



EE1 Training Refresh Kickoff

Agenda

- EE1 Training Refresh Effort
- EE1 Training Release Schedule
- Self-Paced Training Courses
- Demo: Accessing self-paced trainings in SLMS



Overview of EE1 Training Refresh Effort

Training Refresh Effort

- Develop Self-paced training courses for SFS Users
 - Leverage information from FAQs, experience from demos, workgroup sessions, and incidents to add background and context
- Publish Self-paced training courses to SLMS starting on August 19
 - Development priority on high-impact change areas
- Establish formal training development, maintenance, and delivery process for core training going forward
 - Continue to build upon the foundational training, as the system and user needs evolve



EE1 Training Release Schedule

EE1 Training Release Schedule

Release contents selected within the schedule are based on the level of change impact and resource availability to complete development. Content available through SLMS using the following **SLMS course code: SFS-9.2-SPT**

Release	Target Date	Release Contents	
Refresher Training Release 1	8/19/15	<ul style="list-style-type: none"> SFS101 – Introduction to the SFS SFS205 - Getting Started with SFS AM101 - Adding and Maintaining Assets AP101 – Introduction to Accounts Payable AP205 - Voucher Entry and Processing AR101 – Introduction to Accounts Receivable and Billing 	<ul style="list-style-type: none"> AR205 - Creating and Maintaining Customers CC101 - Creating and Amending Revenue Contracts CN210 - Creating and Processing Procurement Contracts PO205 - Requisition Processing PSP205 – Working with PSP TE201 - Travel and Expense for Travelers
Refresher Training Release 2*	9/16/15	<ul style="list-style-type: none"> AM205 – Managing Assets AP210 - Advanced Voucher Processing BI320 - Setup and Configurations for Billing CCA205 - Credit Card Administration INV205 – Inventory Management GCC101 - Creating and Amending Customer Contracts (Non-Revenue) 	<ul style="list-style-type: none"> GL205 - Processing Journal Entries KK215 - Processing and Maintaining Budgets PO210 - Approving Requisitions PO220 - Creating & Processing Purchase Orders PPM101 - Creating and Maintaining Projects and Program Management WFA205 – Workflow Administration
Ongoing Releases	Target Date	Release Contents	
Supplemental SFS 9.2 Training Release**	10/21/15	<ul style="list-style-type: none"> AR215 - Creating and Maintaining Receivables AR220 - Creating and Maintaining Deposits ASA205 - Agency Security Administration BI210 - Creating and Processing Billing BI305 - Billing Processes for Managers 	<ul style="list-style-type: none"> EDA205 - Employee Data Administration PO215 - Using Procurement Cards PO225 - Receiving and Return to Vendor TE305- Travel and Expense for Approvers QRY201 - Using Query Viewer and Query Manager

*Release 2 will also include updates to content from previous releases, as needed.

**Additional ongoing release dates will be communicated to support system changes, as needed.

SLMS Course Codes – Release 1

Name	SLMS Course Code	SLMS Class Code
AM101 Adding and Maintaining Assets	SFS-9.2-SPT	Asset Management 101
AP101 Introduction to Accounts Payable	SFS-9.2-SPT	Accounts Payable 101
AP205 Voucher Entry and Processing	SFS-9.2-SPT	Accounts Payable 205
ARBI 101 Introduction to Accounts Receivable	SFS-9.2-SPT	Accounts Receivable 101
AR205 Creating and Maintaining Customers	SFS-9.2-SPT	Accounts Receivable 205
CC101 Creating and Amending Revenue Contracts	SFS-9.2-SPT	Revenue Contract 101
CN210 Creating and Processing Procurement Contracts	SFS-9.2-SPT	Procurement Contract 210
PO205 Requisition Processing	SFS-9.2-SPT	Requisition 205
PSP205 Working with PSP	SFS-9.2-SPT	Payment Sched. Projection 205
SFS101 Introduction to the Statewide Financial System (SFS)	SFS-9.2-SPT	Statewide Financial System 101
SFS205 Getting Started in the Statewide Financial System (SFS)	SFS-9.2-SPT	Statewide Financial System 205
TE201 Travel and Expense for Travelers	SFS-9.2-SPT	Travel and Expense 201



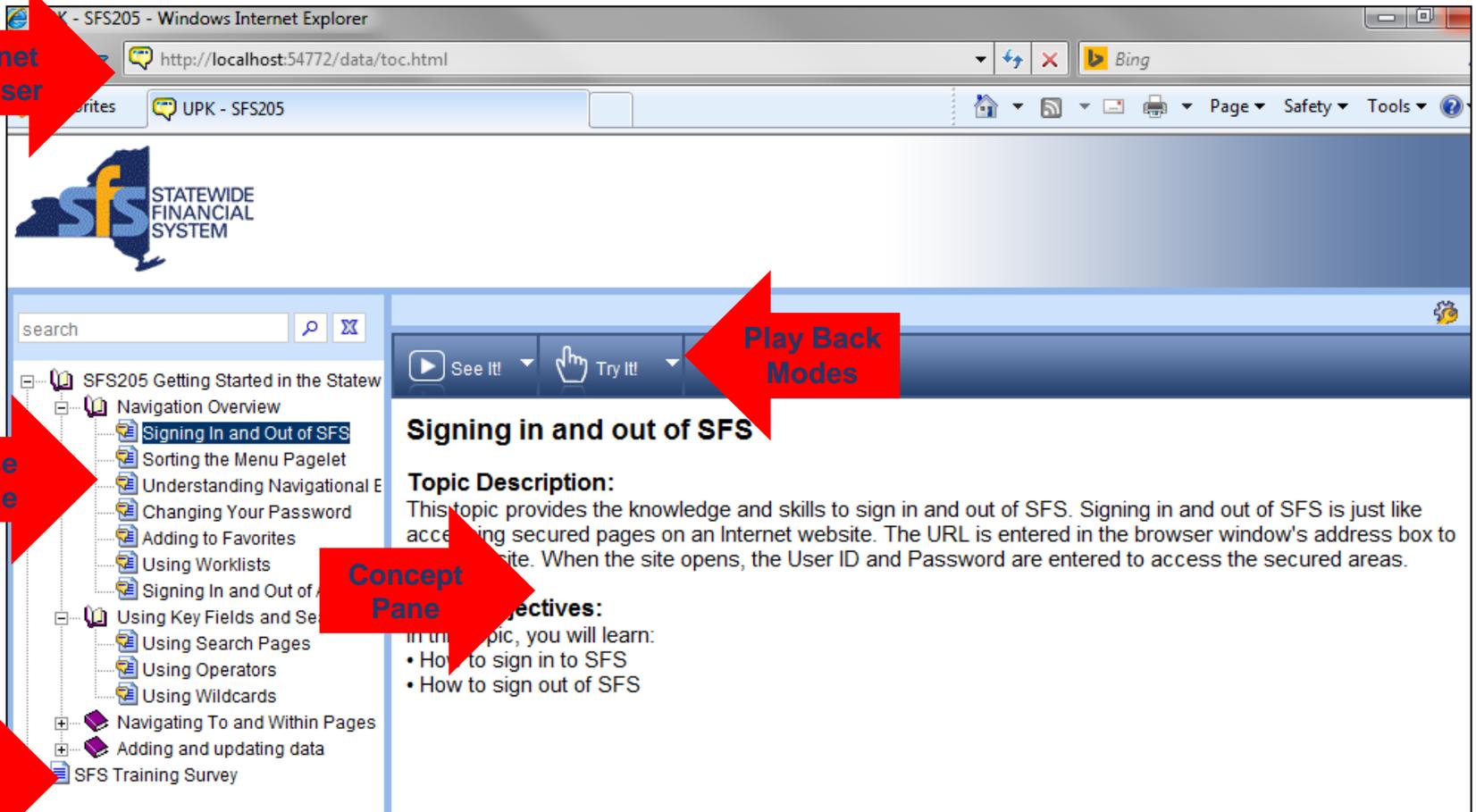
Self-Paced Training Courses

Introduction to Self-Paced Trainings

- SFS self-paced trainings have been developed using the User Productivity Kit (UPK) and will be accessible through SLMS.
- UPK is an Oracle product and on-demand training tool that will allow you to learn how to use SFS at your work station, at your own pace, and at a time that fits in your work schedule.
- These self-paced trainings represent our core system training for SFS users, going forward.

Using the Self-Paced Training

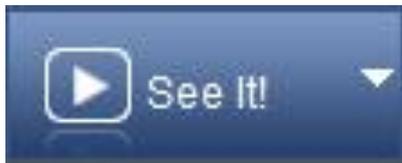
The graphic below is a screenshot of a self-paced training course:



Using the Self-Paced Training

The self-paced training content is delivered through highly interactive, online learning modes.

There are **2 modes** the user can choose from – See it! and Try it!



See it! – Enables a user to learn by watching an animated demonstration of the steps for a task being performed in a simulated environment. All of the required activities, such as moving the mouse and entering data, are completed automatically.

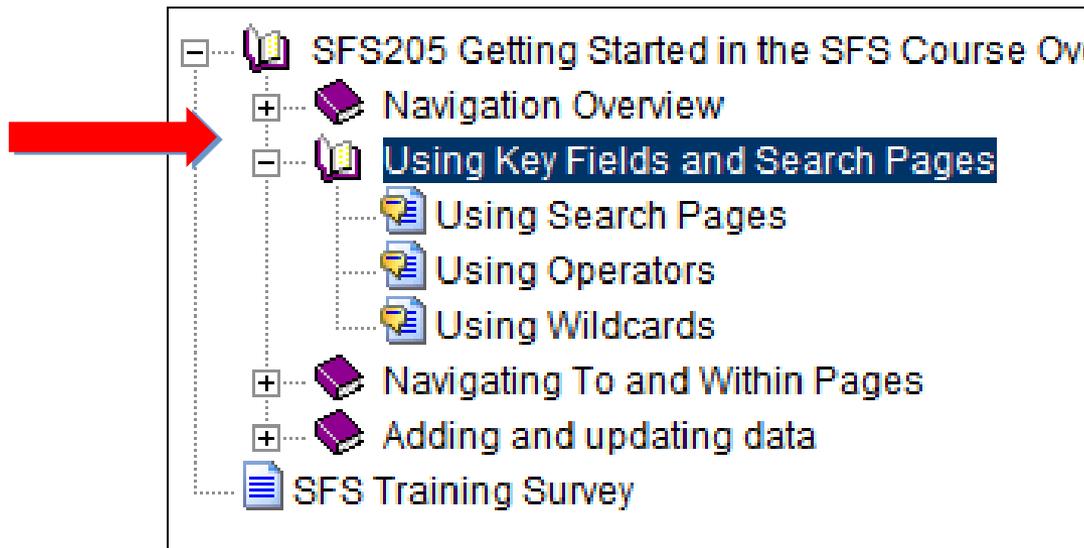


Try it! – Provides interactive prompts that guide users through business scenarios. The user is prompted for mouse clicks and/or keystrokes to complete the task.

The See It! And Try It! modes are available for all training topics.

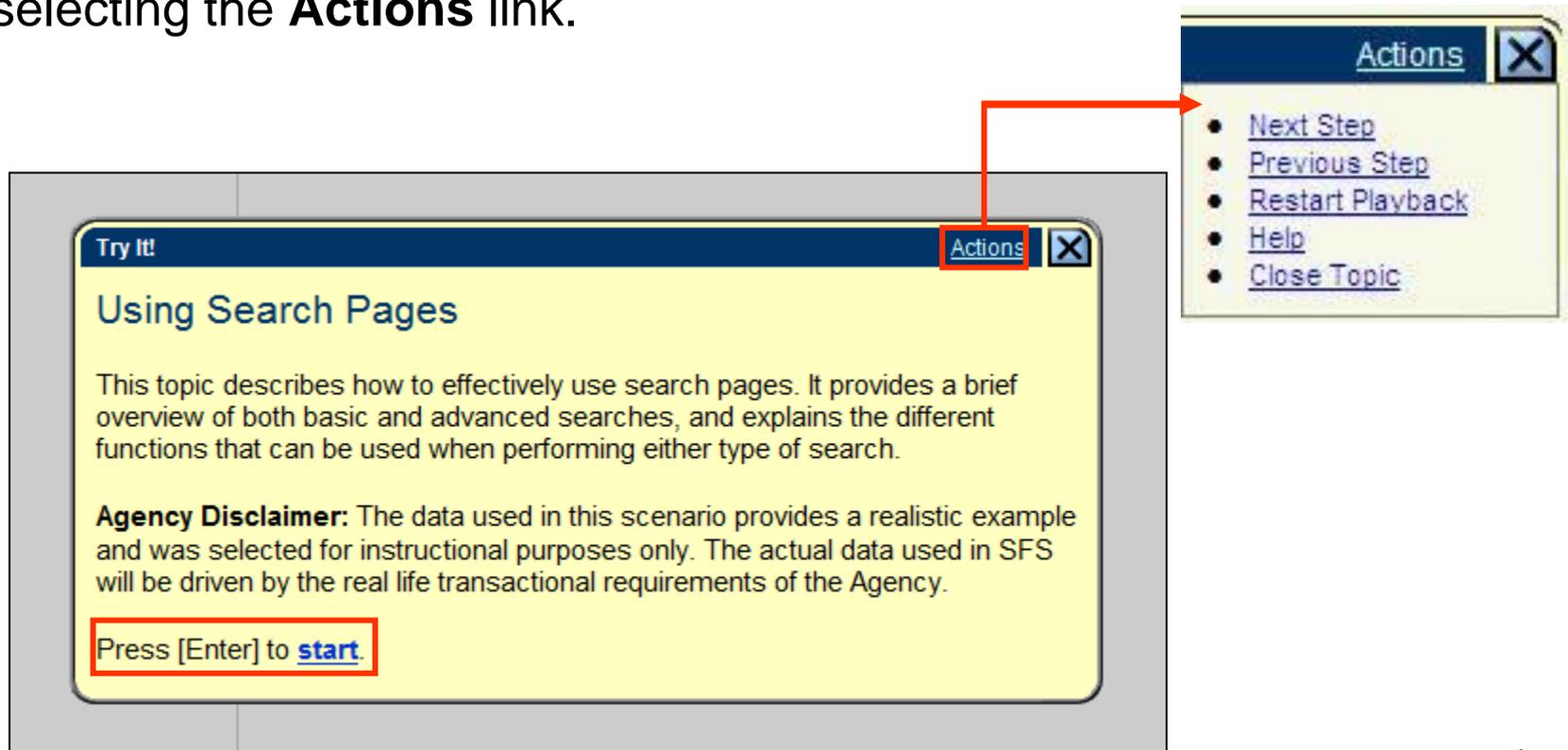
Using the Self-Paced Training

- The self-paced training courses are organized in a folder-type structure.
- Each course consists of a series of Lessons and Topics.
- To open the folders click on the **Plus** sign.



Using the Self-Paced Training

After you select a topic, you can navigate between pages in the self-paced training by following the **on-screen instructions**, or by selecting the **Actions** link.



The screenshot shows a window titled "Try It!" with a yellow background. The main heading is "Using Search Pages". Below the heading is a paragraph: "This topic describes how to effectively use search pages. It provides a brief overview of both basic and advanced searches, and explains the different functions that can be used when performing either type of search." Below this is an "Agency Disclaimer" section. At the bottom, there is a red-bordered box containing the text "Press [Enter] to [start](#)". In the top right corner of the window, there is an "Actions" button with a close icon. A red arrow points from this button to a separate "Actions" menu box on the right. This menu box contains a list of options: "Next Step", "Previous Step", "Restart Playback", "Help", and "Close Topic".

Try It! Actions

Using Search Pages

This topic describes how to effectively use search pages. It provides a brief overview of both basic and advanced searches, and explains the different functions that can be used when performing either type of search.

Agency Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in SFS will be driven by the real life transactional requirements of the Agency.

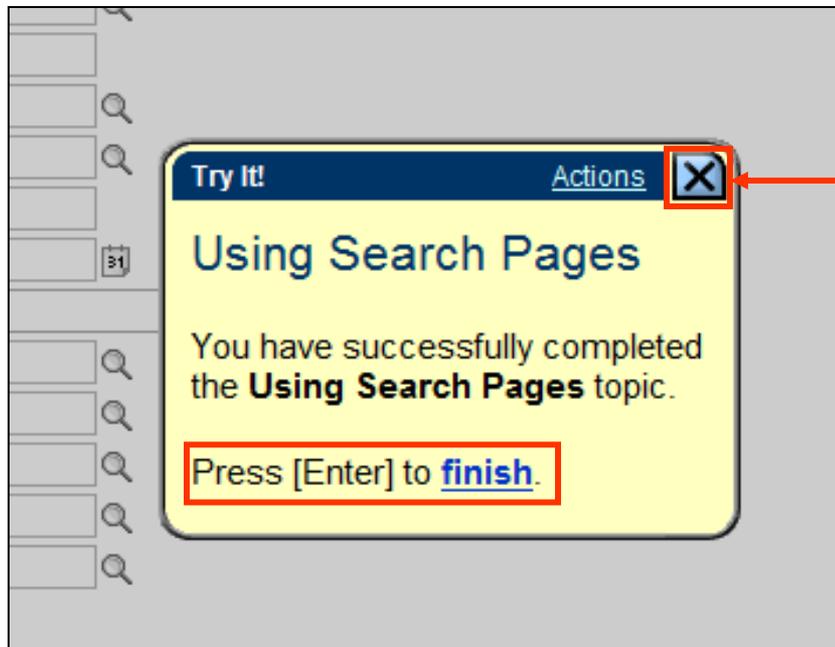
Press [Enter] to [start](#)

Actions

- [Next Step](#)
- [Previous Step](#)
- [Restart Playback](#)
- [Help](#)
- [Close Topic](#)

Using the Self-Paced Training

You can finish or close the self-paced training by following the on-screen instructions, or by selecting the **Close** link.



Clicking the close button will close the topic and return you to the course outline.



Demo

Demo

Key Steps to accessing a self-paced training course:

- Navigate to SLMS
- Search for the SFS Financials Course
- Determine which self-paced training you are interested in
- Enroll in the applicable self-paced training(s)
- Launch the self-paced content from SLMS

SLMS Course Codes – Release 1

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Feedback

Feedback from users is important to ensure we are focused on delivering an effective product for our stakeholders.

- The link to an **SFS Training Survey** is included at the end of every self-paced training course.

Any additional feedback on self-paced trainings (e.g., request for topic updates or requests for new topics) should be submitted through the SFS Help Desk. Please include the name of the specific self-paced training in the incident.

- Help Desk phone: (518) 457-7737 or (877) 737-4185 (toll-free).
- Help Desk email: HelpDesk@sfs.ny.gov.

**This concludes the EE1 Training
Refresh Kickoff.**

Thank you!