

# AT-A-GLANCE: SAVING & MODIFYING CLIPBOARDS

## 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.

## HOW TO SAVE A CLIPBOARD

To save a Clipboard, click Save on the form header or hit F8 on your keyboard. After hitting Save, always click NEW to ensure you are not saving over another user's saved list. Enter the title of your clipboard in the Name field and add a description if necessary. Click Save. If your clipboard is coded Temporary it will be auto-deleted by the system after 30 days. If your clipboard is coded Permanent it will not be deleted. Clipboards default to Private. To share your clipboard with other Advance users you must make them public by unchecking the Private box and clicking Save. Selecting List Headers will provide you with a listing of your own saved clipboards.

## HOW TO FIND & MODIFY A SAVED CLIPBOARD

To modify an existing clipboard, open up the clipboard application and click on the Load List button to open up your saved list. Selecting List Headers will provide you with a listing of your own saved clipboards. Once the Load ID List screen appears, find the list you wish to open. Click on the ellipsis to load the list or click on the icon under the View column to view the list in entity lookup results format. You can sort the clipboards by any of the column headers (i.e. Name, Type, Owner). Make sure to save your changes when modifications are complete by placing a checkmark next to 'Replace Saved ID List with Current Clipboard List' in the Save ID list application.

## HOW TO DELETE A CLIPBOARD

We ask users to periodically review their clipboards and send an email to [advancetrainer@case.edu](mailto:advancetrainer@case.edu) with the list of clipboards they want deleted.

Clipboard

Modify Content in the Current Clipboard:

Create or Update a Saved ID List:

Work with a Saved ID List:

Entity Clipboard (50462) (85) Actions Help

Items 1 to 15 of 85

ID	
23691	Judit Andai, L.C.S.W., P.S.Y.D.
26165	Mrs. Althea Lynn Avery-Johnson

Save ID List Actions

Clipboard Lists (229/229) Save Actions Help

Name	Type	Owner	Share	ID Count
12c16	Entity	Mr. Michael P. Wise	<input checked="" type="checkbox"/> Private	636
12c16	Entity	Mr. Michael P. Wise	<input checked="" type="checkbox"/> Private	636
12c17	Entity	Mr. Michael P. Wise	<input checked="" type="checkbox"/> Private	629
12c18	Entity	Mr. Michael P. Wise	<input checked="" type="checkbox"/> Private	4454
12d03	Entity	Mr. Michael P. Wise	<input checked="" type="checkbox"/> Private	529
12d04	Entity	Mr. Michael P. Wise	<input checked="" type="checkbox"/> Private	117

Name\*

Type

Category

Delete Date (MM/DD/YYYY)

Description

Active  Temporary

Private

Replace Saved ID List with Current Clipboard List

Clipboard Actions

Modify Content in the Current Clipboard:

Create or Update a Saved ID List:

Work with a Saved ID List:

Entity Clipboard (0) Actions Help

Load ID List (228) Actions Help

Sort Criteria: Idcount (Asc)

View	Name	Type	Owner	Category	ID Count
...	FCW2_20120110110038	Entity	Ms. Felicia West	Temporary List	
...	acd63_260	Entity	Andrea C. Dunn	Temporary List	6
...	kmo30_186	Entity	Mrs. Kristen Mcl	Temporary List	6
...	duo1_241	Entity	Ms. Dorothy Ol	Temporary List	7
...	kmo30_236	Entity	Mrs. Kristen Mcl	Temporary List	7
...	Cindy to Daniel	Entity	Mr. Donald Stua	Temporary List	8
...		Entity	Ms. Nilda R. Bak	Temporary List	8
...		Entity	Ms. Jennie Szeg	Temporary List	8
...		Entity	Mrs. Gwen Rear	Temporary List	10

Click "Owner" to sort by your name.

Click the ellipsis to open in clipboard.