

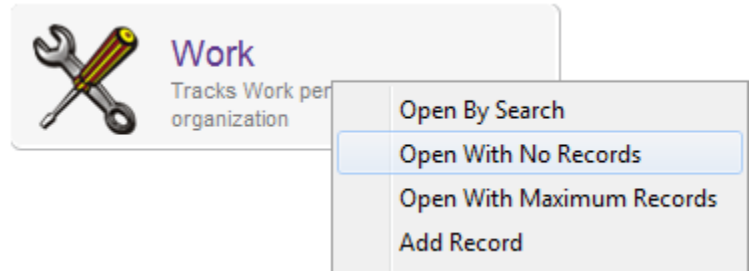
A Recordset is essentially a stored list brought up by a set of saved search criteria. There are two components to a search based recordset:

- **List Settings:** the columns displayed in the list (the order, width, etc.)
- **Search Settings:** the search ranges used to achieve the desired list.

Creating a recordset makes sense when you find yourself repeatedly entering the same search criteria for a particular capsule.

**STEP I: List Settings**

1. Right click on the capsule and select **Open With No Records**. This will bring up a blank List.



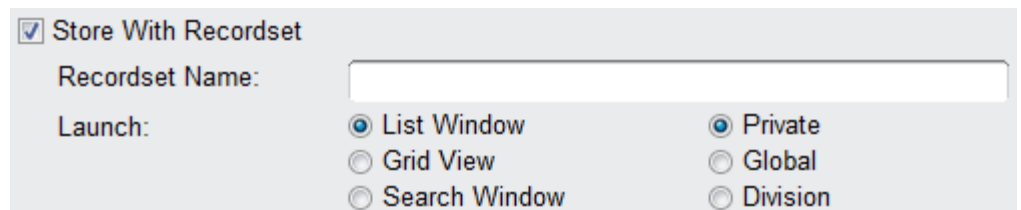
2. Manipulate the list to include all of the columns you want to appear in your recordset. Arrange them in your preferred order; this will be how your recordset is displayed. **Note: Do not Capture Settings as that will replace your current settings.**

**Reminders:**

- right-mouse click on a column title to add and remove columns.
- click and drag a column to change the order.
- click the area between two columns and drag to set the column width.

**STEP II: Search Settings**

1. From the List click on the Search Icon (🔍).
2. In the Search window, enter the search criteria to achieve the desired results. You may also define a primary Sort and Subsort that will be applied when the Recordset is launched.
3. At the bottom of the Search window, check the box that says **Store with Recordset**.



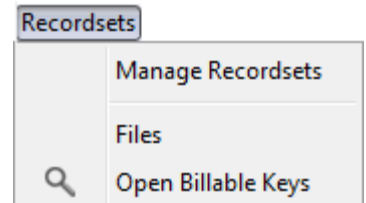
A new section will open that includes the Recordset Name field and Launch details.

- Type in the **Recordset Name** you want for your Recordset.
- Determine how the Recordset will open: **List Window**, **Grid View**, or first open the **Search Window**.
- Then indicate which users will be able to access the Recordset: **Private** (just you), **Global** (all users), **Division** (just users in the current division).

### Managing Recordsets

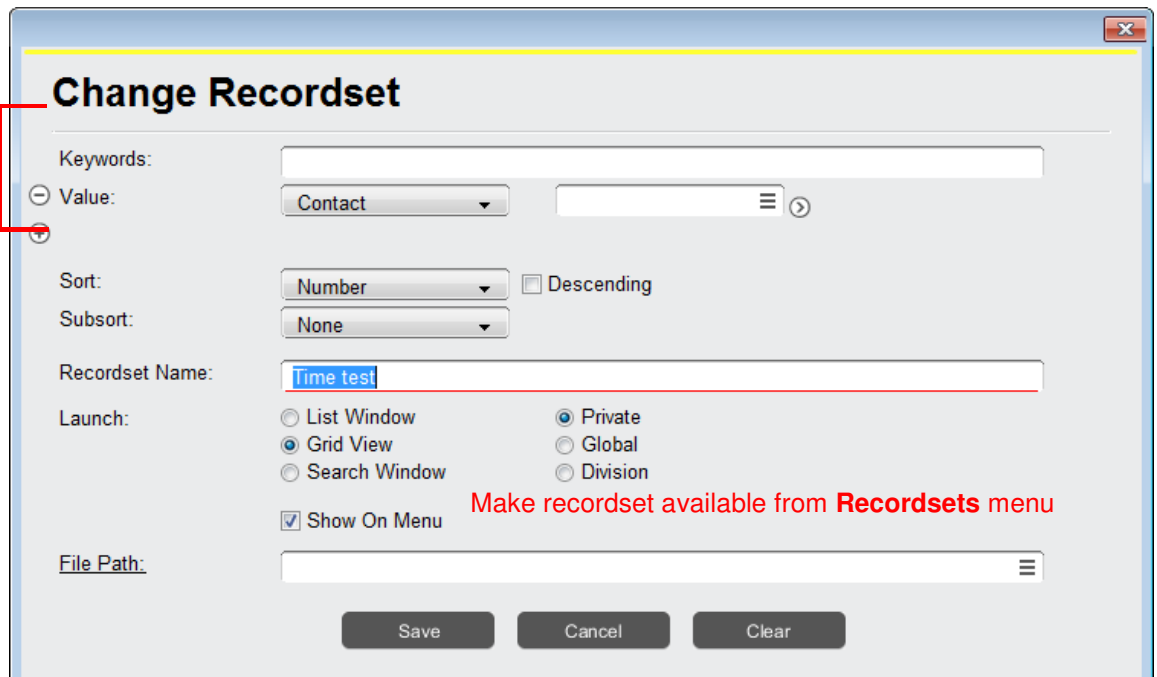
After you've created a recordset, you can open it by selecting it from the **Recordsets** menu on the menu bar.

If you select **Manage Recordsets**, you will bring up a list of all your recordsets. This is where you can change and delete recordsets.



### To change a Recordset:

1. Highlight the recordset and select the key icon.
2. This will open a window giving you access to the settings of the recordset, including:



**Change Recordset**

Keywords:

Value:

Sort:   Descending

Subsort:

Recordset Name:

Launch:  List Window  Grid View  Search Window  Private  Global  Division

Show On Menu

File Path:

Buttons: Save, Cancel, Clear

Search ranges

Sort/Subsort

Name

Launch method

Specify a file to open whenever the recordset is opened (for pasting into)

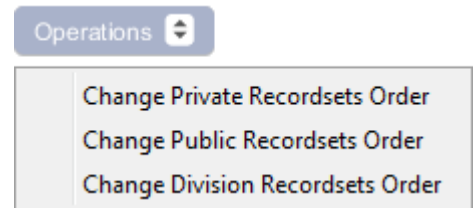
Make recordset available from **Recordsets** menu

**Notes:**

- Launch via Grid View if you have a Sort and Subsort and would like to launch the Recordset using that feature with the data displayed horizontally and vertically in cells.
- Launching a new Search Window before going straight to the records is ideal if you need to tweak your search terms slightly and do not want to make multiple Recordsets that search for basically the same thing. This is also helpful if you have Recordsets that include dates.
- Any changes to the search or Sort and Subsort values will be automatically saved the next time you use that Recordset. The Sort and Subsort fields are limited to columns that already appear in the recordset's list view.

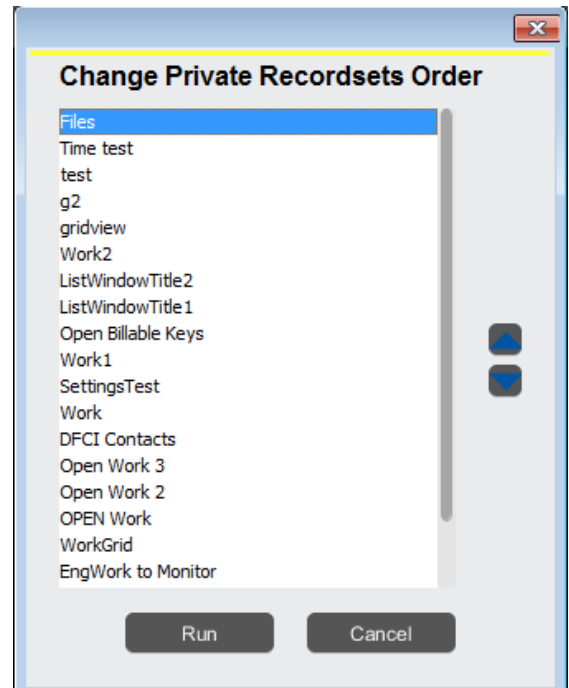
**Operations**

The **Operations** button includes a few operations to help you manage the order of your recordsets.



**Change Private/Public/Division Recordsets Order**


Highlight the recordset and use the arrows to adjust the order.



**Use Active Division**

Found on the Manage Recordsets menu, the “Use Active Division” checkbox is available for Global Recordsets only. If a user opens a recordset with this checkbox selected, AwareManager will use the user’s Active Division instead of switching to division the Recordset was saved in.

**Changing Column Order/Settings**

If you would like to change the columns in your Recordset, arrange the columns while in your recordset and use the Capture Settings icon ().

This will prompt the system to ask if you would like to overwrite the original settings. Hitting No will overwrite the normal capsule settings.