




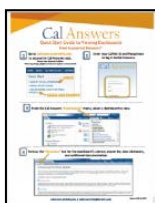
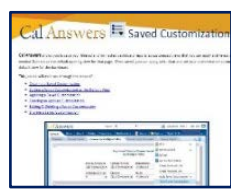

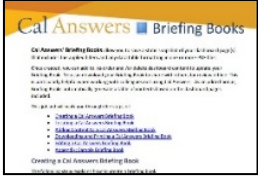
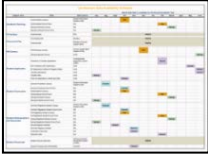


This Cal Answers Financials Gifts & Endowments Learning Map provides you with a comprehensive set of the latest training materials to support you in getting started working with the Gift & Endowment reports. Explore these resources in numeric order for a linear learning experience or as needed based on your immediate question. Find this map at https://calanswers.berkeley.edu/sites/default/files/cal_answers_gifts_endowment_learning_map.pdf

#	Resource	Questions Answered	Cal Answers Training Videos
1	 Cal Answers Web site	<ul style="list-style-type: none"> • Where do I log in? • Who has access to Cal Answers Dashboards? • Where can I find information on training & training materials? • What are the frequently asked questions (FAQs)? 	<ul style="list-style-type: none"> ▫ Cal Answers Dashboard Overview Coming Soon!
2	 Quick Start Guide page 1	<p>How do I...</p> <ul style="list-style-type: none"> • Log in & access the dashboards and reports? • Navigate to the dashboards? • Locate additional resources within the dashboard? 	<ul style="list-style-type: none"> ▫ Cal Answers Dashboard Overview Coming Soon!
3	 Navigating Cal Answers Home Page	<ul style="list-style-type: none"> • How do I navigate to the dashboards? • What do all the blue menu bar icons do? • How do I access My Folder in Cal Answers? • Where do I access the Ad Hoc Analysis section? • How do I set my default Cal Answers opening page? 	<ul style="list-style-type: none"> ▫ Navigating the Cal Answers Home Page (2 min)
4	 Gift & Endowment Reporting Job Aid	<ul style="list-style-type: none"> • Who has access to the Cal Answers Finance Gift & Endowment Dashboards? • What is the purpose of each dashboard? • What are the available filters on each dashboard report? • How can Development and Finance staff use these dashboards? 	
5	 Cal Answers Home Gift & Endowment Wiki	<p>The Gift & Endowment Wiki includes detailed report documentation and a data dictionary for the fields featured in each of these reports.</p>	
6	 Quick Start Guide page 2	<p>How do I...</p> <ul style="list-style-type: none"> • Filter on my specific data needs? • Sort & drill into data tables? • Print & export data from Cal Answers dashboards? 	<ul style="list-style-type: none"> ▫ Excluding Columns from Tables (1 min) ▫ Changes You Can Make to Tables (3 min) Sort, exclude, include and rearrange data columns ▫ Features You'll Find Below Tables (3 min)
7	 Saved Customizations	<ul style="list-style-type: none"> • Can I save the filtering and layout changes I made to a dashboard tab to use again without having to redo the filtering and edits? • Is there a way I can set the default view of a dashboard tab to always open with my College, Division, Department or Course pre-selected 	<ul style="list-style-type: none"> ▫ Page Options Menu Customizations (3 min) Saving & applying customized views created of dashboards.

#	Resource	Questions Answered	Cal Answers Training Videos
8	 <p>Dashboard Bookmark Links</p>	<ul style="list-style-type: none"> How can I share a filtered and formatted dashboard report with a colleague? Where can I enter a Cal Answers Bookmark link that was shared with me? 	<ul style="list-style-type: none"> Cal Answers Bookmark Links Coming Soon!
9	 <p>PDF Briefing Books</p>	<ul style="list-style-type: none"> How can I share a filtered and formatted dashboard report with a colleague? Can I create a PDF of multiple print outs of dashboard tab data tables? 	<ul style="list-style-type: none"> How to Create and Save a Cal Answers Briefing Book (5 min) How to Edit a Cal Answers Briefing Book (3 min)
10	 <p>Planned Data Refresh Schedule</p>	<ul style="list-style-type: none"> What are the source systems for data in Cal Answers? What is the planned timing for the next data load from our source systems into Cal Answers dashboard reports? 	
11	<p>>> FAQ</p> <p>Cal Answers FAQ</p>	<p>What are the frequently asked questions on how to use the Cal Answers Financials Gift & Endowment Reporting dashboards and how to interpret the data?</p>	
12	<p>Cal Answers Help Desk</p>	<p>If you have questions or feedback for the Cal Answers Team, please contact Campus Shared Services IT Application Support at</p> <ul style="list-style-type: none"> calanswers-help@berkeley.edu or 664-9000 (ext. - option 1, then option 2) 	