



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

Process	Create	Modify	Inactivate
Accounts	✓	✓	✓
Organization Unit	✓	✓	✓
Program Undesignated Funds	✓	✓	✓
Program Fund 20	✓	✓	✓
Program Fund 22	✓	✓	✓
Program Endowment Funds	✓	✓	✓
Program Fund 40 (Investments)	✓	✓	✓
Program Fund 44 (Annuities and Life)	✓		
Program Fund 60	✓	✓	✓
Project Fund 20	✓	✓	✓
Project for Fund 22	✓	✓	

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