SFS Troubleshooting Tips and Reminders

OSC Fall Conference 2025

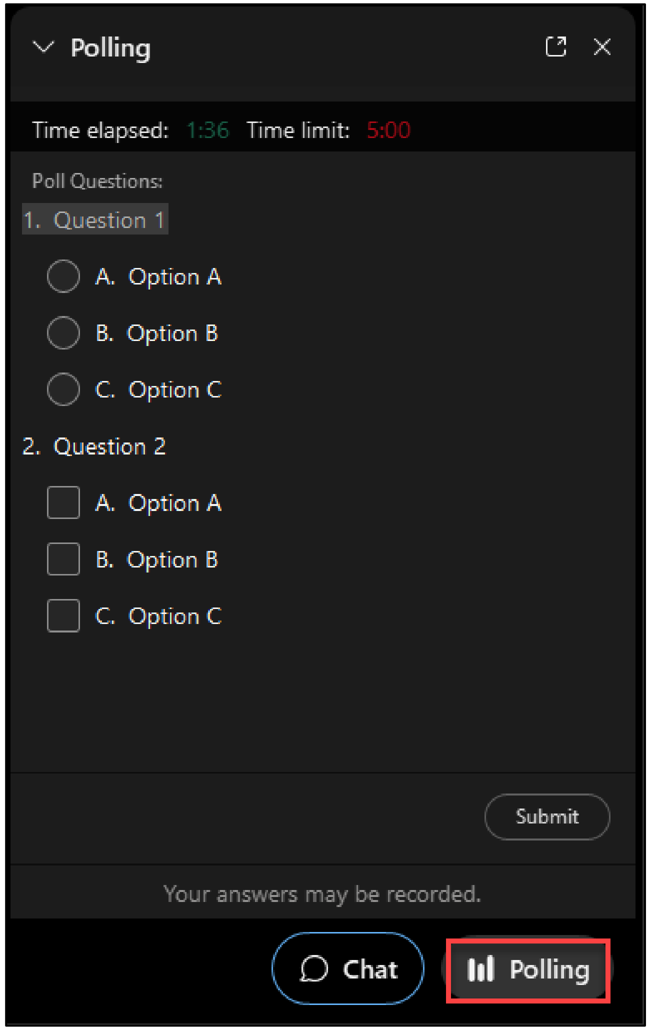
Agenda

This session provides an overview of tips and reminders for common questions about logging in and navigating the Statewide Financial System (SFS).

- Using SFS
  - Logging In
  - Account and SFS Role Updates
  - Transaction inquiries
  - Budget and Chartfield Questions
- SFS Support
  - Policies and procedures
  - Email Notifications
  - SFS Secure
  - SFS Help Desk
- Reminders and Resources
- Questions and Answers

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.



SFS Login

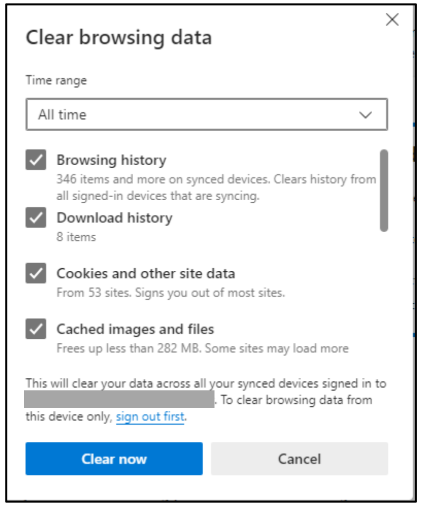
Why can't I log in to SFS?

- If you are having trouble logging in to SFS:
  - Confirm you are entering your User ID and Password correctly.
    - Use caution when cutting and pasting to ensure no extra spaces or characters are in the User ID and password fields.
  - Confirm that you are accessing the correct URL.
    - SFS Agency Portal: https://fin.sfs.ny.gov/
  - Use Google Chrome or Microsoft Edge for best experience.
  - Clear your cache/internet browser history and try logging in to SFS again. Request that cookies, cached images and files, passwords and other site data be clear.
    - Be sure to clear cache for "all-time", not just for a recent time frame.
    - Once cleared, close all browser windows, and retry.
    - Detailed steps for clearing your cache are listed on the next slide.

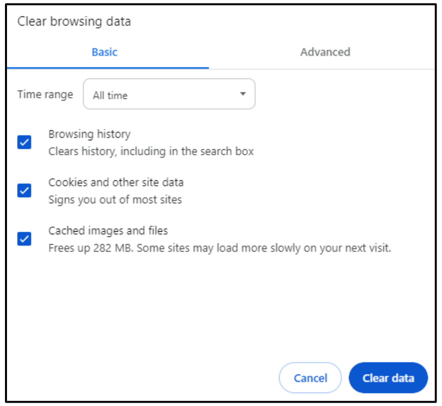
SFS Tip: Clearing Browser Cache

- To clear your cache:
  - Log out of SFS.
  - Clear your cache/internet browser history.
  - Request that cookies, cached images and files, and other site data be clear.
  - Be sure to clear cache for “all-time”, not just for a recent time frame.
- On most internet browsers, you can select **Ctrl+Shift+Delete** on your keyboard to prompt you to clear your cache/history.
- Once cleared, close all browser windows, and try logging in to SFS again.
- If the issue continues, please contact the SFS Help Desk directly.

Clearing your cache in Edge – select Ctrl+Shift+Delete

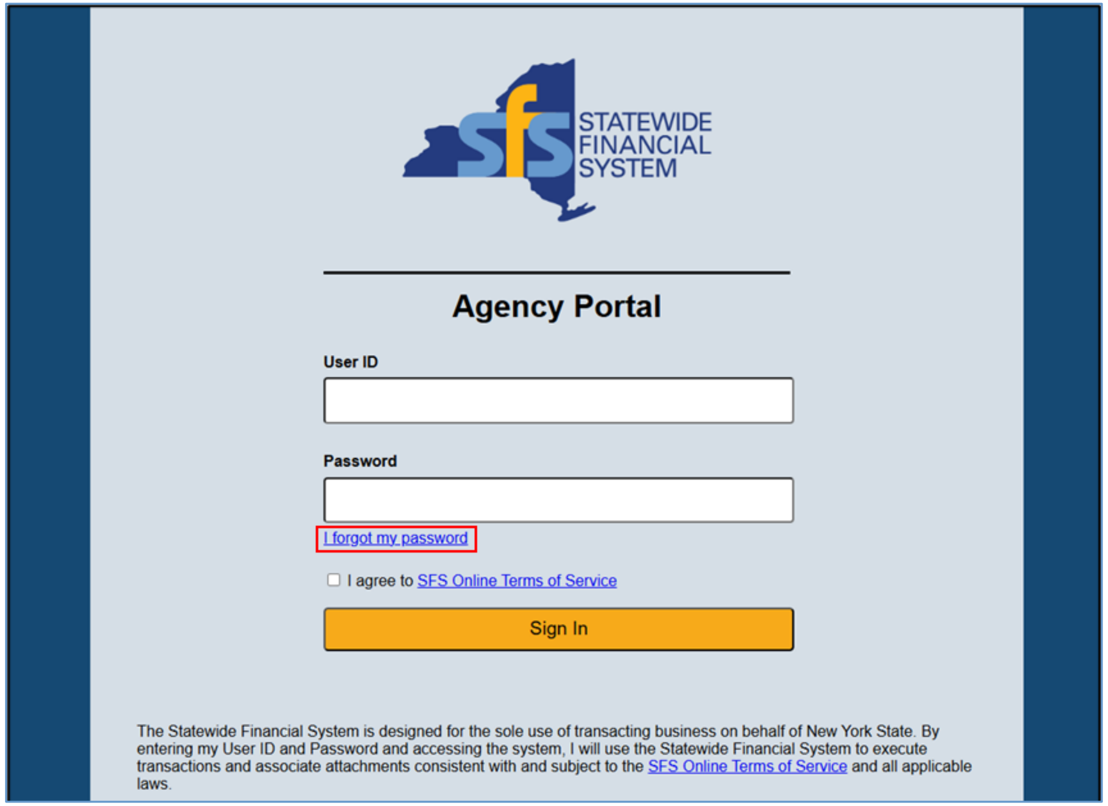


Clearing your cache in Chrome – select Ctrl+Shift+Delete



SFS Login (cont'd)

- If you forgot your password, you can click the "I forgot my password" link on the SFS sign-in page to request a new one.
  - To use this feature, you must have a valid email address established in SFS and set up a security question and answer so you can be authenticated.
    - You can utilize JAA-SFS205-008 for assistance with setting up or changing this information.



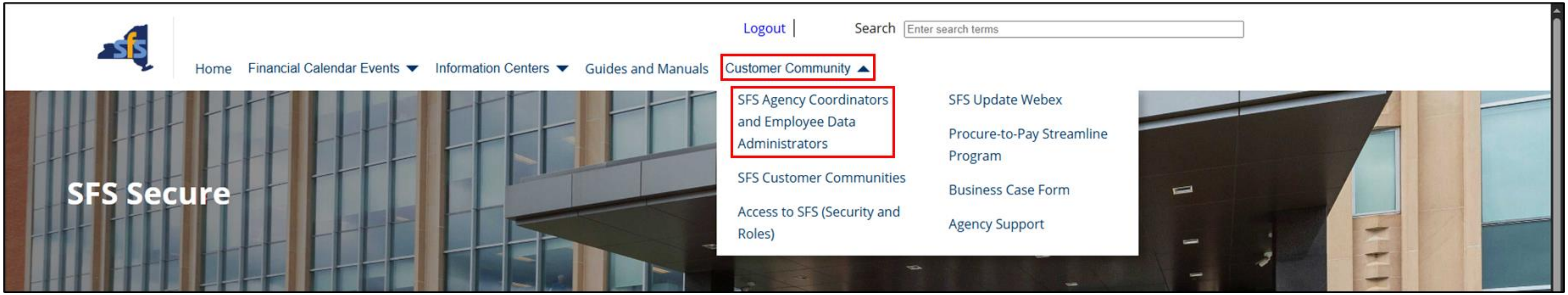
SFS Login (cont'd)

- If your account is locked, here is what you should do next:
  - Work with your internal Agency Security Administrator (ASA) team.
    - ASAs control the assignment of system roles, add and remove user accounts, reset user passwords, and lock and unlock user accounts within an agency.
    - If you don't know your ASA, reach out to your supervisor or Agency Coordinator.
      - A complete list of Agency Coordinators is located on SFS Secure (SFS Secure > Customer Community > SFS Agency Coordinators and Employee Data Administrators).
  - Let the ASA know your password doesn't work and that you may be locked out.
  - The ASA can reset your password or unlock your credentials if needed.
- The SFS Help Desk cannot address account access or login issues and will direct you to contact your ASA for assistance.

Name/Address/Supervisor Changes

I need to update my information in SFS. Who can help me?

- Employee Data Administrators (EDAs) are staff within your agency who maintain employee data in SFS, such as default chartfield string values, travel supervisors, and requestor and buyer defaults (e.g., default business unit and ship to information). EDAs also assign travel proxies.
  - If you need updates to information such as your Official Station, travel supervisor, or name within SFS, contact your EDA.
  - A complete list of Employee Data Administrators is located on SFS Secure under the **Customer Community** tab.



Role Assistance

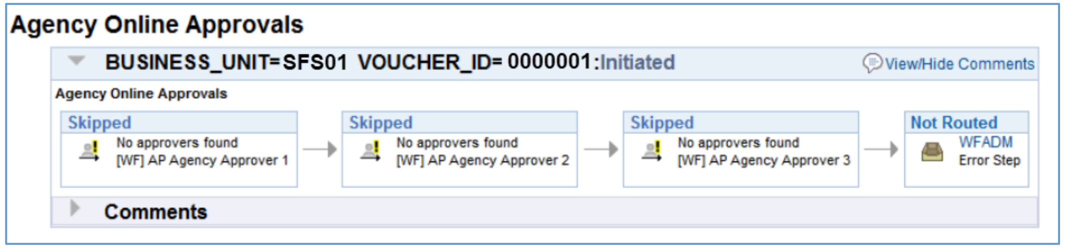
How do I know what roles I need in SFS?

- If you are trying to reach a page in SFS and you are unable to locate/access the page, you may not have the necessary role.
- The roles you are provisioned in SFS depend upon the work you perform in the system for your agency.
  - For assistance with finding out the roles you need, work with your supervisor and your ASA – the ASA is the person at your agency who will assign you roles in SFS.
- If you are an ASA, refer to Modifying an Existing User Account (JAA-ASA205-005) found in SFS Coach Training to add or remove roles to an existing account or Adding a New User Account (JAA-ASA205-004) to create a new user account.
  - For additional information, the SFS Agency Role Guide assists ASAs in understanding and managing roles and role assignments.
    - This resource is located on SFS Secure (Customer Community > Access to SFS (Security and Roles)).

Transaction Inquiries

Can I see the status of a transaction I submitted?

- You can inquire upon the status of a transaction after submission. There are different SFS pages to use depending on the type of transaction you are trying to view. SFS Coach Training includes job aids that detail the steps to take within a specific module. Examples include:
  - [Inquire and Review a Procurement Contract: JAA-CN210-060]
  - [View Requisition Status: JAA-REQ205-011]
  - [Viewing PO Information: JAA-PO220-024]
  - [Inquiring on a Receipt: JAA-REC205-003]
  - [Searching for Invoices: JAA-EM205-002]
  - [Inquiring Upon Vouchers: JAA-AP205-010]
  - [Performing Payment Inquiries: JAA-AP205-012]
- If your transaction is in an Error status due to workflow or routing, you will need to reach out to your Workflow Administrator (WFA) for assistance.
  - If you don't know your WFA, reach out to your supervisor or Agency Coordinator.
    - A complete list of Agency Coordinators is located on SFS Secure (SFS Secure > Customer Community > [SFS Agency Coordinators and Employee Data Administrators]).



Example of a transaction in an Error status.

Transaction Inquiries (cont'd)

My transaction routed to the wrong group of approvers, who can assist and resolve this?

- WFAs provide first-level support for transactions that need to be re-routed within your agency (e.g., your expense report is in the approval queue of someone who is not your Travel supervisor).
- Instances in which you would reach out to your WFA for assistance include:
  - Reassigning Transactions and Documents for Approval
    - The WFA can reassign transactions from a user's worklist to a different employee in SFS. This would occur if there was incorrect role mapping, employee separation, or employee movement.
  - Restarting a Transaction
    - The WFA can restart transaction types including Budget Journals, GL Journals, Requisitions, POs and Vouchers. This allows for agencies to be able to quickly address workflow issues that are caused by security changes.
    - This is the solution when transactions are in a "Stuck" or "Recycled" status.
- It is recommended that each agency have at least two WFAs to share the responsibility and ensure that there is more than one person available to support your agency's workflow.

Expense Report Inquiries

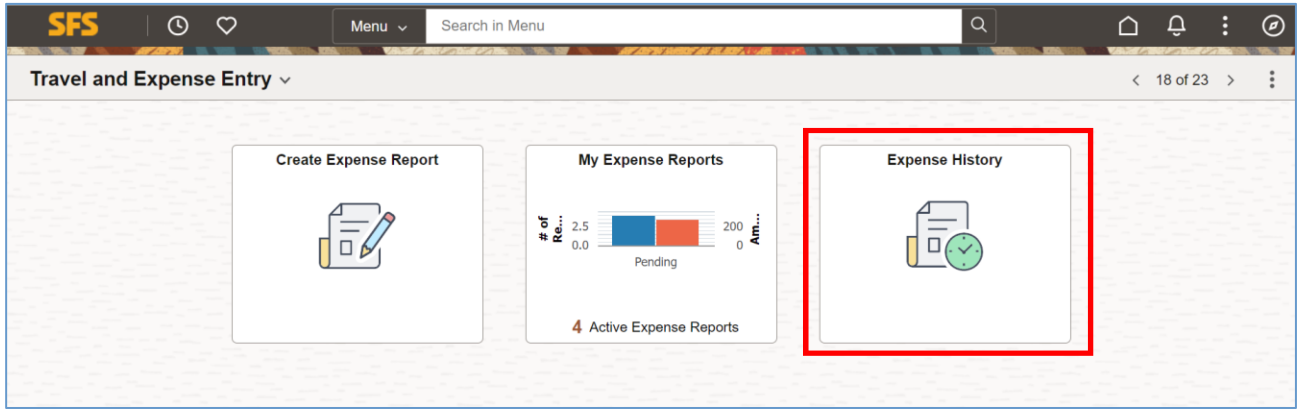
I have a question on expense reports. Where should I go?

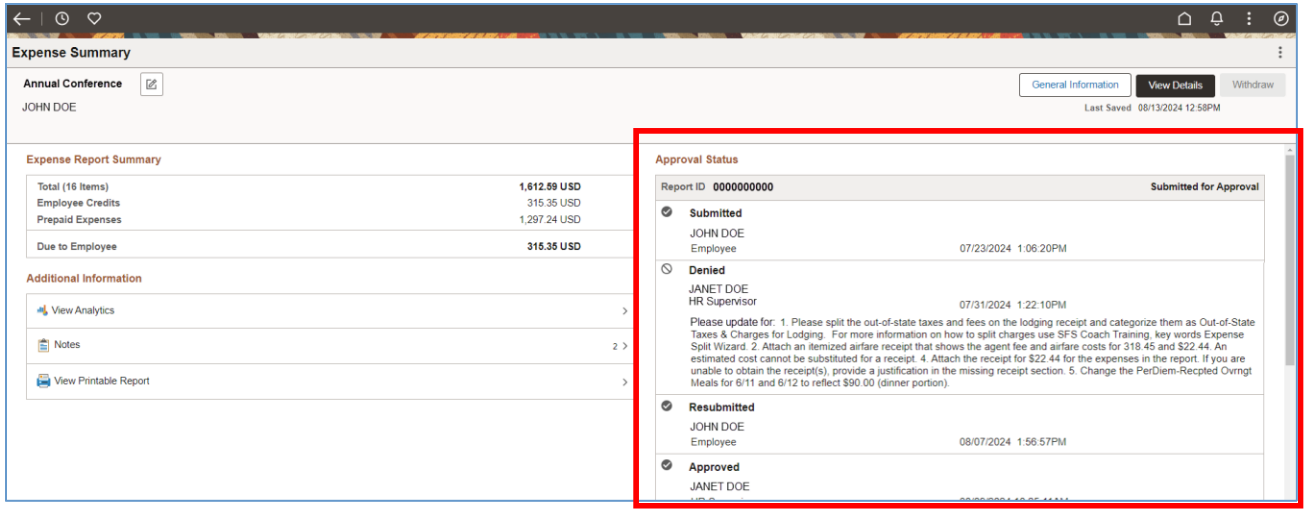
- For questions on:
  - How to complete and submit an expense report:
    - Refer to SFS Coach Training or the SFS Help Desk.
  - System functionality, transaction entry, or system errors:
    - Contact the SFS Help Desk.
  - Travel and Expense Policy:
    - Refer to the Office of the State Comptroller (OSC) Guide to Financial Operations (GFO) or the OSC Travel Manual.
    - Refer to the Business Services Center (BSC) Travel Webpage.
  - Approval disputes or process:
    - Contact your agency's Travel Team.
    - BSC Customer Agencies: For questions about a denied expense report, contact the BSC Travel Team: BSCfinance@ogs.ny.gov (include "Travel" and the expense report ID in the subject line of your email) or 518-457-4272.
  - Updates to employee information (supervisor, proxy, Official Station, etc.):
    - Work with your agency's EDA.

Expense Report Workflow

I submitted my expense report – where is it now?

- To inquire upon the status of a submitted expense report, navigate to the Travel and Expense Entry Homepage and then select the **Expense History** tile.
  - You can inquire upon the status of any submitted expense report, including Paid expense reports.
- From the Expense Report History page, click on the expense report you wish to inquire upon. Then, navigate to the Expense Summary page of the expense report.
- The **Approval Status** section to the right of the page will show you the approval history of the expense report, including the denial reason for the expense report if the report was denied.





Expense Report Statuses

What do the different expense report statuses mean?

- Pending
  - The report is in the **traveler's queue** and has either not yet been submitted or has been denied.
- Submitted
  - The report has been submitted to a **traveler's supervisor** and is now in the supervisor's queue.
    - Note: Your Travel Supervisor in SFS may not be your HR supervisor, but it will be someone within your agency.
- In Process
  - The report is either with the **TE Approver** (agency approval) or **TE Approver 2**.
    - The TE Approver will be someone within your agency (e.g., your agency's Travel Unit or Finance Office).
    - For BSC Customer Agencies: The TE Approver 2 will be the BSC.
- Returned/Denied
  - The report has been sent to the **traveler's queue** by someone in workflow (either the traveler supervisor, TE Approver, TE Approver 2, or OSC) and will need to be modified or corrected and resubmitted.
- Rejected
  - The report cannot be modified or resubmitted.
- Paid
  - The report has been approved at all levels, including OSC, and payment has been sent.

Expense Report Workflow – High-Level Overview

Who approves or denies my expense reports?

Traveler: Completes business travel event.

Traveler/ Proxy: Creates and submits the expense report.

Agency Approvers: Review and approve the expense report.

Business Services Center (BSC)*: Reviews and approves the expense report.

Office of the State Comptroller (OSC): Audits and approves the expense report.

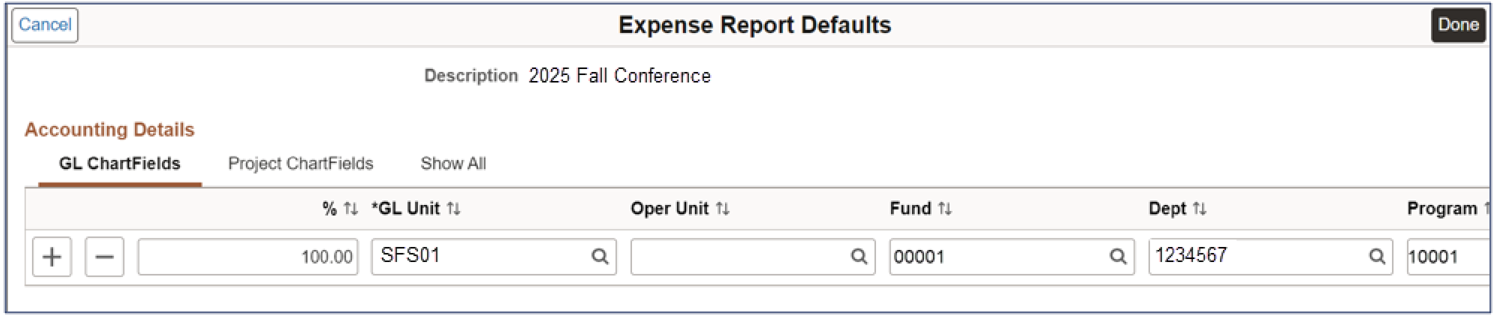
Payment is generated to traveler.

* The BSC is inserted into workflow for BSC Customer Agencies only.

Budget Errors

I can't submit/approve a transaction because of a budget error. How do I resolve the error?

- In SFS, transactions (requisitions, purchase orders vouchers, expense reports, etc.) are generally **budget checked**, or pre-budget checked, to ensure the Chartfield string is valid and there is sufficient budget, prior to being submitted to workflow for approval.
  - **Chartfields** are codes used to categorize financial and budget transactions. Collectively, these values make up the Chart of Accounts (COA).
- Upon a successful and valid budget check, the available budget will be reduced by the amount of the transaction. If you receive an error after a transaction has been budget checked, the transaction will not be able to move forward in the approval workflow until the error is resolved.
- Specific Chartfield values and Chartfield strings vary by agency. If you are experiencing a budget error or a Chartfield error, reach out to your Agency's Finance Office or Budget Analyst for assistance.
- For an overview of SFS budget error definitions and resolutions, please review the Budget Error Resolutions reference guide available in SFS Coach Training under the **Commitment Control** Topic.



Example of Chartfield values on an expense report.

Polling Questions: Knowledge Check

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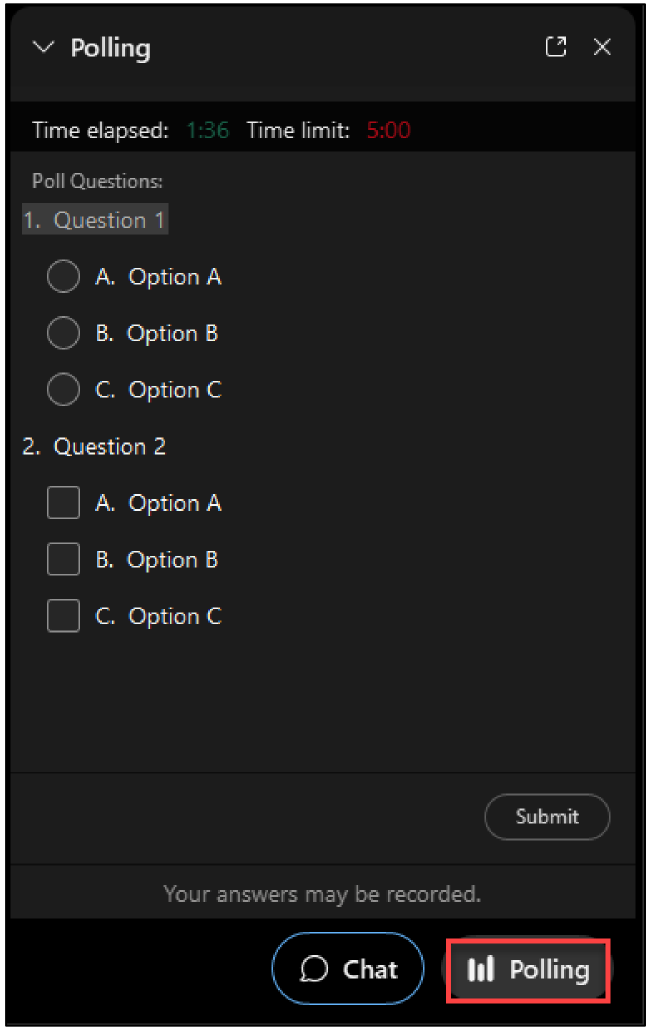
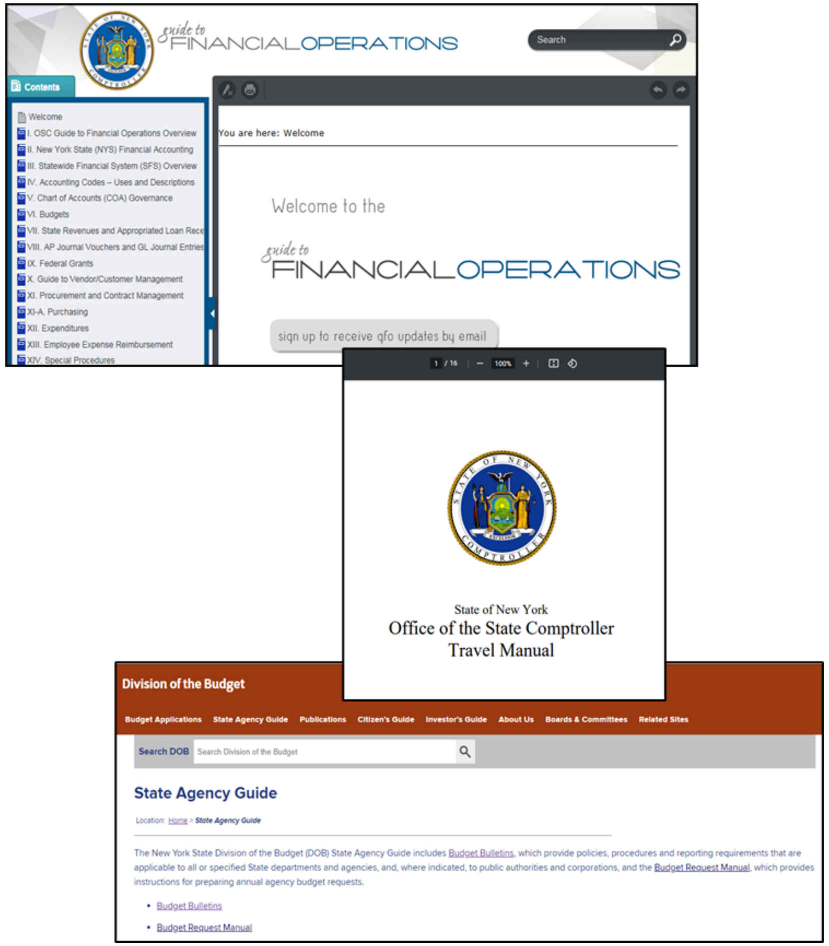


Policy and Procedures

I have a question on policy and procedure. Where should I go?

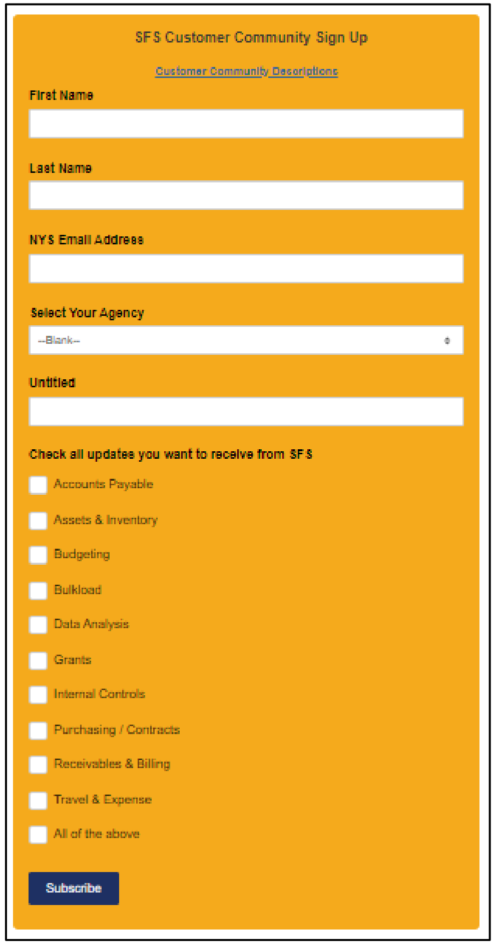
- OSC Guide to Financial Operations (GFO)
    - This guide is the reference source for Statewide accounting policies, procedures and OSC related mandates for use by State agencies.
- OSC Travel Manual
    - This manual provides specific guidance on Travel policy. This includes information about when you're eligible for certain per diems, different types of transportation options, receipt requirements and more.
- Division of the Budget (DOB) Budget Bulletins
    - The bulletins provide policies, procedures, and reporting requirements for State agencies.
- Your agency may also have specific policies and procedures. Work with your supervisor for more information on agency-specific policies and procedures.



Email Notifications

I want to receive emails for upcoming trainings. How do I sign up?

- SFS Customer Communities are email lists for each transaction area in SFS.
- When you sign up you will receive emails allowing you to be aware of updates to the system that impact that transaction area and of any upcoming trainings related to that transaction area.
- Your preferences can be updated through SFS Secure.
- Descriptions of the communities can be found on the SFS Customer Communities page in SFS Secure.


SFS Customer Community Sign Up
Customer Community Descriptions
First Name
Last Name
NYS Email Address
Select Your Agency
--Blank--
Untitled
Check all updates you want to receive from SFS
Accounts Payable
Assets & Inventory
Budgeting
Bulkload
Data Analysis
Grants
Internal Controls
Purchasing / Contracts
Receivables & Billing
Travel & Expense
All of the above
Subscribe

Email Notifications (cont'd)

- In addition to emails related to the specific SFS Customer Community you sign up for, you can also request to receive emails regarding System Alerts about scheduled maintenance and when business events will be taking place.
  - To be added to the SFS System Alerts distribution list, please reach out to the SFS Help Desk.

- SFSInfo
  - Sometimes you may receive a communication or meeting invite from SFSInfo@sfs.ny.gov.
  - SFSInfo is an **unmonitored inbox**. Replies are forwarded to the SFS Help Desk but, to avoid delays in receiving a response, please only direct inquiries and questions to the SFS Help Desk.

SFS vs. SFS Secure

What is the difference between SFS and SFS Secure?

SFS System

- SFS is where the transactions are completed and holds the training tools to help you complete those tasks.
- The User ID and Password you would use to log in is provisioned to you by your Agency Security Administrator (ASA).
- SFS Agency Portal URL: https://fin.sfs.ny.gov/

SFS Secure

- SFS Secure is where data files and information for business events are published. Resources such as the SFS Glossary and the SFS Release Calendar are also available from Secure.
  - Along with emails and SFS Tile Notices, Secure is one of the methods SFS uses to publish communications regarding upcoming trainings, new resources, and other announcements.
- SFS Secure requires your NY.gov User ID and Password to log in.
  - The SFS Secure credentials is provisioned to you by your Participating Organization Data Administrator (PODA).
- SFS Secure URL: https://www.sfs.ny.gov/secure/

SFS Secure

How do I get access to SFS Secure?

- SFS Secure houses announcements, such as upcoming trainings, updates to the system, etc.
- SFS Secure holds the SFS Release Calendar, which advertises updates and new features that were recently added to the system.
- Access to SFS Secure is provisioned by your agency's Participating Organization Data Administrator (PODA).
  - Work with your supervisor or Agency Coordinator to find out who your agency's PODA is.
  - To find out who your Agency Coordinators are within your Agency, you can access the Agency Coordinators list located on SFS Secure.
    - Navigation: SFS Secure > Customer Community > SFS Agency Coordinators and Employee Data Administrators. Select the hyperlink for the Agency Coordinator List.
- Not sure if you need access to SFS Secure based on the work you do for your agency? Check with your supervisor.

SFS Help Desk

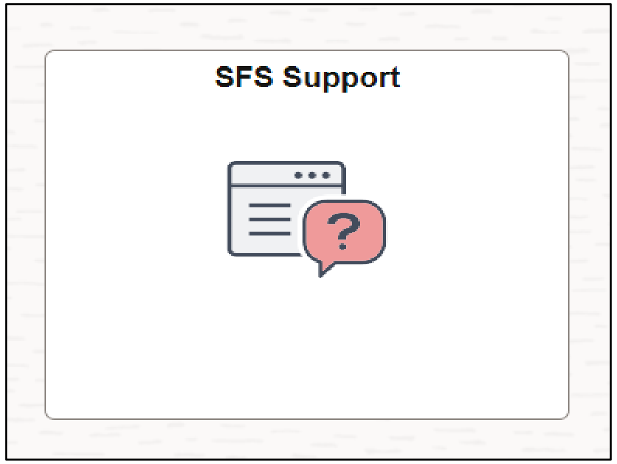
When should I reach out to the SFS Help Desk?

- The Help Desk provides the first level of SFS user support to agency staff.
- The Help Desk is a single point of contact for:
  - NYS agencies and their technical team members
  - NYS vendors and businesses seeking to become vendors
- The Help Desk can provide assistance with issues such as:
  - SFS transaction processing assistance or errors
  - SFS system or functional issues
- The Help Desk **cannot** provide assistance with issues such as:
  - Roles, login access, password resets (work with your ASA)
  - Address and supervisor changes (work with your EDA)
  - Policy or agency-specific procedure (refer to the GFO, OSC Travel Manual, Budget Bulletins, or your supervisor)

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

Call (518) 457-7737

helpdesk@sfs.ny.gov



Contacting the SFS Help Desk

What do I include in my message to the Help Desk?

- Questions regarding SFS should be submitted to the SFS Help Desk:
  - Email: helpdesk@sfs.ny.gov
  - Phone: (518) 457-7737 or (877) 737-4185
  - Through the SFS Support tile in SFS Production

- 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.

SFS Help Desk Incidents

I reached out to the Help Desk with an inquiry. Now what?

- The Help Desk will open an incident on your behalf regardless of the contact method you used.
  - You will receive an email once your incident has been opened from nyoscprod@service-now.com. Subsequent emails related to your incident will also be sent from this email address.
    - If you need to provide additional information or have questions about your incident, please reply to the email from nyoscprod@service-now.com. This ensures that the communication remains tied to the incident.
- Any updates to your incident will be sent to your email, including when your incident has been Resolved.
- If more information about your issue/inquiry is needed, the SFS Help Desk or the subject matter expert assigned to your incident may reach out to you via email or phone.

Reminders and Resources

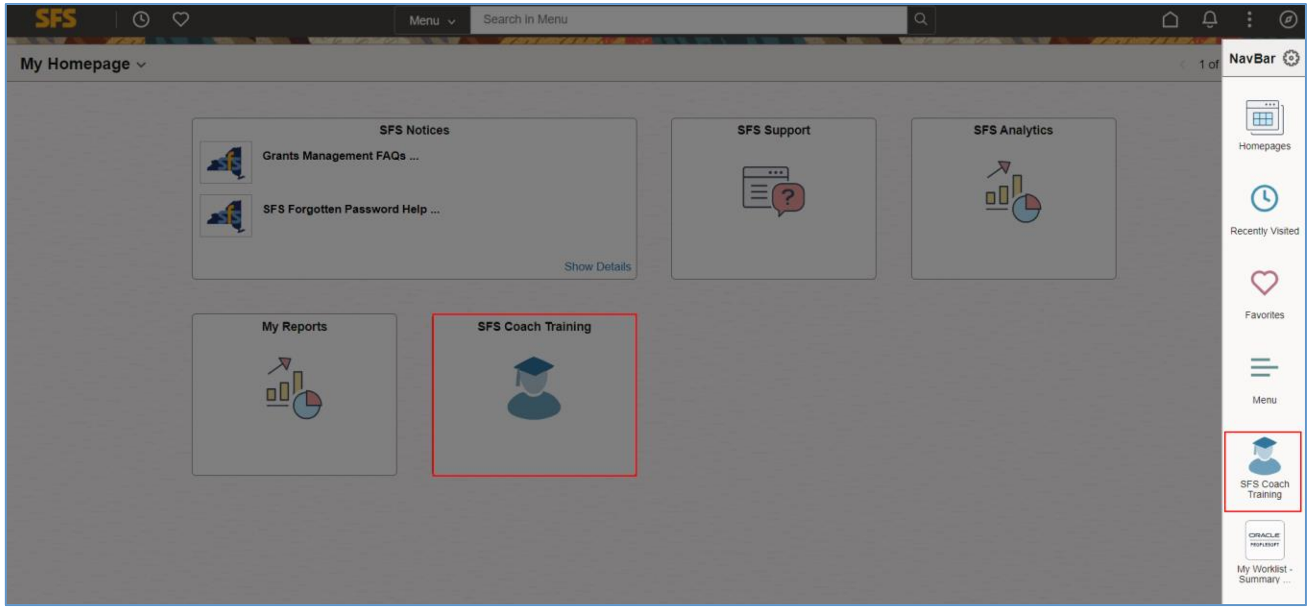
SFS Coach Training

- SFS training created for all SFS module areas, to support new and advanced SFS users.

- Quick, direct access to SFS learning guides from any page in the SFS environment.
  - Open the **NavBar** and click the **SFS Coach Training** icon from any page or click the **SFS Coach Training** tile from **My Homepage**.

- Ability to search for training by Topic, Training Material, Training Type, or Keyword.

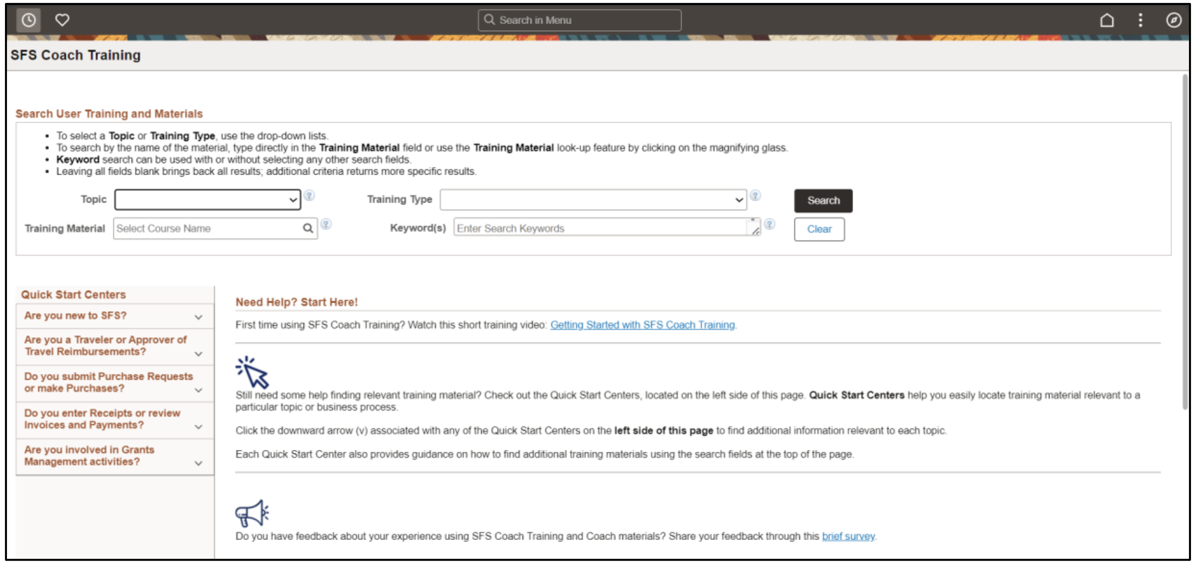
- Includes job aids, handbooks, presentations, reference guides, and videos.



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.

SFS Orientation – Resources and Support

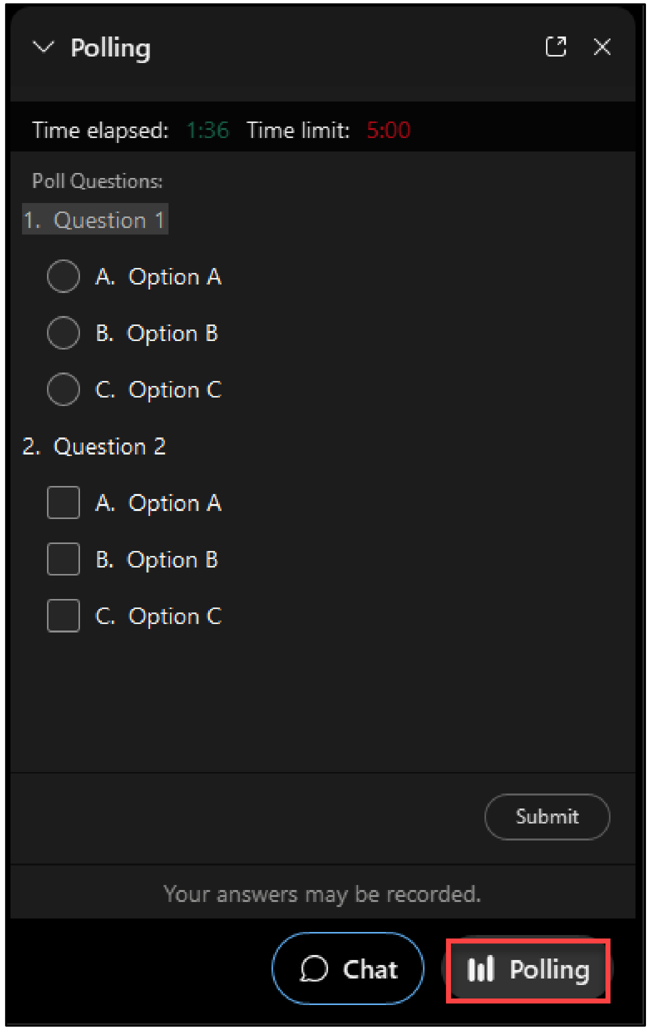
- Each month, SFS holds an Orientation to SFS session intended for NYS agency staff who are newer to SFS, as well as individuals who want to learn more about resources and support options.

- 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 SFS email updates. SFS users can visit the SFS Customer Communities page on the SFS Secure website to sign up.
  - On the Notice tile in the SFS Production and Agency Business Process test environments.

Session Wrap Up 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.



Recap: Key Contacts by Topic Area

- For assistance with:
  - SFS User ID issues, password resets, security roles and access, adding or removing accounts
    - Contact your Agency Security Administrator (ASA)
  - Address and supervisor changes in the SFS
    - Contact your Agency Employee Data Administrator (EDA)
  - Access to SFS Secure
    - Contact your Agency Participating Organization Data Administrator (PODA)
  - General agency policies or procedures
    - Contact your Agency Supervisor
  - SFS transaction processing assistance or errors
    - Contact the SFS Help Desk
  - Relevant SFS training material for a specific topic
    - Refer to SFS Coach Training
  - Statewide policies, including travel policy
    - Refer to the OSC GFO and the OSC Travel Manual

Questions and Answers