^^^ The new look of Bay Advisor showing the Staff Home page
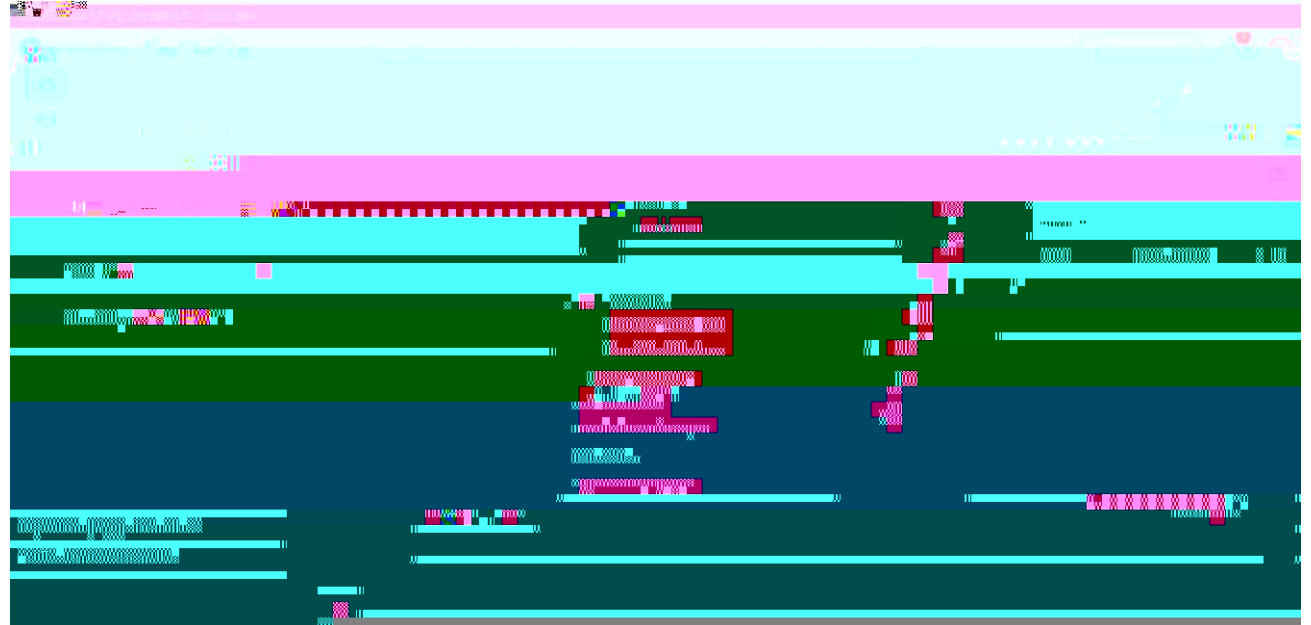
Welcome!

Welcome to the first BAY ADVISOR BULLETIN. EAB, the parent company to our Bay Advisor platform hosts a yearly conference to share ideas across the several hundred schools in their collective. A newsletter like this is one of those ideas. I wanted to have a fun and easy way to send out updates to the advising community here at East Bay about the platform along with highlights on data, you the users, new ideas, and resources from the advising community. The Bulletin will be sent out at the start of each term, Spring, Summer and Fall. As you read this, if you like what you see and want to help write any sections, or have ideas please let me know by emailing bill.irwin@csueastbay.edu
In this first issue, I wanted to start small and establish a few recurring sections. The title story is on the major user interface update EAB is pushing in January. (look to the right) Yes, your beloved Bay Advisor is going to look different at the start of next semester, but

real massive change will come in summer to the student scheduling experience. More on that in our next issue.

recurring pieces. I plan on having these sections in each issue as they highlight data and specific functionality of the platform. There are other features and news in this first Bulletin, so please continue to read on. As always, I welcome any feedback and look forward to working with you all in 2021.

New Look Coming January

EAB is updating their Navigate platform, our Bay Advisor, this January with a new GUI, or graphical user interface. This update is mainly a cosmetic update and there will be limited changes to functionality. The biggest change in look
used to be in the upper right-hand corner in between the term setting and the help center

moved to the top front center, and no longer has the small looking glass icon. The functionality of the quick search is unchanged, you can still look up students by first name, last name, NetID, EmplID, or even horizon email address, whichever data point you have.
Also, the toolbar which houses the other icons across the top where the quick search is located are as follows. Appointment Queue, Unread Messages, and Minimized Dialogs. If there are more than 10 unread messages, you have the option to click Show More to open the Conversations page. Next is the Quick Search, the Term Selector, and the Help button, which opens the Help Center.
The Menu Bar is also updated and can be expanded to show the name of the page it takes you to. To expand the menu bar click the sidebar icon >. Each icon will have the name of
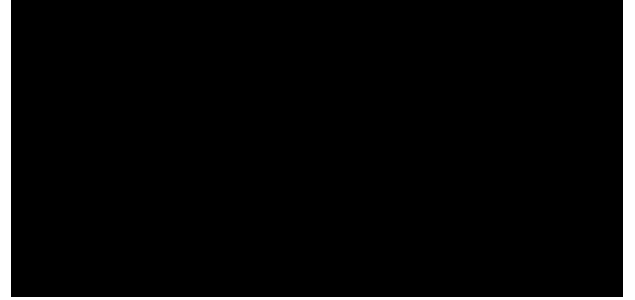
the page it takes you to next to it. Note that you may not have all the same icons as shown below based on your permissions.

Lastly, in-platform notifications have been updated and will no longer show as a yellow bar across the top of the page, but in a pop-up window in the bottom right corner.

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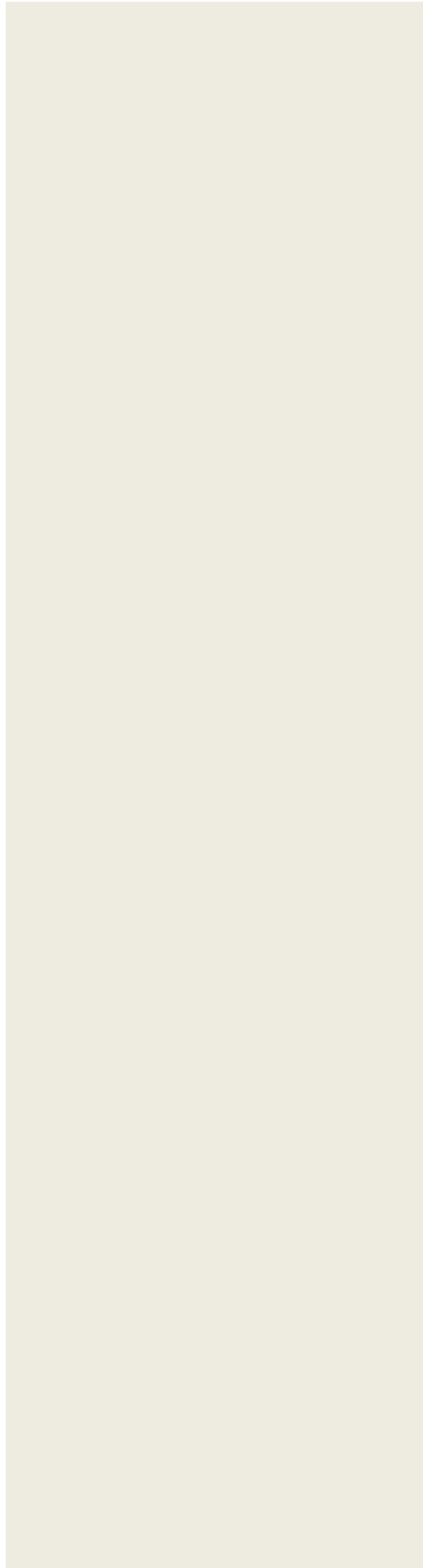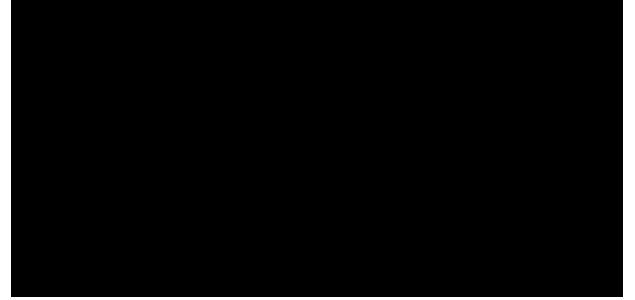
Update your availability

If you use Bay Advisor to allow students to schedule appointments with you, you will need to update/edit your availability by going through your availability tab.

Update Cohort lists

If you have any student groups in PeopleSoft, be sure the group lists are updated with any new or leaving students. The student group changes will be reflected the next day in Bay Advisor and can be searched through categories.

Update Student Assignments

If you or your department have student assignments in Bay Advisor, please work with Bill Irwin to update any relationship assignments needed for the upcoming semester.

Update your own Student Lists

Student lists, formerly known as watch lists, are local to your own Bay Advisor. They are a good way to separate student assignments, especially for messaging, and should be updated each term.

Decide what Campaigns you will run this term and when

Appointment Campaigns should be planned out in advance. For more details look at the EAB Campaign Ideas by reading further in this Bulletin.

Relax, long semester

Be sure to make some time for yourself. You did a great job in Fall 2020, time to do it again

New Appointment Summary Boxes
Remaining Requirements & Referrals

Do you wish there was an easy place to track referrals? What about separating out a remaining course requirements to make them easier

^^^ New Appointment Summary Boxes to assist in tracking remaining requirements and referrals