

In ANDI, clipboards can be used to run reports or create mailing lists.

Creating a Clipboard using an Excel File:

1. Collect ANDI ID numbers on an excel spreadsheet. Make sure the IDs are in the first column.
2. Save the spreadsheet as a “Text-Tab Delimited File” type. If you receive any prompts from Excel when saving, select “Yes”.
3. In ANDI, select “Clipboard” from the top menu.
4. Select “Import List” from the top row.
5. Make sure the “Tab Delimited” option is selected. If your spreadsheet has a header row, check the “First row is a header” box. Then, click “Choose File” and select your saved spreadsheet.
6. Once the file is selected, click “Import New”.
7. You should now see a list of names that correspond with the IDs you uploaded.
8. To save your clipboard, hit “Save” at the top of the page.
9. Select “New” from the top. Enter a name for the clipboard.
 - a. If you are creating a list for mail labels or email, select the proper category from the “Type Category” drop-down menu. Otherwise, leave the drop-down blank.
 - b. If you need others to be able to see your clipboard, uncheck the “Private” box. If you leave it checked, you will be the only one able to see the clipboard.
10. Click “Save”. You should see a yellow box indicating the save was successful.

Creating a Clipboard using a Lookup:

1. Select “Lookups” from the top menu in ANDI.
2. Use the drop-down menus on the left to select your desired criteria.
 - a. Multiple criteria can be combined when using the Lookup function. Status/active indicators or date ranges can be helpful in narrowing search results.
3. Once the proper criteria have been selected, change the “Output Type” using the drop down menu at the top of the screen. Select “Copy to Clipboard/Replace”.
4. Hit “Search”. You should receive a message indicating the IDs have been successfully copied to the clipboard. Select “OK”.
5. Click “Clipboard” from the top menu. You should see a list of the IDs.
6. To save the clipboard, select “Save” next to “Create or Update a Saved ID List”.
7. Select “New” from the “Clipboard Lists” bar.
8. Enter a name for the clipboard.
 - a. If you are creating a list for mail labels or email, select the proper category from the “Type Category” drop-down menu. Otherwise, leave the drop-down blank.
 - b. If you need others to be able to see your clipboard, uncheck the “Private” box. If you leave it checked, you will be the only one able to see the clipboard.
9. Click “Save”. You should see a yellow box indicating the save was successful.