

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.

Posted: 8 March 2013

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).

The screenshot shows the CUNYfirst interface for the 'Class Permissions' search. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The 'Add to Favorites' link is highlighted with a red box and a red arrow. The left-hand menu has 'Records and Enrollment', 'Term Processing', and 'Class Permissions' highlighted with red boxes. The main content area is titled 'Class Permissions' and contains a search form with the following fields: 'Academic Institution', 'Term', 'Subject Area', 'Catalog Nbr', 'Academic Career', 'Campus', 'Description', 'Course ID', and 'Course Offering Nbr'. Each field has a dropdown menu and a search icon. There is also a 'Case Sensitive' checkbox. At the bottom of the form, there are 'Search' and 'Clear' buttons, and links for 'Basic Search', 'Save Search Criteria', and 'Delete Saved Search'.

Then fill out the 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.

Menu

Search:

- ▷ My Favorites
- ▷ CUNY
- ▷ Self Service
- ▷ Manager Self Service
- ▷ Recruiting
- ▷ Campus Community
- ▽ Records and Enrollment
 - ▷ Enroll Students
 - ▷ Student Term Information
 - ▷ Career and Program Information
 - ▷ Enrollment Summaries
 - ▽ Term Processing
 - ▽ Class Permissions
 - Class Permissions
 - [Generate Add Permissions](#)
 - ▷ Waitlist
 - ▷ Enrollment Verifications
 - ▷ Transcripts
 - ▷ Graduation
 - ▷ Transfer Credit Evaluation
 - ▷ Student Background Information
- ▷ Curriculum Management
- ▷ Student Financials
- ▷ Academic Advisement
- ▷ Contributor Relations
- ▷ Set Up HRMS

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):

Use Saved Search:

Academic Institution: =

Term: =

Subject Area: =

Catalog Nbr: begins with

Academic Career: =

Campus: begins with

Description: begins with

Course ID: begins with

Course Offering Nbr: =

Case Sensitive

[Basic Search](#) [Delete Saved Search](#)

CUNYfirst
Fully Integrated Resources & Services Tool

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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: [Dropdown menu]

Academic Institution: Soc courses

Term: [=] [Text field]

Subject Area: [=] [Text field]

Catalog Nbr: [begins with] [Text field]

Academic Career: [=] [Text field]

Campus: [begins with] [Text field]

Description: [begins with] [Text field]

Course ID: [begins with] [Text field]

Course Offering Nbr: [=] [Text field]

Case Sensitive

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:

The screenshot shows the 'Class Permissions' search interface. On the left, a 'Menu' sidebar contains a 'Search:' section with 'My Favorites' and 'Class Permissions' highlighted by red boxes. Below these are links for 'Manage Service Indicators', 'Add to Favorites', and 'Edit Favorites'. The main content area is titled 'Class Permissions' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A 'Find an Existing Value' button is present. The search form includes a text input for 'Maximum number of rows to return (up to 300): 300', a 'Use Saved Search:' dropdown menu, and a text input for 'Academic Institution:' containing 'Soc courses', which is also highlighted by a red box. Other search criteria include 'Term:', 'Subject Area:', 'Catalog Nbr:' (with a 'begins with' dropdown), and 'Academic Career:'.

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.

CUNYfirst
Fully Integrated Resources & Services Tool

Home | Worklist | Sign out

New Window | Help | Customize Page |

Menu

Search:

- My Favorites
- Class Permissions
- Manage Service Indicators
- Edit Favorites**

- ▷ CUNY
- ▷ Self Service
- ▷ Manager Self Service
- ▷ Recruiting
- ▷ Campus Community
- ▷ Records and Enrollment
- ▷ Curriculum Management
- ▷ Student Financials
- ▷ Academic Advisement
- ▷ Contributor Relations
- ▷ Set Up HRMS
- ▷ Set Up SACR
- ▷ Worklist
- ▷ Reporting Tools
- ▷ PeopleTools
- firstSolutions Knowledge Base

Edit Favorites

Click the Save button after editing or deleting favorites.

*Favorite	Sequence number	
Class Permissions	0	Delete
Manage Service Indicators	1	Delete

Change "sequence number" from 0 to 2 (first unused number). Then "save".

Save Notify

Menu

Search:

- My Favorites
- Manage Service Indicators
- Class Permissions
- CUNY Textbook Data
- Edit Favorites**

▶ CUNY

▶ Self Service

▶ Manager Self Service

▶ Recruiting

▶ Campus Community

▶ Records and Enrollment

▶ Curriculum Management

▶ Student Financials

▶ Academic Advisement

▶ Contributor Relations

[New Window](#) | [Help](#) | [Customize Page](#) |

Edit Favorites

Click the Save button after editing or deleting favorites.

Favorites		
*Favorite	Sequence number	
Manage Service Indicators	1	Delete
Class Permissions	2	Delete
CUNY Textbook Data	3	Delete

Edit sequence numbers to change display order