

Deltek Costpoint 8.0 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 form view. The header bar contains the following elements from left to right: 'New' button, 'Copy' button with a dropdown arrow, 'Delete' button, navigation arrows (back, forward), '1 of 6 Existing' status, 'Table' button, 'Query' button with a dropdown arrow, a maximize button, and a close button. The form content includes:

- Sequence Number ***: Input field with value '1'.
- Data Type ***: Dropdown menu set to 'Text'.
- Label ***: Input field with value 'PRODUCT LINE'.
- Requirements**: A section with a checked 'Validated Text' checkbox and an unchecked 'Required' checkbox. Below it is a 'Costpoint Validation Field' input.
- Help Description**: A text area containing 'Enter the description of the product line.'

A 'Validated Text' label is located in the bottom right corner of the form area.

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

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 **Form** to open the form view.

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

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

<input checked="" type="checkbox"/>	Sequence Number *	Data Type *	Label *	Help Description	Costpoint Validation Field	Validated Text	Required
<input checked="" type="checkbox"/>	1	Text ▼	PRODUCT LINE	Enter the description of the product line.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2	Text ▼	DEPOSITOR	Enter name of person making deposit.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	Text ▼	ET ACCT TYPES	Enter an ET Account Type.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	26	Number ▼	AMT OF DEPOSIT	Enter the amount of deposit.		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	28	Text ▼	BANK	Enter the name of the bank deposit was made to.		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	30	Date ▼	DATE OF DEPOSIT	Enter the date of deposit.		<input type="checkbox"/>	<input type="checkbox"/>

[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.

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.

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