Chartfield Maintenance (CFM) Application

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Presentation and Demo
The **Chartfield Maintenance (CFM)** application automates a workflow with review and approval requested by all appropriate school and unit Fiscal Officers, the Budget Office and Controller’s Office.

- Alleviates user frustration and improves operating efficiency for all stakeholders
- Streamlines adding, modifying and inactivating chartfield segments in FAME
- All requests can be tracked and audited
- Due diligence checks done before inactivating chartfield segments in FAME.
- All communications and approval are stored within the application and easily retrieved
### Current Process

- Requests are submitted by **email and ModTrak** and are difficult to manage and track
- **Manual** workflow process
- Incomplete and incorrect information is often submitted due to users being unsure of the varying requirements
- New chartfield information is not consistently shared with the appropriate schools and units
- Analysis and metrics is time consuming and not readily available

### New Process

- Requests are **submitted using a form** in the chartfield maintenance application
- **Automated** workflow process
- Forms clearly indicate required (asterisks) fields.
- **Built-in review & approval** by appropriate schools and units
- **Email notifications** to schools and units when request is completed
- **Reporting and ServiceLink metrics** on end-to-end process with SLAs built into ServiceLink (e.g. request type, turnaround time, number of requests).
● Identify all required fields for requests to reduce incomplete information. All required fields need to be completed.

● Schools and Units are notified via ServiceLink email when chartfields are created, modified or inactivated so that necessary action can be taken.

● Purpose codes are required for all programs and projects to ensure funds are budgeted and used for the stated purpose.

● Ability to create necessary reports.

● Ability to analyze metrics on end to end process.

● Improve request turnaround time.

● Reduce data entry errors. Ability to select most fields from drop down menu.

● Ability to attach necessary documents.
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<th>Process</th>
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<th>Modify</th>
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<td>Accounts</td>
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How to Access CFM application

- Navigate to the Chartfield Maintenance Forms card from the Work Tab at NYU Home
- Or via the CFM url: https://bpasprod.its.nyu.edu/cfm/entry

Support
Contact AskFinanceLink@nyu.edu or 212-998-1111 for all questions

Chartfield Maintenance Support and FAQs
Upcoming Enhancements
The following will become available in the coming months:

- Processing Mass Requests
- Reporting on all Submitted Requests
- Projects for NYU Abu Dhabi Funds