Advisor Reference Sheet for CUNYfirst Navigation

*TIP* Always use Microsoft Internet Explorer, Mozilla Firefox, or Apple Safari when working in CUNYfirst.
*TIP* To save time, save commonly used pages in your favorites.

**Claiming your Account**

1. For CUNYfirst
   a. https://home.cunyfirst.cuny.edu
   b. Choose “First Time Users” and follow the instructions.

2. For Training Environment
   a. https://cnyeptst.cunyfirst.cuny.edu
   b. Choose “First Time Users” and follow the instructions. You are likely to need a different password than you chose for CUNYfirst, even though your username will be the same.

**To practice in the training environment**

1. Log in to Choose “First Time Users” https://cnyeptst.cunyfirst.cuny.edu
2. Choose HR/Campus Solutions

**To use UPKs (tutorials) or Powerpoints Associated with a workshop**

1. Log in at https://home.cunyfirst.cuny.edu
2. Choose Enterprise Learning Management
3. Then select Self Service→Learning→All Learning
4. If you would like to complete the tutorials, select launch next to the course you are interested
5. If you would like to see the powerpoint, don’t launch, but select the course link, then select “notes and attachments”

**To access a reference guide**

1. Go to http://cuny.edu/cunyfirst.
2. In the quick links to the left, select Faculty/Advisor Self-Service→Advisors→Advisement Quick Reference Guide.pdf

**Setting Defaults in CUNYfirst**

1. Navigate to Set Up SACR
2. Choose User Defaults
3. If you only work at CSI, in the CSI User Defaults 1 tab, enter CSI01 next to “Academic Institution”
4. If you only work with undergraduates, in the User Defaults 1 tab, enter UGRD next to “Academic Career”

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1 When we go live in CUNYfirst, you’ll be able to set defaults that you may find useful.
How to add to your favorites:
1. When you get to a screen you use frequently, click Add to Favorites in the upper right hand corner.
2. Give it a name that makes sense to you and click OK.
3. Now you can navigate to that page with My Favorites and avoid multiple steps.

To view a transcript:
1. Navigate either to: Self Service > Advisor Center > Advisee Student Center
2. Enter Student data (ex. Last Name/First Name, Emblem ID)
3. Search and Select student
4. Under Student Center Tab, in the Academics section, use drop down menu to select Transcript: View Unofficial
5. Hit go button
6. Select College of Staten Island > Then the report you want (either Student or Advisor Copy)

To view course history (quicker then producing a transcript):
1. Navigate either to: Self Service > Advisor Center > Advisee Student Center OR Campus Community > Student Services Center
2. Enter Student data (ex. Last Name/First Name, Emblem ID)
3. Search and Select student
4. Under Student Center tab, in the Academics section, use drop down menu to select Course History
5. Hit go button
6. Sort any way you wish

To remove a Service Indicator (stop):
1. Navigate either to: Self Service > Advisor Center > Advisee Student Center OR Campus Community > Student Services Center
2. Enter Student data (ex. Last Name/First Name, Emblem ID)
3. Search and Select student
4. Select General Info tab
5. Select service indicator you wish to remove
6. Click release then click ok

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2 You can only generate an unofficial transcript in the Advisor Center. It cannot be done in Student Services Center.
To enroll (register) a student {Quick Enrollment}:

1. Navigate either to: Self Service > Advisor Center > Advisee Academics OR Campus Community > Student Services Center
2. Enter Student data (ex. Last Name/First Name, Emblem ID)
3. Search and Select student
4. Scroll down to the Term Summary area, select the appropriate term on the left (ex. if enrolling for Fall 2013, select Fall 2013)
5. On the right, look below the Classes section and click the Quick Enrollment link
6. You can either enter the section # if you know it or you can search for courses/sections using the search feature.
7. If using the search function, select the section you want and click select course.
8. Click submit

To post an override:

1. Navigate either to: Self Service > Advisor Center > Advisee Academics OR Campus Community > Student Services Center
2. Enter Student data (ex. Last Name/First Name, Emblem ID)
3. Search and Select student
4. Scroll down to the Term Summary area, select the appropriate term on the left (ex. if enrolling for Fall 2013, select Fall 2013)
5. On the right, look below the Classes section and click the Quick Enrollment link
6. You can either enter the section # if you know it or you can search for courses/sections using the search feature.
7. If using the search function, select the section you want and click select course.
8. Click the General Overrides Tab
9. Click the override necessary to enroll in the course (ex. Appt., unit load, time conflict, action date, career, service indicator, requisites) by checking the box that applies.
10. For more specific overrides (override a specific section), click the Class Overrides Tab
11. Click the override necessary to enroll in the specific course/section (ex. Closed class, linked class) by checking the box that applies.
12. Click submit
To view the Schedule of Classes:
1. Self Service > Search > Browse Course Catalog
2. Click Search for Classes
3. Select College of Staten Island > Then the semester you wish to search
4. Search