SFS Analytics for Advanced Users: Using Statewide Financial System (SFS) data to analyze spending

October 28, 9:00 a.m. – 10:00 a.m.

Agenda

- Intro to SFS Analytics

- DW470 – Vouchers Posted to Cash Ledger

- DW426 – P-Card/NET Card Analysis

- Questions & Answers

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

STATEWIDE FINANCIAL SYSTEM

Intro to SFS Analytics

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 the SFS Analytics (NYF_AGY_SFS_ANALYTICS) functional role

- 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

SFS Analytics landing page

Contents subject to change.

Common Reports Used to Analyze Spending

- DW557 – Expense Report Listing

- DW438 – Ad Hoc General Ledger Report

- DW951 – Purchase Order Listing

- DW128 – Contract Dashboard

- DW470 – Vouchers Posted to Cash Ledger

- ***New!*** DW426 – P-Card/NET Card Analysis

DW470 – Vouchers Posted to Cash Ledger

DW470 – Vouchers Posted to Cash Ledger

- Available under the **Document Listing Reports** section of SFS Analytics

- Used to view all vouchers that have posted to the cash ledger for the selected accounting period

- The Journal Date represents the date of disbursements

- There is also the ability to drill down to initiating documents

- Report User Guide available on the Help tab

Contents subject to change.

DW426 – P-Card/NET Card Analysis

DW426 – P-Card/NET Card Analysis

- New report added in April 2021

- Available under the **Document Listing Reports** section of SFS Analytics

- Used to view PCard and NET Card information in a variety of ways including by employee, by card, and by timeframe

- Report User Guide available on the Help tab

Questions and Answers

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