



Creating a Clipboard

A clipboard is a custom list of Entity IDs (EID) that you want to use in reports on a regular basis. The example shown here uses a clipboard to get a list of entity addresses.



1. Retrieve your list of EIDs:

- a. From the Advance Home page, run a report, such as the Donor/Alumni Giving or any report that will give you the list of entities you want to work with. If you already have a list of EIDs, skip ahead to step 2.
- b. From the Report Viewer, click **Actions** from the form header and select **Export Form**. The results of your report will appear in Microsoft Excel format.
- c. Highlight and copy the EIDs that you want to put into your clipboard.
- d. Close the Report Viewer tab.

2. Create your clipboard:

- a. From the Advance Home page, click **Clipboard Creation** from the page tree.
- b. In the **Clip Name** field, type a name for your clipboard. You may want to use a naming convention so your clipboards are easy to find when you need to select one. For example, you might name your lists after your school or department.
- c. From the **Owner** list, select your name.
- d. Select the **Private** check box. Private lists can only be used by you. If not marked as private, the list can be used by other users.
- e. Select what type of list you are creating, usually **Entity**.
- f. Paste your EIDs into the **ID List** box.
- g. Click **Run Report**. Your clipboard has now been created.

3. Load your clipboard for use in another report:

- a. Click the **Clipboard** icon  from the top of the Advance window.
- b. Click **Load List**. The Load ID List form appears with a long list of shared clipboards as well as your own. Using your naming convention should make finding your list easier.
- c. Click the ellipsis button  next to your list to load it.
- d. From the Clipboard from header, click **Actions** and select **Reports**. A list of available reports that you can run for your list of EIDs appears.
- e. Scroll down the list and select the ellipsis button that appears next to the report you want to run, such as CUF Entity Mailing List to get the mailing addresses of your entities, or another helpful report is the CUF Prospect Summary to get a report summarizing each entity's biographic history and affinity.
- f. Select your criteria for the report and click **Run Report**.
- g. You may need to click **Actions** and select **Export Form** to see all the information for the report.

Note: When using clipboards to create address lists, be sure to recreate your list when you use it again because addresses change.

To delete an ID from the clipboard list, select the record row by clicking anywhere on the row so it appears highlighted. Click the Delete button to remove the highlighted ID.