

# Deltek Costpoint 7.1.1 Query and Lookup Quick Reference Card

## Query Function

The Query function in Costpoint allows you to search for a single or multiple existing records on the tables used by a particular screen. You can perform basic and advanced searches using the Find, Query, Sort, or Saved Queries tabs on the Query dialog box. Query is available on Costpoint maintenance screens.

Click  on Costpoint screens to launch this function. Click the drop-down arrow on this button to quickly access any existing saved queries.

### Find Tab

Use this to retrieve records using specific fields on the **Search Criteria** group box. On this tab, your search is limited only to the available search fields for the screen.

### Sort Tab

Use this to define the display order of your search results. Select the fields that will be used to sort the records and the order of the search results. These settings will be used when you run the search process on the **Find** or **Query** tab.

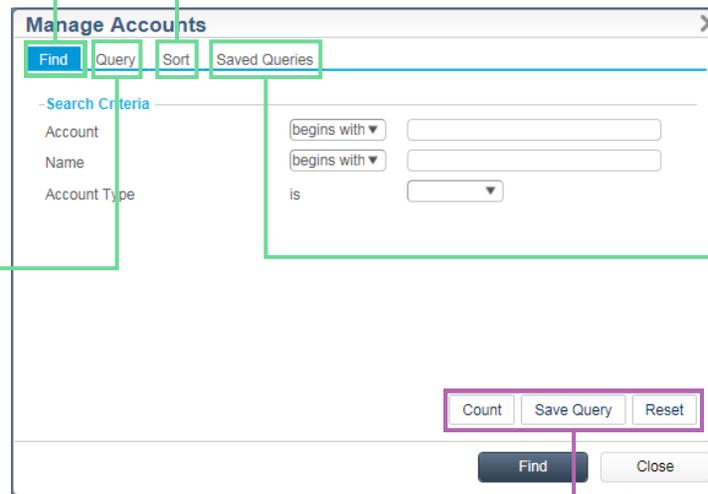
### Query Tab

Use this to create custom criteria for the search process. Enter the following for each query condition:

- **Field** — The field that you want to use in the search
- **Relation** — The logical operator for the condition statement (for example, **Contains**, **Begins With**)
- **Value** — The field data (or part of the data)

### Saved Queries Tab

Use this to view or run previously saved queries for the screen. You can also clone and delete existing saved queries.



The screenshot shows the 'Manage Accounts' dialog box with the following elements:

- Tabbed interface: Find, Query, Sort, Saved Queries.
- Search Criteria section:
  - Account: begins with (dropdown), [input field]
  - Name: begins with (dropdown), [input field]
  - Account Type: is (dropdown), [input field]
- Bottom buttons: Count, Save Query, Reset, Find, Close.

The Find, Query, and Sort tabs contain the following standard buttons:

- **Count** — This displays the number of records that will be returned by the search process.
- **Save Query** — This saves and adds your current search details to the list on the Saved Queries tab.
- **Reset** — This resets the fields on the tab.

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## Lookup Function

Use the Lookup function to select from a list of values that are valid in particular fields. To access this feature, click the Lookup icons (either on the global toolbar or in the selected field). Alternately, you can press **F10** after you click in a field that has the Lookup function. This function is useful when you do not have the exact value needed to complete a field.

### Lookup Icons

Click these icons to launch the Lookup dialog box for the selected field. This icon is available on the global toolbar and in each field with the Lookup function.

Fields with blue bars have the Lookup function.

The screenshot shows the Deltek Costpoint interface. The main window title is 'Company 1 > Deltek Costpoint'. The menu bar includes FILE, LINE, OPTIONS, PROCESS, and HELP. The toolbar contains various icons, including a search icon (magnifying glass) highlighted with a green box. The breadcrumb trail is 'Browse Applications > Accounting > General Ledger > Accounts > Link Accounts/Organizations'. The main form is titled 'Account/Organization' and has fields for 'Account\*' (containing '00001-1') and 'Organization\*'. A dropdown list is visible below the 'Account' field, showing '00001-100', '00001-101', '00001-102', and '00001-103'. A 'Lookup' dialog box is open, showing a table of results. The table has columns: Account, Name, Type, Project Required, Active, and Detail. The first row is selected, showing '00001-100', 'Asset Mats', 'A', 'Project Required' checked, 'Active' checked, and 'Detail' checked. The dialog box also has a 'Query' dropdown menu highlighted with a purple box, and 'Select' and 'Cancel' buttons at the bottom.

Account	Name	Type	Project Required	Active	Detail
00001-100	Asset Mats	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
00001-101	Asset Dir Labor	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
00001-102	Asset Subcont	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

When you enter partial values on fields with Lookup function, the screen displays a list of up to 10 results that begin with the characters that you entered. You can then select the results in the list.

If there are more than 10 AutoComplete results, you can click **more values...** to view the complete list.

### Lookup Dialog Box

When you click , this dialog box displays the values that you can enter in a field. When you select a value in this dialog box, the screen transfers the selected information in the field.

Click **Query** to filter the results in the Lookup dialog box using the Query functionality (Find, Query, Sort, and Saved Queries).