clock icon, a heart icon, and a search bar labeled 'Search in Menu'. Below this, the 'Query Viewer' title is displayed. A search instruction says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search section includes a '*Search By' dropdown set to 'Query Name', a 'begins with' text input containing 'NY_AP_MATCH', a 'Search' button, and a link to 'Advanced Search'. Below the search section is the 'Search Results' section with a '*Folder View' dropdown set to '-- All Folders --'. The main content area is titled 'Query' and contains a table of results. The table has columns for 'Query Name', 'Description', 'Owner', 'Folder', 'Run to HTML', 'Run to Excel', 'Run to XML', 'Schedule', 'Definitional References', and 'Add to Favorites'. The first row shows a query named 'NY_AP_MATCH_EXCEPTIONS' with a description 'AP Prmpt Pay Match Exceptn Qry', owned by 'Public' in the 'NY AP USER QUERIES' folder. The 'Run to HTML', 'Run to Excel', 'Schedule', and 'Add to Favorites' columns for this row are highlighted with red boxes. The 'Run to HTML' and 'Run to Excel' cells contain links 'HTML' and 'Excel' respectively. The 'Schedule' cell contains a link 'Schedule'. The 'Add to Favorites' cell contains a link 'Favorite'. The 'Definitional References' cell contains a link 'Lookup References'. The table also includes pagination controls at the top right showing '1-1 of 1' and a 'View All' link.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
NY_AP_MATCH_EXCEPTIONS	AP Prmpt Pay Match Exceptn Qry	Public	NY AP USER QUERIES	HTML	Excel	XML	Schedule	Lookup References	Favorite

- The **HTML** link will run the query and return the results in a new window.
- The **Excel** link will run the query and return the results in an Excel file.
- The **Schedule** link is used to schedule the query to run at a specific time.
 - This option may be used when you do not wish to wait on the page for the results to be returned, or when running a query with a large data set.
- The **Favorites** link can be used to designate a query as a favorite.
 - If selected, the query will display on the “My Favorite Queries” panel on the Query Viewer page.

Common SFS Queries

- NY_AP_MATCH_EXCEPTIONS – Match Exceptions Query
 - This query includes all vouchers with match exceptions.
- P2P_INV_VCHR_INV_AWAITING_ACTN – Invoices Awaiting Action Query
 - This query lists all vouchers awaiting action.
- NY_PO_STATUS – POs with Budget Activity Only Query
 - This query reports on purchase order status, including the PO's budget check status and the PO's PSP budget check status.
- NY_REQ_IN_BUDGET_ERROR – Requisitions Not Passed Budget Check Query
 - This query provides a list of approved requisitions that have not passed budget check.

SFS Query Demonstration: Match Exceptions Query

SFS Query Polling Questions

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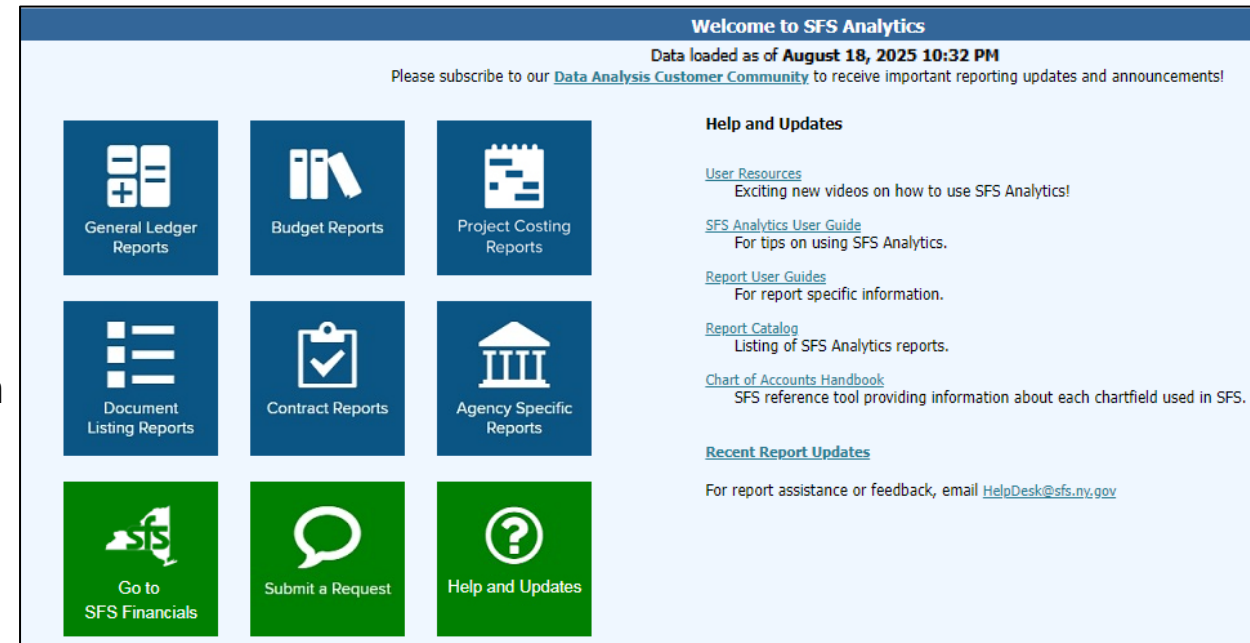
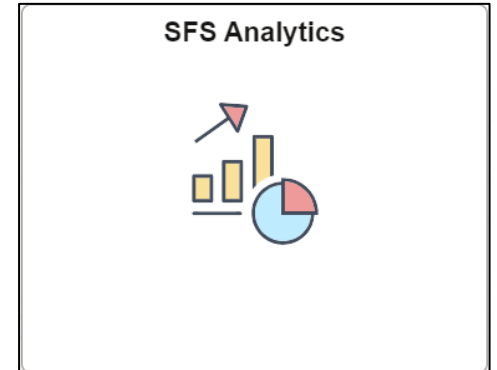
The screenshot displays the Webex Polling interface. At the top, a header bar shows a dropdown arrow, the word "Polling", and icons for a share and close button. Below this, the status "Time elapsed: 1:36" and "Time limit: 5:00" is shown. The main section is titled "Poll Questions:" and contains two questions. "1. Question 1" has three radio button options: "A. Option A", "B. Option B", and "C. Option C". "2. Question 2" has three checkbox options: "A. Option A", "B. Option B", and "C. Option C". A "Submit" button is located at the bottom right of the question area. Below the questions, a message states "Your answers may be recorded." At the very bottom, a navigation bar contains a "Chat" button with a speech bubble icon and a "Polling" button with a bar chart icon, which is highlighted with a red rectangular border.



SFS Analytics

What Is SFS Analytics?

- SFS Analytics is the data warehouse for SFS financial and accounting information.
 - With its flexibility, it can assist agencies with their reporting and data analysis needs.
 - Staff provisioned any reporting role in SFS can access SFS Analytics on the SFS Homepage through the SFS Analytics tile or by navigating from the **NavBar > Menu > Reporting Tools > SFS Analytics**.
- In SFS Analytics, you can:
 - Customize reports before running the results with several search prompts or by including or excluding result columns once the results populate.
 - Further analyze result data by clicking on transaction links to view additional details.



SFS Analytics landing page

SFS Analytics – Landing Page

Key Concepts

- The As of Date
- Customer Communities
- Subject Area Tiles
- Report Guides
- User Resources
- Get more help

The screenshot shows the SFS Analytics landing page. At the top, a blue banner reads "Welcome to SFS Analytics" with a sub-header "Data loaded as of August 18, 2025 10:32 PM". Below this, a message invites users to subscribe to the "Data Analysis Customer Community". The main content area features a 3x3 grid of tiles: "General Ledger Reports", "Budget Reports", "Project Costing Reports", "Document Listing Reports", "Contract Reports", "Agency Specific Reports", "Go to SFS Financials", "Submit a Request", and "Help and Updates". To the right of the grid, under the heading "Help and Updates", are links for "User Resources", "SFS Analytics User Guide", "Report User Guides", "Report Catalog", and "Chart of Accounts Handbook", each with a brief description. At the bottom right, a section titled "Recent Report Updates" provides an email address for assistance: HelpDesk@sfs.ny.gov.

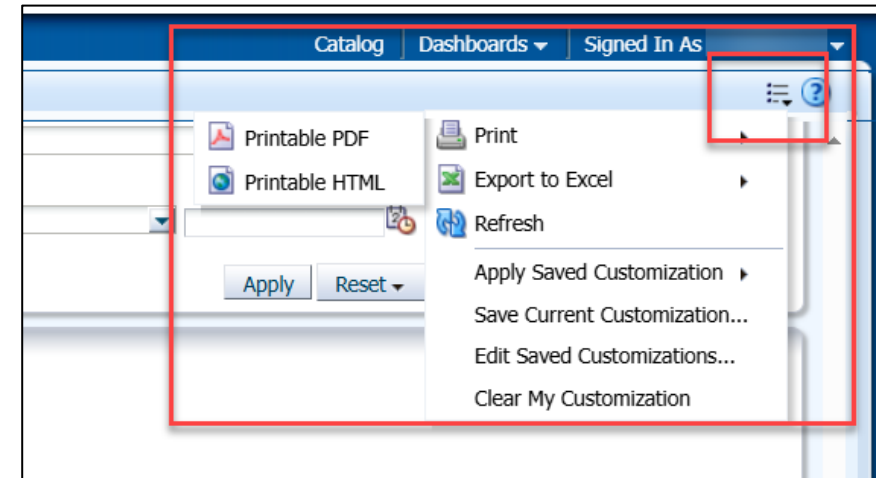
Note: All data loaded into SFS Analytics is sourced from SFS Production as of the close of business one day prior, including weekends.

When Should You Use SFS Analytics?

- Agencies can use SFS Analytics to:
 - Produce monthly and yearly disbursement reports, and project anticipated future spending based on historical trends.
 - Manage the cash ceiling of certain appropriations within a specific fund.
 - Monitor funds for low balances and transfers between funds.
 - Identify expenses for federal claim reimbursements.
 - Provide detailed reports to program units to determine chargebacks for divisions at your agency.

SFS Analytics Customizations

- SFS Analytics reports offer robust filtering options to search and return desired results for your reporting purposes.
- Search parameters can be saved as a customization. You can easily access reports you run frequently by selecting your saved customization instead of reentering search criteria.
 - Please view the [Working with Customizations](#) training video located on the SFS Analytics User Resources page for additional details on customizing your reports.



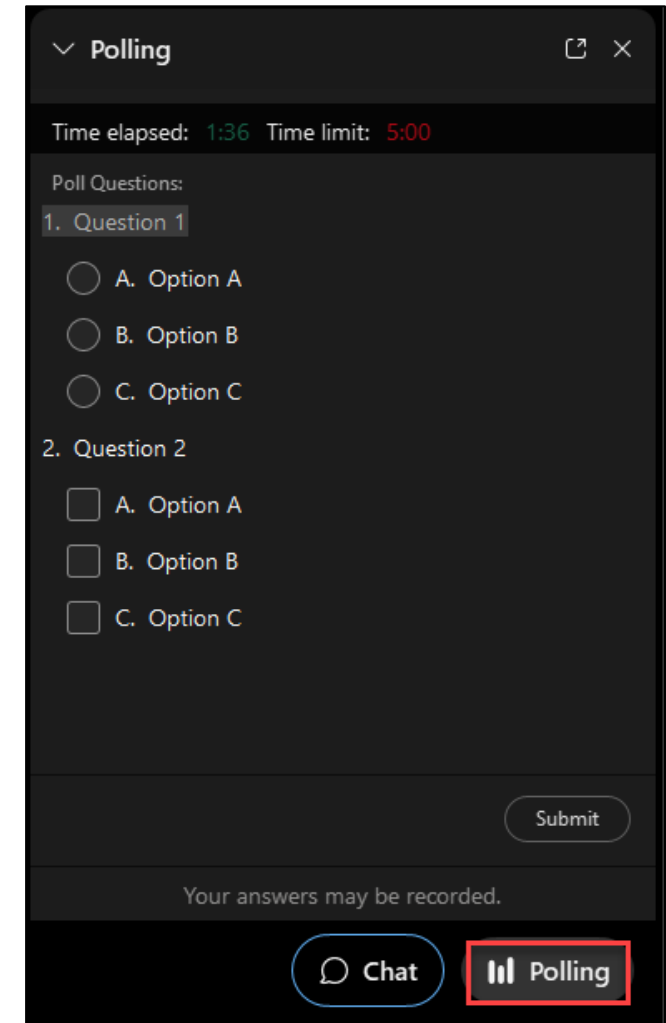
Common SFS Analytics Reports

- DW620 – Appropriations Budget Overview
 - This report is used to monitor and view all relevant activity against an appropriation.
- DW438 – Ad Hoc General Ledger Report
 - This report provides a view of any combination of actual Cash, Modified Accruals, or Agency Accruals.
- DW720 – General Ledger by Tree
 - This report is used to view monthly Cash, Modified Accrual, or Agency Accrual ledgers by reporting trees.
- DW809 – Documents Posted to General Ledger
 - This report shows all documents posted to the General Ledger for a selected time frame.

SFS Analytics Demonstration: DW620: Appropriations Budget Overview

SFS Analytics Polling Questions

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The screenshot shows a dark-themed 'Polling' window. At the top, it displays 'Time elapsed: 1:36' and 'Time limit: 5:00'. Below this, the section is titled 'Poll Questions:'. There are two questions listed: '1. Question 1' and '2. Question 2'. Each question has three radio button options: 'A. Option A', 'B. Option B', and 'C. Option C'. For 'Question 2', the options are represented by checkboxes. At the bottom right of the question list is a 'Submit' button. Below the questions, a message states 'Your answers may be recorded.' At the very bottom of the window, there are two buttons: 'Chat' and 'Polling'. The 'Polling' button is highlighted with a red rectangular border.



Reporting Tools Resources

Reporting Tools Resources

- The [Featured Reports Listing](#) gives navigation to SFS Financial reports. It is available in SFS Coach Training under the Report and Query Support Training Type.
- The [SFS Reports and Query Fact Sheet](#) gives guidance on how to use the different query formats.
- The [Featured Queries Listing Guide](#) provides an overview of available queries in SFS. It is available in SFS Coach Training.
- The User Resources and Report User Guide links on the SFS Analytics homepage provide navigation to all report user guides and walkthrough video resources. Topics include:
 - Report customization Tips and Tricks;
 - How to run and export reports; and
 - How to rearrange columns within reports.

SFS Coach Training Resources

The screenshot shows the 'SFS Coach Training' web application. At the top is a navigation bar with a search menu. Below it, the 'Search User Training and Materials' section contains instructions and search filters. The 'Training Type' dropdown is highlighted with a red box and contains the text 'Report and Query Support: Guide and Excel listing'. The 'Search Results' section displays a table with 5 rows of results.

Search User Training and Materials

- To select a **Topic** or **Training Type**, use the drop-down lists.
- To search by the name of the material, type directly in the **Training Material** field or use the **Training Material** look-up feature by clicking on the magnifying glass.
- Keyword** search can be used with or without selecting any other search fields.
- Leaving all fields blank brings back all results; additional criteria returns more specific results.

Topic: [Dropdown] Training Type: Report and Query Support: Guide and Excel listing [Dropdown] Search [Button]

Training Material: Select Course Name [Text] Keyword(s): Enter Search Keywords [Text] Clear [Button]

Search Results 5 rows

	Topic ↑↓	Popularity ↑↓	Training Material ↑↓	Notes ↑↓	Training Type ↑↓
1	Statewide Financial System	98.3%	+ Featured_Reports_Listing	This document provides a listing of commonly used SFS reports which are grouped by module area with the following	Reports And Queries
2	Statewide Financial System	82.0%	+ Featured_Queries_Listing	This document provides a listing of commonly used SFS queries with their names and descriptions grouped by module area.	Reports And Queries
3	Statewide Financial System	NR	Report_Use_FactSheet	This document provides facts and processing tips for SFS reports and queries.	Reports And Queries

- To locate report and query materials in SFS Coach Training, search under the 'Report and Query Support: Guide and Excel listing' **Training Type**.
- The search will return the following resources:
 - Featured Reports Listing
 - Featured Queries Listing
 - Report and Query Fact Sheet

SFS Analytics User Resources & Report User Guides

User Resources

- Access introductory videos, report walkthroughs, and tips and tricks for using SFS Analytics.
- View Webex recordings of previous SFS Analytics workshops.

Report User Guides

- Access report-specific user guides that explain basic report usage and define data elements.

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 Help Desk

- Provides the first level of SFS user support to Agency staff.
- Contact the SFS Help Desk for your reporting questions, including:
 - How to run a report
 - Navigating to a report or query
 - How to set up a Run Control ID
- Help Desk ticket 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



SFS Orientation – Resources and Support

- Each month, SFS holds an orientation to SFS session intended for New York agency staff who are newer to SFS, as well as individuals who want to learn resources and support options.
- In these sessions, 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.
- When available, information regarding the Orientation, including the date, time, and link to join the session, can be found:
 - On the [event calendar](#) of the SFS Secure website.
 - In an email sent to individuals signed up for email updates. SFS users can visit the SFS [Customer Communities](#) page on the SFS Secure website to sign up.
 - On the notice tile of the SFS Production and Agency Business Process test environments.

Session Wrap Up Polling Questions

- A polling section displays within your Webex window. Answer the provided questions 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.

The screenshot shows a 'Polling' window with a dark theme. At the top, it says 'Polling' with a dropdown arrow and a close button. Below that, it shows 'Time elapsed: 1:36' and 'Time limit: 5:00'. The main section is titled 'Poll Questions:' and contains two questions. 'Question 1' has three radio button options: 'A. Option A', 'B. Option B', and 'C. Option C'. 'Question 2' has three checkbox options: 'A. Option A', 'B. Option B', and 'C. Option C'. At the bottom right of the question area is a 'Submit' button. Below the questions, it says 'Your answers may be recorded.' At the very bottom, there is a navigation bar with a 'Chat' button (speech bubble icon) and a 'Polling' button (bar chart icon), which is highlighted with a red rectangle.

Questions and Answers