

Deltek Costpoint 8.2 Views Quick Reference Card

Form View

Any screen in Costpoint that has the Query function can display in form view or table view.

In form view, the information for a single record is displayed in fields, grouped in boxes, and in tabs.

Select the **check box** to select the record. The record will also show as selected in table view.

Click **Query** to define search parameters for the data records.

Click **Table** to open the table view. The toggle name is based on the view displayed.

Click **New** to create a record.

The screenshot shows the 'Label Info' form in Deltek Costpoint 8.2. The top toolbar contains the following elements from left to right: a 'New' button, a 'Copy' button with a dropdown arrow, a 'Delete' button, a set of navigation arrows (back, forward, first, last), a status indicator '1 of 9 Existing', a 'Table' button, a 'Find' text input field, a 'Query' button with a dropdown arrow, a maximize button, and a close button. The main form area is divided into several sections: 'Sequence Number *' with a value of '1', 'Data Type *' set to 'Text', and 'Label *' set to 'PRODUCT LINE'. Below these is a 'Requirements' section with a checked 'Validated Text' checkbox and an unchecked 'Required' checkbox, followed by a 'Costpoint Validation Field'. To the right is a 'Help Description' box with the text 'Enter the description of the product line.' At the bottom right of the form, the text 'Validated Text' is displayed.

Click the **navigation arrows** to move between records.

Enter a value in the **Find** field to quickly locate records in applications and subtasks.

Click **Maximize** to expand the form.

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Table View

The same fields that are in form view display as columns, in the same order, in table view.

Each row represents a record.

Click the **Select All Rows** box to select all rows in the table. Selected rows are shaded in the table.

Click **Form** to open the form view.

Click **Delete** to mark a row for removal. The row is deleted when you save the updates.

Enter a value in the **Find** field to quickly locate records in applications and subtasks.

User-Defined Labels

NewCopy▼DeleteFormFindQuery▼—□×

<input checked="" type="checkbox"/>	Sequence Number *	Data Type *	Label *	Help Description	Costpoint Validation Field	Validated Text
<input checked="" type="checkbox"/>	1	Text ▼	PRODUCT LINE	Enter the description of the product line.		<input checked="" type="checkbox"/>
	2	Text ▼	DEPOSITOR	Enter the name of the person making the deposit.		<input checked="" type="checkbox"/>
	4	Date ▼	DATE	Enter the transaction date.		<input type="checkbox"/>
	5	Text ▼	REFERENCE	Enter the transaction reference number.		<input type="checkbox"/>
	11	Date ▼	DATE	Enter the account creation date.		<input type="checkbox"/>
	12	Number ▼	AMOUNT	Enter the transaction amount.		<input type="checkbox"/>

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Validated Text

In this column, a check mark indicates edits were made on an existing row.

An X indicates a deleted row.

An arrow indicates a new row.

A shaded box indicates a selected row. Double-click the box to open the record in form view.

The field names in table view sometimes differ from the names in form view.

Otherwise, names may change for spacing.

Click **Query** to define search parameters for the data.

Click **Maximize** to enlarge the view.