

Quick Guide

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SEARCHES

Quick Search

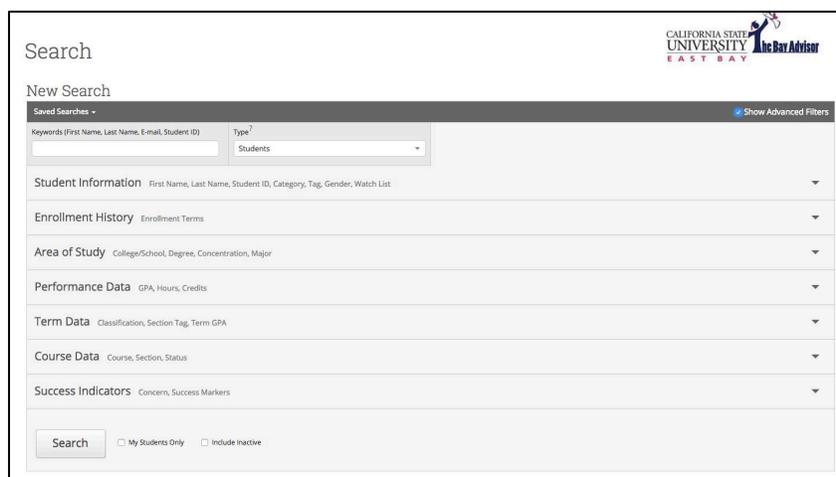
There are two types of searches in The Bay Advisor, a quick search or an advanced search. As an advisor, you can do a quick search from the notification bar at the top of any page. Click on the magnifying glass and enter either a student's first name or NetID.



Performing a quick search allows you to easily search for a student and view their academic performance information if you know their name, Horizon email, NetID or 9 digit MyCSUEB ID. You will be able to view their Student Profile, any notes from other advisors, current and previous enrollment information, progress report campaign information and much more.

Advanced Search

Advanced Search gives you as an advisor the ability to search for groups of students through various characteristics. You can control how specific or general of a search you intend to do with the criteria selected through the advanced search feature. Click the “advanced search” button to display all searchable characteristic drawers.



Examples of searchable characteristics include:

- *Student Information
- *Enrollment History
- *Area of Study
- *Performance Data
- *Term Data
- *Course Data
- *Success Indicators

STUDENT PROFILE

Overview

To view a student's profile, either from Quick Search or Advanced Search, click their name (or right-click their name and open in new tab if from Advanced Search). This will bring you to the student's overview.

The screenshot shows the 'Overview' tab of a student profile. At the top, there are navigation tabs: Overview, Success Progress, History, Class Info, and More. Below this is a summary dashboard with the following data:

Course Grade D/F	Repeated Courses 11	Withdrawn Courses 0	Missed Success Markers 1	Cumulative GPA 2.05
Total Credits Earned 117.33	Credit Completion % at this institution 41%			

Below the dashboard, the student's major is listed as **History BA (HISTBA)**, a Bachelor of Arts with a concentration in Migration and Globalization (MIGLOBA) in Coll - Letters, Arts & Soc Sci. The student's classification is Senior, and their most recent enrollment was in Spring 2020. A 'Categories' box at the bottom lists: EGT - TBD, Entry Term - Summer Quarter 2012, IAP - Incomplete, Native GE Pattern, Student Housing Active Student.

This overview is also referred to as the “30 Second Gut-Check”. It is in this overview that you can quickly assess how a student is performing academically. You are able to view important information, such as courses a student received a D/F/WU/IC, repeated courses, withdrawn courses, missed success markers, GPA, concern level, and more, all in one centralized location. You can also view all categories a student has been assigned. Categories designate specific characteristics of individual students, such as the term they entered, if they are a Transfer or Native Students, and if they belong to any special programs or sports teams.

To view more details, expand your selection by clicking the arrow next to each number or hover over underlined information to view more details.

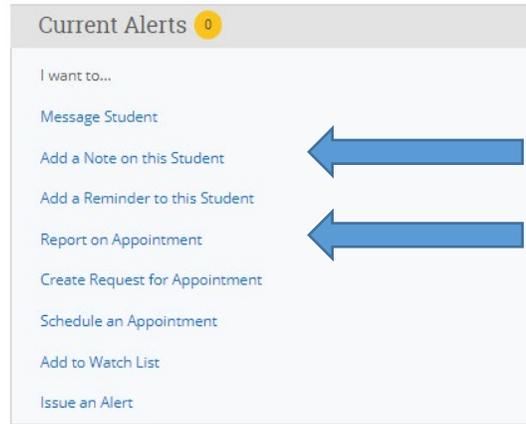
This screenshot shows the same student overview page but with expanded details. The 'Course Grade' section is expanded to show a list of courses: HIST322 (Summer Session 2019), HIST101 (Spring 2019), HIST201 (Spring 2019), and HIST201 (Spring 2020). The 'Repeated Courses' section is expanded to show HIST101 (Spring 2020), HIST101 (Spring 2019), HIST201 (Spring 2020), and HIST101 (Spring 2019). The 'Missed Success Markers' section is expanded to show HIST201: HIST3010 (complete 15 C-60-90 1-1 attempt) with a 'View All Success Markers' link. The 'Cumulative GPA' section is expanded to show Overall GPA 2.05, Institution GPA 2.05, and Transfer GPA 0.00. The 'Major History' section is also expanded to show the History BA (HISTBA) and Biological Science BS (BIOLBS) programs.

***Pro-Tip** - When working with a student, you may be inclined to use the various pieces of information Bay Advisor offers advisors. While meeting with a student, make sure you use “Student View” when showing a student information with The Bay Advisor. Student view removes private advising information, such as personal identifying information and concern level, regarding a student.

The screenshot shows a 'Student Info' panel with the following information: Age: 23, DOB: 07/13/1993. At the bottom of the panel, there is a 'Student View' toggle switch, which is currently turned on (green). A blue arrow points to the toggle switch.

NOTES

Advising Summary Reports and Advising Notes give you the ability to record accurate notes regarding an advising session. While in a student's profile, you have the ability to create either an Advising Summary Report and/or an Advising note. Simply click "Add a Note on this Student" (Advising Note), or "Report on Advising" (Advising Summary Report) in the upper right hand box in a student's profile.



Advising Summary Report

An Advising Summary Report allows you to record a detailed summary of an advising appointment. It is important to document advising sessions and include direct academic information given to a student and any follow-up asked of the student. Remember, this report can be seen by other advisors, so the more specific you are, the better. Within the Advising Report, you have the ability to even attach files (PDF or Doc) to a student report. A student cannot view information in an Advising Summary Report. Always make sure to include a reason(s) within the appointment details.

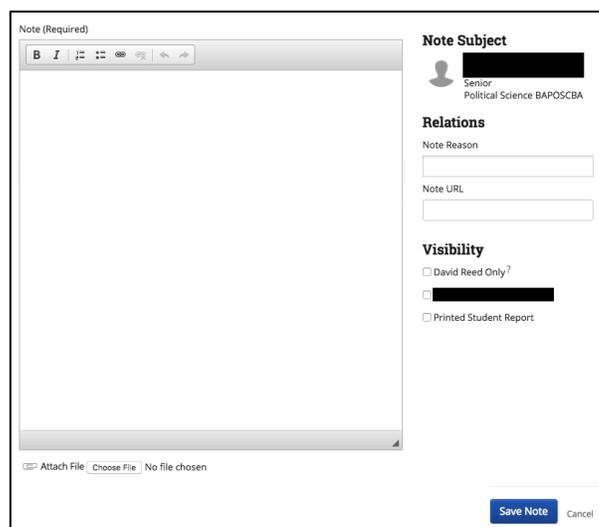
The screenshot shows a form titled 'APPOINTMENT REPORT FOR MAYA PARKAS'. It is divided into two main sections: 'Appointment Details' on the left and 'Appointment Summary' on the right. The 'Appointment Details' section contains several dropdown menus and text input fields: 'Appointment' (04/10/2020 11:00a-11:30a PDT - F.A.S.T. Advising), 'Care Unit' (Advising), 'Location' (Athletics Office), 'Service' (F.A.S.T. Advising), 'Course' (Start typing to search all courses), 'Meeting Type' (Select Meeting Type), 'Date of visit' (04/10/2020), 'Meeting Start Time' (11:00am) and 'Meeting End Time' (11:30am). Below these are 'Attendees' (two redacted names, both checked as 'Attended') and 'Suggested Followup' (This will be saved on the report as a suggestion. No appointment will be created. Date and Time fields). The 'Appointment Summary' section is a large text area with a rich text editor toolbar (B, I, list, link, Paragraph, undo, redo). Below it is an 'Attachments' section with 'Attach File' and 'Choose File' buttons, and a 'No file chosen' message. At the bottom right, there is a blue 'Save this Report' button.

Advising Notes

Advising Notes are a great way to document any additional information to a student's record outside of a traditional advising appointment. For example, you may want to attach a note to a student if you happen to run into the student on campus, and have a conversation that warrants a record. You must always add a *Note Reason* to an Advising Note for the note to be properly recorded. Notes are uploaded to Peoplesoft Advising Notes nightly and are shared with graduation evaluators.

If you wish to share a note with a student in the platform, you must select the student's name under visibility.

***Pro-Tip** – If you want to make the note private and only viewable by you, select only your name under Visibility.



The screenshot shows a web interface for creating an advising note. On the left is a large text area with a rich text editor toolbar (bold, italic, link, etc.). Below the text area is an 'Attach File' button and a message 'No file chosen'. On the right, the 'Note Subject' section shows a student profile: 'Senior Political Science BAPOSCBA'. Below that, the 'Relations' section has 'Note Reason' and 'Note URL' input fields. The 'Visibility' section has two radio button options: 'David Reed Only?' (selected) and 'Printed Student Report'. At the bottom right are 'Save Note' and 'Cancel' buttons.

OTHER FEATURES

- Mass E-Mail/Texting Capabilities
- Calendar Syncing
- Watch List/Saved Searches

For questions or concerns, please contact Bill Irwin – bill.irwin@csueastbay.edu