

Deltek Costpoint 8.0 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 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 'Find' tab selected. The 'Search Criteria' section includes three rows: 'Account' with a 'begins with' dropdown and text input, 'Name' with a 'begins with' dropdown and text input, and 'Account Type' with an 'is' dropdown and text input. At the bottom of the dialog, there are buttons for 'Count', 'Save Query', and 'Reset' in a purple box, and 'Find' and 'Close' buttons in a grey box.

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.


The screenshot shows the 'Link Accounts/Organizations' window with the 'Account' field selected. A list of accounts is displayed, including '10001-001-00001' through '10001-004-00002'. The 'Lookup' dialog box is open, showing a table of account data. The 'Query' dropdown in the dialog box is highlighted, indicating the option to filter results.

Account	Name	Type	Project Required	Active	Detail
00101	Test A/R Sales Abbrev	I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
00111-010	OPERATING - CASH	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
00111-020	PAYROLL - CASH	A	<input 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).