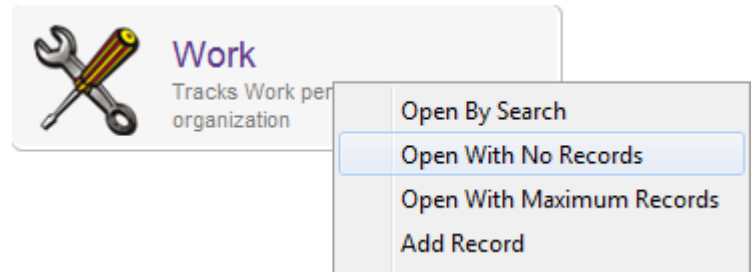


A Recordset is essentially a stored list of records. A static recordset is a non-search based recordset, meaning that the same information will be brought up each time the recordset is opened.

Creating a recordset makes sense when you find yourself repeatedly looking for the same information in 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 on your recordset. Arrange them in your preferred order; **this will be how your recordset is displayed**.




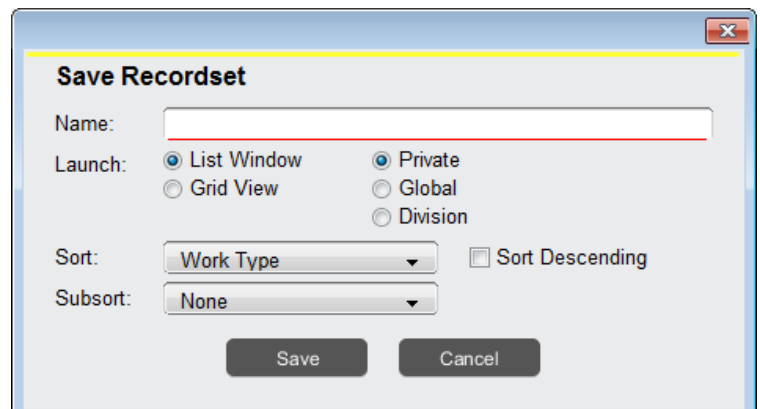
**Note:** Do not Capture Settings as that will replace your current settings.

**Reminders:**

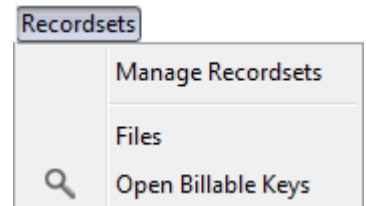
- right-mouse click on a column title to add and remove columns.
- click and drag a column to change the order.
- click the area between two columns and drag to set the column width.


**STEP II: Creating Recordset**

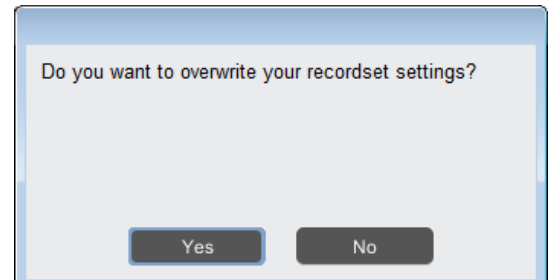
1. From the List click on the Search Icon
2. In the Search window, enter the search criteria to achieve the desired results.
3. Once your list of records is how you always want to see it, click on the **Save Recordset** icon (  )
4. After clicking the icon, a box called **Save Recordset** will appear. Type in the title you want for your recordset. Here you can also decide if you want this to be a Global recordset (visible to all users in all divisions) or a Division recordset (visible to all users in the division you are in). You may also define a primary **Sort** and **Subsort** that will be applied when you open the Recordset in List view.



- Now that your static recordset has been created, selecting this from the Recordset menu will always bring up the same data in the layout you created.

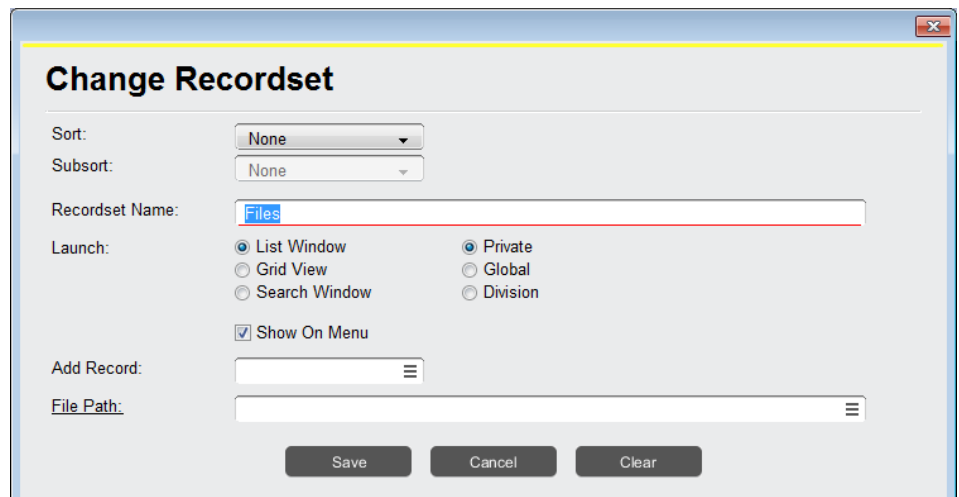


- If you would like to change the columns in your Recordset, arrange the columns and use the Capture Settings icon (  ), which will ask if you would like to overwrite the original settings.




- If you need to add any additional records to your Static Recordset, go to the Recordsets menu in the top left-hand side of the screen and choose "Manage Recordsets."

- Among the options you can choose is whether the Recordset will appear in the menu and the option to add a record from the capsule the Recordset was saved in.
- You may also define a primary Sort and Subsort that will be applied when you open the Recordset in List view.



Lastly, you can choose to add additional records to your recordset (one at a time) via the **Add Record** field.

### Changing Column Order/Settings

If you would like to change the columns in your Recordset, arrange the columns 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.