Deltek Costpoint 8.2 Shortcut Keys, Toolbar Icons, and Buttons Quick Reference Card

Keyboard Shortcuts

The following tables list the keyboard shortcuts you can use in Costpoint. The shortcut keys depend on the function you want to perform on an application, table window, or process.

Line Functions

Description	Shortcut
Duplicate a selected line/record.	CTRL + E
Force validation for the selected line.	ALT + SHIFT + V
Add a new line/record.	F2
Mark a selected line/record for deletion.	CTRL + DEL

Edit Functions

Description	Shortcut
Copy selected text.	CTRL + C
Cut selected text.	CTRL + X
Paste copied or cut text.	CTRL + V
Undo the last action taken.	CTRL + Z

File Functions

Description	Shortcut
Clone selected record.	F4
Print the default report.	SHIFT + CTRL + P
Save all changes and continue working on the application.	F6
Log out.	CTRL + SHIFT + F12
Force validation for an object.	CTRL + ALT + V
Close the current application.	ALT + W
Add a new row.	F2
Save all changes.	F5
Execute the default application process.	F3

Option Functions

Description	Shortcut
Go to the next window.	CTRL + B
Go to the next record.	CTRL + →
Go to the previous record.	CTRL + ←
Go to the last record.	CTRL + ↓
Go to the first record.	CTRL + ↑
Toggle between table and form view.	CTRL + M
Toggle viewing between new and existing records.	ALT + CTRL + T
Go to the next tab.	CTRL + TAB
Open the Query window.	F11
Open a Lookup window.	F10
Reset the default positioning and view.	SHIFT + ALT + Z
Show/hide messages & errors.	SHIFT + F3

Miscellaneous Functions

Description	Shortcut
Decrease the scale of a report.	ALT + - (minus)
Increase the scale of a report.	ALT + + (plus)
Click **OK** on a subtask.	Alt + O
Print a report in report preview.	Alt + P
Go to the next open application.	CTRL + J
Open the Print Options window.	CTRL + ALT + P
Copy selected text or selected rows (if no text is selected).	CTRL + C
Open the My Menu window.	F8
Open the help file.	SHIFT + F1
Refresh all.	SHIFT + F11
Process the default action.	SHIFT + CTRL + R
Toggle record section.	SHIFT + F7

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Global Toolbar Icons

The following table lists all toolbar icons on the Costpoint user interface. The availability of these icons depends on the application or screen you are using.

Toolbar icons		
Icon	**Name**	**Description**
Q Use CTRL+S to search	Search Applications	Use this field to search for the Costpoint application you want to open. As you type, Costpoint will suggest applications that match the text you enter. Select a result to open the application.
💾	Save	Click this icon to save your data to the database.
💾	Save and Continue	Click this icon to save your input without clearing the screen. This allows you to continue working on the current record.
🔄▼	Refresh	Click this icon to restore the default values or clear the fields on a screen, subtask, or document.
📋	Clone Record	Click this icon to duplicate an existing record. You can then edit that record and save it as new data.
🔍	Lookup	Click this icon to open the Lookup window for a selected field.
⚙▼	Default Action	Click this icon to run an application's default process. You can click the drop-down arrow beside this icon to view and select available actions for the currently active screen.
🔃	View Action and Report Status	Click this icon to open the View Action and Report Status screen, where you can view all active and inactive jobs in the job server.
⚡	Execute	Click this icon to populate the table window. Costpoint uses the filtering conditions you entered on the top screen. If you have not yet entered filtering parameters (for example, when you have just opened the application), you can click **Execute** to retrieve all available database rows permitted by the business rules.
📄	Page Setup	Click this icon to configure your report display options. Choose from Portrait and Landscape layouts, select margins and paper sizes, fonts, and whether to include footers and your company name and logo.

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Icon	**Name**	**Description**
	Print Options	Click to display the Print Options dialog box, where you can change your printer options. Choose the destination for your output (for instance, system or local printer, file, email, download, or archive), select specific pages for printing, number of copies, and more. See Print Options for more information.
	Preview Menu	Click this icon to display a preview of the current report. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode.
	Print Menu	Click this icon to print a report using your default settings. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode.
	Reset Default Positioning and View	Click this icon to return objects within an application (for instance, tables and screens) to their default positions, and to return the current application to the view (Table or Form) in which it displayed when you activated it.
	Show Messages & Errors	Click this icon display or hide the Message(s)/Error(s) window. The Message(s)/Error(s) window is hidden by default.
	Make Available Offline	Click this icon to make the application available for offline use. Costpoint will query the records on the application screen and the related subtask data. This icon is only available for applications that are included in the Offline Access Applications subtask of the Configure System Settings screen.
	Page Layout	Click this icon to toggle between one-page and two-page layout.
	Voice (disabled)	Click this icon to enable Hey Deltek! and permit Costpoint to use the microphone on your computer or mobile device. If you already granted permission, clicking this icon will turn on the microphone so that Costpoint can listen to voice commands.

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Toolbar icons		
Icon	**Name**	**Description**
🎤	Voice (enabled, passively listening)	This icon indicates that Hey Deltek! is enabled and passively listening to your voice. Click this icon or say "Hey Deltek" to activate the voice assistant so that it is ready to perform a task. Once you click it, a green indicator displays.
🎤	Voice (enabled, actively listening)	The green indicator lets you know that the device microphone is on and Hey Deltek! is actively listening to you. Click this icon to mute Hey Deltek!, and Costpoint will return to passive listening mode.
◫ ▾	Workflow	Click this icon to resend the workflow email. You can use the drop-down arrow to view workflow activity instructions and complete an activity.
◫ ▾	Export to Excel	Click this icon to export the current report to Microsoft Excel. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes, except the report output is automatically set to Excel format.

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Global Options and Navigation Toolbar Icons

The following table lists the icons on the Global Options and Navigation toolbar of the Costpoint user interface.

| CPSUPERUSER ▼ | Company 1 (CTB82REGO19) ▼ | ⏻ |

Q Use CTRL+S to search

🏠 ★ ⓪ ⊞ Welcome to Costpoint

Toolbar icons

Icon	Name	Description
CPSUPERUSER ▼	Screen Configuration	Click this icon to view the current company, system, and validation frequency. You can also customize your screen configuration (Top-Level Toolbar, Current Application Layout, and My Menu) and select an administrator profile. You must close all open applications before you can select an administrator profile.
Company 1 (CTB82REGO19) ▼	Select Company	Click this icon to view the current company accessed by the current session. To switch to another company, you must close all open applications, click this icon, and select the company you want to access from the drop-down list.
⏻	Log Out	Click this icon to log out of Costpoint. Upon logging out, Costpoint will prompt you to save your changes. Unsaved data will be lost.
🏠	Home Dashboard	Click this icon to access the Home Dashboard. The Home Dashboard displays actionable data that you access most often, including information on your timesheets, pending tasks, expense reports and authorizations, available leave balances, and outstanding expenses. This dashboard is also available from the Reports & Analytics domain. The Home Dashboard is available and visible only to users who are licensed for Deltek Time & Expense.
★	My Menu	Click this icon to open the My Menu panel, where you can view all your commonly used applications. You can set up My Menu using the Screen Configuration icon or the Configure User Preferences screen.
⓪	Open Applications	This icon displays the number of open applications for the current session. Click this icon to view these applications. You can use this list to navigate between applications or close an application.
⊞	Show Welcome Screen	Click this icon to display the Costpoint Welcome Screen. The Welcome Screen displays quick links and shortcuts to your frequently used applications and recent activities.

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Application Toolbar Icons

The following table lists all function icons on an application screen. The availability of these icons depends on the screen or subtask you are using. In addition, these icons display depending on whether the screen or subtask is displayed in Table View or Form View.

Toolbar icons		
Icon	**Name**	**Description**
New	New Record	Click this button to create a new record or insert a new line into a table window.
Copy ▼	Copy Record	Click this button to duplicate a selected record/line. You can then edit this record/line and save it as new data.
Delete	Delete	Click this button to mark a selected record/line for deletion. That record/line does not delete until you save your changes.
Undelete	Undelete	Click this button to restore a record/line that has been marked for deletion.
Attach	Attach	Click this button to attach a document to the currently selected record.
Email	Email	Click this button to view messages and attachments related to the current record or to send messages with attachments.
Approval	Approval	For applications or result sets that have an approval workflow defined and that is active, the **Approval** button is displayed on the application toolbar. Click this button to display the Approve dialog box
⏮	First	In Form View, click this button to go to the first item in the current list of records.
◀	Previous	In Form View, click this button to go to the previous item in the current list of records.
🔄	Toggle View	In Form View, click this button to switch between a list of existing records and a list of new records.
▶	Next	In Form View, click this button to go to the next item in the current list of records.

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Application Toolbar Icons

The following table lists all function icons on an application screen. The availability of these icons depends on the screen or subtask you are using. In addition, these icons display depending on whether the screen or subtask is displayed in Table View or Form View.

| New | Copy | ▼ | Delete | Attach | ▼ | Email | Approval | |◄ | ◄ | 1 of 1 New | ⟳ | ► | ►| | Table | Find | Query | ▼ | ☐ | ▬ | ▢ | ✕ |

Toolbar icons		
Icon	**Name**	**Description**
►|	Last	In Form View, click this button to go to the last item in the current list of records.
Table	Switch to Table View	Click this button to display a screen or subtask in Table View.
Form	Switch to Form View	Click this button to display a screen or subtask in Form View.
Find	Find	Use Find on the Application Toolbar to quickly locate records in applications and subtasks. Find is available in form-type maintenance applications.
Query ▼	Query	Click this button to open the Query window.
☐	Select/Deselect This Record	In Form View, select this check box to select the currently displayed record. This check box allows you to select multiple records.
▢	Maximize	Click this button to maximize the size of the application screen.
▣	Restore	Click this button to display the default size of the application screen.
📌	Set Always on Top	Click this button to pin or constantly display a subtask of an application even if you use its parent or main screen.
✕	Close	Click this button to close a screen or subtask. Costpoint prompts you to save any changes you made on the screen.

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