Deltek Costpoint 8.1 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 **Query ▼** 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.
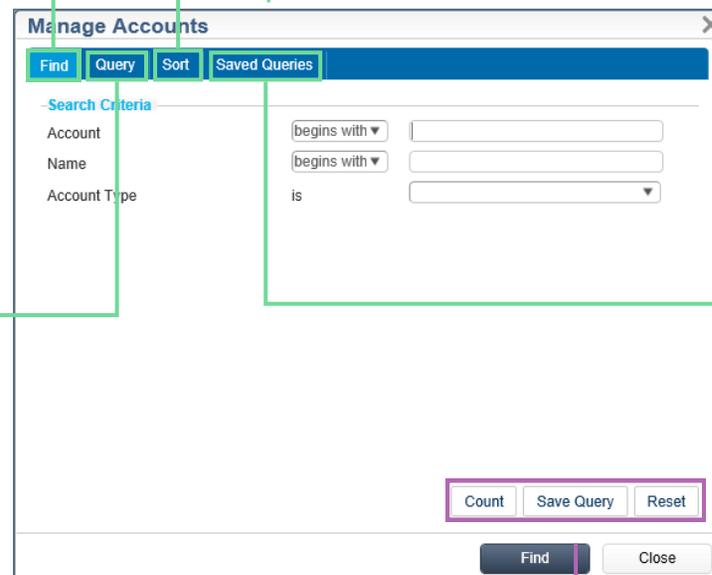
Query Tab
Use this to create custom criteria for the search process. Enter the following for each query condition:

- **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)

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

Manage Accounts

| Find | Query | Sort | Saved Queries |

Search Criteria

Account	begins with ▼	
Name	begins with ▼	
Account Type	is	▼

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.

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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.

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).

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