

Cal Answers Briefing Books

Cal Answers' Briefing Books allow you to save a static snapshot of your dashboard page(s) that includes the applied filters and any data table formatting in one or more PDF files.


Once created, you can add to, re-order and /or delete dashboard content to update your Briefing Book. You can download your Briefing Book to share with others for review offline. This is particularly helpful when working with colleagues not using Cal Answers. As an added bonus, Briefing Books automatically generate a table of contents based on the dashboard pages included.

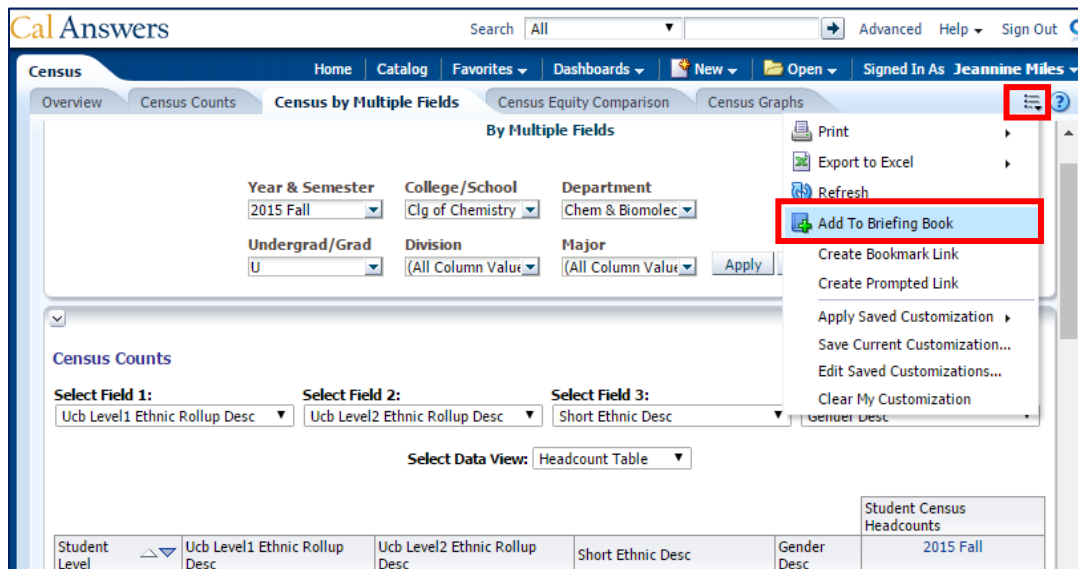
This job aid will walk you through the steps of:

- [Creating a Cal Answers Briefing Book](#)
- [Locating a Cal Answers Briefing Book](#)
- [Adding Content to a Cal Answers Briefing Book](#)
- [Downloading and Printing a Cal Answers Briefing Book](#)
- [Editing a Cal Answers Briefing Book](#)
- [Appendix: Sample Briefing Book](#)

Creating a Cal Answers Briefing Book

The following steps explain how to create a briefing book.

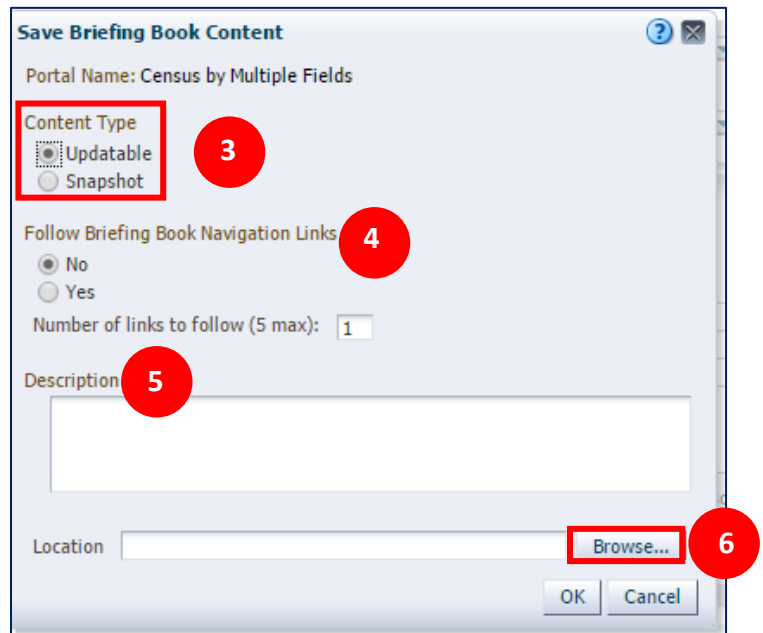
1. Navigate to the Cal Answers dashboard you would like to include in your briefing book. Apply the necessary filters and modify the data table layout (sort/move/exclude columns, etc.) as needed to format your page.
2. Click the **Page Options Drop Down**  and select **Add to Briefing Book**.



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3. The **Save Briefing Book Content** dialog box appears. For **Content Type**, choose either:

- **Updatable.** The page content is refreshed whenever the Briefing Book is downloaded. *If downloaded outside of the Cal Answers hours of operation an error message will display. Check the [Cal Answers Home](#) page for the latest hours.*
- **Snapshot.** This adds the content in its current state. Snapshot content preserves the original data and is not updated when the briefing book is downloaded.



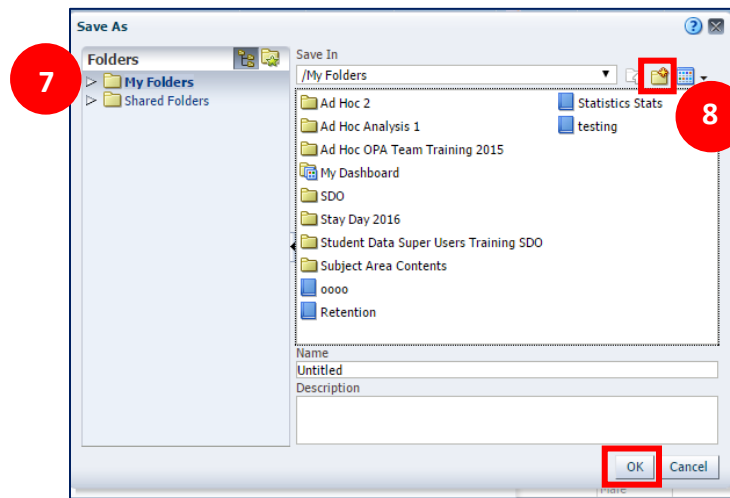
The screenshot shows the 'Save Briefing Book Content' dialog box. The 'Portal Name' is 'Census by Multiple Fields'. The 'Content Type' section has 'Updatable' selected (indicated by a red box and a red circle with the number 3) and 'Snapshot' unselected. The 'Follow Briefing Book Navigation Links' section has 'No' selected (indicated by a red circle with the number 4). The 'Number of links to follow (5 max):' is set to 1. The 'Description' field is empty (indicated by a red circle with the number 5). The 'Location' field is empty, and the 'Browse...' button is highlighted with a red box and a red circle with the number 6. The 'OK' and 'Cancel' buttons are at the bottom right.

4. For **Follow Briefing Book Navigation Links**, leave the default set to **No**.


5. A **Description** entered here in the **Save Briefing Book Content** dialog box will not display. Check the [Editing a Cal Answers Briefing Book Step #3](#) for directions on how to add a description to your Briefing Book.

6. To identify the **Location** or file folder you want to store your Briefing Book in, click the **Browse** button to open the **Save As** dialog box.

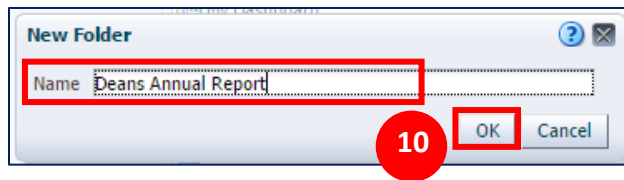
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7. Navigate to **My Folders** and select the folder from the available list that you would like to store your Briefing Book.

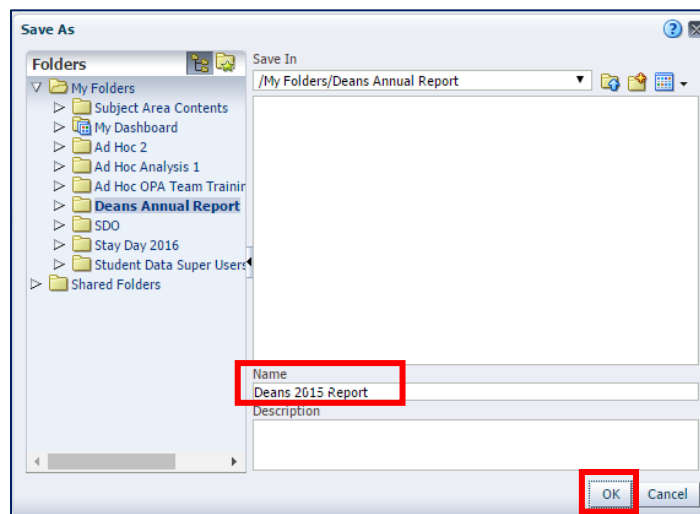
8. If needed, click the yellow **New Folder** icon  to add a new folder to **My Folders**.

9. Enter a **Name** in the **New Folder** dialog box.



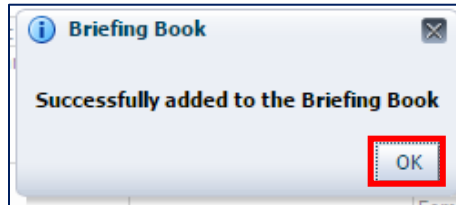
10. Click **OK** to return to the **Save As** dialog box.

11. Input a **Name** for the Briefing Book, and then click **OK** to save the briefing book.



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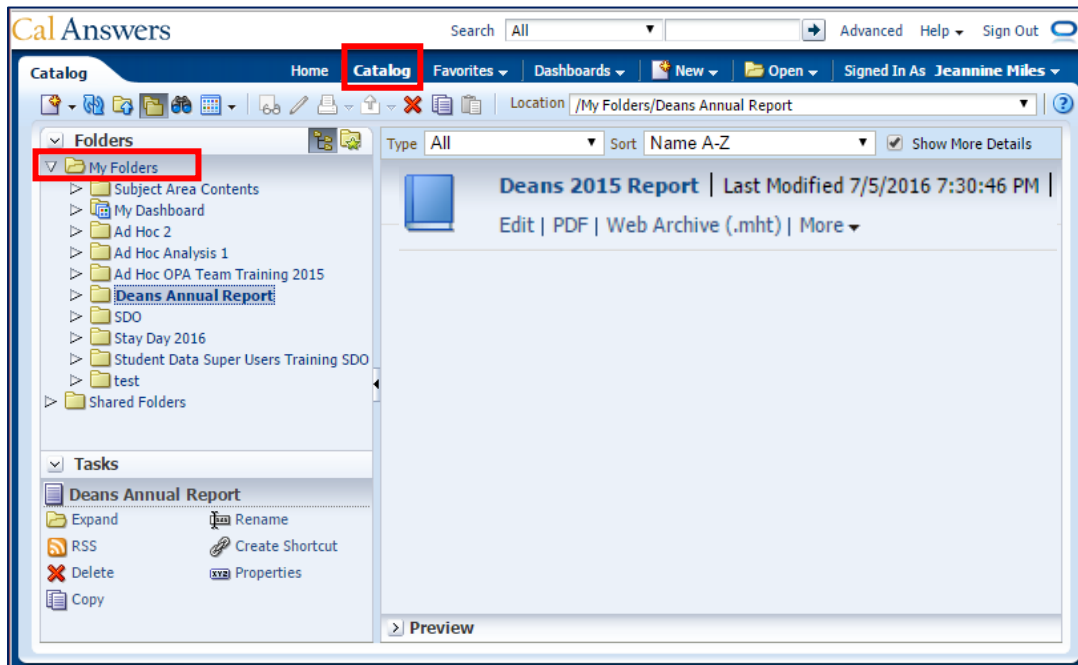
12. Click **OK** from the Briefing Book pop up confirmation box.



Locating a Cal Answers Briefing Book

Once saved, the Briefing Book can be accessed from the **Catalog** tab, in the **My Folders** location within Cal Answers.


1. Navigate to the **Catalog** tab.
2. Open the **My Folders** file.
3. Open the file folder you saved the Briefing Book in. The saved Briefing Book and other saved files in the folder will be listed in the right hand display pane.

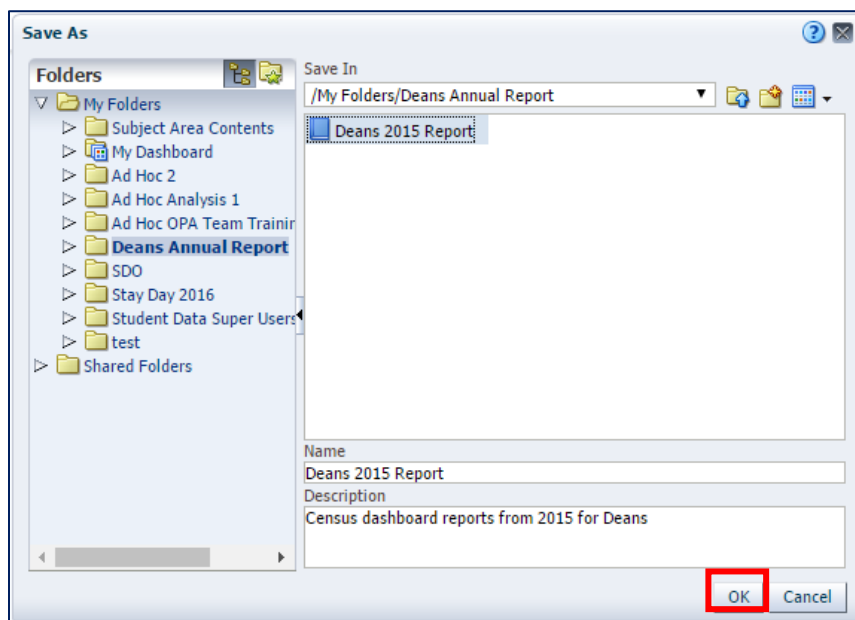


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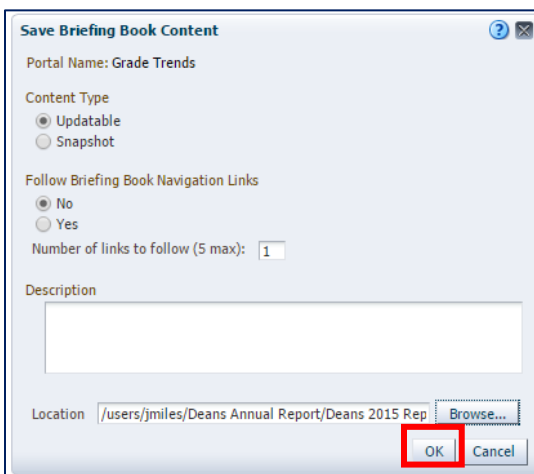
Adding Pages to a Cal Answers Briefing Book

Use the following steps to add additional dashboard page(s) &/or content to an existing briefing book.

1. Complete steps #1 to #6 of the **Creating a Briefing Book** instructions.
2. From the **Save As** dialog box, navigate within **My Folder** to access the folder with the existing Briefing Book. Click on the Briefing Book noted with the blue briefing book  icon.



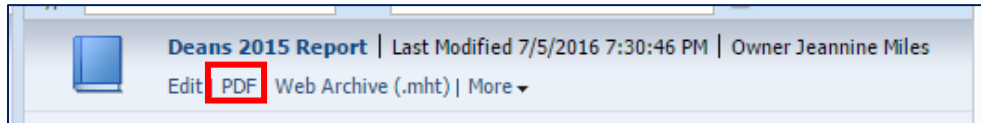
3. Click **OK** to add the dashboard page to the Briefing Book.



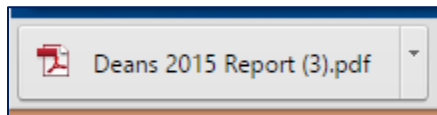
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Downloading and Printing a Cal Answers Briefing Book

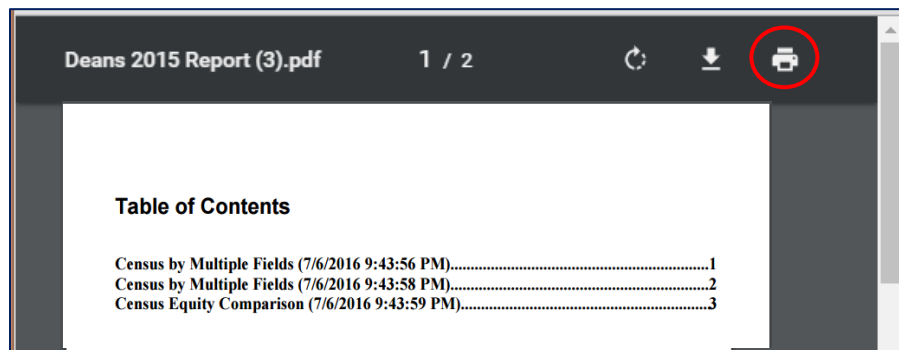
1. To download the briefing book, navigate to the **Catalog** tab and locate the Briefing Book. Click on **PDF** from the right display pane. The Briefing Book will download to the location specified in your system settings.



2. Click on **PDF** to download the Briefing Book. You can then print, save locally and/or attach the PDF and share via email.



3. Open the downloaded book to see the auto generated “Table of Contents” and all reports. You can click on the dashboard name in the Table of Contents to jump straight to that page.



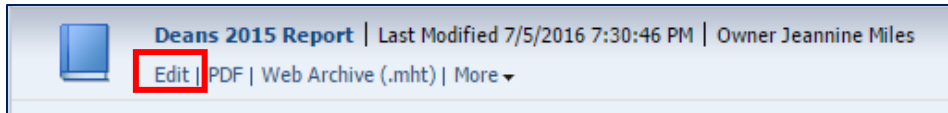
4. From this PDF screen you can click the Printer icon  to print the Briefing Book.

NOTE: The Adobe Reader application is required to view or print a briefing book PDF.

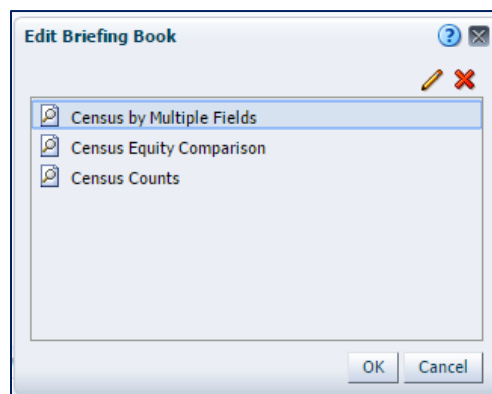
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Editing a Cal Answers Briefing Book

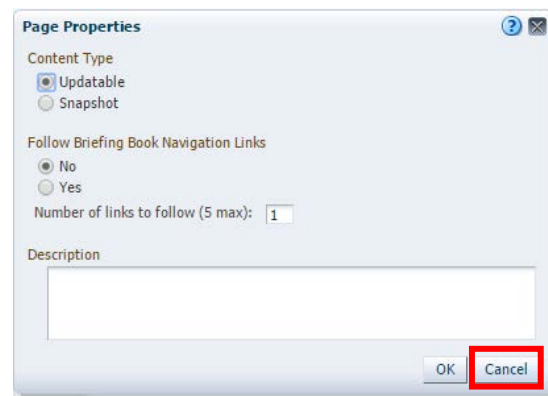
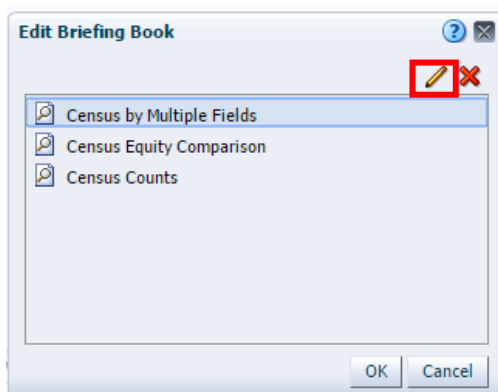
1. Navigate to the **Catalog** tab in Cal Answers to locate the Briefing Book and click on **Edit**.



2. From the **Edit Briefing Book Content** dialog box:

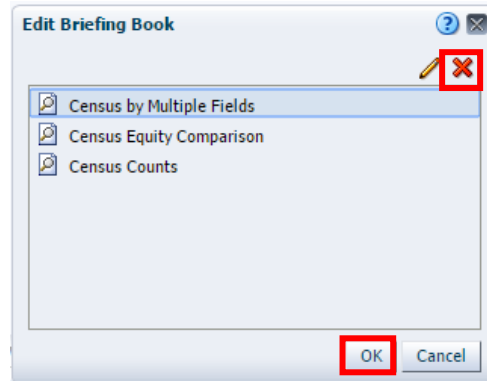


- a. To re-order the pages of your briefing book, click on the desired dashboard page and drag and drop.
- b. To edit the content type for a page, click on the pencil icon to open the **Page Properties** dialog box where you can change the content type.

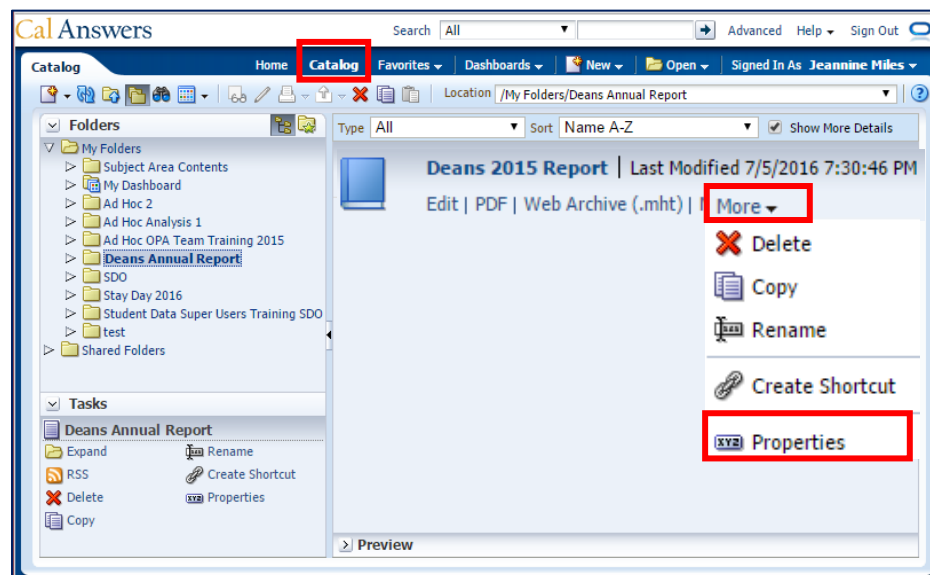


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- c. To delete a page, click the page and select the **X** icon from the upper right hand corner of the **Edit Briefing Book** dialog box.

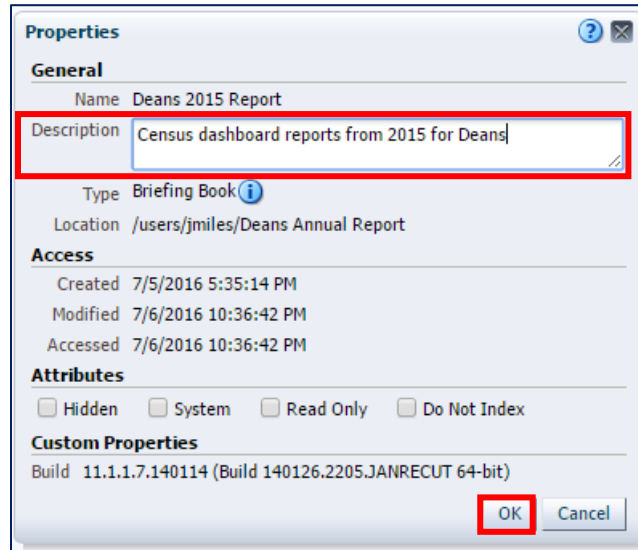


- d. When all edits are complete, click **OK**.
3. To add a description to your Briefing Book display, click on the **More** dropdown and select **Properties**.

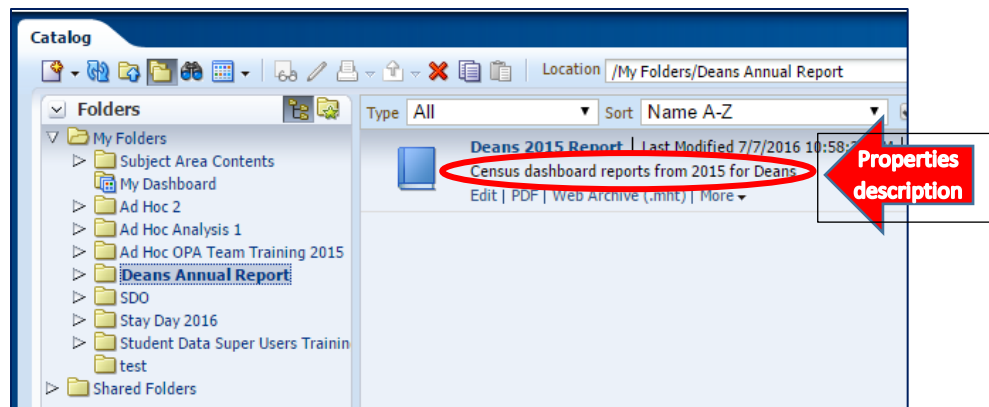


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- From the Properties dialog box, insert a **Description**.



- Click **OK**. The briefing book display updates with the Properties Description.



Additional Help

If you have questions or feedback for the Cal Answers Team on Briefing Books or other functionality, please contact Campus Shared Services IT Application Support at calanswers-help@berkeley.edu or 664-9000 (ext. - option 1, then option 2). Application Support is available Monday through Friday, 8am - 5pm.

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APPENDIX: Sample Cal Answers Briefing Book

This sample Cal Answers briefing book PDF includes an automatically generated table of contents for the three dashboard pages.

These dashboard page images were manually updated with page numbers.

Table of Contents

Census by Multiple Fields (7/19/2016 11:59:58 AM).....1
 Census Equity Comparison (7/19/2016 11:59:58 AM).....2
 Census Counts (7/19/2016 11:59:58 AM).....3

Registered Student Census Counts
By Multiple Fields

Year & Semester 2015 Fall	College/School None	Department (All Column Values)
Undergrad/Grad U	Division (All Column Values)	Major (All Column Values)

Census Counts
Census by Two Fields Data

Student Level	Ucb Level1 Ethnic Rollup Desc	Ucb Level2 Ethnic Rollup Desc	Gender Desc	Student Census Headcounts 2015 Fall
U	Asian/Pacific Islander	Asian	Female	5,544
		Pacific Islander	Female	24
International	International	Decline to State	Male	33
		Female	1,819	
Underrepresented Minority	African American	Female	1,893	
		Male	515	
	Chicano/Latino	Female	396	
		Male	2,206	
Native American/Alaska Native	Female	1,555		
	Male	100		
	Decline to State	Male	71	
White/Other	Decline to State	Female	4	
		Male	509	
	White	Decline to State	525	
		Female	1	
		Male	3,587	
Grand Total				27,496

The filters used to display these values are:
 Semester Year Name Concat is equal to 2015 Fall
 and Ungrad Grad Cd is equal to U

Registered Student Census Counts
By Term, Level, and Unit

Year & Semester
2015 Fall

Census Counts
Census Equity Comparison Data - Campus Total

Student Level	Campus Unit	Student Headcount 2015 Fall
U	All	27,496
S	All	10,708
Grand Total		38,204

Please note that when viewing headcount data, the grand total line counts unduplicated students and so may not equal the sum of the row values.
 When using a Fall/Spring Avg. view, you must select both the fall and spring semesters within an academic year for the average to calculate correctly.