



## Tips and Tricks to Better Manage Your Work Using SFS

Alex DeFrancesco, SFS

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### Topics

- Personalizing your SFS Homepage
- Accessing Training through SFS Coach
- Using Hyperlinks within SFS Queries
- Opening an SFS Help Desk Ticket
- Introducing the SFS Newsletter
- Using SFS*Secure*
- Questions and Answers

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## Personalizing Your SFS Homepage

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## SFS Homepage & New User Experience

- Updated look and feel of SFS pages
- Homepages for various modules
  - i.e., Travel, Requisitions, Purchasing, etc.
- NavBar and Navigator to navigate to SFS pages
- Ability to personalize homepages to meet your needs

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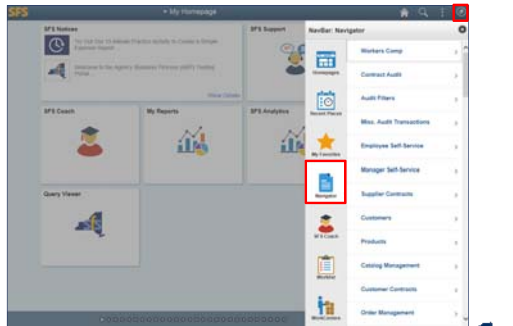
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## NavBar & Navigator



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## Demo: Using the NavBar



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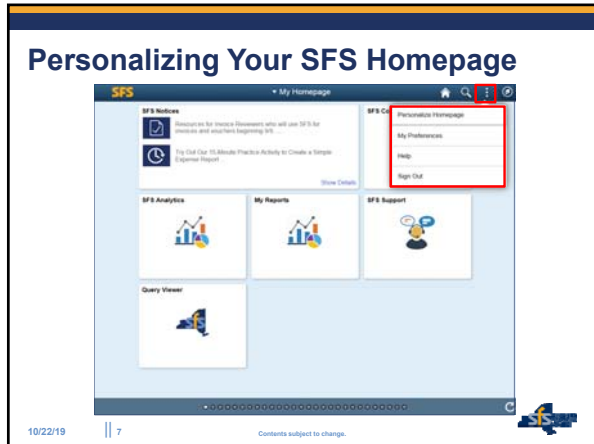
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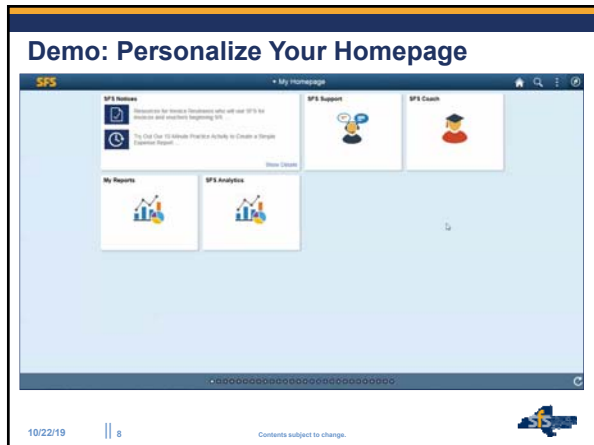
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### SFS Training Overview

- All training created to benefit new and advanced SFS users.
- More than 50 self-paced training courses cover all SFS modules.
- Three training modes available:
  - See It
  - Try It
  - Print It
- Also includes reference guides and videos.

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### SFS Coach

- SFS training material fully integrated into SFS.
- Quick access to material within SFS, from anywhere in the system.
- Ability to search for the specific training needed.
- Updated to support system changes and user needs.

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### Accessing SFS Coach



The screenshot shows the SFS My Homepage interface. At the top, there is a navigation bar with the SFS logo and a search icon. Below the navigation bar, there are several tiles: SFS Notices, SFS Analytics, My Reports, SFS Support, and Query Viewer. The SFS Coach tile, which features a graduation cap icon, is highlighted with a red rectangular box. The footer of the screenshot includes the date 10/22/19, a page number 12, and the text 'Contents subject to change.' along with the SFS logo.

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### Searching for SFS Coach Training

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### Demo: Accessing SFS Coach

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## Using Hyperlinks within SFS Queries

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## Using Hyperlinks within SFS Queries

- Provides quick access to related transactions in SFS
- Click the hyperlink to open a new window to the transaction detail
- Available in many existing SFS queries today, across multiple areas
  - i.e., Receiving, eSettlements (Invoices), Accounts Payable, etc.

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## Using Hyperlinks within SFS Queries

Example:

- Each Invoice Number in the query results has a hyperlink.
- Clicking each hyperlink opens a new window, taking you to the invoice in SFS.

Business Unit	Vendor ID	Vendor Name	Invoice Number	Voucher ID	Invoice Dt
KYZ01	1100111363	BIMBO BAKERIES USA INC	<a href="#">0027233333</a>	00388449	3/18/2019
KYZ01	0420000055	OFFICE OF GENERAL SERVICES	<a href="#">3148705248</a>	00392636	3/31/2019
KYZ01	1000015833	STAFF CARE INC	<a href="#">3000000000</a>	00388099	4/25/2019
KYZ01	0410000629	ADV ACCT - CAP DIST PSY - STAFF CARE	<a href="#">PETTY CASH</a>	00392191	6/4/2019
KYZ01	1000015186	ALL-MODE COMMUNICATIONS INC	<a href="#">13869</a>	00391801	3/28/2019
KYZ01	1000015186	ALL-MODE COMMUNICATIONS INC	<a href="#">13891</a>	00390666	4/24/2019

Invoice Header Information

Invoice # 0027233333    Vendor ID 1100111363    View Status History    View Original Invoice

Invoice # 0027233333    Vendor Name BIMBO BAKERIES USA INC    Invoice Date 3/18/2019

Location 0420000055    Invoice Date 3/18/2019    Invoice Date 3/18/2019

230 BULLARD ST    1000015833    Invoice Date 3/18/2019

HOUSTON, TX 77002    Invoice Date 3/18/2019    Invoice Date 3/18/2019

Country US    Invoice Date 3/18/2019    Invoice Date 3/18/2019

Invoice Details

Invoice # 0027233333    Vendor ID 1100111363    Invoice Date 3/18/2019    Invoice Date 3/18/2019

Invoice # 0027233333    Vendor ID 1100111363    Invoice Date 3/18/2019    Invoice Date 3/18/2019

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## Opening an SFS Help Desk Ticket

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## SFS Help Desk

- Provides personalized support and answers to agency questions.
- Staff available to provide immediate support or, when issues are complex, research questions through subject matter experts.
- Contact the SFS Help Desk by:
  - Creating a ServiceNow ticket [via email](#)
  - Calling 518-457-7737 or 877-737-4185 toll-free
  - Using the SFS Support tile on the SFS Homepage

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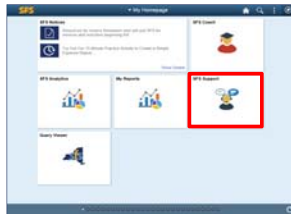
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## Contacting the Help Desk from My Homepage

- SFS users can create and submit a request through the SFS Support tile available on "My Homepage."
- The SFS ticket request form on the SFS Homepage replaces Magic SDE quick tickets.



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## Ticket Request Wizard (Step 1)

The **Ticket Request Wizard** will automatically populate your name, phone, and email if it exists in the user profile. Once entered, click Next.



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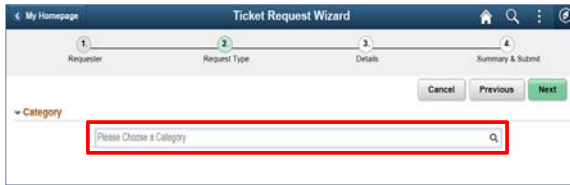
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### Ticket Request Wizard (Step 2)

The **Request Type** page will provide users with the ability to choose a category for the request. Some categories have Sub-category options.



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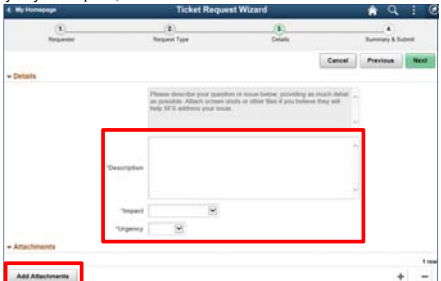
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### Ticket Request Wizard (Step 3)

The **Details** page provides space to enter a description, select the impact and urgency of your request, and add an attachment.



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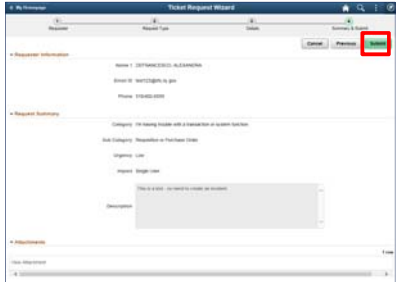
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### Ticket Request Wizard (Step 4)

The Summary and Submit page allows users to verify the information and attachments entered, and to click the submit button.



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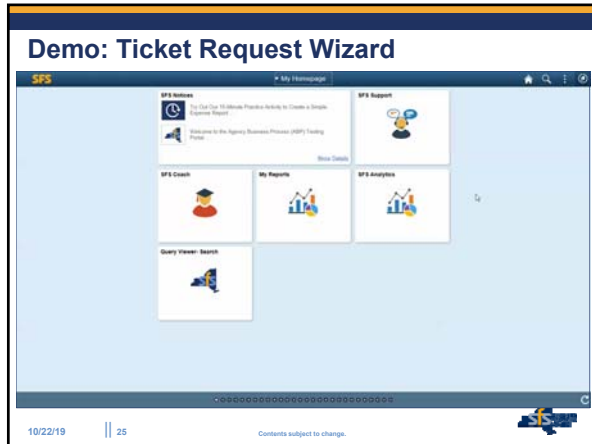
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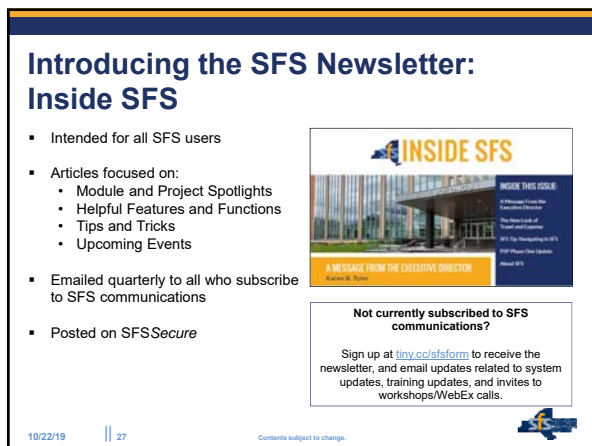
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## Using SFSecure

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## Using SFSecure

- Secure Announcements
- Meetings and Events Calendar
- SFS Information Centers
- Query & Report User Guides
- Glossaries
- SFS Release Calendar



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## Questions and Answers

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