Quick guide: Using CUNYfirst more efficiently: “favorites” and “saved searches”

These quick guides are based on the "simulation/training environment". Things may work somewhat differently in the production environment. These "quick guides" are produced quickly with little attention to formatting and fitting everything on a letter size page for printing. More elaborate guides will be made available at a later point. These guides are meant to get you started -- following an introductory hands-on session. Or, for the more adventurous, to guide self-study.

This guide assumes that you have worked through some the content oriented guides already -- like the one on how to enter class permissions. As you know by now, it can take several clicks to get you to the start page for a specific task and the "navigation path" is not always intuitive and for a task like entering class permission around registration time things get very repetitive. In this guide, I discuss some ways to use CUNYfirst more efficiently saving you time and frustration.

But if you feel that this adds only more complexity, then just skip the whole guide. You can do your tasks without these shortcuts.

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Once you have arrived at a start page (like the one for entering class permissions), you can add this path as a "favorite". The next time, you need to go this start page, you can select this page from your favorites (more below).
Then fill out the top of the search form and click "Save Search Criteria". (For most advisors, the top three field will be constant for each registration round. Subsequently, these three entries will be available from the "Use Saved Searches" box -- which will appear once you have a saved search for this type of form (here: a course search form). You name the saved search any way you like.
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Class Permissions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

Use Saved Search: 

- Academic Institution: HTR01
- Term: 1132
- Subject Area: SCC
- Catalog Nbr: begins with
- Academic Career: 
- Campus: begins with
- Description: begins with
- Course ID: begins with
- Course Offering Nbr: begins with

Case Sensitive

Search  Clear  Basic Search  Save Search Criteria  Delete Saved Search
Now, putting it together. Assume you just logged in and went to the home menu. With just 4 clicks, you can get to a list of the courses in your department:
Of course, nothing is perfect, and there is a glitch you need to be aware of if you plan to save more than one favorite. When you add a new favorite, follow up by editing the sequence number and change the sequence number of "0" to the first unused whole number: "1" if this is the first favorite you have saved, "2" if it is the second, etc. The program should be smart enough and do it automatically, but it does not. Rather, each favorite is saved with a sequence number of "0" and if you have more than one favorite with the sequence number "0" only the first one saved appears in your favorites menu.
Change "sequence number" from 0 to 2 (first unused number). Then "save".
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Edit Favorites

Click the Save button after editing or deleting favorites.

<table>
<thead>
<tr>
<th>Favorite</th>
<th>Sequence number</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Service Indicators</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Class Permissions</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>CUNY Textbook Data</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

Edit sequence numbers to change display order