An introductory guide to CUNYfirst for departmental advising and administration

Last update: August 3, 2017
• Preferred browsers:
  – Firefox, Chrome
• You may find CUNYfirst non-intuitive in many ways, particularly as you start.
  – Many of the names menus and dialogs will use jargon unfamiliar to academics. Part of this is because the system was adapted from an Oracle system used in the corporate world.
  – So, at times, you will just have to take a deep breath, and….. Be patient….. We are here to help..... ☺
CUNYfirst Campus Solutions is used for.....

• Dept. advising/administration functions
  – Access of transcripts
  – Access of class schedules and browsing course catalog
  – Enrollment permissions (over-tallies, waiving prerequisites, etc.)
  – Monitoring course enrollment
  – And much more.....

• General faculty functions
  – Supplying textbook information for students
  – Accessing class rosters
  – Attendance verification
  – Entering grades
What this guide covers....

1. Activating your CUNYfirst account (if you haven’t already done so)

2. Logging in to your CUNYfirst account

3. Function #1A: Accessing student records through the Student Summary View

4. Function #1B: Accessing student records through the Advising Center

5. Function #2: Viewing the Schedule of Classes

6. Function #3: Viewing the Course Catalog

7. Function #4: Viewing Departmental Rosters (and class enrollment totals)

8. Function #5: Granting Enrollment Permissions
Do you have the CUNYfirst “Roles” you need??????

- To perform the various departmental advising and administrative functions described here, you will need to be set up in CUNYfirst with the proper CUNYfirst “Roles” (i.e. permissions).
- If you do not have access to the functions needed to do your job, please contact your CUNYfirst Liaison, who can help you get the Roles you need
  - To find your CUNYfirst Liaison, visit here: http://support.ccny.cuny.edu/cunyfirst/?page_id=1960
FERPA training

• Before you look at student records using CUNYfirst PLEASE complete the FERPA training module at....
  – https://apps.ccny.cuny.edu/ferpa

• You will only need to do this once....

• It doesn’t take that long.....

• Use your CCNY userid and password (used for email, library, etc)

• By the way...
  – FERPA: Federal Educational Rights and Privacy Act

• TROUBLESHOOTING
  – If you forgot your CCNY userid/password...go to...
    • https://accountlookup.ccny.cuny.edu/
Activating your CUNYfirst account
(if you haven’t already done so)

- Enter this address in the address bar of your browser:
  - https://home.cunyfirst.cuny.edu

- Click on “New User” and follow the prompts (activation may take a little time)
  - As activation finishes, please note CUNYfirst username and EMPLID (see next page).
When activation is complete you will be shown your username (which you’ll need to log in) and your EMPLID (which is useful in certain situations). Please write down this information!!!
Now... login to your CUNYfirst account

- Enter exact address below in address bar
  - https://home.cunyfirst.cuny.edu
  - Enter your CUNYfirst username and password...
- If you have login problems, please see http://support.ccny.cuny.edu/cunyfirst/?page_id=1269
Depending on your permissions, you’ll see some subset of the commands shown to the left....

Click on “HR/Campus Solutions” (NOTE: Do NOT click on Self-Service on this “Enterprise Menu”)

This is your “base” menu – we’ll be returning here again and again....
You can access your “Favorites,” and edit them, by expanding the “My Favorites” section on the upper left.

Special Note: ”Favorites”

If you would like to bookmark a particular function, click “Add to Favorites” on upper right part of screen.
Function #1: Viewing Student Records

Method A – CUNY Student Summary View
Accessing student records– Method 1

1. Click to expand “CUNY Student Summary View”

2. Then click on “Student Summary View”
1. Enter a student’s first and last name and click “Search”

- **Special Note**: “The CUNYfirst spinning wheel”

- Often, you’ll click on something and it will seem like nothing is happening. However, you may see a spinning “wheel” towards the **upper right** of the page. This is an indication that CUNYfirst is searching (often slowly)
You will now see all the students currently enrolled at CCNY with the name you specified. If several are listed, to find the right student, you must click through the possible students, or else get other info, such as their CUNY ID# (on left), birthday, or last four of SSN.

Note: It might be a good idea to get students to routinely append their CUNY ID to all emails

Click on one of the students
Each of the ~15 items can be revealed/hidden by clicking on the triangles at left (I’ve hid them for confidentiality).

Some highlights:

- “Affiliation Information” shows CUNY schools attended
- “Enrollment Information” shows grades for every class taken in a sortable list
- “Term History Information” shows GPA and credits taken for each semester
- “Service Indicator Information” indicates Stops/Holds on registration
- “Testing Information” indicates Stops/Holds on registration

Click on the triangles to see/hide the section.....
Function #1: Viewing Student Records

Method B – The Advisor Center
Accessing student records– Method 2

1. Click to expand “Self Service”

2. Then click to expand “Advisor Center”

3. Then click on “Advisee Student Center”
1. Now, enter the student’s name, and click “Search.”

After the “wheel” spins for a bit, you’ll see all the Stephanie Montenegros at CUNY, not just at CCNY (!!!) This is again why it’s useful to have other info...

2. Click again on one of the students...
The default view for the student includes their schedule for the week...... Also, Stops are indicated under “Holds” at right.

1. Click here..... to get other kinds of info ....

This will expand the dialog box......

2. Click on “Course History”...

3. Then click on the “>>”
You should now see a list of courses (which I’ve blocked out), with sortable columns.

1. **Click “student center”** to get back to the last view.

2. Go back to the little dialog box to the left, pick “Transcript: View Unofficial”

3. Then click on the “>>”
1. Enter “City College” and “Advisor Unofficial Copy”, like so.....

2. Then click “view report”

This should generate a nice PDF of the transcript, but note that if pop-ups are blocked you will get nothing!!!!!! If the PDF doesn’t appear, allow pop-ups (look near top of screen) and then click “view report” again.
Function #2: Accessing a Schedule of Classes
Accessing the Schedule of Classes

Click to expand “Self Service”

Then click to expand “Search”

Then click on “Class Search”
1. Select “City College” and pick semester (Term)

2. Select dept. (“Course Subject”) and course level (“Course Career”)

3. Click “Search” (Look for button towards bottom of screen)

Do you just want to show open classes?
Click on a course (section) to get more info, including enrollment limit and number of seats available.

### BIO 10004 - HUMAN BIOLOGY

#### Section 06-LEC(57671)  Status

**Session:** Regular  
**Requirement Designation:** Required Core - Life and Physical Sciences

<table>
<thead>
<tr>
<th>Days &amp; Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Meeting Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tu 11:00AM - 11:50AM</td>
<td>TBA</td>
<td>Staff</td>
<td>01/27/2014 - 05/23/2014</td>
</tr>
<tr>
<td>Th 11:00AM - 11:50AM</td>
<td>TBA</td>
<td>Staff</td>
<td>01/27/2014 - 05/23/2014</td>
</tr>
<tr>
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#### Section 07-LEC(57672)  Status

**Session:** Regular  
**Requirement Designation:** Required Core - Life and Physical Sciences

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<th>Meeting Dates</th>
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<td>TBA</td>
<td>Staff</td>
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<tr>
<td>Th 6:30PM - 8:20PM</td>
<td>TBA</td>
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<td>Th 11:00AM - 11:50AM</td>
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</table>

#### Section 08-LEC(57673)  Status

**Session:** Regular  
**Requirement Designation:** Required Core - Life and Physical Sciences

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<th>Instructor</th>
<th>Meeting Dates</th>
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<td>TBA</td>
<td>Staff</td>
<td>01/27/2014 - 05/23/2014</td>
</tr>
<tr>
<td>Th 6:30PM - 8:20PM</td>
<td>TBA</td>
<td>Staff</td>
<td>01/27/2014 - 05/23/2014</td>
</tr>
</tbody>
</table>
Function #3: Browsing the course catalog
Browsing the course catalog

Click to expand “Self Service”

Then click to expand “Search”

Then click on “Browse Course Catalog”
Select City College, and click “change”

Then click first letter of department name

Then click on department

The (long?) list of courses will appear.

Select your course!!!
Function #4: Accessing class rosters (and seeing enrollment totals)
Accessing class rosters

1. Click to expand “CUNY”

2. Then click to expand “Campus Solutions”

3. Then click to expand “CS Extensions”

4. Then click on “Departmental Class Rosters”
1. Click on the magnifying glasses to enter info ....

2. Click Search

Note: Most entries can also be directly typed...

Note: Search criteria can be saved...
<table>
<thead>
<tr>
<th>Class Data</th>
<th>Title</th>
<th>Instructor</th>
<th>Enrolled</th>
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</thead>
<tbody>
<tr>
<td>BIO 10004 (57667.02)</td>
<td>HUMAN BIOLOGY (Lecture)</td>
<td>Samms, Michael</td>
<td>25</td>
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<tr>
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</tr>
<tr>
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<td>BIO 10100 (57638.03)</td>
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<td>Firooznia, Fardad</td>
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<td>BIO 10100 (57639.04)</td>
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<tr>
<td>BIO 10100 (57640.05)</td>
<td>FOUND OF BIOLOGY 1 (Lecture)</td>
<td>Firooznia, Fardad</td>
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<td>BIO 10100 (57641.06)</td>
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<td>Firooznia, Fardad</td>
<td>20</td>
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<td>Firooznia, Fardad</td>
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<td>FOUND OF BIOLOGY 1 (Lecture)</td>
<td>Firooznia, Fardad</td>
<td>20</td>
</tr>
<tr>
<td>BIO 10100 (57644.09)</td>
<td>FOUND OF BIOLOGY 1 (Lecture)</td>
<td>Firooznia, Fardad</td>
<td>20</td>
</tr>
</tbody>
</table>

Click on multi-colored icon to get rosters
Indicates class enrollment
Click on a box (or boxes) then click "Notify Selected Students" at bottom of page to email students.

Clicking on grid icon will allow you to download an Excel spreadsheet with the roster.

Click here to navigate to different sections of the course.
Function #5: Granting enrollment permissions

(the trickiest part of CUNYfirst – many dept. advisers will not be doing this)
NOTE: How enrollment will work under CUNYfirst

• Students will enroll with CUNYfirst (bye, bye, eSIMS)
• For special cases (overtallies, waiving prereqs, etc), advisors/administrators will no longer enroll students....
• Instead, they will use CUNYfirst to give permissions to students to enroll in individual courses
• The students must then execute the permission, generally within a short time-frame
• In very special cases (e.g. students wishing to retake a course for which they received a passing grade), students may have to be enrolled by a professional advisor with “Quick Enroll” access....
Granting enrollment permissions

1. Click to expand “Records and Enrollment”

2. Then click to expand “Term Processing”

3. Then click to expand “Class Permissions”

4. Then click on “Class Permissions” again!!!
1. Click on the magnifying glasses (or type directly) to enter the info shown below....

Note: 1179 indicates Fall 2017

21st Century

2017 Semester starts in Sept. (9th month)

Another e.g: 1182 = Spring 2018

2. Click Search

Note: You can save searches!!!
These settings control the default Permissions (settings here will control default settings for all new Permissions – Permissions are described on next page)
The meaning of Permissions

Please only apply those permissions that you want your student to have. This will make sure that students will not receive any unnecessary permissions.

Think of each of the four permission types as a *roadblock* that may or may not be preventing enrollment.

Checking the box *removes* that roadblock...

### Permission Type | Description
--- | ---
**Closed Class** | Select to indicate that the student may enroll in the class even though it is closed due to capacity size (similar to SIMS overtally). Note that CUNYfirst does not have a secondary limit field as SIMS did.
**Requisites Not Met** | Select to indicate that the student may enroll in the class even though he/she does not have all of the required pre or co-requisites.
**Consent Required** | Select to override the consent restriction set when creating the course. (SIMS permissions)
**Career Restriction** | Select to allow the student to take a course that violates their degree requirements – such as allowing an undergraduate student to take a graduate course.

---

Assign More Permissions: [Generate]
1) Enter CCNY ID of student, or Click “search glass” to search by name.

If students have already been given permissions for the section, click the ‘+’ corresponding to student at the bottom to create a new permission line.
Note the four tabs:
1) General Info (view shown above),
2) Permissions, 3) Comments,
4) Updated By

Indicates whether the Permission has been used

Note Expiration Date of Permission, which you can change.

For “Closed Class” Permissions (over-tally), this should be set to the current day or next day.
Clicking on "**Permission**" tab will allow you to set permissions for individual students (regardless of how defaults are set)
### Sample permissions

<table>
<thead>
<tr>
<th>Permission Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over-tally</td>
<td>Assigning permissions to a class without restrictions</td>
</tr>
<tr>
<td>Waiving pre/coreqs</td>
<td>Granting permission to bypass prerequisites/corequisites</td>
</tr>
<tr>
<td>Over-tally AND Waiving pre/coreqs</td>
<td>Combining both Over-tally and Waiving pre/coreqs</td>
</tr>
<tr>
<td>Granting Instructor Permission</td>
<td>Assigning permission based on instructor authority</td>
</tr>
</tbody>
</table>

#### Undergrad taking grad course (or vice versa)

- Over-tally: Assigning permission for an undergraduate student to enroll in a graduate course.
- Waiving pre/coreqs: Allowing an undergraduate student to enroll in a graduate course without meeting prerequisites/corequisites.
- Over-tally AND Waiving pre/coreqs: Combining both Over-tally and Waiving pre/coreqs for an undergraduate student to enroll in a graduate course.
- Granting Instructor Permission: Allowing an instructor to grant permission for an undergraduate student to enroll in a graduate course.

These scenarios highlight the flexibility in course enrollment, particularly for students transitioning between undergraduate and graduate levels.
1. After setting Permissions, click on “Comments” tab

2. Enter reason for granting the Permission. **CCNY POLICY STATES THAT YOU MUST DO THIS.**
The “Updated By” tab will indicate who gave the permission.
When done, click ‘+’ to add another student, or click “Save” to.... Save! But, before saving, SEE NEXT SLIDE.

Use arrows here for multiple section courses.

Also: see next slide.
Clicking on “Save” will bring up a dialog box that allows the permissions you entered to be set for all sections of the course. *This only happens the FIRST time you Save for a particular student in a particular course, ........SO BE CAREFUL!*

SUPER IMPORTANT NOTE: For “Closed Class” Permissions (Over-tallies), you should ALWAYS click “No.” For other Permissions, you can click “Yes,” though depts. may inform you of exceptions
That’s all for now!!!!!!
Special Note
Reminder:

Don’t forget to use “Add to Favorites.”

Here’s what my “My Favorites” looks like!!!
Need help? Comments? Questions?

Contact Jay Edelman at...

jedelman@ccny.cuny.edu