
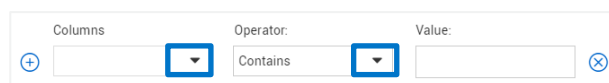

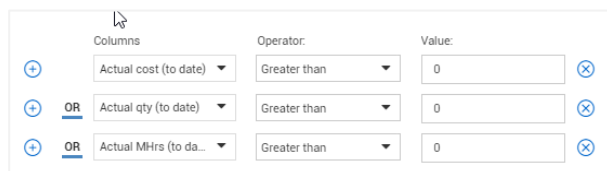




USING THE QUERY BUILDER

- From the side toolbar, click the **Filter**  icon, then **Query...**
- The Query builder slide out panel opens.
- Select a column and an operator from the drop-down menus. Then enter a value.



- To add multiple parameters to the query, click the **Add**  icon.



- Click **Apply** to apply the filter.
- To save this Query, click the **Save as**  icon and enter a **New query name** for the query. Then click the **Save**  icon.

As part of a business process, reviewing standardized filters or analyzing exceptions on an establish frequency can help identify issues while also ensuring information reported to Control is correct.

Use the **Query Builder** to run filters on any of the Exception Criteria listed on the front and back of this Quick Guide.

Exception Criteria	Function	Column	Operator	Value	Purpose
Active Codes		Actual Qty	Greater than	0	Active Codes for the selected period
	Or	Actual Mhrs	Greater than	0	
	Or	Actual Cost	Greater than	0	
Actual \$ Or Mhrs w/ No QTY		Actual Cost Or Actual Mhrs	Greater than	0	Identify either incorrectly coded Cost/Mhrs or missing Qty
	AND	Actual Qty	Equal	0	
QTY w/ No Actual Mhrs Or Actual \$		Qty	Greater than	0	Identify either incorrectly claimed qty or missing Cost/Mhrs
	AND	Actual Cost Or Actual Mhrs	Equal	0	
Actual Mhrs w/o CB Mhrs		CB Mhrs	Equal	0	Can help identify codes with hours and no budget
	AND	Actual Mhrs	Greater than	0	
100% w/ Remaining Forecast \$ or Mhrs		% Complete	Equal	100	Can help identify codes that may need to be adjusted to zero. Important with "Manual" Forecasts
	AND	Remaining Forecast \$ or Mhrs	Greater than	0	
QTY > 100%		% Complete	Greater than or Equal	100	Depending on setting this can show overclaimed codes
Negative Actual \$ or Mhrs (Period)		Actual \$ or Mhrs	Less then	0	Can identify cost/Mhrs moves or incorrectly posted period
Negative Period % Complete		% Complete	Less then	0	Can identify Quantity changes in the wrong period

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QUICK GUIDE

BUILDING & ANALYZING EXCEPTION FILTERS



Exception Criteria	Function	Column	Operator	Value	Purpose
Negative Forecast Remaining \$ or MHR		Forecast Remaining \$ or Mhrs	Less then	0	Negative forecast remaining cost or MH Important when forecast method is set to "Manual"
\$ Variance From Straightline +/- 10% (Forecast)		Delta from Straightline	Greater than	10000	Forecast Health Report Shows Cost current forecast method deviates 10% or more from SL Forecast
Improvement Factor (Forecast)		Improvement Factor	Greater than	1.10	$(\text{Actual Unit Price}) / (\text{Forecasted Remaining Unit Price}) = \text{Improvement Factor}$
	Or		Less then	0.9	Forecast Remaining \$/Unit >10% from JTD \$/Unit Used to look at different between current forecasted unit price and remaining Unit price as a ratio. Below 1 and you are forecasting to do worse. Above 1 you are forecasting to do better.
Forecast Cost Change (Forecast)		Forecast Cost Change	Greater than	10000	Forecast Health Report will show more than 10% or 50K from prior month
Labor Efficiency Index (LEI)		LEI (to date)	Greater than	1.10	$(\text{Prod Factor}) \times (\text{Comp Factor}) = \text{LEI}$
	Or		Less then	0.9	Values >1.10 are Under Budget Labor \$ by >10%; Values <0.90 are Over Budget Labor \$ by >10%
Production Factor (PF)		CB Production Factor	Greater than	1.10	$(\text{Earned Mhrs}) / (\text{Actual Mhrs}) = \text{PF}$
	Or		Less then	0.9	Values >1.10 are Under Budget MHR by >10%; Values <0.90 are Over Budget MHR by >10%
Compensation Factor (CF)		Compensation Factor (CF)	Greater than	1.10	$(\text{C.B. } \$/\text{MHR}) / (\text{Actual } \$/\text{MHR}) = \text{CF}$
	Or		Less then	0.9	Values >1.10 are Under Budget \$/MHR by >10%; Values <0.90 are Over Budget \$/MHR by >10%
Forecast Remaining PF		Forecast Remaining PF	Greater than	1.10	Forecast remaining PF deviates 10% or more from Final forecast PF
	Or		Less then	0.9	Values >1.10 are Under Budget Labor \$ by >10%; Values <0.90 are Over Budget Labor \$ by >10%
Forecast Total PF		Forecast Total PF	Greater than	1.10	Forecast remaining PF deviates 10% or more from Final forecast PF
	Or		Less then	0.9	Values >1.10 are Under Budget Labor \$ by >10%; Values <0.90 are Over Budget Labor \$ by >10%