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# How To Use The Clipboard In Advance

Ver. 1.1

3/7/2019

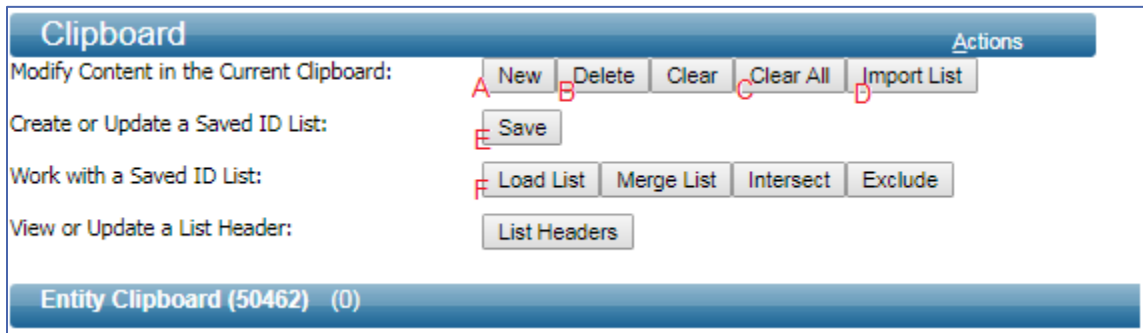
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1. Log in to Advance.
2. Click **Clipboard**  from the **Main Menu**.
3. This will open the **Clipboard** window.

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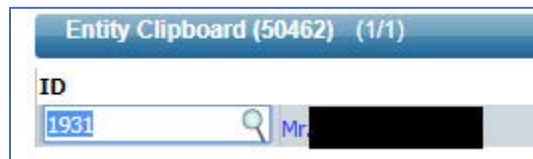
## FIRST A GENERAL TOUR OF THE CLIPBOARD

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### SOME KEY FUNCTIONS OF THE CLIPBOARD DEFINED

- A. **New** - This creates a row on the **Clipboard** and allows you to enter an individual **Entity ID** manually. Like so...I have typed the ID 1931 into the box below.



- B. **Delete** - Use to delete individual entries on the **Clipboard**. Click to highlight the line that you want to remove, then click **Delete**.
- C. **Clear All** - Use to clear all entries on the **Clipboard**.
- D. **Import List** - Use to import **Entity IDs** from a Comma-separated file (.csv). **THIS IS THE PROCESS THAT THIS FILE WILL STEP YOU THROUGH.**
- E. **Save** - Use **Save** to store the current **Clipboard** contents to **Advance** so that you may use it over and over again. **WARNING: IF YOU USE THE SAVE FUNCTION, IT IS YOUR RESPONSIBILITY TO KEEP IT UP TO DATE. THIS CAN BE CHALLENGING AS ENTITIES OFTEN NEED TO BE ADDED OR REMOVED TO YOUR LISTS.**
- F. **Load List** - Use this button to load saved lists. (See E. above.)

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Ver. 1.1

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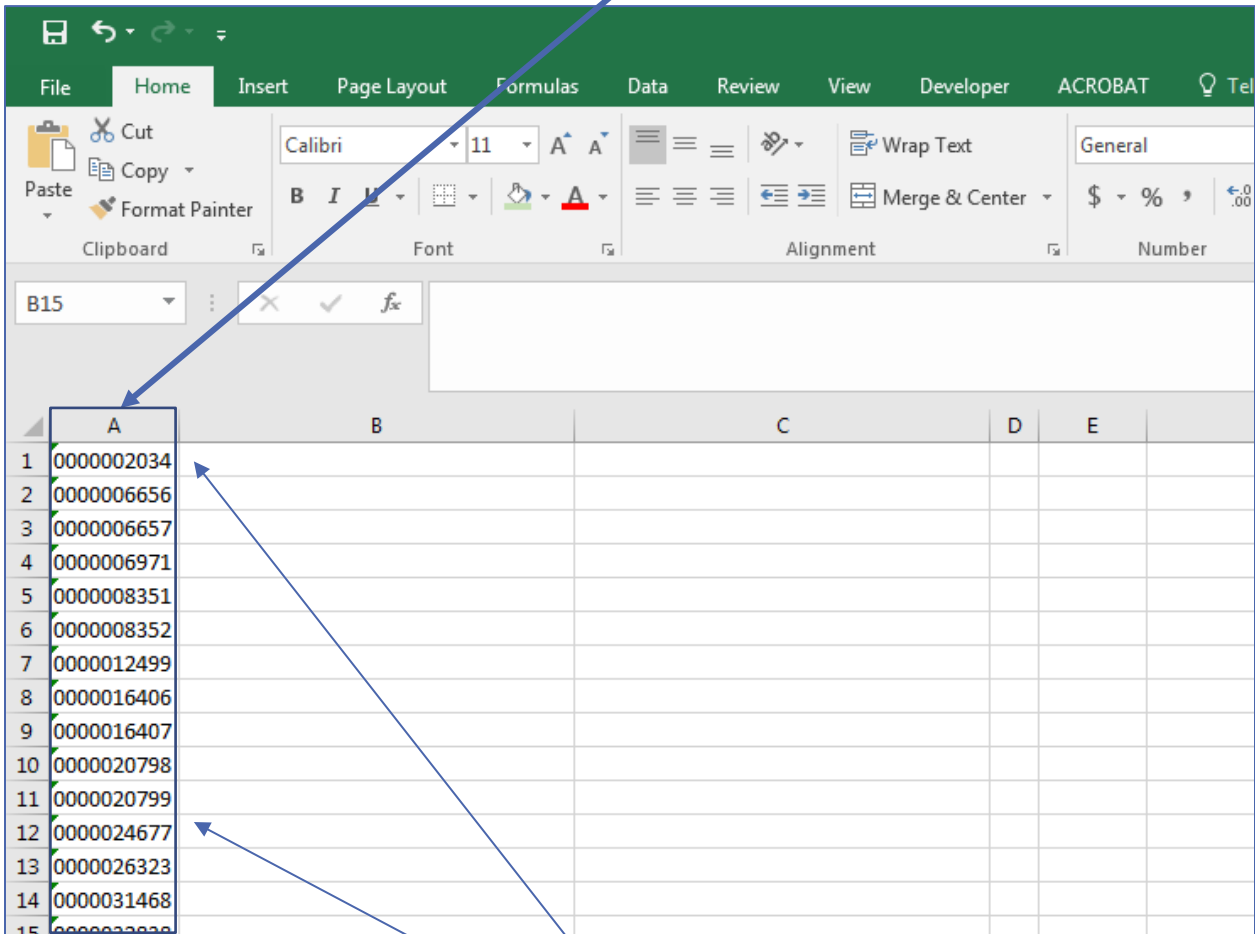
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## HOW TO CREATE A .CSV FILE

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1. Open .xls file with the list of Entity names in Excel .
2. Make sure that all Entity IDs are in Column A.



3. Make sure there are no sub-headers or a main header row. (This example has none. If you have any, delete them.)

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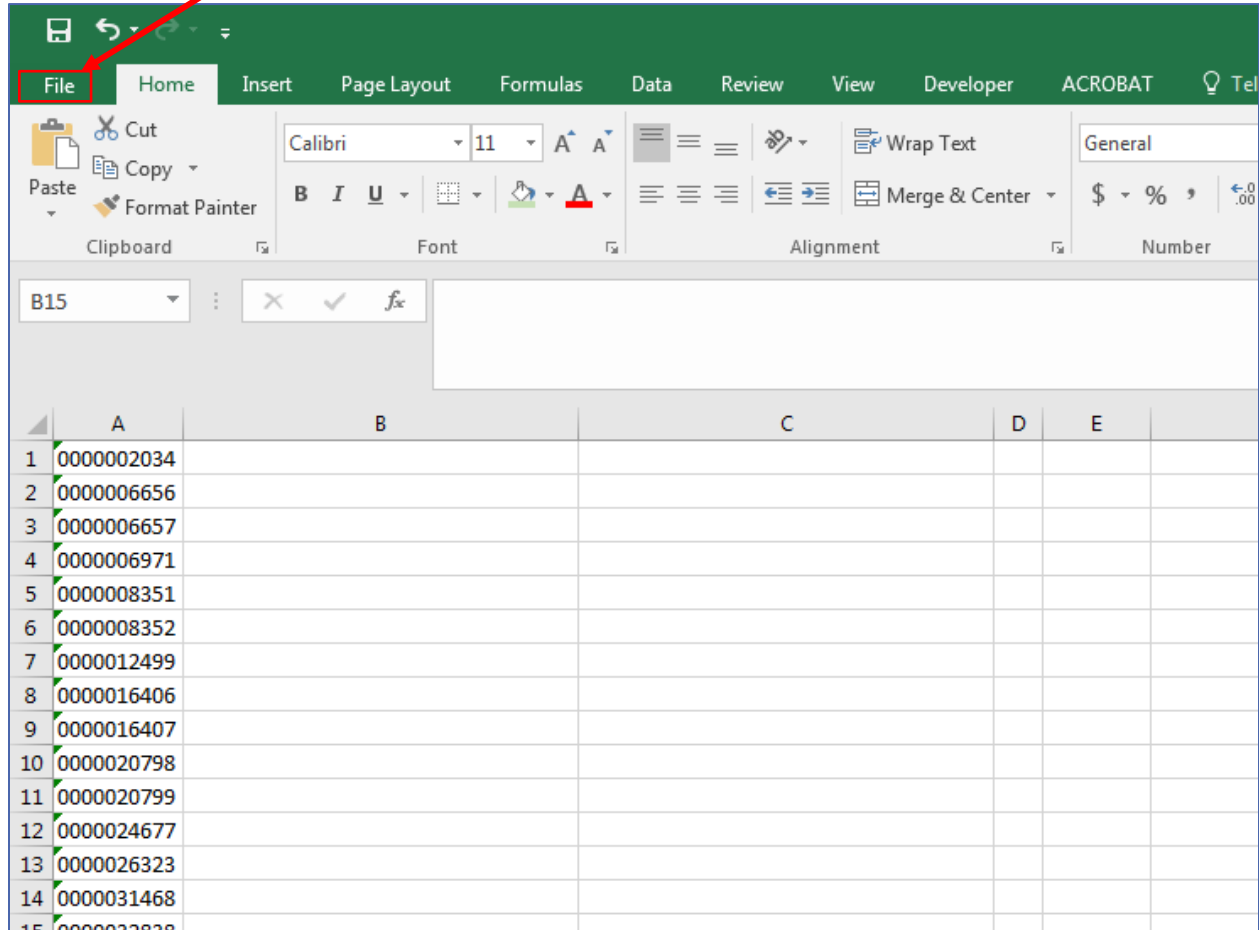
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Ver. 1.1

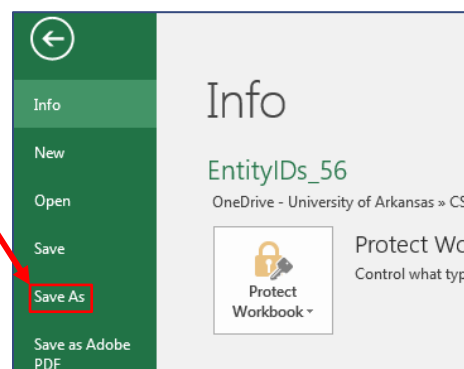
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4. Click on **File** in the top left corner.



5. Click **Save As**.



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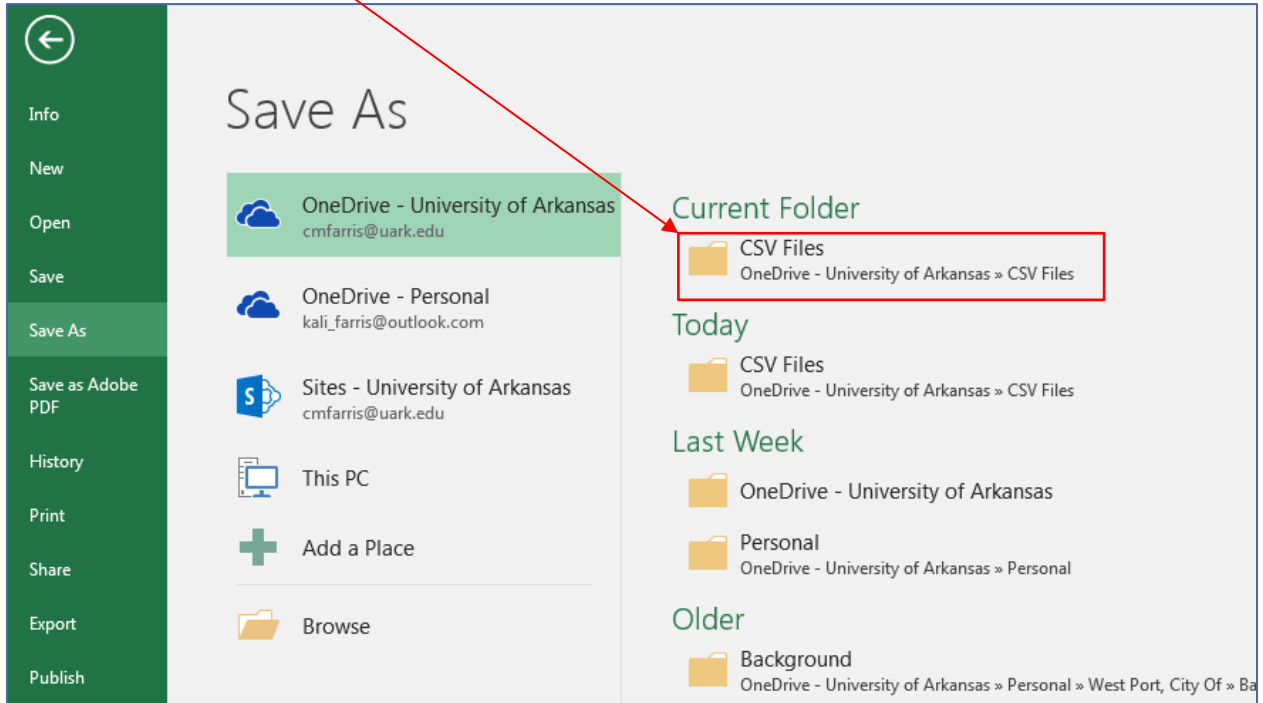
# How To Use The Clipboard In Advance

Ver. 1.1

3/7/2019

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6. Choose your save location.

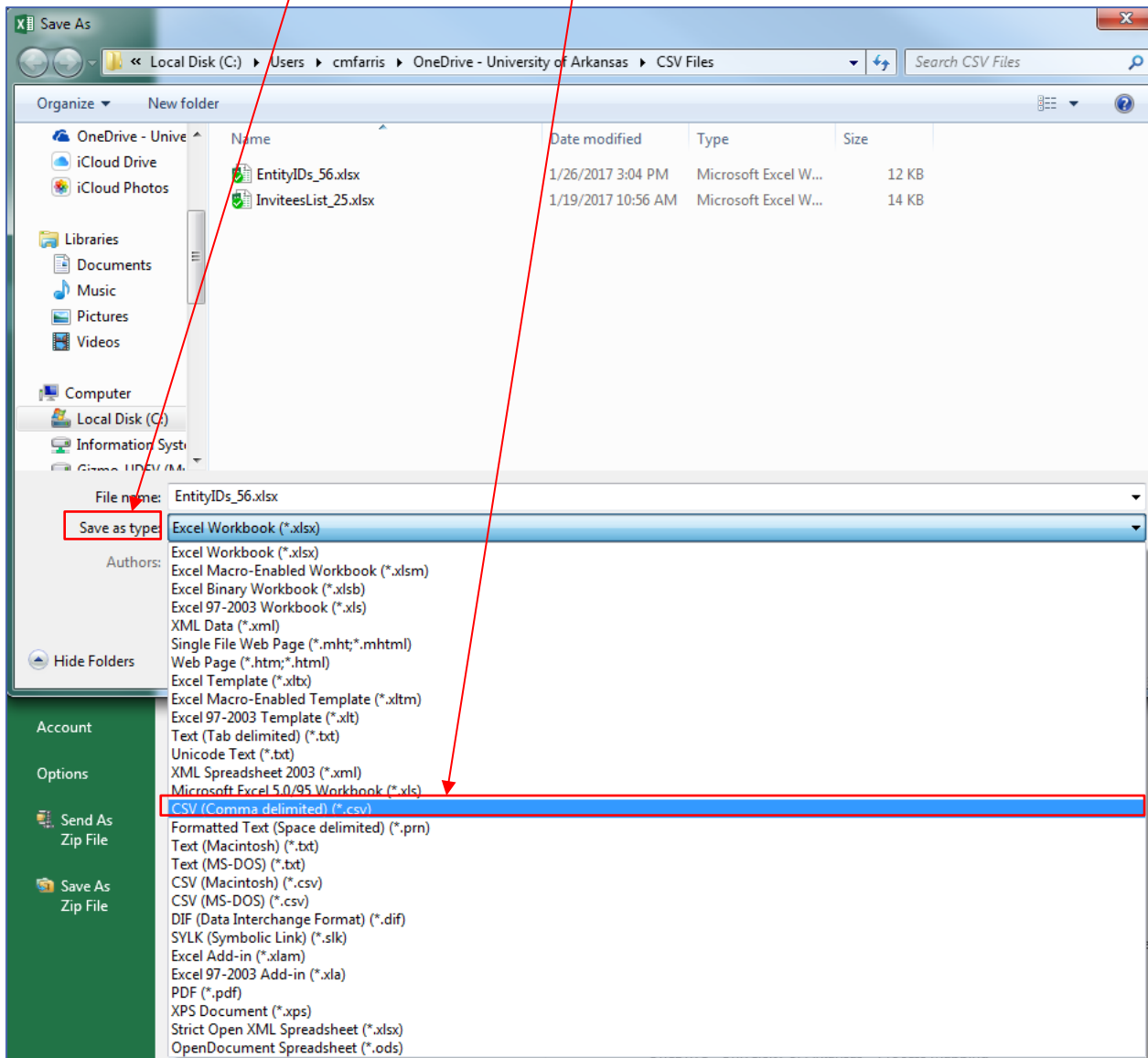


# How To Use The Clipboard In Advance

Ver. 1.1

3/7/2019

7. Change your **Save as type:** to **CSV (Comma delimited) (\*.csv)**.



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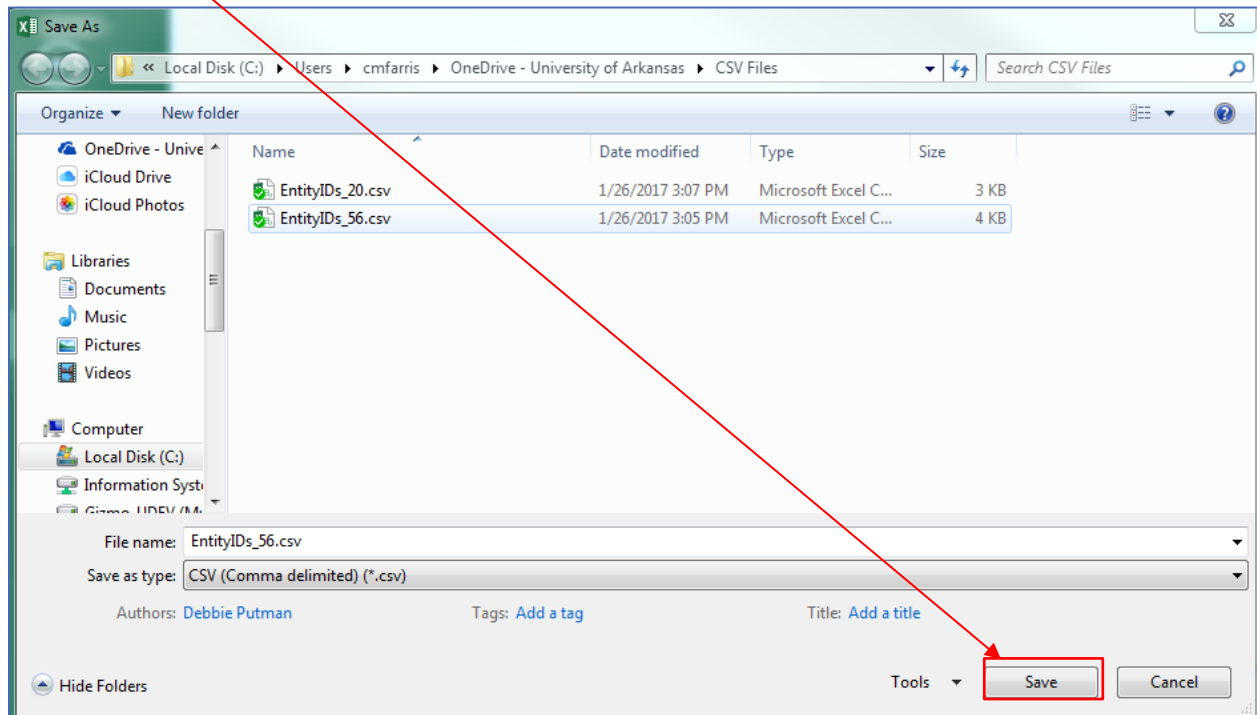
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Ver. 1.1

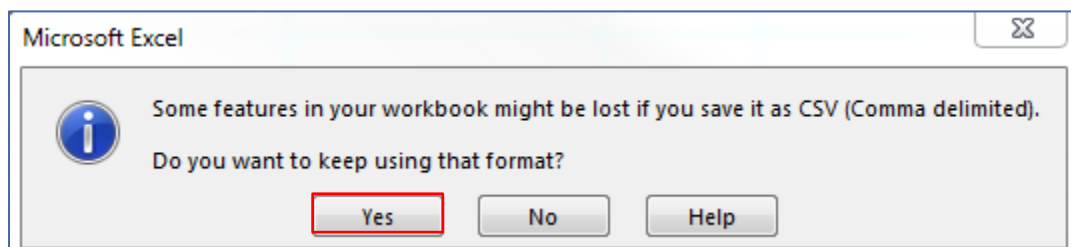
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8. Click **Save**.



9. THE SYSTEM IS GOING TO ASK YOU SEVERAL TIMES IF THINGS ARE OKAY, KEEP SAYING YES. Here is an example of one of those messages:



10. You now have a working .csv file.

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Ver. 1.1

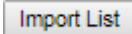
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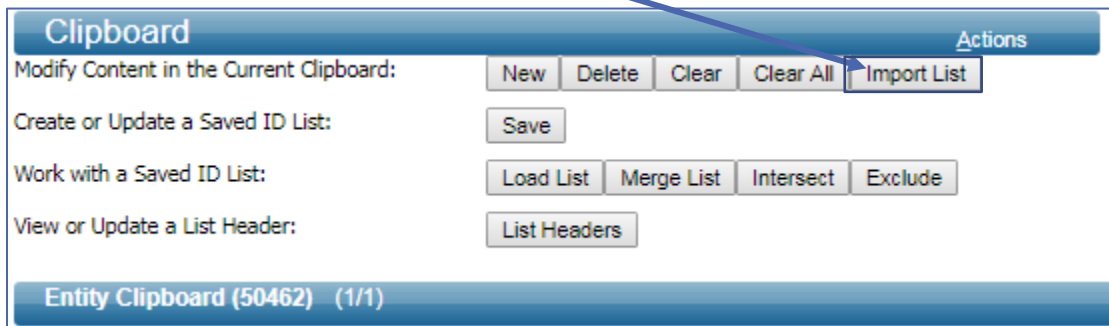
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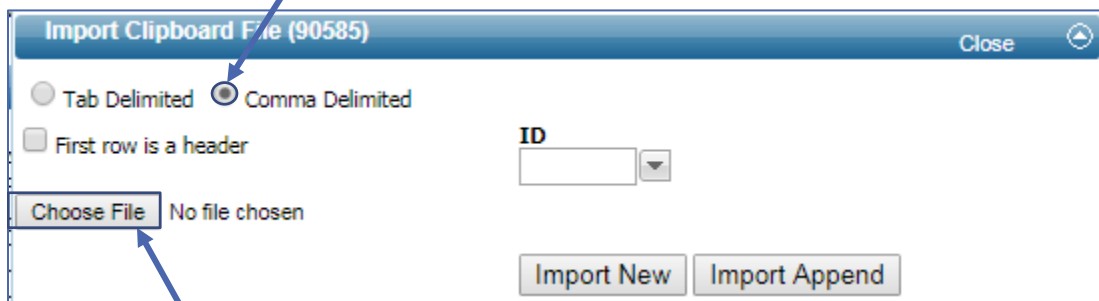
# HOW TO IMPORT A LIST OF ENTITIES FROM A .CSV FILE

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1. From the **Clipboard**, click the **Import List**  button.



2. This opens the **Import Clipboard File** window.
3. Click the **Comma Delimited** radio button.

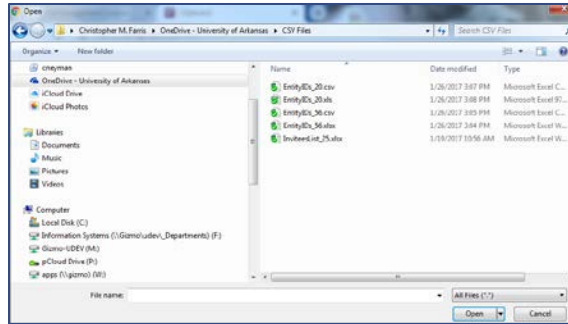


4. Click **Choose File**.
5. This will open the Computer's file search window. Like so:

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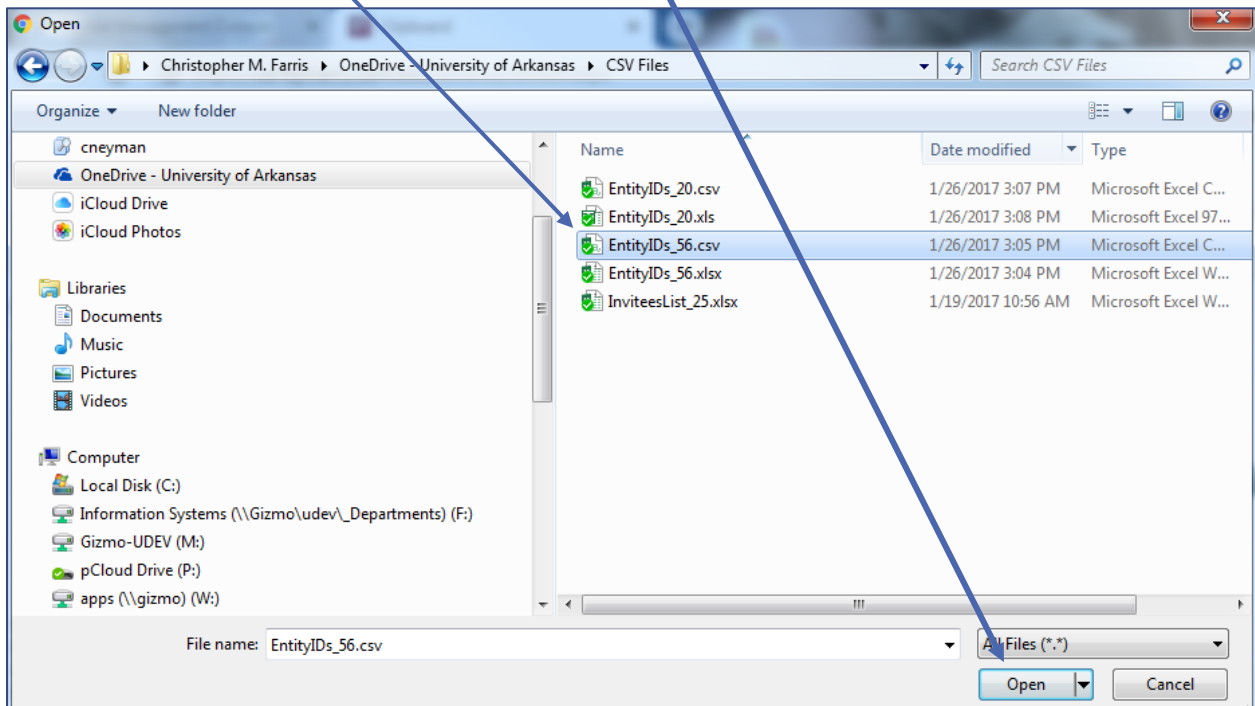
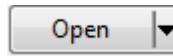
Ver. 1.1

3/7/2019



6. Find the file that you are looking for.

7. Click on the **file name**, then click the **Open** button



**IMPORTANT: THE FILE YOU ARE IMPORTING MUST BE A .CSV (COMMA-SEPARATED FILE)**

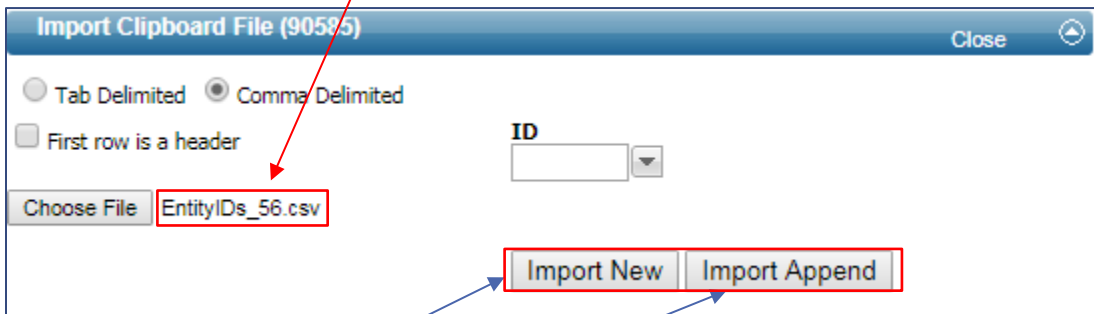


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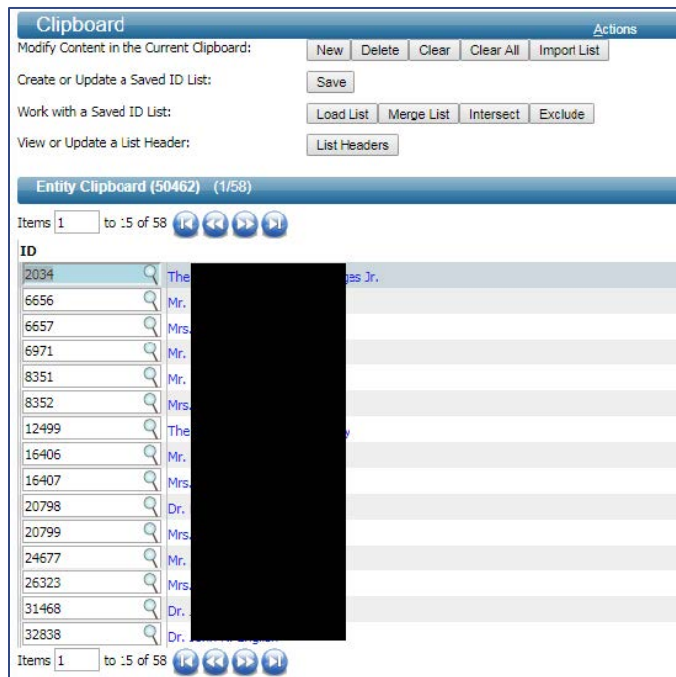
Ver. 1.1

3/7/2019

8. You should now see your **file** on the screen prepared to upload.



9. Choose one of the two Import Buttons.
- Import New** - Import the contents of the file and overwrite everything on the clipboard.
  - Import Append** - Import the contents of the file and add it to the end of what is already on the clipboard.
10. This will now give you a clipboard full of Entities like so:



11. We have one last thing to check.

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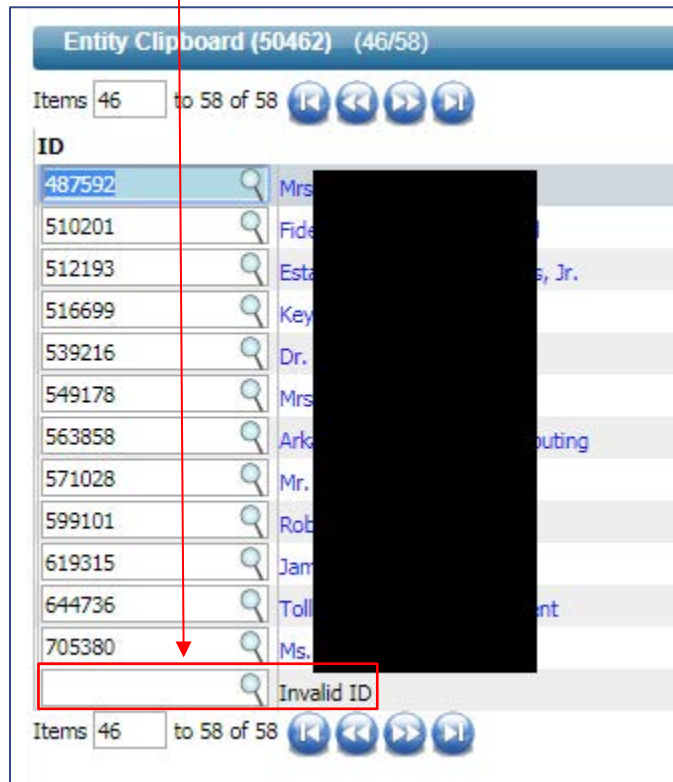
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3/7/2019

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12. Click the end VCR button to go to the last page of the Clipboard.

13. You are looking for this:  Invalid ID



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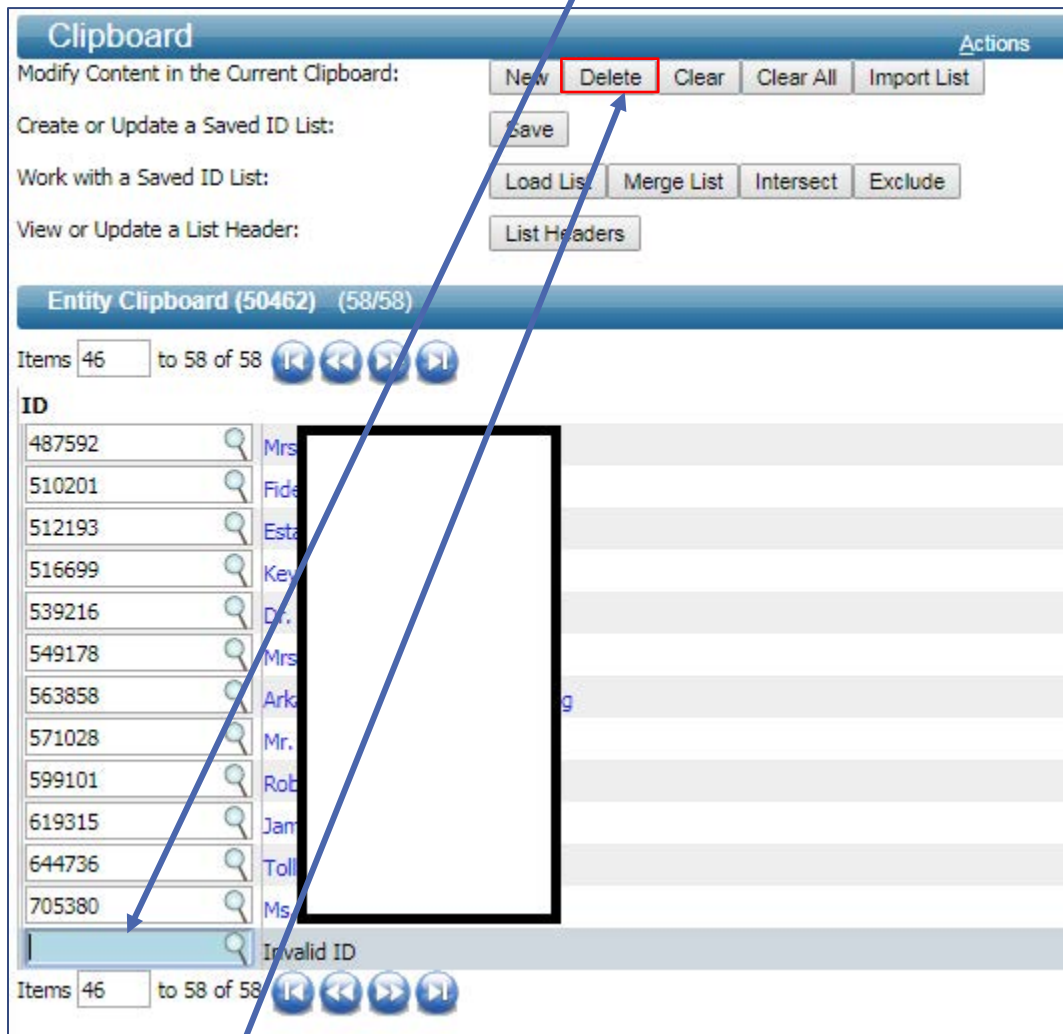
## How To Use The Clipboard In Advance

Ver. 1.1

3/7/2019

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14. Left click on the **Invalid ID** so that it is **highlighted**.



15. Click the **Delete** button.

**YOUR CLIPBOARD IS NOW READY FOR WHATEVER TASK YOU  
NEED TO PERFORM NEXT.**