Deltek Costpoint 8.2 Query and Lookup Quick Reference Card

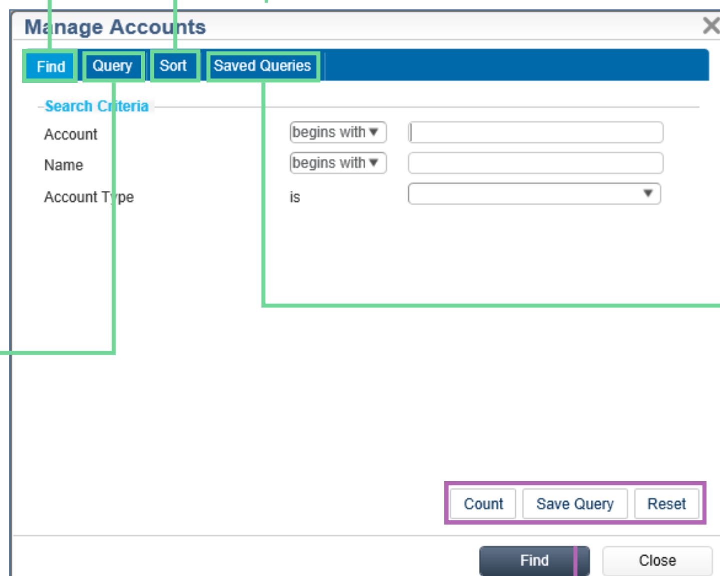
Query Function

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 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)
- **Combine Method** — The method of multiple condition statements (select either **AND** or **OR**)

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 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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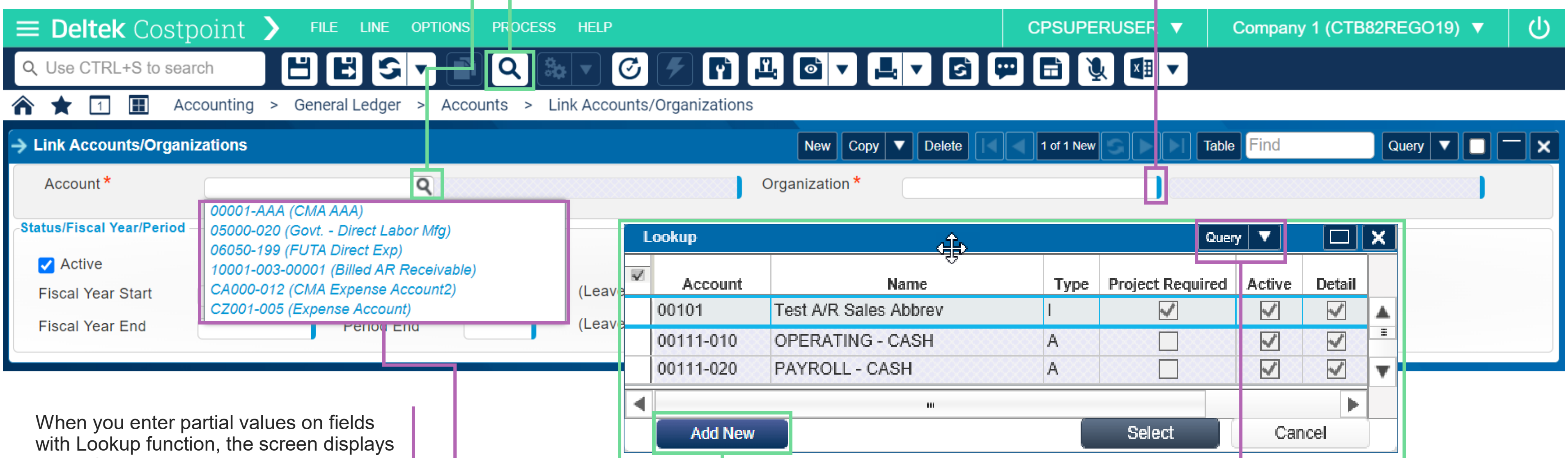
Lookup Function

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. You can also add a new record if the value you are searching does not exist.

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.



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.

Add New Button

Click this button to add a new record and insert it into the field from which you executed Lookup. This button is currently available only in the Lookup of the **Prime Contractor** and **Lead Contact** fields on the General tab of the Manage Opportunities screen.

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).

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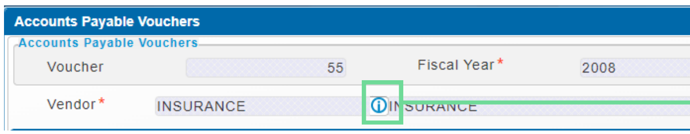
Info Card Function

Use the Info Card function to view more information on the current field value, a record in the AutoComplete drop-down list, or a record in the Lookup result set. Click ⓘ on fields with the Lookup function, on the AutoComplete drop-down, or on the Lookup dialog box to display an Info Card. The Info Card function is available in both Form and Table views.

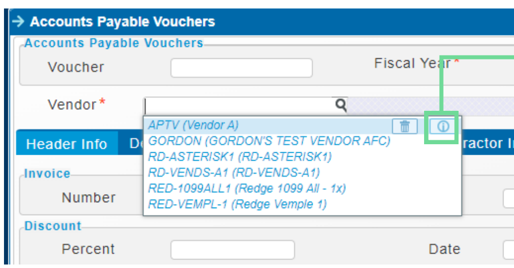
Info Card on a Non-Editable Field with Lookup

Click this icon on a non-editable field with Lookup to display the Info Card for the current field value.



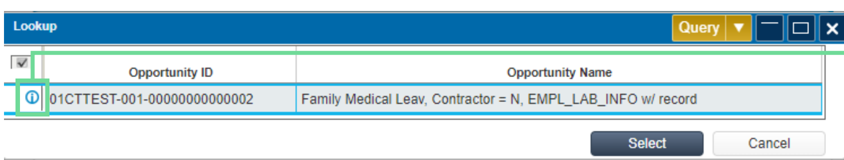
Info Card on an Editable Field with Lookup (AutoComplete)

Click this icon on the AutoComplete drop-down list of an editable field with Lookup to display the Info Card for a suggested record.



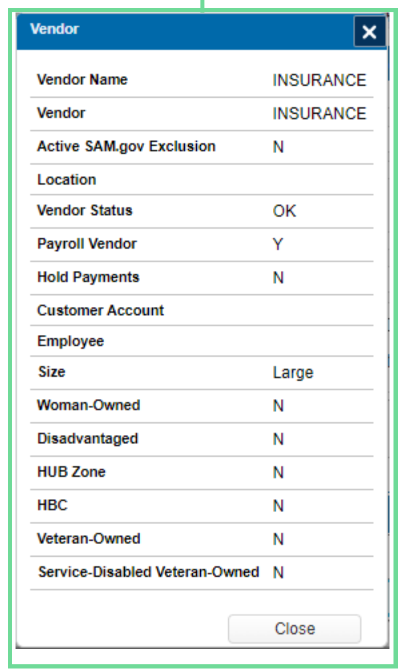
Info Card on the Lookup Dialog Box

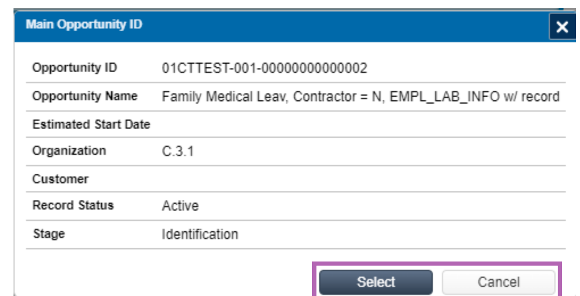
Click this icon on the Lookup dialog box to display the Info Card for a record.



Info Card (For Non-Editable Fields and AutoComplete)

Use the Info Card to view additional details about the current value in a field, an AutoComplete suggestion, or Lookup record to help you better understand what you are viewing without having to leave the current screen.





When viewing the Info Card of a Lookup record, the **Select** and **Cancel** buttons display.