Welcome to the CUNYfirst Training Times newsletter for the Wave 3 Campus Solutions Go-Live. This issue will provide detailed information related to training and end user support for current campus activities.

3i’s Information, Interfaces, Integration focuses on the processes that can be accomplished in multiple ways, or require multiple users to complete. We will focus on items that may be completed in multiple offices, items that require collaboration with other users, or why information is displayed in a given way.

Working with CUNYfirst addresses items available to the CUNYfirst user. Items will include: understanding various reference materials and providing suggestions to help with the day-to-day processing of transactions in CUNYfirst.

How to... provides step-by-step information to complete processes that are key during this Go-Live period and additional information when completing a process. Also, when new or changed processes are approved, these items will be contained in this section.

Lastly in Your Questions Answered, we provide an area for Help Desk questions and answers. Each issue, we choose questions and answers from users across the university. The goal is to provide visibility to questions from CUNYfirst users and to make the answers more readily available.

We encourage readers to submit questions to CUNYfirstTrainingHelp@cuny.edu for inclusion in future issues.

Claim your CUNYfirst Account: In order to utilize CUNYfirst, student and staff must activate their account by visiting: https://home.cunyfirst.cuny.edu and clicking the First Time User link. If you have questions or need assistance, contact your campus helpdesk as shown on page 5.

How to... Get Ready for Campus Solutions: Once CUNYfirst is live, users prepare the system by: Selecting their user defaults in SACR Set Up, Managing Pop Up Blockers for their chosen browser, and entering My Favorites bookmarks to Simplify CUNYfirst Navigation. Continued on Page 3 and 4 ...

Student Financials: Staff in the Bursar's office provide support for enrollment activities using the CUNYfirst View Customer Account component. Here one sees the student's Academic Plan and Enrollment status. Additionally, one can see the student's financial activity by term, and use links to drill down to specific financial transactions. Continued on Page 3 ...

Updating Schedule Classes: Want to save time, while updating a course with multiple sections? With the Update Sections of a Class component, information like Class Type, Enrollment limits and Add/Drop Consent are able to be viewed and updated for multiple sections. Continued on Page 3 ...

CUNYfirst Training Manager
Pre-Enrollment Checklist:
Students must be activated/matriculated into a program, term activated, and assigned an enrollment appointment before they can enroll.

Program Activation (Admissions & Registrar)
Students must have an Academic Career, Academic Plan, and Academic Program before they can be term activated.

Residency (Admissions & Registrar)
Staff must ensure that students have updated Residency status. Please note that it is essential to update Residency status for subsequent processes to run effectively, such as Term Activation, Tuition Calculation, and Enrollment.

Term Activation (Registrar)
Term Activation process makes students active for the term and allows them to enroll for classes. The process must be completed each semester, prior to the assignment of enrollment appointments. Without Term Activation, students can not enroll, have transfer credits posted, have tuition calculated, or have financial aid packaged for a term.

Enrollment Appointments (Registrar)
Appointments are time blocks setup each term to allow enrollment using Self Service during specific dates/times. This can be used to prioritize class enrollment for specific sets of students. Once enrollment appointments are assigned, students can view their appointment via Student Center self-service and during their appointed time can enroll for classes for the term.

Advisement (Faculty & Advisors)
Advisors can use Advisor Center and/or DegreeWorks to advise students regarding enrollment choices for a term. For certain classes, a student must also obtain class permission from the instructor and/or department. Advisors may also need to release the “advisement required” service indicator.

CUNYfirst Enrollments:
The majority of enrollments for a term are completed by students using Student Self Service. Additionally, Registrar personnel, Advisors and Departments may process student enrollments (add, drop, swap) using Quick Enroll or Enrollment Request.

Who Performs Enrollment?
Enrollment may need to be performed by an academic advisor or department. Examples may include a student being allowed to enroll in a class for which s/he has not met the prerequisite, a student allowed to enroll with a negative service indicator or enroll for greater than the maximum unit load allowed for their academic program.

It may be necessary, or at least more efficient to use the Enrollment Request or Quick Enroll components to enroll students in courses. For example, a faculty member might have given a student who does not meet enrollment requirements permission to enroll in a particular class. However, the class is not set-up in the Schedule of Classes to require consent. Rather than using the Schedule of Classes component and changing the Basic Data and Enrollment Control pages, a more efficient approach is to use Quick Enroll or the Enrollment Request component.

Quick Enroll
In the Quick Enroll component, data fields are listed under separate tabs. Clicking on the “Show All Columns” icon located to the right of the tabs will combine all of the tabs and display them as one long row of information.

Enrollment Request
The Enrollment Request component has the same functionality and the same data as the Quick Enroll component. The difference is the fields are listed on one page instead of separate tabs.

Enrollment FAQ: Can students drop or add classes themselves?
Students can drop and add classes online in their Student Center. Instructions with screenshots are available on the www.cuny.edu/CUNYfirst and select the Training link.

In some instances, assistance is needed from their advisor or a registrar. For example, a service indicator may be overridden by staff with security access in keeping with the policies on that campus.

Serving our Students, Faculty & Staff
How to... Set UP User Defaults

User Defaults automatically enter default values in designated fields. As needed, defaults may be overwritten. Most of these values are constant; however, some change periodically such as term.

1. Navigate to: Set Up SACR > User Defaults.
2. On the User Defaults 1 tab select the:
   a. Academic Institution: Select user institution.
   b. Academic Career: Match for most students for whom the user enters data.
   c. Term: Enter current term. As needed, overwrite and update each term.
3. On the User Defaults 2 tab select the:
   a. SetID: same value as Business Unit.
   b. Aid Year: changes each Financial Aid term.
   c. Business Unit: Select for your User Institution.
   d. Cashier’s Office: If applicable, select cashier’s office most commonly used.
   e. Campus: Select 'MAIN'.
4. On the User Defaults 4 tab select the:
   a. Carry ID checkbox. The same student’s data is shown from component to component until overwritten to look at another student.
5. Click the Save button.

Working with CUNYfirst

Documentation is available for any course whether you are enrolled in that course or not.

1. Log into CUNYfirst at home.cunyfirst.cuny.edu.
2. Click Enterprise Learning Management (ELM).
3. Navigate to: Self Service > Learning > Browse Catalog.
4. Click the Repository link.
5. Click the Repository Campus Solutions (REP-01) link.
6. Click View Details link for the desired module (Admissions, Student Records, etc.).
7. Click Notes and Attachment link.
8. Select the file link to open the desired document.

If you are enrolled in a course, then you may access training materials via your learning transcript.

1. Log into CUNYfirst at home.cunyfirst.cuny.edu.
2. Click Enterprise Learning Management (ELM).
4. Select the title link of the course for which you want the documentation.
5. Click Notes and Attachment link.
6. Select the file link to open the desired document.

Customer Accounts

Navigate to:

Student Financials > View Customer Accounts.

Key Fields:
- Total Balance: The total amount charged to the student. This balance can include a balance from previous semesters.
- Anticipated Aid: The estimated amount of financial aid the student is expected to receive.
- Balance: The amount in the account summary reflects a specific term balance.
- Academic Information Link: Provides enrollment summary information by term.

Cashiering - Target Keys:
Cashiering offices have been setup to meet the current business needs of CUNY campuses therefore the following set of Cashier Office Target Keys will be implemented for the Wave 3 schools.

- 529 PLAN: 529 Education Plan
- CASHALL: Cash payment for all charges
- CHECKALL: Check payment for all charges
- ENROLL DEP: Commitment Deposit payment for first time enrolled students
- THIRDPARTY: Check payment by a Sponsor

Updating Scheduled Classes

Navigate to: Curriculum Management > Schedule of Classes > Update Sections of a Class.

Using this component, users save time updating information associated with each section of the scheduled course. The advantage is that fields are displayed in a grid with a row for each section making it easy to identify and update only those fields whose values are to be changed.

Key Fields:
Class Status tab-
- Class Type: Enrollment or Non-Enroll.
- Class Status: Active or Cancelled.
- Association Numbers: Linked component sections.
- Auto Enroll: To automatically enroll a student in an associated class.
- Class Permissions: When instructor or department consent is required to add/drop a class.

Class Enrollment Limits tab-
- Enrollment Capacities: Number of available seats.
- Waitlist Capacity: Number of students allowed to waitlist.
Some browsers allow the user to automatically allow pop-ups from specific websites. In your browser, turn pop-up blockers off for CUNYfirst prior to using the system.

**Mozilla Firefox**
1. In the header, click the Tools menu.
2. Select Options.
3. Select the Content panel.
4. Click the Exceptions button.
5. To add a website to the Exceptions list, on the Allowed Sites – Pop-ups dialogue box in the Address of web site field, enter home.cunyfirst.cuny.edu.
6. Click the Allow button.
7. Click the Close button.
8. Click the OK button.

**Internet Explorer**
1. In the header, click the Tools icon.
2. From the menu, select Internet options.
3. Select the Privacy tab.
4. Select the Turn on Pop-Up Blocker checkbox.
5. Select the Settings button.
6. In the field Address of website to allow, enter the url address home.cunyfirst.cuny.edu.
7. Click the Add button.
8. Click the Add button again.
9. Click the Close button.

**Apple Safari**
1. To allow pop-ups in Safari, select Safari on the main tool bar.
2. If the Block Pop-Up Windows option is checked, select it to uncheck it and unblock pop-up windows. Note: This applies to all websites. There is no site specific option in Safari.

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**Self Service Documentation Website**

Students, Faculty and Advisors gain easy access to comprehensive learning support documentation at cuny.edu/cunyfirst. Bookmark the site!

In the menu on the left, select the Training link to view, print or save .pdf step sheets for each active component. Select procedures have narrated video guides.

Staff who wish to access UPK’s that guide the learner click by click will continue to do so in CUNYfirst on the Enterprise Learning Management menu.

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**Reminders**

**Sign-out:** To protect your privacy and prevent unauthorized use of your account, be sure to **sign out** and close all web browser windows to end your session.

**Timeout:** For security purposes, the system will **time out** after 20 minutes of inactivity.

**Save:** After data entry, don’t run the risk of having to redo your work—click **‘Save’** often.

**Password Expiration:** CUNYfirst password expires 90 days after the last password change.

**Effective Dating:** When entering data do **not overwrite**. If possible, add a **new row** and specify and effective date to maintain a complete chronology.

**Run Control ID:** It is important for you to create a meaningful Run Control ID for each different report, one that you will recognize easily later. The Run Control ID is specific to your EmplID. Once you create a Run Control ID for a report, you cannot delete it, so make sure you name it meaningfully.

**Navigation:** Do not use the Browser **back and forward buttons** to navigate. Use CUNYfirst “Previous Page”, “New Window”.

**Search Results:** When you perform a search only the first **300 rows** of result set will display. You must refine your search to narrow your search results.
Your Questions Answered

Q. When will the faculty member be able to enter grades in the Faculty Center?
A. A Grade Roster icon appears next to the Class Roster icon after the Office of the Registrar has created the Grade Rosters for the term.

Q. In the schedule of classes, are we able to see the number of students enrolled in each section?
A. Click on class detail to see the enrollment capacity, the number of enrolled students, and number of seats available.

Q. How do we view the Class Schedule for a specific session in a term?
A. Expand Additional Search Criteria to narrow your search result by Session.

Q. If a student is added to a new tuition group, can the tuition calculation process be run manually to adjust tuition and fees?
A. Yes, the process can be run to calculate tuition for an individual student. This updates tuition/fee amounts which will appear on the student's account.

Q. What is the correct order to open the Cashiers Office?
A. Open Office, Open Registers, Open Cashiers

Q. What is the purpose of calculating tuition using a batch process?
A. The purpose of calculating tuition in batch is to update all students or multiple groups of student’s tuition/fee charges at one time.

Q. Are there reports to validate if the tuition calculation process has run successfully?
A. Yes. The tuition calculation error report is used to identify suspended or unprocessed student accounts which occurred during the tuition calculation process.

Q. Will student financial aid be packaged and awarded in CUNYfirst for Wave 3 campuses?
A. No. Student financial aid will be packaged and awarded for Wave 3 campuses in current financial aid legacy systems. Financial aid that is packaged and awarded in current financial aid legacy systems will be interfaced into CUNYfirst for staff and the student to view.

Security

If you do not have access to the components that you need to do your job:
1. Go to this security .url in your browser - security.cuny.edu
2. Select CUNYfirst Application Security.
3. Download and complete the Campus Solutions User Access Request Form <pdf>.

Training Liaisons and Help Desks

Call your help desk to open a ticket for any problems that you are having in the training environment.

BOROUGH OF MANHATTAN COMMUNITY COLLEGE
Training Liaison: RuRu Rusman
Email: RRusman@bmcc.cuny.edu
Help Desk
Hours: Mon-Fri 8am-8pm, Sat-Sun 9am-5pm
Phone: 212-220-8379
Email: helpdesk@bmcc.cuny.edu

BROOKLYN COLLEGE
Training Liaison: Anna Rakhmanchik
Email: AnnaR@brooklyn.cuny.edu
Help Desk
Hours: Mon-Fri 9am-5pm
Phone: 718-951-4200
Email: helpdesk@brooklyn.cuny.edu

HUNTER COLLEGE
Training Liaison: Michael Nisbett
Email: mike.nisbett@hunter.cuny.edu
Help Desk
Hours: Mon-Thu 8am-8pm, Fri 8am-5pm, Sat-Sun 10am-4pm
Phone: 212-772-4357
Email: helpdesk@hunter.cuny.edu

NEW YORK CITY COLLEGE OF TECHNOLOGY
Training Liaison: Billy Wang
Email: BWang@CityTech.cuny.edu
Help Desk
Hours: Mon-Fri 8am-6:30pm
Phone: 718-260-5626
Email: helpdesk@citytech.cuny.edu

COLLEGE OF STATEN ISLAND
Training Liaison: Doriann Pieve-Hyland
Email: doriann.hyland@csi.cuny.edu
Help Desk Hours 4/28-5/24 (subject to change)
Hours: Mon-Thu 8am-9pm, Fri 9am-7pm Sat 9am-5pm, Sun 11am-3pm
Phone: 718-982-3695
Email: cunyfirsthelpdesk@csi.cuny.edu

YORK COLLEGE
Training Liaison: Wenying Huang-Stolte
Email: wstolte@york.cuny.edu
Help Desk
Hours: Mon-Fri 8am-10pm, Sat 8am-4pm
Phone: 718-262-5300
Email: helpdesk@york.cuny.edu

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