

AT-A-GLANCE: CLIPBOARD & CONTEXT-SENSITIVE REPORTING

WHAT IS CLIPBOARD?

Clipboard is the list management feature in Advance. Clipboard allows lists of entities to be organized, combined, saved and maintained. Clipboard lists can remain private or can be shared with other Advance users. Never delete Entity ID's, Prospect ID's or Proposal ID's from an Advance Excel export. These ID numbers can always be imported back into Advance using the Clipboard Import feature. Once imported, a user will be able to run context sensitive reports and receive the most up-to-date data directly from Advance. To access the clipboard feature, either hit F4 or click on the clipboard icon.

USING LOOKUPS TO CREATE A CLIPBOARD

Perform an entity lookup using the Lookups icon on the main menu. After Advance has executed the search and has generated a list of results, select the drop down arrow and select Copy to Clipboard/Replace then hit Continue. Selecting Copy to Clipboard/Replace will ensure the system clears a user's current clipboard so as to not merge two search results together. The search results have now been copied to your clipboard. Open up clipboard by selecting the clipboard icon on the main menu, or hit F4 on your keyboard.

RUNNING CONTEXT SENSITIVE REPORTS FROM CLIPBOARD

1) Open your list in Clipboard or perform a lookup and select an output type of "Copy to Clipboard/Replace" if you wish to overwrite any existing ID's on your clipboard. To combine the current lookup with an a clipboard that is already populated, select "Copy to Clipboard" which will merge the two lists together.

2) Open the clipboard list you wish to report on, and select Reports from the Actions menu. This will display the list of available Context Sensitive Reports.

3) Select which Context Sensitive Report is relevant to your needs. Click the ellipsis button to run the selected report. Context Sensitive Reports produce three output types: (P)- PDF Style Report, (D) - Excel Spreadsheet, (C) - Clipboard (will send your results to a clipboard).

The screenshot shows the 'Lookups' interface. At the top, the user 'Sarah Chahy [Logout]' is logged in. A clipboard icon in the navigation bar is circled in red. The main area shows search criteria and results. A dropdown menu is open, highlighting 'Copy to Clipboard'.

The screenshot shows the 'Clipboard' interface. The main area shows a list of items with columns for ID and Name. The first item is '23691 Judit Andai, L.C.S.W., P.S.Y.D.'

The screenshot shows the 'Report List' interface. The main area shows a list of reports with columns for Context, Name, and Description. The first item is 'Entity AF Uber-Refresh (D) Refreshes data from the AF Uber-'.

Context	Name	Description
Entity	AF Uber-Refresh (D)	Refreshes data from the AF Uber-
Entity	Basic Entity Info Report (D)	Basic Entity Info Report
Entity	Basic Entity Info Report (P)	Basic Entity Report
Entity	Basic Entity Information - Alt Version (D)	Basic Entity Information - Alt Versi
Entity	Basic Entity Information - Alt Version (P)	Basic Entity Information - Alt Versi
Entity	Bio w/ Giving (SP111) (D)	Bio w/ Giving Download
Entity	Bio w/ Giving (SP111) (P)	Bio with Giving (SP111) Report