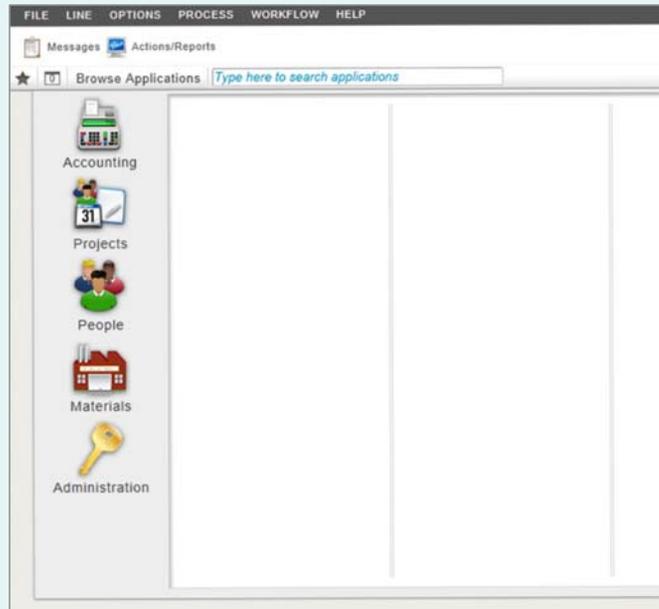# Deltek Costpoint Query and Lookup
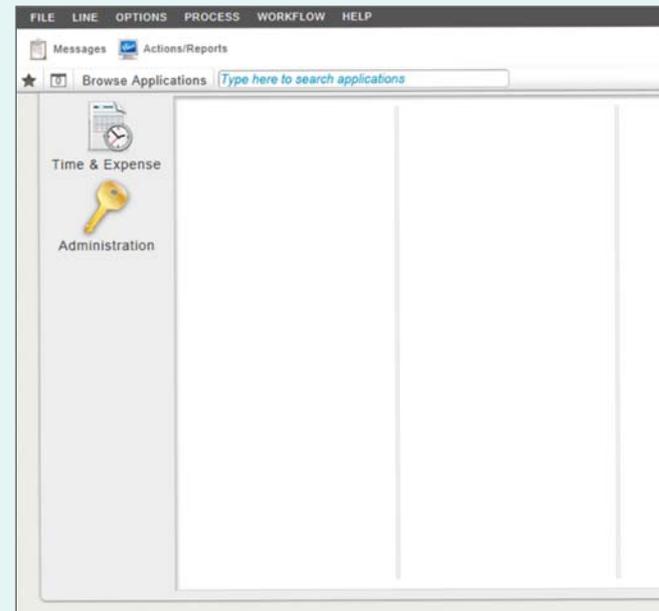# Quick Reference Card

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## Domains

The domains that display in the left navigation pane are determined by product licensing.

In this example, the customer is licensed for Time & Expense only.



In this example, the customer is licensed for Costpoint only.

# Deltek Costpoint Query and Lookup Quick Reference Card

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## Query Function

The Query function in allows you to search for 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 maintenance screens.

## Query Button

Click this button to display the Query dialog box. You can also click the drop-down arrow on this button to quickly access any existing saved queries.

## Find Tab

Use this tab to retrieve records using specific fields on the **Search Criteria** group box. If you use the Find tab, your search is limited only to the available search fields.

The search fields on this tab changes depending on the screen that you are using.

## Query Tab

Use the tab to create custom criteria used by the search process. You must enter the following information for each Query condition:

- **Field** — The field that you want to use in the search parameter.
- **Relation** — This is the logical operator for the condition statement (for example, **Contains**, **Begins With**, **Is Greater Than**, and so on).
- **Value** — This is the field data (or part of the data) that you want to use in the search parameter.
- **Combine Method** — This is the method of multiple condition statements. You can select either **AND** or **OR** in this field.

Query Dialog Box

## Sort Tab

Use this tab to define how to display the results of your search. You can select the fields used to sort the records and the sorting order of the search results.

The sorting parameters listed in this tab is used when you run the search process on the Find or Query tab.
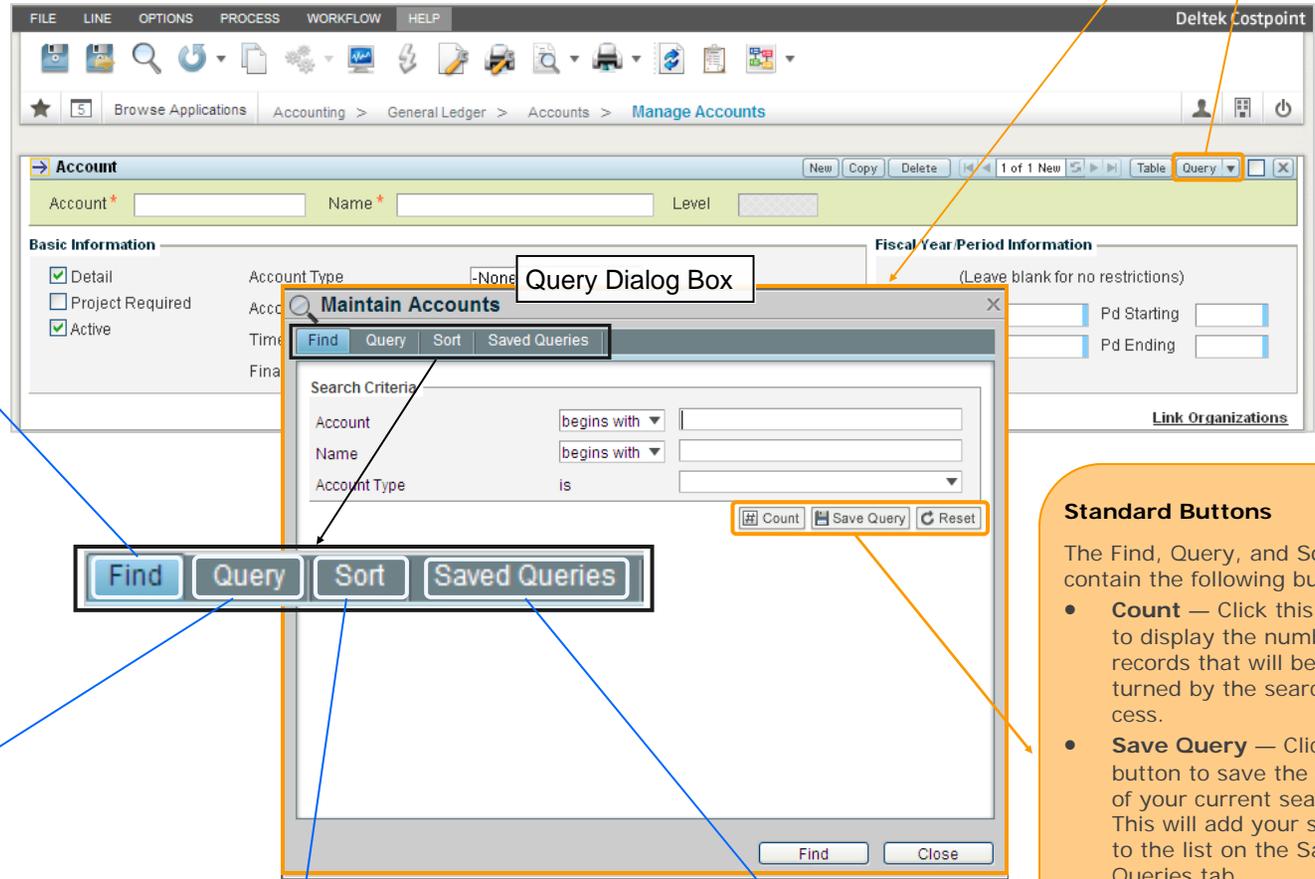
## Saved Queries Tab

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

## Standard Buttons

The Find, Query, and Sort tabs contain the following buttons:

- **Count** — Click this button to display the number of records that will be returned by the search process.
- **Save Query** — Click this button to save the details of your current search. This will add your search to the list on the Saved Queries tab.
- **Reset** — Click this button to reset the fields on the tab.

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# Deltek Costpoint Query and Lookup
# Quick Reference Card

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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.

The Lookup function is useful when you are unsure of the exact value needed to complete a field.

**Fields with Lookup**

The Lookup function is available on all fields that have a thick blue bar on the right side. If you move the pointer over the blue bar or if you click in the field, this line changes to a Lookup icon.
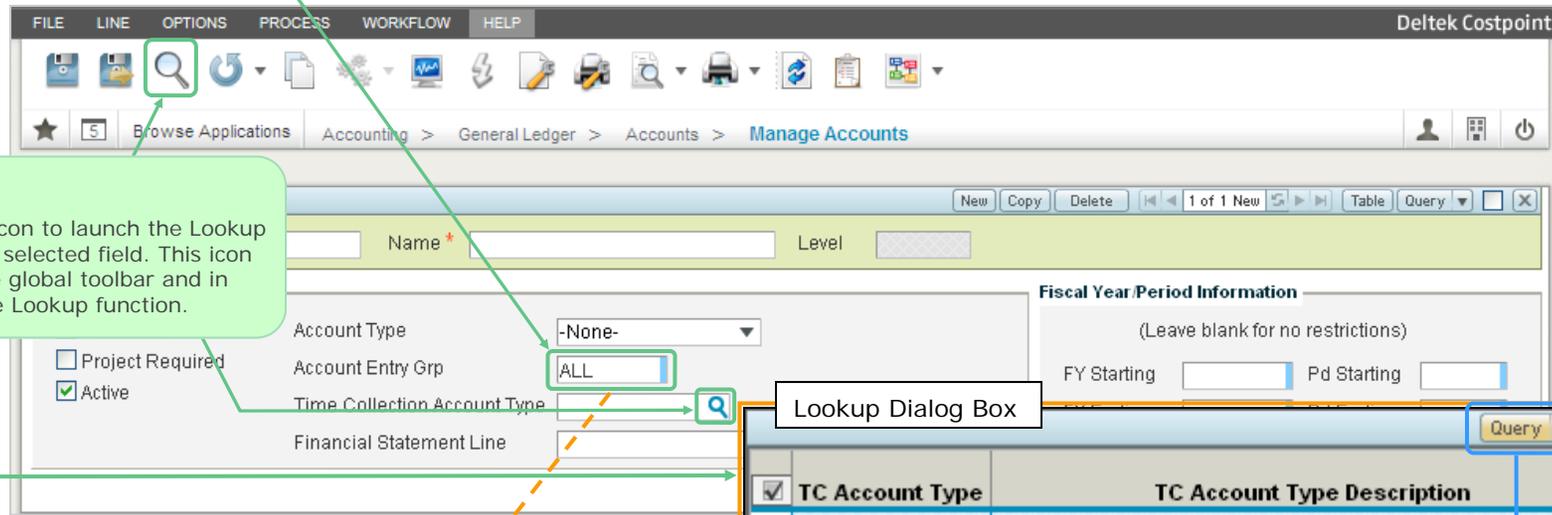
**Lookup Icons**

Click the Lookup icon 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.



Lookup Dialog Box

**AutoComplete Feature**

Each field with the Lookup function also has the AutoComplete feature. A list instantly displays up to 10 results that begin with the characters that you enter. The list changes as you enter more characters. From the list, you can select the specific value that you want to use in the field.

If there are more than 10 AutoComplete results, you can click **more values...** to view the complete list.

**Lookup Dialog Box**

The Lookup dialog box displays the values that are available for entry into a specific screen field. When you highlight a value in Lookup and click **Select**, the value is transferred to the field from which you launched Lookup.

**Query Button**

Click this button to open the Query dialog box. This function allows you to filter the Lookup results and narrow down your search by using Query features (Find, Query, Sort, and Saved Queries).

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