Using Field Computer

Information in this section explains how to use PCS Axis with the Allegro Field Computer to send and receive survey files. The information is intended for users with *SysAdmin*, *User*, and *Read Only* permissions unless noted otherwise. Topics in this section include those in the following list:

- *Quick Start*

- *Working with Themes and Filter Groups* (page 619)

- *Viewing the Field Computer Log* (page 647)

Quick Start

The procedures listed below explain how to use PCS Axis with the Allegro to send and receive survey files. The process for sending a survey file to the Allegro requires selection of a prompt, layout, and sorting method themes. If themes have not previously been set up in PCS Axis, begin with the section *Working with Themes and Filter Groups* (page 619) and then continue with any of the following procedures for sending a survey file to the Allegro.

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

Topics in this section include those in the following list:

- *Sending a Facility Survey Based on Selected ROWs* (page 596)

- *Sending a Facility Survey Based on a Route* (page 601)

- *Sending a Facility Survey Based on a Schedule* (page 606)

- *Sending a Facility Survey Based on an Import Exported List* (page 611)

- *Receiving a Facility Survey from the Allegro* (page 613)

- *Receiving a Continuous Survey from the Allegro* (page 615)

Sending a Facility Survey Based on Selected ROWs

The following procedure explains how to send a facility survey based on selected ROWs to the Allegro or a folder on your computer. The survey file includes facilities for inspection based on selected pipeline segments in the *Select ROWs* window.

Use the following procedure when you plan to take inspection readings using the Periodic Survey software on the Allegro or you plan to use the survey file with a third party application such as RouteSmart®.

Complete the following steps:

1   Verify the Allegro is connected to your computer if you plan to send the survey file to the Allegro. If needed, refer to the *Allegro User Guide* for information about how to connect the device.

2   Click the **Select ROWs** button 🔍 to open the *Select ROWs* window (Figure 13-1). Click the check box for each pipeline segment with facilities you want to include in the survey file. Click 💾 **Save** to close the window.
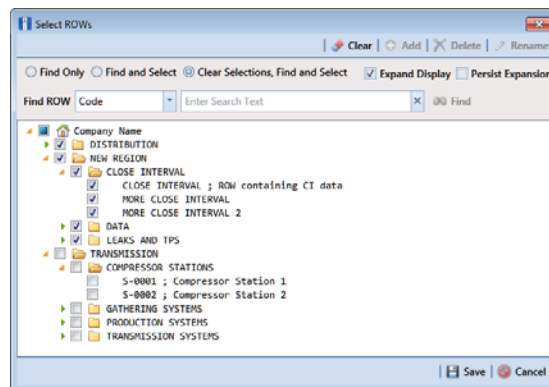

Figure 13-1. Select ROWs

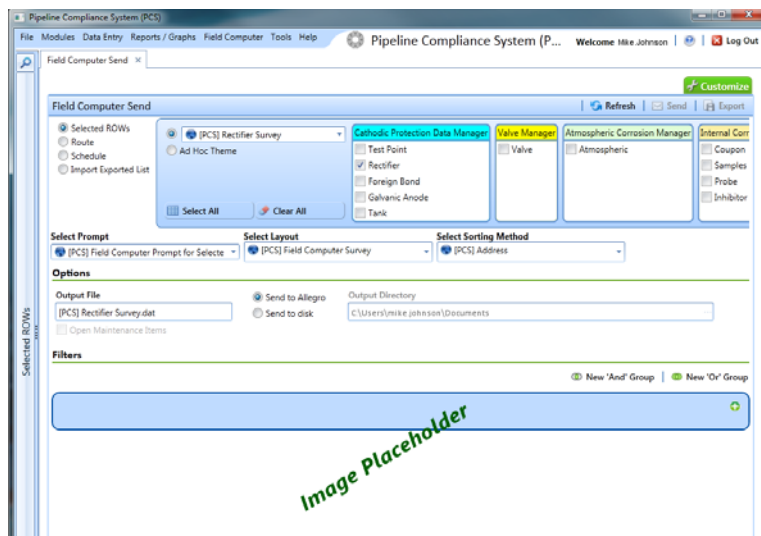3   Click **Field Computer** > **Send** to open the *Field Computer Send* window (Figure 13-2).

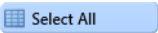**Figure 13-2. Field Computer Send**

NOTE: Clicking the *Selected ROWs* bar collapses the *Selected ROWs* panel allowing you to view more of the grid. Clicking the *Selected ROWs* bar again expands the *Selected ROWs* panel.

---

4 Click the **Selected ROWs** option and then choose one or more facility types using one of the following options described in **step a**, **b**, or **c**:

a Click the down arrow and select a facility type theme in the selection list, such as 🌐 [**PCS] Test Point Survey**.

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

---

b Click **Ad Hoc Theme** and then click the check box for each facility type you want to view in the grid.

NOTE: An *Ad Hoc Theme* only applies to the current session and is not saved. A facility type is selected when a check mark appears inside the check box. To clear the check mark, click the check box again.

---

c Click the **Select All** button ⊞ Select All to select all facility types.

5 Click ⊟ **Apply** to update the grid.

6 Select a prompt, layout, and sorting theme as follows (Figure 7):

a Click the down arrow in **Select Prompt** and select a prompt theme in the selection list.

b Click the down arrow in **Select Layout Theme** and select a layout theme in the selection list.

c Click the down arrow in **Select Sort Theme** and select a sorting theme in the selection list.

7 If you want to work with a subset of facility records that meet *all* filter conditions, create an AND filter group using the following steps:

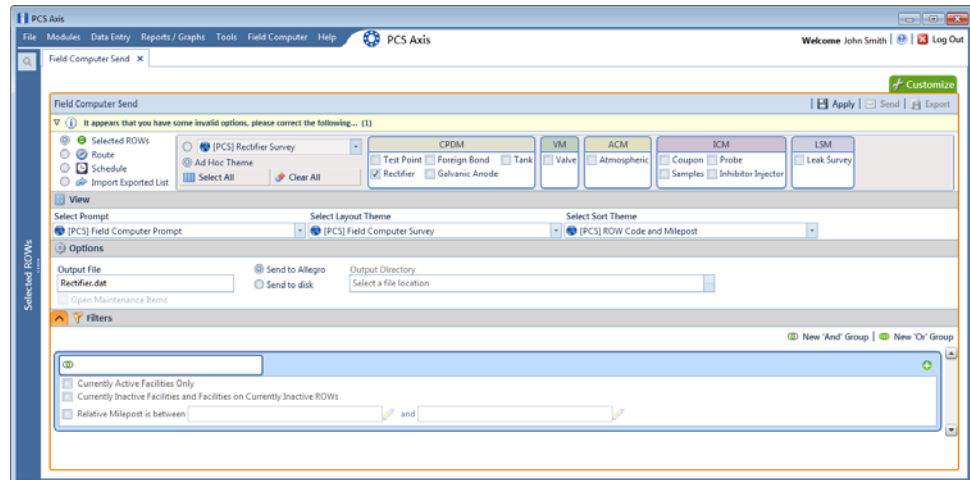**a** Click the ⌄ **Filters** button to open the *Filters* panel (Figure 8).

Figure 13-3. Filters

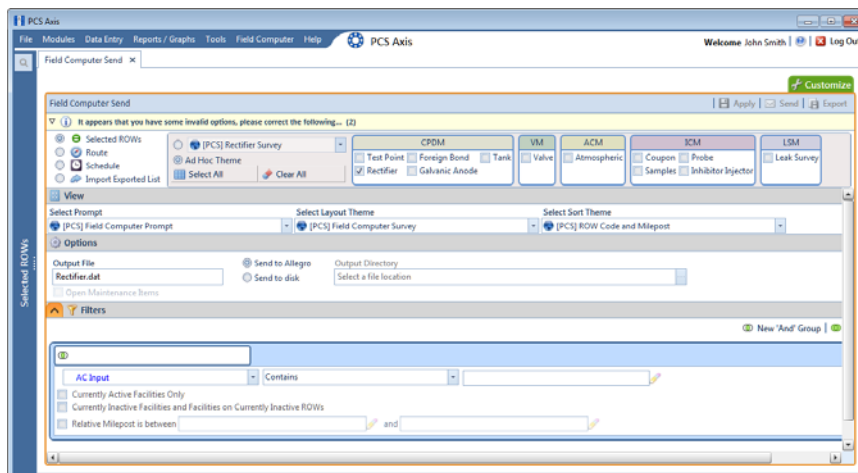**b** Click ⊕ **Add** to open the filter properties group box.

Figure 13-4. New 'And' Filter

c Set up filter criteria. Select a PCS Axis field, operator, and filter condition(s) using filter selection fields.

d If you want to set up an additional filter, click ⊕ **Add** to add another row of filter selection fields. Select a PCS Axis field, operator, and filter condition(s) to set up filter criteria. Repeat this step as needed. When you finish, click the ⌃ **Filters** button to close the *Filters* panel.

8 If you want to rename the survey file, type a name in the field **Output File**.

9 Choose a *Send to* option using one of the following methods:

a Select **Send to Allegro** if you plan to send the survey file to the Allegro.

b Select **Send to disk** if you plan to send the survey file to a folder on your computer. Identify the folder location as follows:

1) Click the ellipsis button **...** in the **Output Directory** field to open the *Browse For Folder* dialog box.

2) Navigate to the folder and select it. Click **OK** to close the dialog box and return to the *Field Computer Send* window.

10 If the check box **Open Maintenance Items** is available for selection, click the check box if you want to include open maintenance records in the survey file (Figure 8, page 599).

> **NOTE:** When the selected prompt theme includes maintenance prompts, the check box *Open Maintenance Items* is available for selection. It is disabled and unavailable for selection when maintenance prompts are not included in the currently selected prompt theme.

11 Click ![save icon] **Apply** to update the grid.

12 Click ![send icon] **Send**. Based on your selection earlier, the survey file is sent either to the Allegro or a folder on your computer.

13 When a message displays confirming the send process is complete, click ![check] **OK** to close the message (Figure 13-5).

If you selected to send the survey file to the Allegro, PCS Axis sends the survey file to the *PSData* folder on the Allegro.
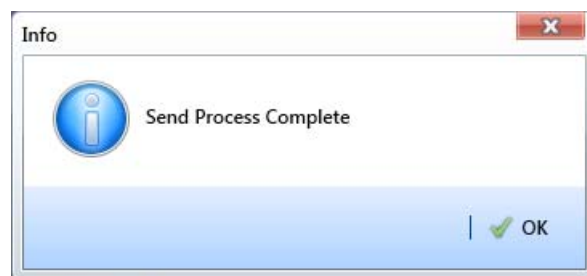

Figure 13-5. Send Process Complete

Sending a Facility Survey Based on a Route

The procedure in this section explains how to send a facility survey based on a route to the Allegro or a folder on your computer. The information assumes a route has previously been set up in Define Routes (*Data Entry > Define Routes*).

Use the following procedure when you plan to take inspection readings using the Periodic Survey software on the Allegro or you plan to use the survey file with a third party software such as RouteSmart®.

Complete the following steps:

1   Verify the Allegro is connected to your computer if you plan to send the survey file to the Allegro. If needed, refer to the *Allegro User Guide* for information about how to connect the device.

2   Select one or more pipeline segments in the *Select ROWs* window (Figure 13-6). Click ![save icon] **Save** to close the window.
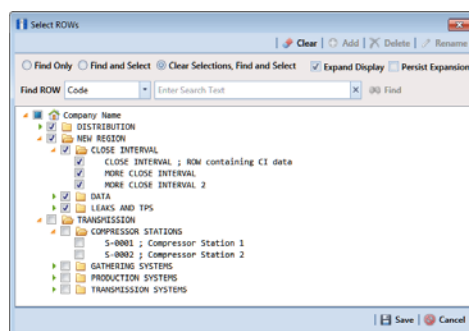

Figure 13-6. Select ROWs

3   Click **Field Computer** > **Send** to open the *Field Computer Send* window.

4   Click the **Route** option and then select a route in the selection box. The following figure shows *My Route_2* has been selected (Figure 13-7).
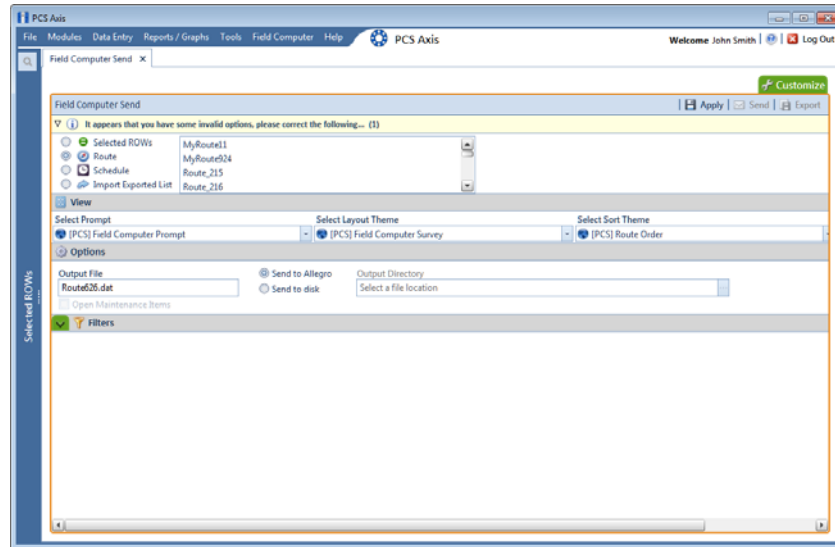
Figure 13-7. Field Computer Send

5 Click 💾 **Apply** to update the grid.

6 Select a prompt, layout, and sorting theme as follows (Figure 13-7, page 602):

a Click the down arrow in **Select Prompt** and select a prompt theme in the selection list.

b Click the down arrow in **Select Layout Theme** and select a layout theme in the selection list.

c Click the down arrow in **Select Sort Theme** and select a sorting theme in the selection list.

7 If you want to rename the survey file, type a name in the field **Output File**.

8 Choose a *Send to* option using one of the following methods:

a Select **Send to Allegro** if you plan to send the survey file to the Allegro.

b Select **Send to disk** if you plan to send the survey file to a folder on your computer. Identify the folder location as follows:

• Click the ellipsis button **...** in the **Output Directory** field to open the *Browse For Folder* dialog box.

• Navigate to the folder and select it. Click **OK** to close the dialog box and return to the *Field Computer Send* window.

9 If the check box **Open Maintenance Items** is available for selection, click the check box if you want to include open maintenance records in the survey file.

NOTE: When the selected prompt theme includes maintenance prompts, the check box *Open Maintenance Items* is available for selection. It is disabled and unavailable for selection when maintenance prompts are not included in the currently selected prompt theme.

10 Click ⊞ **Apply** to update the grid.

11 If you want to filter records in the grid and in the route sent to the Allegro, complete the following steps.

IMPORTANT: Filter settings in *Field Computer Send* apply only to the current session and are not saved. See *Working with Themes and Filter Groups* (page 619) for information about saving filter settings.

a   Click the ⌄ **Filters** tab to open the *Filters* panel (Figure 13-7, page 602).

b   Select one or more options in *Filters* and then click ⊞ **Apply**. For example, click **Active Facilities Only** to only include active facilities in the grid and in the route sent to the Allegro (Figure 13-8).
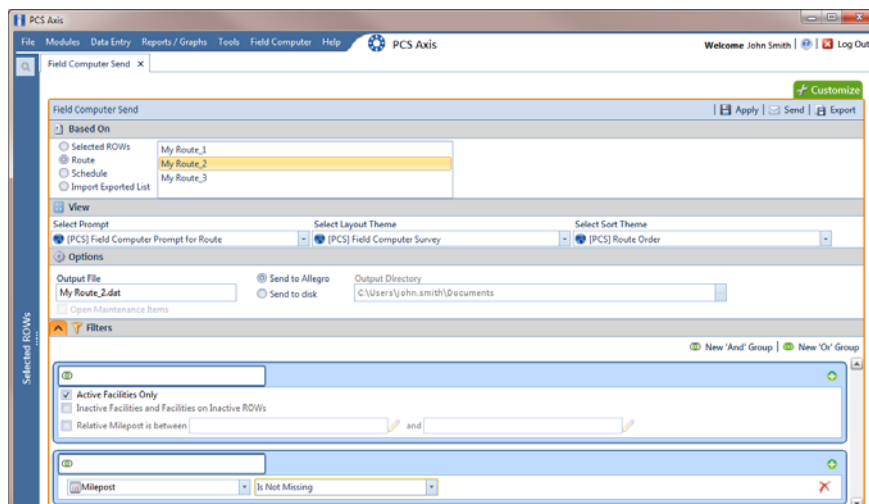

Figure 13-8. Filters

c   If you want to add a new AND or OR filter group, continue with one of the following steps. Otherwise continue with **step 14** (page 606).

•   To add a new AND filter group continue with **step 12** (page 604).

•   To add a new OR filter group continue with **step 13** (page 605).

12 If you want to add a new AND filter group, complete the following steps. With an AND filter group, PCS Axis includes a subset of records that meet *all* filter conditions defined for the filter group. Records are filtered in the grid and in the route sent to the Allegro.

a Click ⬤ **New 'And' Group** to open the filter properties group box. (Figure 13-9).
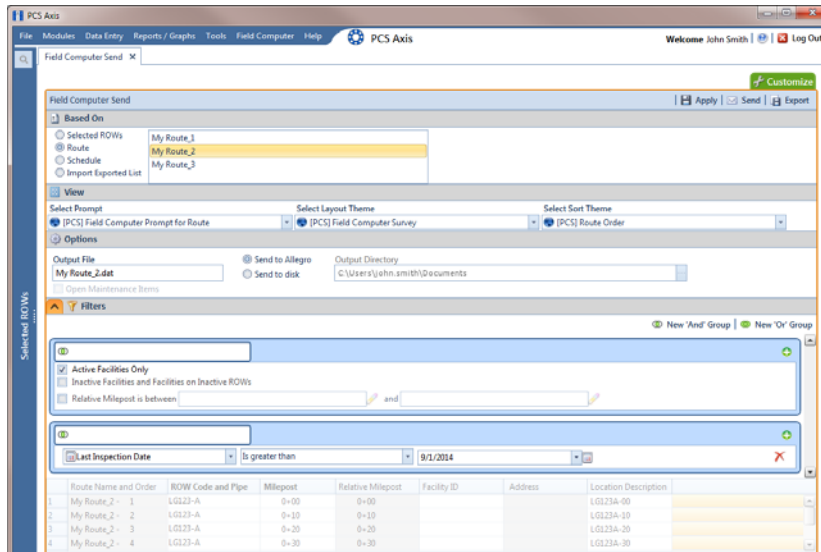

Figure 13-9. New 'And' Filter Group

b Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.

When adding a date filter, such as *Last Inspection Date Is Between*, set a date range using one of the following methods:

- Type a date in the start and end date fields. Enter a start and end date using the format M/DD/YYYY to indicate the month, day, and year.

- To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a start date. Then click the down arrow in the end date field to open a calendar and select an end date.

- To set a date range using dynamic start and end dates, click the ⬛ calculator button in the start date field and set up dynamic date properties. Repeat this step for the end date field. Clicking the calculator button opens and closes dynamic date property fields.

NOTE: Clicking the ▽ toggle button in the ⓘ information bar displays important information related to required settings.

13 If you want to add a new OR filter group, complete the following steps. With an OR filter group, PCS Axis includes a subset of records that meet *any* filter condition defined for the filter group. Records are filtered in the grid and in the route sent to the Allegro:

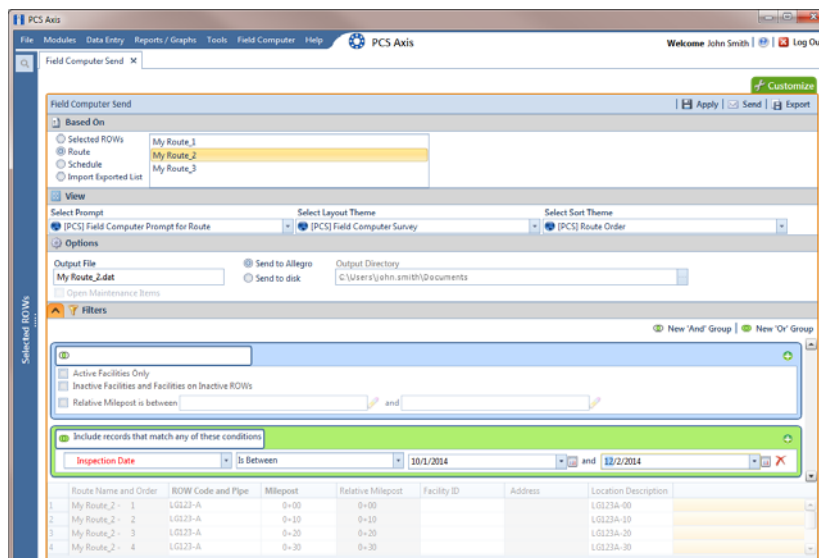**a** Click ⬤ **New 'Or' Group** to open a filter properties group box Figure 13-10).

Figure 13-10. New 'Or' Filter Group

b Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.

When adding a date filter, such as *Last Inspection Date Is Between*, set a date range using one of the following methods:

- Type a date in the start and end date fields. Enter a start and end date using the format M/DD/YYYY to indicate the month, day, and year.

- To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a start date. Then click the down arrow in the end date field to open a calendar and select an end date.

- To set a date range using dynamic start and end dates, click the ▦ calculator button in the start date field and set up dynamic date properties. Repeat this step for the end date field. Clicking the calculator button opens and closes dynamic date property fields.

NOTE: Clicking the ▽ toggle button in the ⓘ information bar displays important information related to required settings.

14 Click the ⌃ **Filters** tab to close the *Filters* panel. Then click ⊟ **Apply** to update the grid.

15 Click ✉ **Send**. Based on your selection earlier, the survey file is sent either to the Allegro or a folder on your computer.

16 Click ✔ **OK** when the message *Send Process Complete* displays (Figure 13-11). If you selected to send the survey file to the Allegro, the survey file transfers to the *PSData* folder on the Allegro.
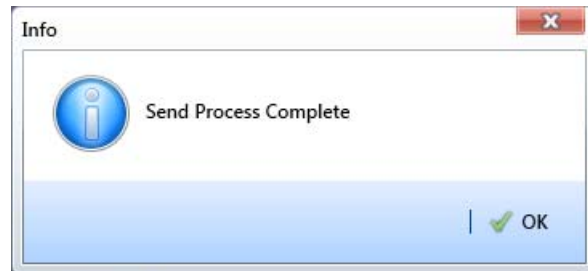

Figure 13-11. Send Process Complete

Sending a Facility Survey Based on a Schedule

The procedure in this section explains how to send a facility survey based on a schedule to the Allegro or a folder on your computer. The survey file includes facilities for inspection based on a schedule definition and schedule date range.

Use the procedure in this section when you plan to take inspection readings using the Periodic Survey software on the Allegro or you plan to use the survey file with a third party software such as RouteSmart.

The following procedure assumes scheduling criteria has previously been set up in *Edit Schedule Settings* and a schedule definition created in *Define Schedules*.

Complete the following steps:

1 Verify the Allegro is connected to your computer if you plan to send the survey file to the Allegro. If needed, refer to the *Allegro User Guide* for information about how to connect the device.

2 Select one or more pipeline segments in the *Select ROWs* window (Figure 13-12). Click ⊟ **Save** to close the window.
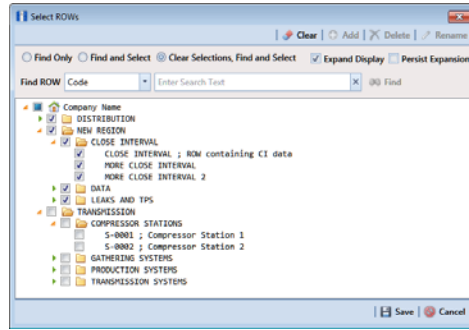
Figure 13-12. Select ROWs

3   Click **Field Computer** > **Send** to open the *Field Computer Send* window (Figure 13-13, page 607).

4   Click the **Schedule** option (Figure 13-13). Then click the down arrow in the field **Select Schedule Definition** and select a schedule definition in the list.
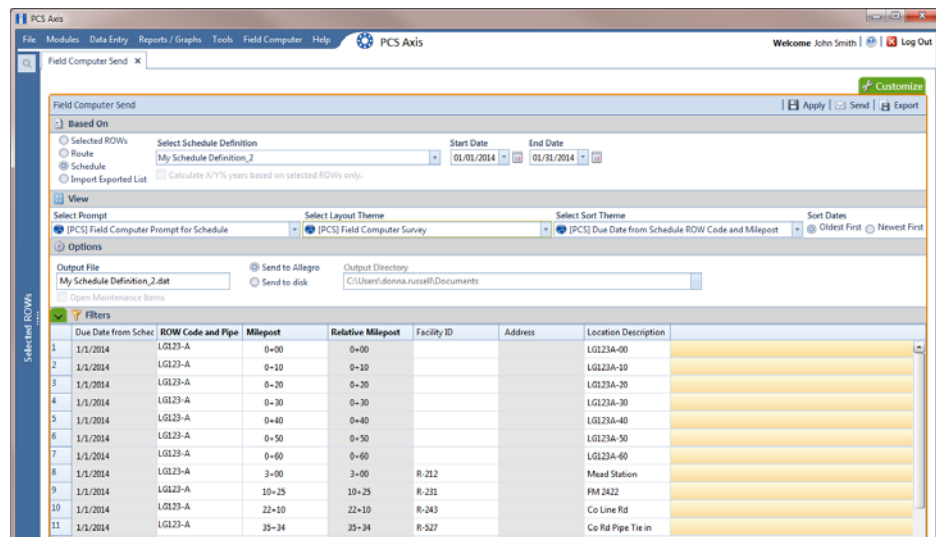

Figure 13-13. Field Computer Send Schedule

NOTE: Clicking the ▽ toggle button in the ⓘ information bar displays important information related to required settings.

Complete **step 5** or **step 6** to set a schedule date range:

5   To set a schedule date range, type a date in the **Start Date** field and a date in the **End Date** field using the format M/DD/YYYY to indicate the month, day, and year. Then continue with **step 7**.

6   To set a schedule date range using dynamic dates, follow these steps:

    a   Click the **Start Date** ![calculator icon] calculator and set properties in the following manner:

- Click the down arrow in the **Start Date** field and select one of the following options: *Today*, *Beginning Of Month*, *End Of Month*, *Beginning of Year*, or *End Of Year*.

- In the remaining two fields, type an offset value in the first field and then click the down arrow in the second field and select one of the following options: *Day(s)*, *Month(s)*, or *Year(s)*. Click the ![pencil icon] pencil button to close dynamic start date fields.

    b   Click the **End Date** ![calculator icon] calculator and set properties in the following manner:

- Click the down arrow in the **End Date** field and select one of the following options: *Today*, *Beginning Of Month*, *End Of Month*, *Beginning of Year*, or *End Of Year*.

- In the remaining two fields, type an offset value in the first field and then click the down arrow in the second field and select one of the following options: *Day(s)*, *Month(s)*, or *Year(s)*. Click the ![pencil icon] pencil button to close dynamic end date fields.

7   Click ![save icon] **Apply** to update the grid.

8   If the option **Calculate X/Y% years based on selected ROWs only** is available for selection, click the check box if you want due dates calculated based on your ROW selection instead of the *X years/y%* setting for facility types in *Edit Schedule Settings*.

NOTE: *X/Y due dates* refer to inspections older than *X years* with a minimum of *Y percent* scheduled for inspection. For more information, refer to *Using a Schedule* (page 453).

---

9   Select a prompt, layout, and sorting theme in the following manner:

    a   Click the down arrow in **Select Prompt** and select a prompt theme in the selection list.

    b   Click the down arrow in **Select Layout Theme** and select a layout theme in the selection list.

    c   Click the down arrow in **Select Sort Theme** and select a sorting method theme in the selection list.

10 Click **Oldest First** or **Newest First** in *Sort Dates* to sort records with the oldest or newest dates first.

11 If you want to rename the survey file, type a name in the field **Output File**.

12 Choose a *Send to* option using one of the following methods:

a Select **Send to Allegro** if you plan to send the survey file to the Allegro.

b Select **Send to disk** if you plan to send the survey file to a folder on your computer. Identify the folder location as follows:

- Click the ellipsis button **...** in the **Output Directory** field to open the *Browse For Folder* dialog box.

- Navigate to the folder and select it. Click **OK** to close the dialog box and return to the *Field Computer Send* window.

13 If the check box **Open Maintenance Items** is available for selection, click the check box if you want to include open maintenance records in the survey file.

NOTE: When the selected prompt theme includes maintenance prompts, the check box *Open Maintenance Items* is available for selection. It is disabled and unavailable for selection when maintenance prompts are not included in the currently selected prompt theme.

14 Click the ⬇ **Filters** button to open the *Filters* panel.

15 If you want to filter records in the grid and in the schedule sent to the Allegro, select one or more options in *Filters.* For example, click *Active Facilities Only* to only include active facilities.

IMPORTANT: Filter settings in *Field Computer Send* apply only to the current session and are not saved. See *Working with Themes and Filter Groups* (page 619) for information about saving filter settings.

If you want to add a new AND or OR filter group, continue with **step 16** or **step 17**.

16 To filter records in the grid and in the schedule sent to the Allegro based on a subset of records that meet *all* filter conditions, complete the following steps to add a new AND filter group:

a Click 🔘 **New 'And' Group** to open the filter properties group box.

b Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.

When adding a date filter, such as *Last Inspection Date Is Between*, set a date range using one of the following methods:

- Type a date in the start and end date fields. Enter a start and end date using the format M/DD/YYYY to indicate the month, day, and year.

- To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a start date. Then click the down arrow in the end date field to open a calendar and select an end date.

- To set a date range using dynamic start and end dates, click the calculator button in the start date field and set up dynamic date properties. Repeat this step for the end date field. Clicking the calculator button opens and closes dynamic date property fields.

17 To filter records in the grid and in the schedule sent to the Allegro based on a subset of records that meet *any* filter condition, complete the following steps to add a new OR filter group:

a Click **New 'Or" Group** to open a filter properties group box.

b Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.

When adding a date filter, such as *Last Inspection Date Is Between*, set a date range using one of the following methods:

- Type a date in the start and end date fields. Enter a start and end date using the format M/DD/YYYY to indicate the month, day, and year.

- To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a start date. Then click the down arrow in the end date field to open a calendar and select an end date.

- To set a date range using dynamic start and end dates, click the calculator button in the start date field and set up dynamic date properties. Repeat this step for the end date field. Clicking the calculator button opens and closes dynamic date property fields.

18 Click the **Filters** button to close the *Filters* panel. Then click **Apply** to update the grid.

19 Click **Send**. Based on your selection earlier, the survey file is sent either to the Allegro or a folder on your computer.

20 When a message displays confirming the send process is complete, click **OK** to close the message (Figure 13-14). If you selected to send the survey file to the Allegro, PCS Axis sends the survey file to the *PSData* folder on the Allegro.
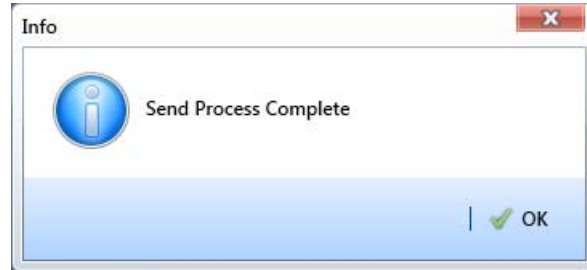
Figure 13-14. Send Process Complete

Sending a Facility Survey Based on an Import Exported List

The following information applies to a survey file that has previously been set up, sent to disk, and then altered by a third party software such as RouteSmart®. Use the procedure in this section to import the survey file in PCS Axis and then send it to the Allegro.

Complete the following steps:

1 Verify the Allegro is connected to your computer. If needed, refer to the *Allegro User Guide* for information about how to connect the device.

2 Select one or more pipeline segments in the *Select ROWs* window. Click ![save] **Save** to close the window (Figure 13-1, page 596).

3 Click **Field Computer** > **Send** to open the *Field Computer Send* window.

4 Click the option **Import Exported List**.

5 Click the ellipsis button **...** in the field **Import Exported List** to display the *Open* dialog box. Navigate to the altered survey file and select it. Click **Open** to close the dialog box and return to the *Field Computer Send* window.

6 Click the down arrow in **Select Prompt** and select a prompt theme in the selection list.

7 If you want to rename the survey file, type a name in the field **Output File**.

8 Click **Send to Allegro** if the option is not selected.

9 If the check box **Open Maintenance Items** is available for selection, click the check box if you want to include open maintenance records in the survey file.

NOTE: When the selected prompt theme includes maintenance prompts, the check box *Open Maintenance Items* is available for selection. It is disabled and unavailable for selection when maintenance prompts are not included in the currently selected prompt theme.

---

10 If you want to work with a subset of facility records that meet *all* filter conditions, create an AND filter group using the following steps:

   a Click the ⊠ **Filters** button to open the *Filters* panel. Then click ⊕ **Add** to open the filter properties group box.

   b Set up filter criteria. Select a PCS Axis field, operator, and filter condition(s) using filter selection fields.

   c If you want to set up an additional filter, click ⊕ **Add** to add another row of filter selection fields. Select a PCS Axis field, operator, and filter condition(s) to set up filter criteria. Repeat this step as needed.

   d Click the ⊠ **Filters** button to close the *Filters* panel.

11 Click ⊟ **Apply** to update the grid.

12 Click ✉ **Send**. When a message displays confirming the send process is complete, click ✓ **OK** to close the message (Figure 13-15).

If you selected to send the survey file to the Allegro, PCS Axis sends the survey file to the *PSData* folder on the Allegro.
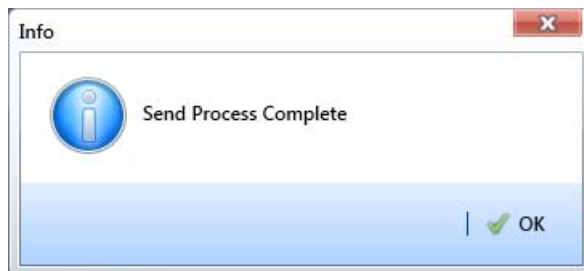

Figure 13-15. Send Process Complete

Receiving a Facility Survey from the Allegro

Complete the following steps to receive an *Allegro PS* periodic survey file in PCS Axis:

1 Verify the Allegro is connected to your computer. If needed, refer to the *Allegro User Guide* for information about how to connect the device.

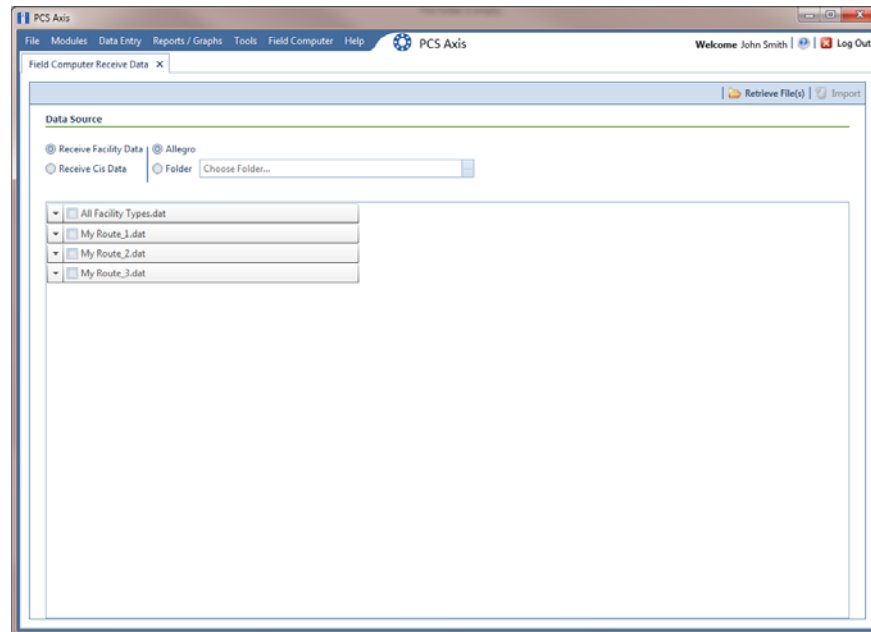**2** Click **Field Computer** > **Receive** to open the *Field Computer Receive Data* window (Figure 13-16).

Figure 13-16. Field Computer Receive

3 Click **Receive Facility Data**, then click the **Allegro** option.

4 Click 📁 **Retrieve File(s)** to view a list of periodic survey files available for selection.

5 Choose survey files you want to transfer from the Allegro. Click the check box for one or more survey files in the list of files available for selection (Figure 13-17).

6 Click the 🔽 toggle arrow for a selected survey file to view the following options for assigning Allegro survey data to a PCS Axis survey folder:

a Select **No Survey Assignments** if you do not want to assign Allegro survey data to a survey folder.

b   Select **Automatic Assignment** and then select one of the following options to have PCS Axis automatically assign Allegro survey data to a survey folder:

- *Assign Survey*: Select this option if you want PCS Axis to automatically assign survey data to an annual or multi-year survey folder based on the inspection date of the Allegro survey data.

- *Assign Periodic Survey and Year*: Select this option if you want PCS Axis to automatically assign survey data to a periodic survey folder based on the inspection date of the Allegro survey data.

c   Select **Manual Assignment** and then select one of the following options to manually select a survey folder for assigning Allegro survey data:

- *Survey*: Select this option to choose an annual or multi-year survey folder for assigning Allegro survey data. Click the down arrow in the **Survey** field and select a survey in the selection list.

- *Periodic Survey, Year*: Select this option to choose a periodic survey folder and the survey year for assigning Allegro survey data. Click the down arrow in the **Periodic Survey** field and select a periodic survey folder in the selection list. Then click the down arrow in the **Year** field and select the survey year.

d   Click **Apply to all selected files** if you want to apply the selected survey folder option to all selected survey files.
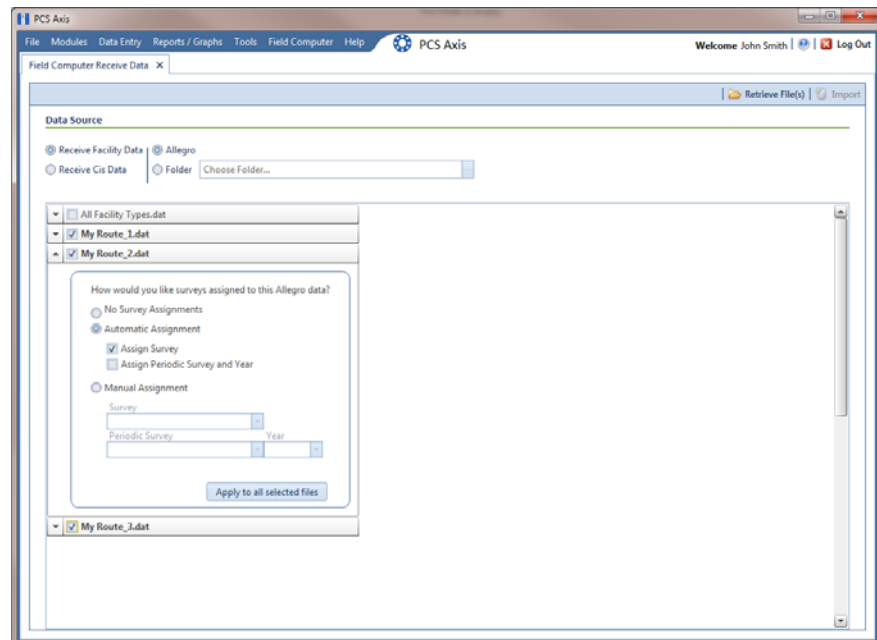

Figure 13-17. Field Computer Receive Data

7 Click 🟡 **Import** to import selected survey file(s) in PCS Axis.

The *Field Computer Receive Status* window displays showing the status of the import process (Figure 13-18).
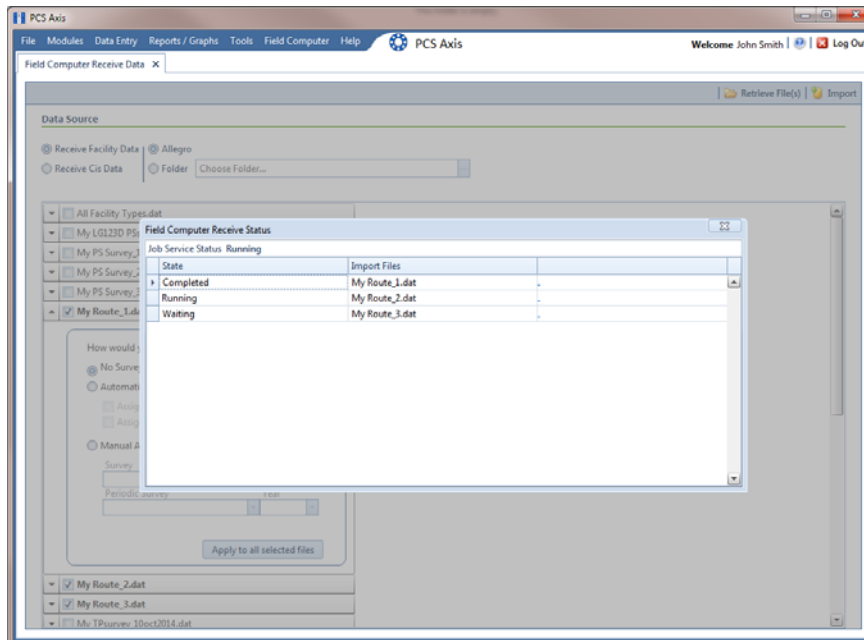

Figure 13-18. Field Computer Receive Status

Receiving a Continuous Survey from the Allegro

Information in this section explains how to receive an *Allegro CeCi* close interval survey file in PCS Axis.

IMPORTANT: For data to transfer properly, the name of the pipeline entered in the *Segment* field of the Allegro CeCi survey file must match the *ROW Code* in PCS Axis. The survey name entered in the *Run* field of the CeCi survey file is used to create a survey folder in PCS Axis (*Data Entry > Survey Folder Maintenance*). See the *Allegro MX User Guide* for more information about setting properties in a CeCi survey file.

Complete the following steps:

1 Verify the Allegro is connected to your computer. If needed, refer to the *Allegro User Guide* for information about how to connect the device.

2 Click **Field Computer** > **Receive** to open the *Field Computer Receive Data* window.

3 Click **Receive Cis Data**, then click the **Allegro** option.

NOTE: *CIS* is an acronym for Close Interval Survey.

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4 Click 📁 **Retrieve File(s)** to view a list of survey files available for selection (Figure 13-19).

5 Select the close interval (CI) survey files you want to transfer from the Allegro. Click the check box for one or more survey files listed in the *Field Computer Receive Data* window.

A check mark inside a check box indicates a selection. To remove a selection, clear the check mark by clicking the check box again.
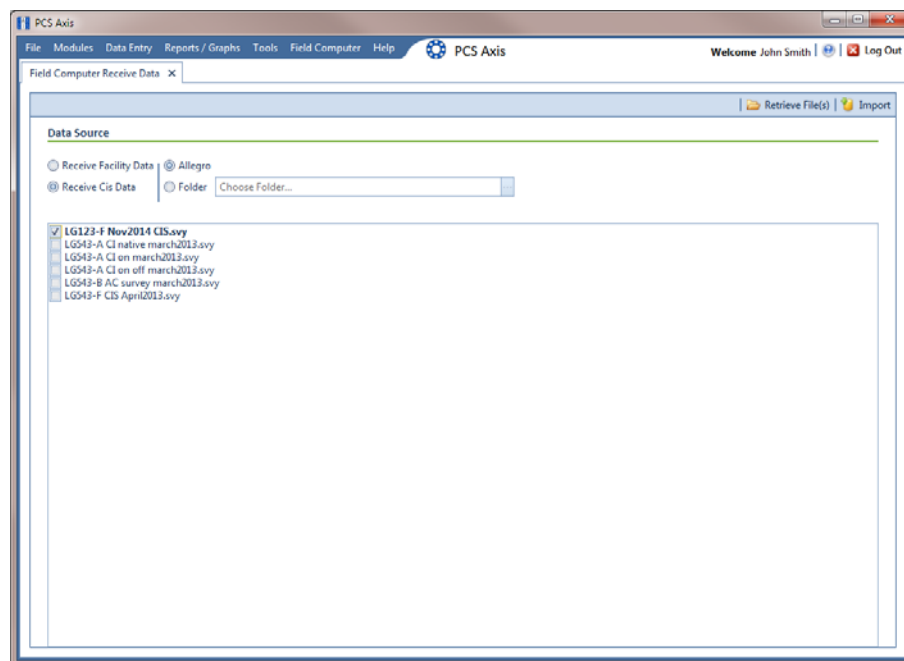
Figure 13-19. Field Computer Receive

6 Click 📒 **Import** to open the *Mark Native* dialog box (Figure 13-20).

7 If you are importing a survey file with native survey data, click the **Native** check box to place a check mark inside the check box.
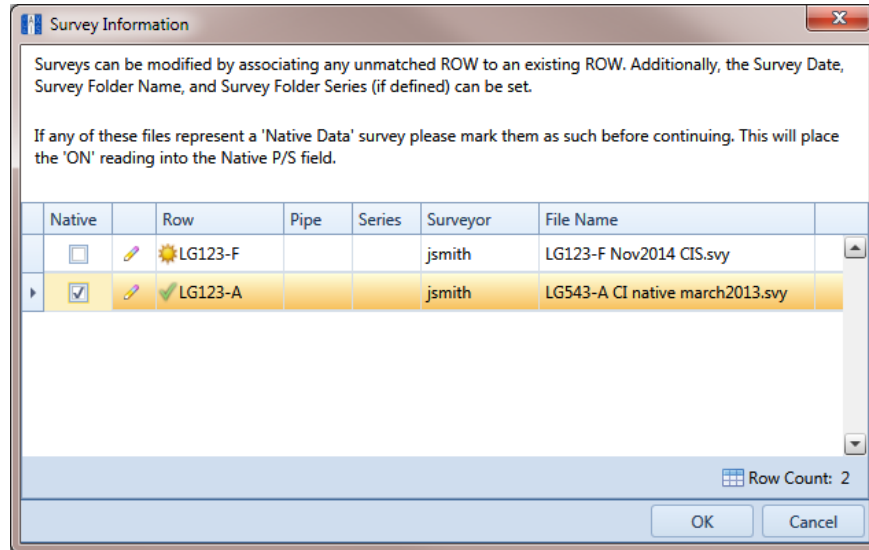
Figure 13-20. Mark Native

8 If you want to associate one or more existing pipeline *Series* with the survey, complete the following steps:

a Click the 🖊 pencil button in the *Mark Native* dialog box to open the *Select Facility* dialog box (Figure 13-21).

b Click the **Row** field and select a pipeline segment in the selection list that you want to associate with the survey.

c Click the **Series** field and select a pipeline *Series* in the selection list that you want to associate with the survey.
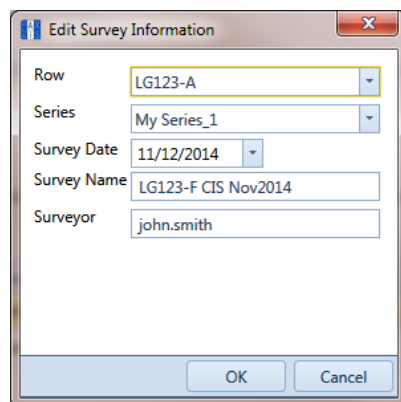
Figure 13-21. Select Facility

d If you want to change the date the survey was taken, click the down arrow in the **Survey Date** field and choose a survey date using a calendar. You can also type a survey date in the field using the format MM/DD/YYYY to indicate the month, day, and year.

e If you want to change the name of the survey file, type a survey name in the **Survey Name** field.

f If you want to change the name of the person who took the survey, type a name in the **Surveyor** field.

g Click **OK** to close the *Select Facility* dialog box. Updated information displays in the *Survey Information* dialog box.

h Click **OK** to close the *Mark Native* dialog box and import the survey file.

The *Field Computer Receive Status* window displays showing the status of the import process (Figure 13-22).

NOTE: Survey data imported from the Allegro is indicated in the *Edit ISM Data* grid with information in the *Allegro Survey Information* field.
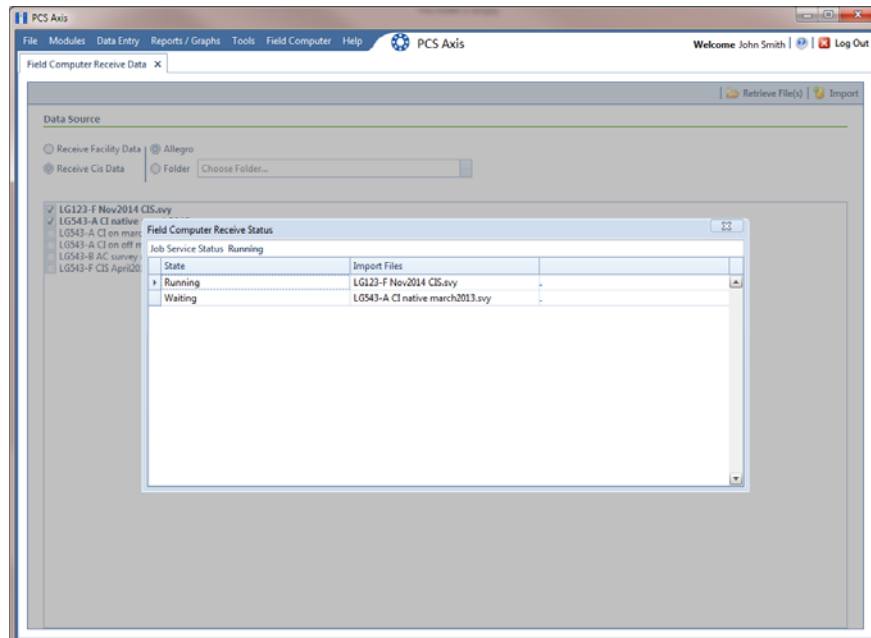
Figure 13-22. Field Computer Receive Status

Working with Themes and Filter Groups

A theme is a group of named settings saved for later use, such as a grid layout or sort theme. Themes are either public or private. A public theme is available for use by all PCS Axis users. A private theme is available only to the user who creates it.

Several installed themes are provided with the PCS Axis software installation. PCS Axis installed themes are public themes available to all PCS Axis users. These themes are identified with a globe icon and PCS in brackets [PCS], such as [**PCS] Facility ID**.

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

A filter group is a named set of one or more filters that affect the data output in the grid of *Field Computer Send* grid and subsequently the file sent to the Allegro. PCS Axis provides two types of filter groups you can define. These include the AND and OR filter groups.

When you add a filter group, you define filter conditions that determine which records to include or exclude. Adding an AND filter group produces a subset of records that meet *all* filter conditions. Adding an OR filter group produces a subset of records that meet *any* filter condition. When you apply a filter group, PCS Axis processes filters in descending order beginning with the filter at the top of the group.

The following sections describe how to add a layout theme, sort theme, and one or more optional filter groups. Topics include those in the following list:

- *Adding a Layout Theme*

- *Adding a Prompt Theme* (page 626)

- *Adding a Sort Theme* (page 635)

- *Adding an AND Filter Group* (page 639)

- *Adding an OR Filter Group* (page 642)

- *Editing and Arranging Filters and Filter Groups* (page 644)

Adding a Layout Theme

A layout theme is a group of fields in a grid layout. Adding a new layout theme allows you to choose which fields you want to include in the grid and then save the layout as a theme for later use. The following procedure applies to the grid layout in *Field Computer Send*.

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

Complete the following steps:

1 Select one or more pipeline segments in the *Select ROWs* window (Figure 13-23). Click ![save icon] **Save** to close the window.
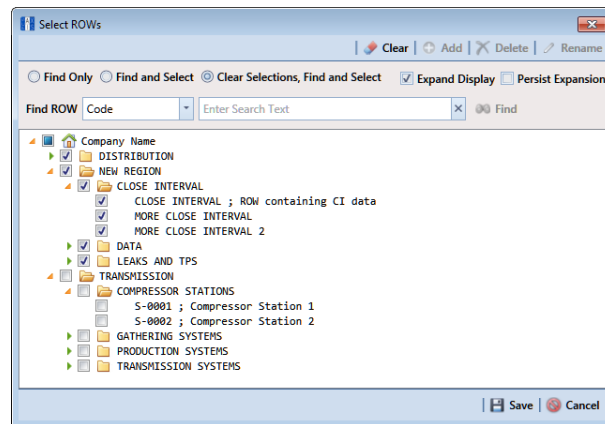
Figure 13-23. Select ROWs

2 Click **Field Computer** > **Send** to open the *Field Computer Send* window (Figure 13-24).
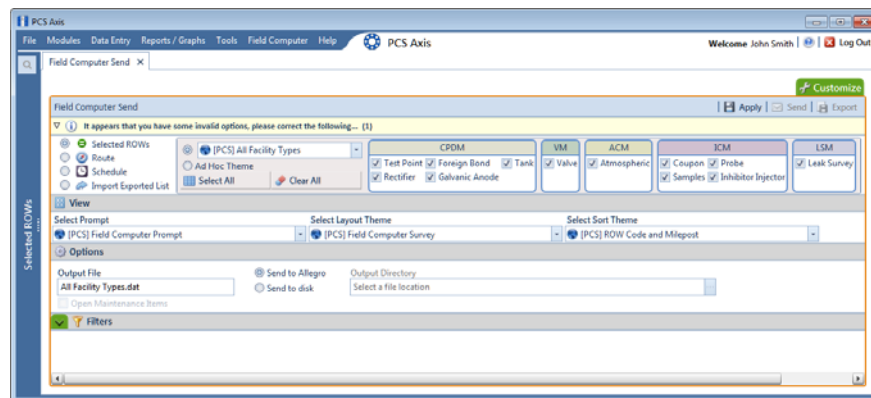
Figure 13-24. Field Computer Send

Complete **step 3** (based on selected ROWs), **step 4** (based on a route), **step 5** (based on a schedule), or **step 6** (based on import exported list) to choose an option for displaying facility records in the grid:

3 To view facility records based on pipeline segment(s) selected in the *Select ROWs* window, follow these steps:

a Click the **Selected ROWs** option (Figure 13-25).
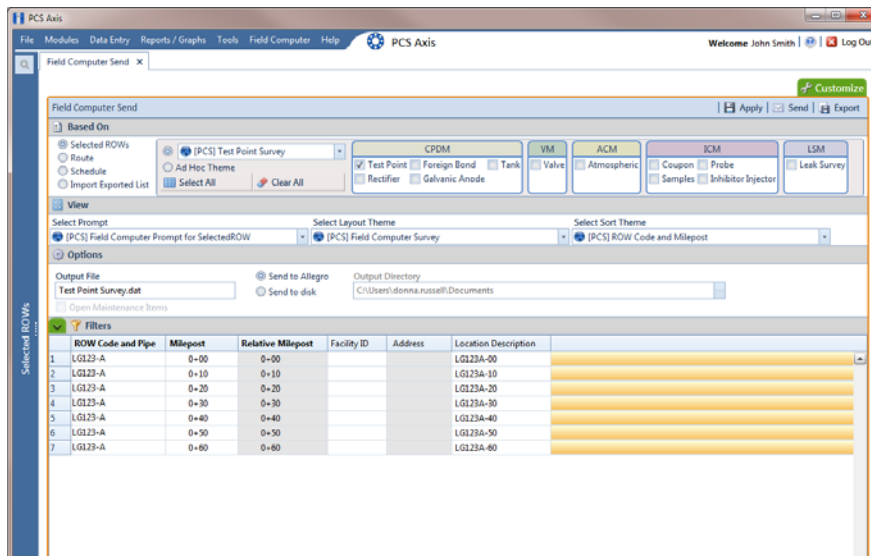
Figure 13-25. Field Computer Send Based on Selected ROWs

b Choose one or more facility types using one of the following options ():

- Click the down arrow and select a facility type theme in the selection list, such as [**PCS] Rectifier Survey**.

- Click **Ad Hoc Theme** and then click the check box for each facility type you want to view in the grid.

- Click the **Select All** button to view all facility types in the grid.

c Click **Apply** to update the grid and then continue with **step b**.

4 To view facility records based on a route:

a Click the **Route** option and then select a route in the selection box (Figure 13-26, page 622).

b Click **Apply** to update the grid and then continue with **step b**.
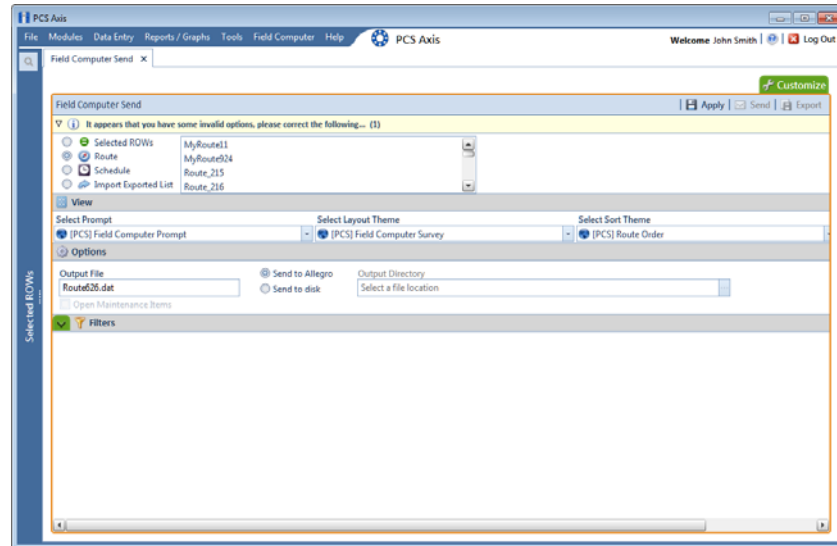
Figure 13-26. Field Computer Send Based on Route

5 To view facility records based on a schedule, follow these steps:

a Click the **Schedule** option (Figure 13-27). Then click the down arrow in the **Select Schedule Definition** field, and choose a schedule definition in the selection list.
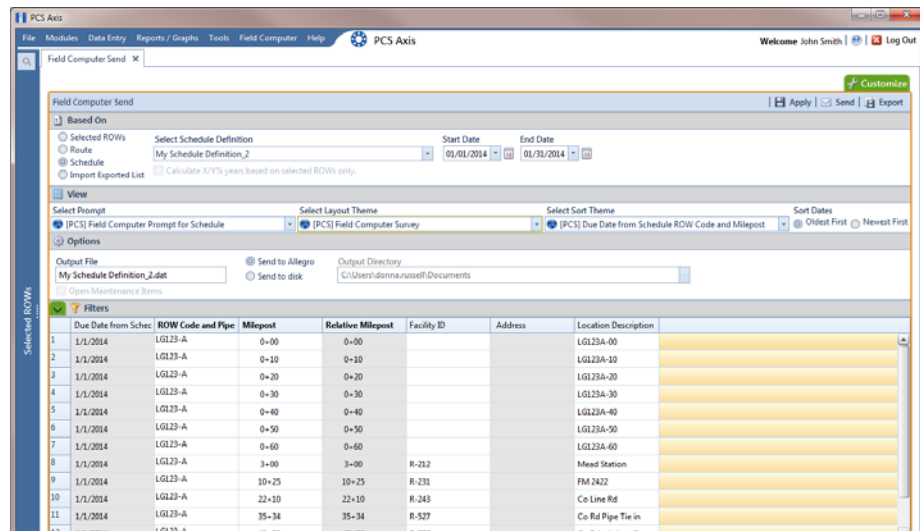
Figure 13-27. Field Computer Send Based on Schedule

Complete step **step b** to enter a schedule date range or **step c** to set a schedule date range using dynamic dates:

b Type a start date in the **Start Date** field and an end date in the **End Date** field.

c To set a schedule date range using dynamic start and end dates, follow these steps:

   1) Click the **Start Date** calculator to open dynamic start date fields. Set properties in these fields in the following manner:

   i) Click the down arrow in the **Start Date** field and select one of the following options: *Today*, *Beginning Of Month*, *End Of Month*, *Beginning of Year*, or *End Of Year*.

   ii) In the remaining two fields, type an offset value in the first field and then click the down arrow in the second field and select one of the following options: *Day(s)*, *Month(s)*, or *Year(s)*. Click the pencil button to close dynamic start date fields.

   2) Click the **End Date** calculator to open dynamic end date fields. Set properties in these fields in the following manner:

   i) Click the down arrow in the **End Date** field and select one of the following options: *Beginning Of Month*, *End Of Month*, *Beginning of Year*, or *End Of Year*.

   ii) In the remaining two fields, type an offset value in the first field and then click the down arrow in the second field and select one of the following options: *Day(s)*, *Month(s)*, or *Year(s)*. Click the pencil button to close dynamic end date fields.

   3) Click **Apply** to update the grid and then continue with **step b**.

6 To view facility records based on an import exported list file, follow these steps:

   a Click the **Import Exported List** option (Figure 13-28).
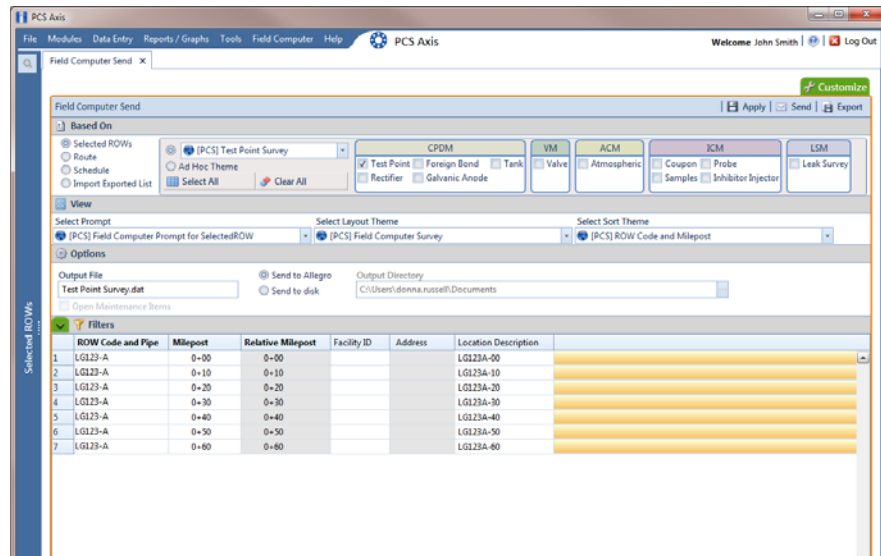
Figure 13-28. Field Computer Send Based on Exported List

b   Click the ellipsis button **...** in the field to display the *Open* dialog box. Navigate to the file and select it. Click **Open** to close the dialog box and return to the *Field Computer Send* window.

c   Click [icon] **Apply** to update the grid and then continue with **step b**.

7   Click the **Customize** tab [Customize] then the [+] **Add** button to open the *New Layout Theme* dialog box (Figure 13-29).
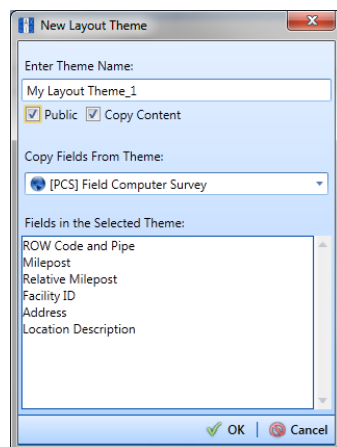
Figure 13-29. New Layout Theme

8   Type a name for the layout theme in the field **Enter Theme Name**. If you want to create a *public* theme, click the **Public** check box to place a check mark inside the check box. When the check box is empty, the layout saves as a *private* theme.

9   If you want to copy fields from another theme to the new layout theme, click the check box **Copy Content**. Then click the down arrow in the field **Copy Fields From Theme** and select a theme in the selection list.

10   Click ✔ **OK** to save changes and return to the *Layouts* page.

11   Verify the name of the new layout theme displays in the field *Select Layout Theme*. If not, click the down arrow in **Select Layout Theme** and select the new theme in the selection list.

12   Complete the following steps to add and remove fields in the new layout theme as needed:

   a   Click the toggle arrow ▶ for a field category in the left pane of the window to view a list of fields available for selection. For example, click ▶ **Facility Fields**.

   b   Double-click a field listed in the left pane to move it to the right pane. Repeat this step as needed. The grid layout theme includes all fields listed in the right pane of the *Layouts* page.

   c   To remove a field in the layout theme, double-click a field listed in the right pane to move it to the left pane. Repeat this step as needed.

13   To change the order of fields listed in the right pane and subsequently in the grid, click and drag a field to a new position in the list. Or, select a field and then click the up ⊙ or down ⊙ button.

14   Click 🖫 **Save and Close** to return to the *Field Computer Send* window.

15   To apply the new layout theme to the grid, click the down arrow in the field **Select Layout Theme** and select the layout theme in the selection list. Then click 🖫 **Apply** to update the grid.

Adding a Prompt Theme

A prompt theme is similar to a layout theme. It is a named set of fields that provide information and prompt the user for survey data when performing a survey using the Allegro.

Adding a prompt theme allows you to choose which fields to include in the survey file sent to the Allegro. The same prompt theme can include multiple facility types, such as test points, rectifiers, bonds, valves, and so on. Each facility type can also include up to eight pages of prompts. For example, you can include up to 8 pages of inspection prompts for entering facility inspection and maintenance readings.

When viewing the survey file on the Allegro, prompts display in either the top or bottom frame of the window. Information prompts display in the top frame while inspection and maintenance prompts display in the bottom frame. See the *Allegro User Guide* for more information about working with a survey file on the Allegro.

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

To add a prompt theme, follow these steps:

1 Select one or more pipeline segments in the *Select ROWs* window (Figure 13-30). Click ⊟ **Save** to close the window.
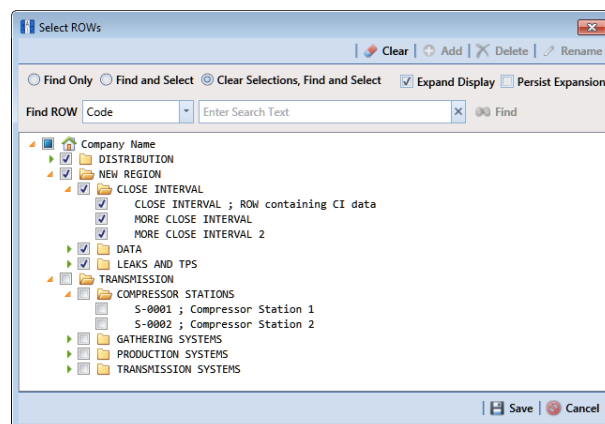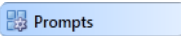
Figure 13-30. Select ROWs

2 Click **Field Computer** > **Send** to open the *Field Computer Send* window.

3 Click the **Customize** tab ⚡Customize, then the **Prompts** button 🔲 Prompts to open the *Prompts* page (Figure 13-31).
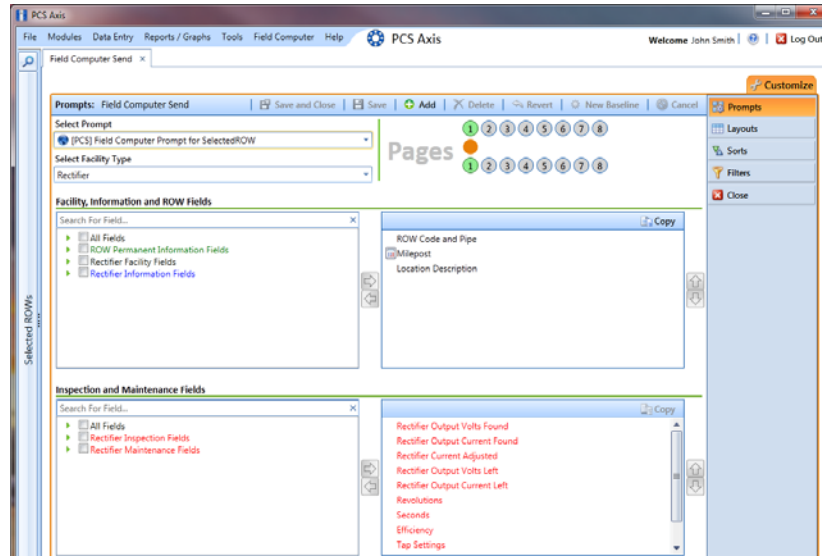
Figure 13-31. Prompts

4   Click the ⊕ **Add** button to open the *New Prompt* dialog box (Figure 13-32).
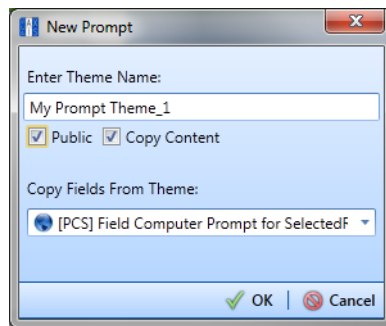
Figure 13-32. New Prompt

5   Type a name for the prompt theme in the field **Enter Theme Name**. Fields marked with ❌ are required.

6   If you want create a *public* theme, click the **Public** check box to place a check mark inside the check box. When the check box is empty, the prompt theme saves as a *private* theme.

7   If you want to copy fields from an existing prompt theme, click the **Copy Content** check box to place a check mark inside the check box. Then click the down arrow in the field **Copy Fields From Theme** and select a theme in the selection list.

If you do not want to copy fields from an existing prompt theme, remove the check mark inside the *Copy Content* check box by clicking the check box.

8   Click ✓ **OK** to save changes and return to the *Prompts* page.

9 Verify the name of the new theme displays in the **Select Prompt** field. If not, click the down arrow and select the theme in the selection list.

10 Click the down arrow in the field **Select Facility Type** and select the facility type you want to work with in the selection list.

11 To add information prompts, follow these steps:

a Double-click ▶ **All Fields** in *Facility, Information and ROW Fields* to view a list of fields available for selection.

b Double-click one or more fields in the selection list to move fields to the right pane. All fields listed in the right pane are included in the prompt theme.

12 To add inspection and maintenance prompts, follow these steps:

a Double-click ▶ **All Fields** in *Inspection and Maintenance Field*.

b Double-click one or more fields in the selection list to move fields to the right pane. All fields listed in the right pane are included in the prompt theme.

13 If you want to remove information, inspection, or maintenance prompts, double-click a field listed in the right pane to move it back to the left pane.

14 Complete the following steps to add site string prompts that help identify one facility from another when using the Allegro. Site string prompts are included with each facility and can be viewed in the Allegro *Site List* window.

a Click the ⌄ **Site String** tab to view a list of fields available for selection (Figure 13-33).
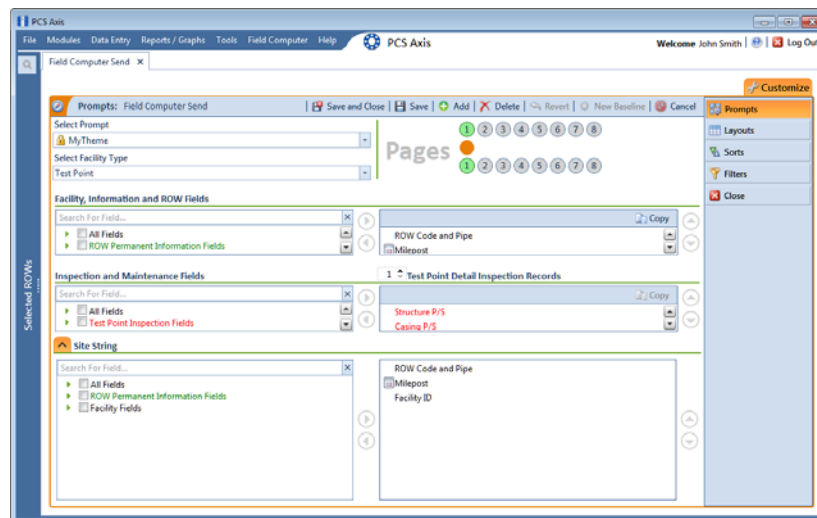
Figure 13-33. Site String

b Double-click one or more fields in the selection list to move fields to the right pane. For example, double-click **Address** and **Facility ID**. Click the ![checkmark] **Site String** tab again to close the pane.

15 If you want to add another page of prompts, click ![icon] **Copy** and then double-click one or more fields as needed in the left pane of **Inspection and Maintenance Fields**.

Information fields in *Facility, Information, and ROW Fields* automatically copy to each page of prompts. The following example shows three pages of prompts (Figure 13-34).
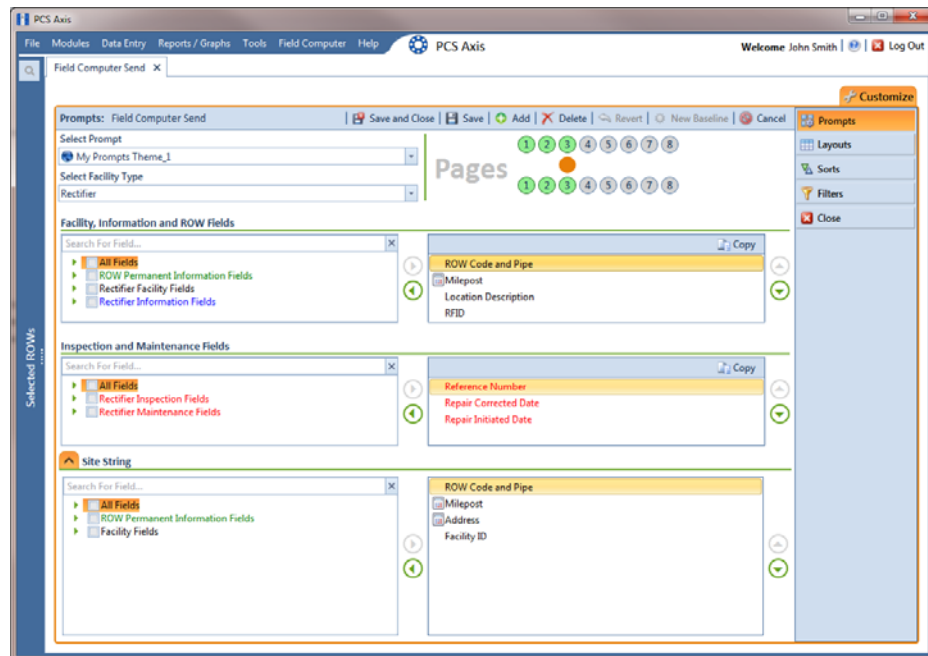
Figure 13-34. Prompts

16 Click ![icon] **Save and Close** to save changes and return to the *Field Computer Send* window.

17 To apply the new prompt theme to the grid, click the down arrow in the field **Select Prompt** and select the theme in the selection list. Then click ![icon] **Apply** to update the grid.

Adding a Prompt Theme for Test Point Subfacilities

The following procedure explains how to add a prompt theme for subfacilities in the *Test Point Detail Inspection* mini-grid. A prompt theme is a named set of fields that provide information and prompt the user for survey data when performing a periodic or close interval survey using the Allegro Field Computer.

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

A subfacility is a field in the *Test Point Detail Inspection* mini-grid that links to a parent facility in the *Test Point Inspection* grid. The prompt theme includes ON/OFF fields for both the subfacility and corresponding parent test point facility. The following criteria must first be met when including subfacilities in prompts sent to the Allegro Field Computer:

- Subfacilities must be set up as *Currently Active* in the *Test Point Detail Information* mini-grid. (See *CPDM > Data Entry > Edit CPDM Data > Test Point > Information > Test Point Detail Information* mini-grid.)

- The parent facility of a subfacility must also be included in prompts sent to the Allegro. Parent facilities include any of the following ON/OFF field pairs: *AC P/S* and *AC IRF*; *Casing P/S* and *Casing IRF*; *Foreign P/S* and *Foreign IRF*; *Insulator P/S* and *Insulator IRF*; or *Structure P/S* and *Structure IRF*. (See the procedure in this section.)

NOTE: For information about how to link subfacilities to a parent facility, refer to *Linking Multiple Subfacilities to a Parent Test Point Facility* (page 335).

To add a prompt theme for subfacility fields in the *Test Point Detail Inspection* mini-grid, follow these steps:

1 Select one or more pipeline segments in the *Select ROWs* window (Figure 13-35). Click ![Save] **Save** to close the window.
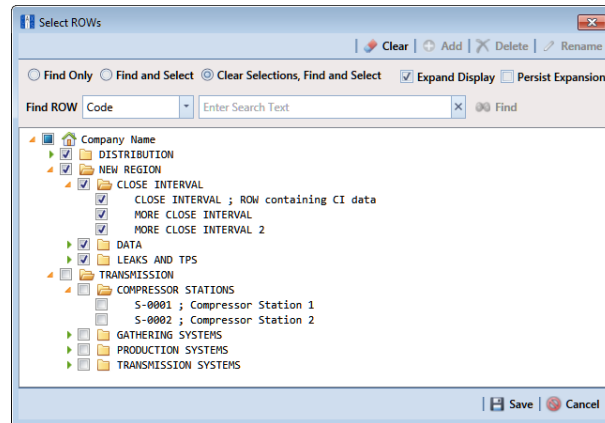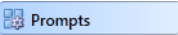
Figure 13-35. Select ROWs

2 Click **Field Computer** > **Send** to open the *Field Computer Send* window.

3 Click the **Customize** tab ![Customize], then the **Prompts** button ![Prompts] to open the *Prompts* page (Figure 13-31, page 627).

4 Click the ![Add] **Add** button to open the *New Prompt* dialog box (Figure 13-32, page 627).

5 Type a name for the prompt theme in the field **Enter Theme Name**. Fields marked with ![x] are required.

6 If you want to create a *public* theme, click the **Public** check box to place a check mark inside the check box. When the check box is empty, the prompt theme saves as a *private* theme.

7 If you want to copy fields from an existing prompt theme, click the **Copy Content** check box to place a check mark inside the check box. Then click the down arrow in the field **Copy Fields From Theme** and select a theme in the selection list.

If you do not want to copy fields from an existing prompt theme, remove the check mark inside the *Copy Content* check box by clicking the check box.

8 Click ![OK] **OK** to save changes and return to the *Prompts* page.

9 Verify the name of the new theme displays in the **Select Prompt** field. If not, click the down arrow and select the theme in the selection list (Figure 13-36, page 633).

10 Click the down arrow in the field **Select Facility Type** and select **Test Point** in the selection list.

11 To add information prompts:

a Double-click ▸ **All Fields** in *Facility, Information and ROW Fields* to view a list of fields available for selection.

b Double-click one or more fields in the selection list to move fields to the right pane. All fields listed in the right pane are included in the prompt theme.

If you want to remove information, inspection, or maintenance prompts, double-click a field listed in the right pane to move it back to the left pane

12 To add prompts for subfacilities and corresponding parent test point facilities:

a Double-click ▸ **Test Point Detail Inspection Fields** in *Inspection and Maintenance Fields* to view a list of fields available for selection.

b Double-click the fields labeled **ON** and **OFF** to move these fields to the right pane (Figure 13-36, page 633).

c Double-click **Test Point Inspection Fields** in *Inspection and Maintenance Fields* to view a list of fields available for selection.

d For each subfacility you plan to survey, add ON and OFF prompts for the corresponding parent test point facility. Double-click the appropriate ON and OFF field to move these fields to the right pane.

For example, to include ON/OFF prompts for structure pipe-to-soil readings, double-click the fields *Structure P/S* and *Structure IRF*. This same method applies to any of the following test point facility field pairs: *Casing P/S* and *Casing IRF*; *Foreign P/S* and *Foreign IRF*; or *Insulator P/S* and *Insulator IRF*.

13 To add maintenance prompts:

a Double-click ▸ **Test Point Maintenance Fields** in *Inspection and Maintenance Fields*.

b Double-click one or more fields in the selection list to move fields to the right pane.

14 Indicate how many new subfacility records should be created when a new test point facility record is added in the survey file using the Allegro Field Computer. Click the up/down arrow to select a value in the field labeled **Test Point Detail Inspection Records**. You can also type a value in this field.

NOTE: The user account of the person adding a new test point facility record on the Allegro Field Computer must be set up in PCS Axis with the option labeled *Can Create New Facilities On The Allegro* in *User Management* (Tools > User Management). For more information about setting up a PCS Axis user account, see *Setting Up User Management* (page 187).

15 Prompts display on the Allegro Field Computer according to how you organize the fields listed in the right pane. To change the field order, click and drag a field to a new position in the list. Or, select a field and then click the up ⬆ or down ⬇ button.
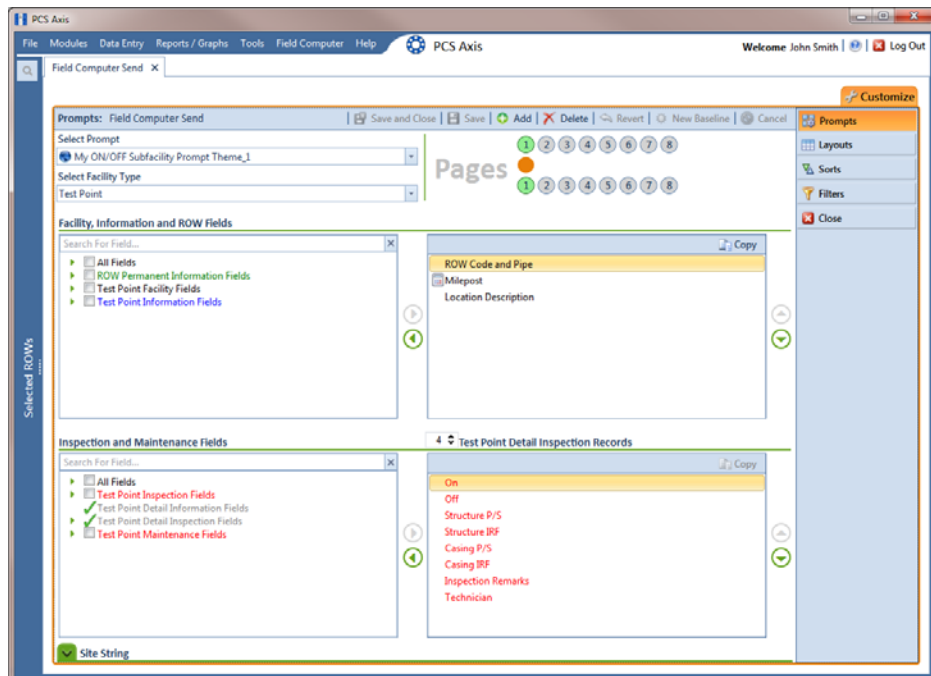
Figure 13-36. Test Point Detail Inspection Prompts

16 Complete the following steps to add site string prompts that help identify one facility from another when using the Allegro Field Computer. Site string prompts are included with each test point facility and can be viewed in the *Site List* window on the Allegro Field Computer.

a   Click the ⬇ **Site String** tab to open the *Site String* pane (Figure 13-37).

b   Double-click ▶ **All Fields** to view a list of fields available for selection. Double-click one or more fields in the selection list to move fields to the right pane. For example, double-click **Address** and **Facility ID**.

c   If you are using the optional Telluric Compensation feature in PCS Axis and want to identify which pipeline segments require telluric compensation, double-click the field **Telluric Compensation Currently Required** to move the field to the right pane.

d   Click the ⬆ **Site String** tab to close the pane.
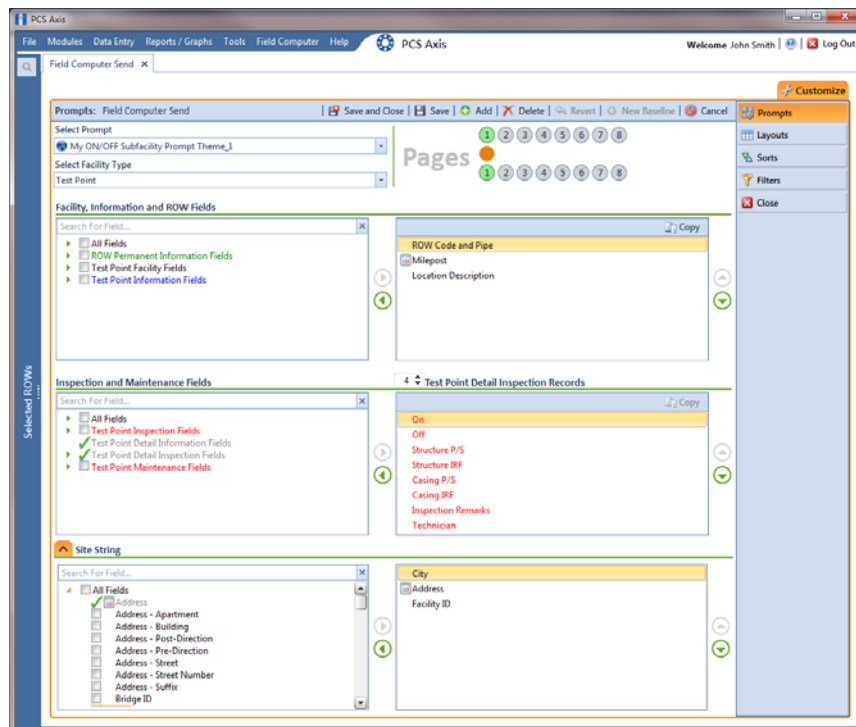
Figure 13-37. Site String

17 If you want to add another page of prompts, click **Copy** and then double-click one or more fields as needed in the left pane of **Inspection and Maintenance Fields**.

Information fields in *Facility, Information, and ROW Fields* automatically copy to each page of prompts (Figure 13-34, page 629).

18 Click **Save and Close** to save changes and return to the *Field Computer Send* window.

19 To apply the new prompt theme to the grid in *Field Computer Send*, click the down arrow in the field **Select Prompt** and select the theme in the selection list. Then click **Apply** to update the grid.

NOTE: Prompts for subfacilities display in the second page of the survey file on the Allegro Field Computer.

If you are using the optional *Telluric Compensation* feature in PCS Axis, inspection readings for subfacilities received from the Allegro Field Computer display in the *Uncompensated On* and *Uncompensated Off* fields of the *Test Point Detail Inspection* mini-grid. For more information, refer to the section entitled *Viewing Test Point Inspections Eligible for Compensation* (page 674).

Adding a Sort Theme

A sorting theme determines how PCS Axis sorts grid records in the *Field Computer Send* window. Adding a sorting theme allows you to choose which field(s) to sort data by and if data sorts alphanumerically in ascending or descending order.

NOTE: Only public themes for layouts, sorts, and reports are available for selection. If you would like to use a private theme, your company's system administrator must make your private theme a public one.

To add a sorting theme, follow these steps:

1   Select one or more pipeline segments in the *Select ROWs* window (Figure 13-38). Click ⊞ **Save** to close the window.
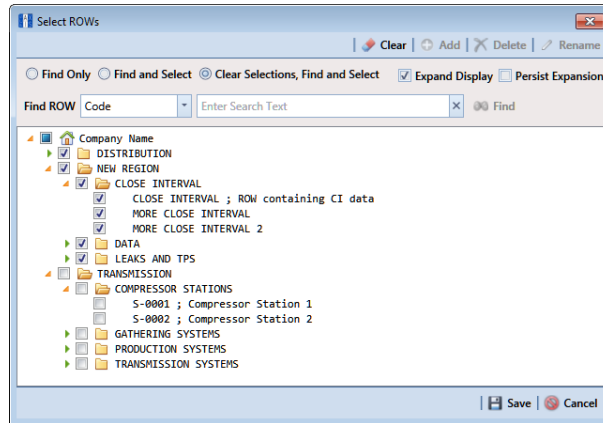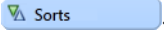
Figure 13-38. Select ROWs

2   Click **Field Computer** > **Send** to open the *Field Computer Send* window.

3   Choose a mode for displaying records in the grid by selecting the option **Select ROWs**, **Route**, or **Schedule**. Then click ⊞ **Apply** to update the grid.

4   Click the **Customize** tab ⚙ Customize , then the **Sorts** button ▦ Sorts .

5   Click the ⊕ **Add** button to open the *New Sort Layout* dialog box (Figure 13-39).
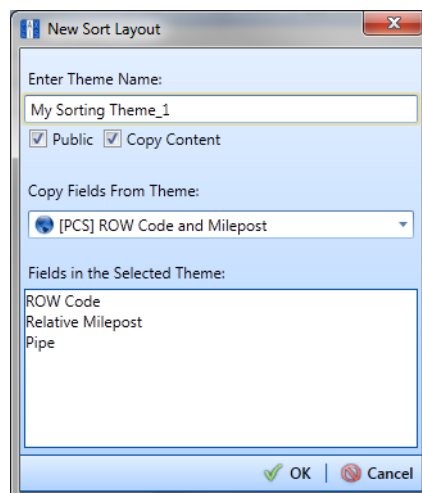
Figure 13-39. New Sort Layout

6   Type a name for the sorting theme in the field **Enter Theme Name**. Fields marked with ⊗ are required.

7   If you want to create a *public* theme, click the **Public** check box to place a check mark inside the check box. When the check box is empty, the sorting theme saves as a *private* theme.

8   Select a sorting theme with fields you want to copy to the new theme. Click the down arrow in **Copy Fields From Theme** and select a sorting theme in the selection list.

9   Click ✓ **OK** to save changes and return to the *Sorts* page (Figure 13-40, page 638).

10 Complete the following steps to add and remove fields in the new sorting theme:

    a   Click the toggle arrow ▶ for a field category in the left pane of the window to view a list of fields available for selection. For example, click ▶ **Facility Fields**.

    b   Double-click a field listed in the left pane to move it to the right pane. Repeat this step as needed. The sorting theme includes all fields listed in the right pane.

    c   If you want to remove a field in the sorting theme, double-click a field listed in the right pane to move it to the left pane. Repeat this step as needed.

11 Select a sorting method for each field listed in the right pane. To sort grid records in ascending order, click the toggle button to select **ASC** `ASC`. To sort in descending order, click the toggle button to select **DESC** `DESC`.

12 To change the order of fields listed in the right pane and subsequently in the grid, click and drag a field to a new position in the list. Or, select a field and then click the up ▲ or down ▼ button.
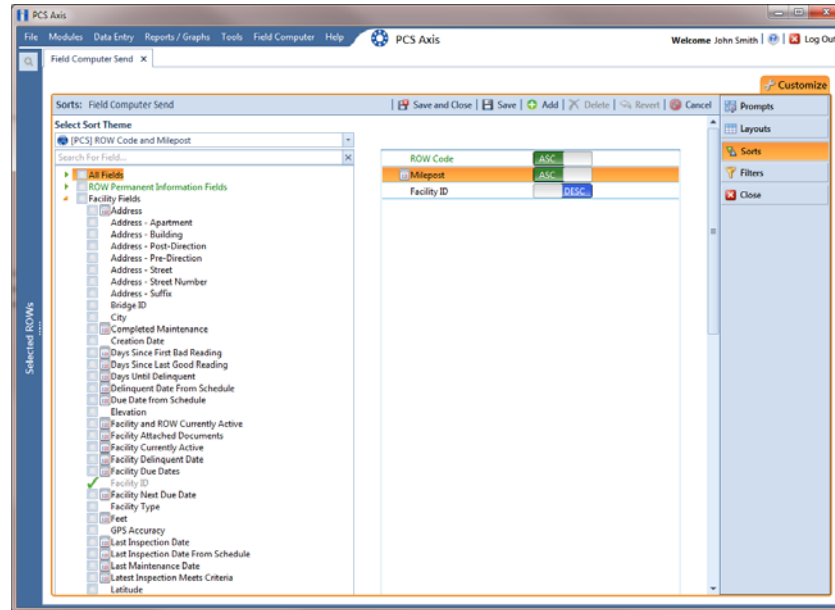
Figure 13-40. Sorts

13 Click **Save and Close** to return to the *Field Computer Send* window.

14 To apply the new sorting theme to the grid, click the down arrow in the field **Select Sort Theme** and select the sorting theme in the selection list. Then click **Apply** to update the grid.

Adding an AND Filter Group

An AND filter group is a named set of one or more filters that affect the data output in the grid of *Field Computer Send* and subsequently the file sent to the Allegro. Adding an AND filter group produces a subset of records that meet *all* filter conditions. PCS Axis processes filters in a filter group in descending order beginning with the filter at the top of the filter group.

To add an AND filter group, follow these steps:

1   Select one or more pipeline segments in the *Select ROWs* window (Figure 13-41). Click ![save] **Save** to close the window.
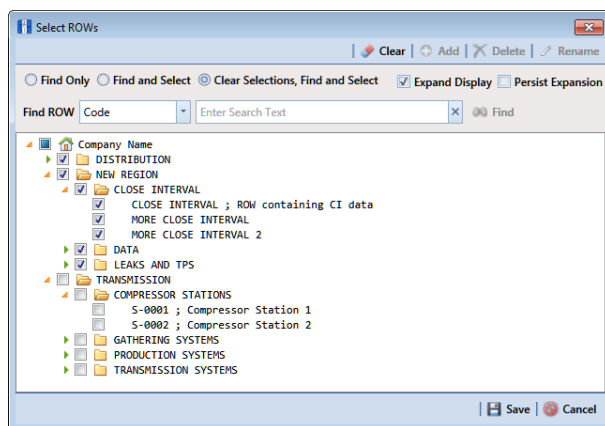
Figure 13-41. Select ROWs

2   Click **Field Computer** > **Send** to open the *Field Computer Send* window.

3   Choose a mode for displaying records in the grid by selecting the option **Select ROWs**, **Route**, or **Schedule**. Then click ![apply] **Apply** to update the grid.

4   Click the **Customize** tab ![Customize], then the **Filters** button ![Filters] to open the *Filters* page (Figure 13-42, page 640).

5   Click ⊙ **New 'And' Group** to open the filter properties group box (Figure 13-42).
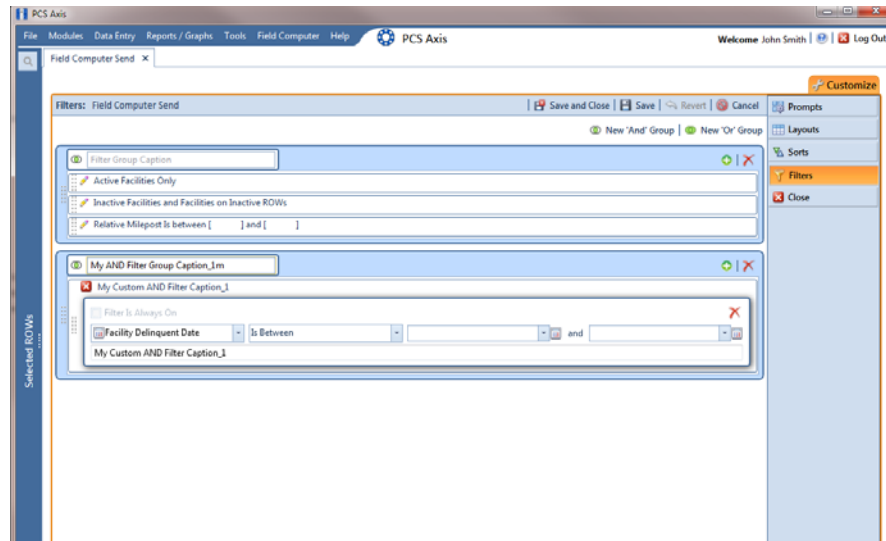
Figure 13-42. New 'And' Filter Group

6   Type a name for the filter group in the field **Filter Group Caption**.

7   Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.

8   If the AND filter group includes a date filter, set a date range using a calendar or dynamic dates in the following manner:

- Type a date in the start and end date fields. Enter a start and end date using the format M/DD/YYYY to indicate the month, day, and year.

- To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a start date. Then click the down arrow in the end date field to open a calendar and select an end date.

- To set a date range using dynamic start and end dates, click the 🗓 calculator button in the start date field and set up dynamic date properties. Repeat this step for the end date field. Clicking the calculator button opens and closes dynamic date property fields.

9   If you want the filter to remain on for all sessions of *Field Computer Send*, select the check box **Filter is Always On**. When this check box is not selected, toggle the filter on and off in the *Field Computer Send* window using the filter's check box.

10 Type a name for the filter in the field **Enter Custom Filter Caption**.

11 If you want to set up additional filter criteria for the filter group:

a   Click the ⊕ **Add** button to open another filter property group box.

b   Type a name for the filter in the field **Enter Custom Filter Caption**.

c   Repeat **step 7** through **step 9** to set up filter criteria.

12   Click the close button ❌ to close the filter group.

NOTE: Clicking the 🖊 edit icon for a particular filter opens that filter's property settings allowing you to change settings as needed.

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13   To move a filter to a different position in the filter group or a filter group to a different position in a group of filters:

a   Point the mouse at the filter handle ⫶ to change the cursor to a vertical resize cursor ↕.

b   Drag and drop the filter or the filter group to a new location.

14   Click 💾 **Save and Close** to return to the *Field Computer Send* window.

Adding an OR Filter Group

An OR filter group is a named set of one or more filters that affect the data output in the grid of *Field Computer Send* and subsequently the file sent to the Allegro. Adding an OR filter group produces a subset of records that meet *any* filter condition. PCS Axis processes filters in a filter group in descending order beginning with the filter at the top of the filter group.

To add an OR filter group, follow these steps:

1 Select one or more pipeline segments in the *Select ROWs* window (Figure 13-43). Click **Save** to close the window.
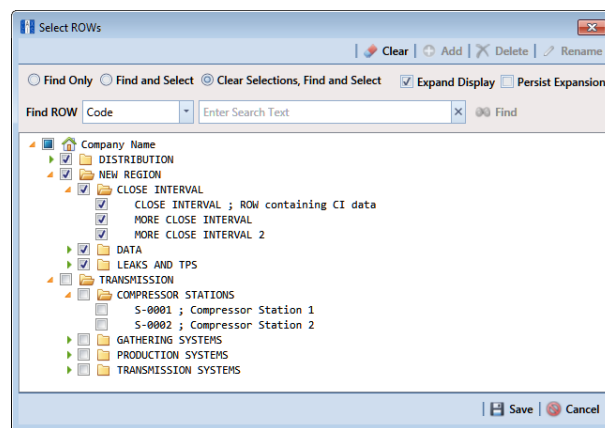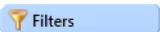
Figure 13-43. Select ROWs

2 Click **Field Computer** > **Send** to open the *Field Computer Send* window.

3 Choose a mode for displaying records in the grid by selecting the option **Select ROWs**, **Route**, or **Schedule**. Then click **Apply** to update the grid.

4 Click the **Customize** tab , then the **Filters** button to open the *Filters* page (Figure 13-44, page 643).

5 Click **New 'Or' Group** to open a filter properties group box (Figure 13-44).
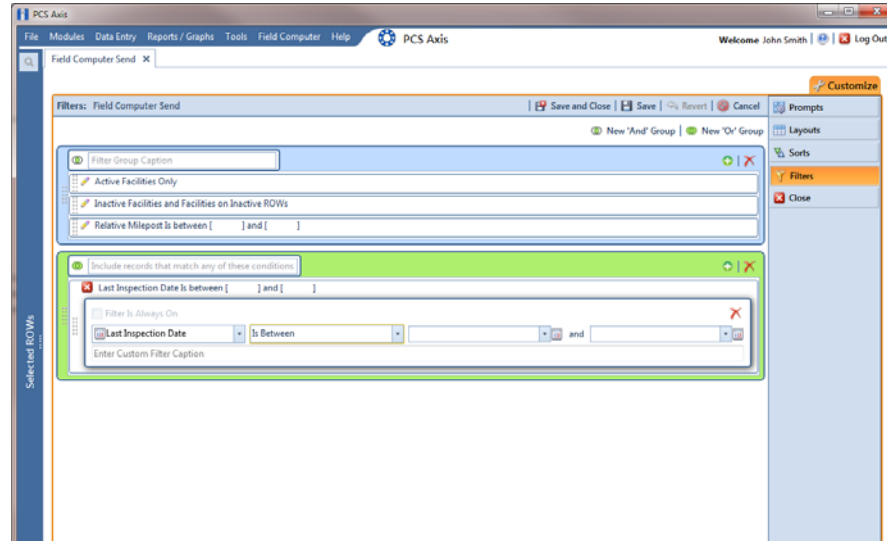
Figure 13-44. New 'Or' Filter Group

6   Type a name for the filter group in the field **Include records that match any of these conditions**.

7   Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.

8   If the OR filter group includes a date filter, such as *Facility Delinquent Date Is Between* shown in Figure 13-44, page 643, set a date range using a calendar or dynamic dates in the following manner:

- Type a date in the start and end date fields. Enter a start and end date using the format M/DD/YYYY to indicate the month, day, and year.

- To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a start date. Then click the down arrow in the end date field to open a calendar and select an end date.

- To set a date range using dynamic start and end dates, click the ▦ calculator button in the start date field and set up dynamic date properties. Repeat this step for the end date field. Clicking the calculator button opens and closes dynamic date property fields.

9   If you want the filter to remain on for all sessions of *Field Computer Send*, select the check box **Filter is Always On**. When this check box is not selected, toggle the filter on and off in the *Field Computer Send* window using the filter's check box.

10 Type a name for the filter in the field **Enter Custom Filter Caption**.

11 If you want to set up additional filter criteria for the filter group:

    a   Click the ⊕ **Add** button to open another filter property group box.

    b   Type a name for the filter in the field **Enter Custom Filter Caption**.

    c   Repeat **step 7** through **step 10** to set up filter criteria.

12 Click the close button ❌ to close the filter group.

NOTE: Clicking the 🖊 edit icon for a particular filter opens that filter's property settings allowing you to change settings as needed.

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13 To move a filter to a different position in the filter group or a filter group to a different position in a group of filters:

    a   Point the mouse at the filter handle ⠿ to change the cursor to a vertical resize cursor ↕.

    b   Drag and drop the filter or the filter group to a new location.

14 Click 💾 **Save and Close** to return to the *Field Computer Send* window.

Editing and Arranging Filters and Filter Groups

PCS Axis processes filters in a filter group in descending order beginning with the filter at the top of the filter group. Filter groups are processed similarly. Information in this section explains how to edit filter property settings and how to arrange filters and filter groups.

Complete the following steps:

1 Select one or more pipeline segments in the *Select ROWs* window (Figure 13-45). Click 💾 **Save** to close the window.
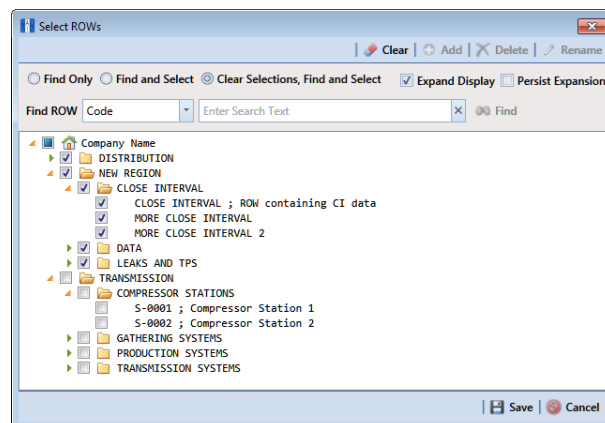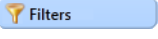

Figure 13-45. Select ROWs

2 Click **Field Computer** > **Send** to open the *Field Computer Send* window.

3 Choose a mode for displaying records in the grid by selecting the option **Select ROWs**, **Route**, **Schedule,** or **Import Exported List**. Then click ▣ **Apply** to update the grid.

4 Click the **Customize** tab ⚙ Customize , then the **Filters** button ▽ Filters to open the *Filters* page (Figure 13-46, page 645).

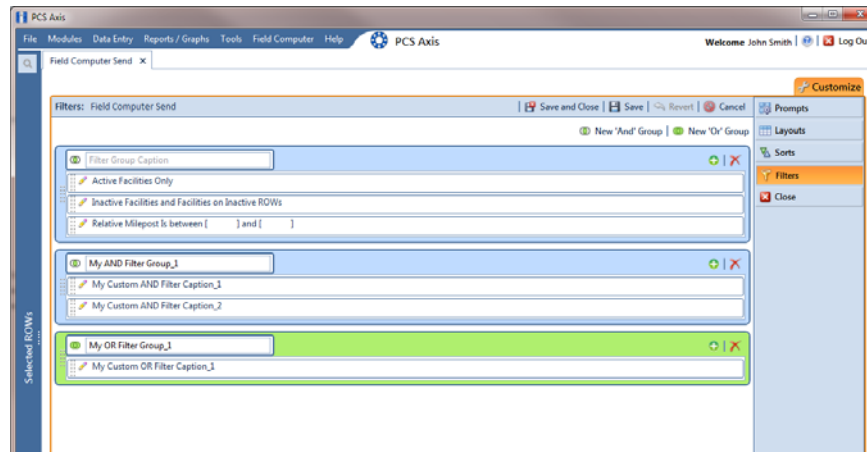**5** Click the edit icon 🖊 to display a filter's property settings (Figure 13-46) .

Figure 13-46. Edit Filters

6 To delete a filter in a filter group, click the filter's ✖ delete button. Then click ✔ **OK** when the *Delete* message displays.

7 To rename a filter, type a description in the filter's name field.

8 To change filter criteria, use filter selection fields to select a PCS Axis field, operator, and one or more filter conditions.

9 To enable a filter for all sessions of the data entry grid, click the check box **Filter is Always On** to place a check mark inside the check box. When this check box is not selected, toggle the filter on and off in the options page using the filter's check box.

10 Click the ✖ close button to close the filter's property settings group box.

11 To move a filter to a different position in a filter group, or to move a filter group to a different position, follow these steps:

a Point the mouse at the handle ⠿ of a filter or filter group to display a vertical resize cursor ↕.

> **b**   Drag and drop the filter or filter group to a new location.

NOTE: PCS Axis processes filters in descending order beginning with the filter at the top of the filter group.

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12 Click ![icon] **Save and Close** to close the filters page and return to the grid in *Field Computer Send*.

13 To apply filter changes to the grid in *Field Computer Send* and subsequently in the file sent to the Allegro, follow these steps:

> **a**   Click the ![icon] **Filters** tab to open the *Filters* panel (Figure 13-47).

> **b**   Click one or more check boxes in *Filters* and then click ![icon] **Apply**. For example, click **Currently Active Facilities Only** to only include active facilities in the grid and in the file sent to the Allegro.

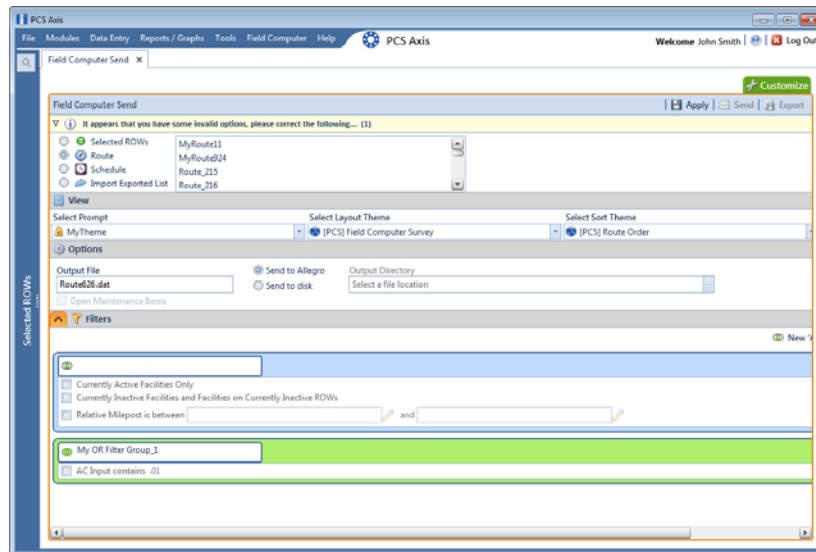> **c**   Click the ![icon] **Filters** tab to close the *Filters* panel.

Figure 13-47. Filters

Viewing the Field Computer Log

The field computer log includes a *Send Log* and *Receive Log*. The *Send Log* lists the facility records sent to the Allegro with the date and time records were processed. Likewise, the *Receive Log* identifies facility records received in PCS Axis from the Allegro, as well as the date and time they were received. Only those facility records updated by the Allegro are processed and included in the *Receive Log*.

You can use information in the field computer log to:

- verify which facility records have been sent and received

- compare both logs to verify all facilities that were inspected contain survey data

- troubleshoot issues if a problem occurs during data transfer

To view the field computer log, follow these steps:

1 Click **Field Computer** > **Log** to open the *Field Computer Log* window.

2 Click the **Receive Log** tab to view facility records received in PCS Axis from the Allegro Field Computer (Figure 13-48).
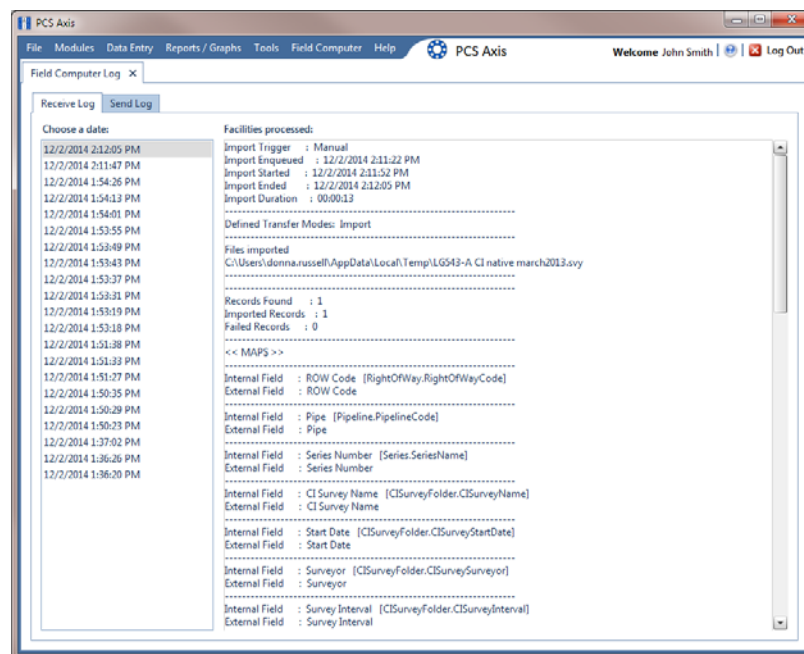

Figure 13-48. Field Computer Log / Receive Log

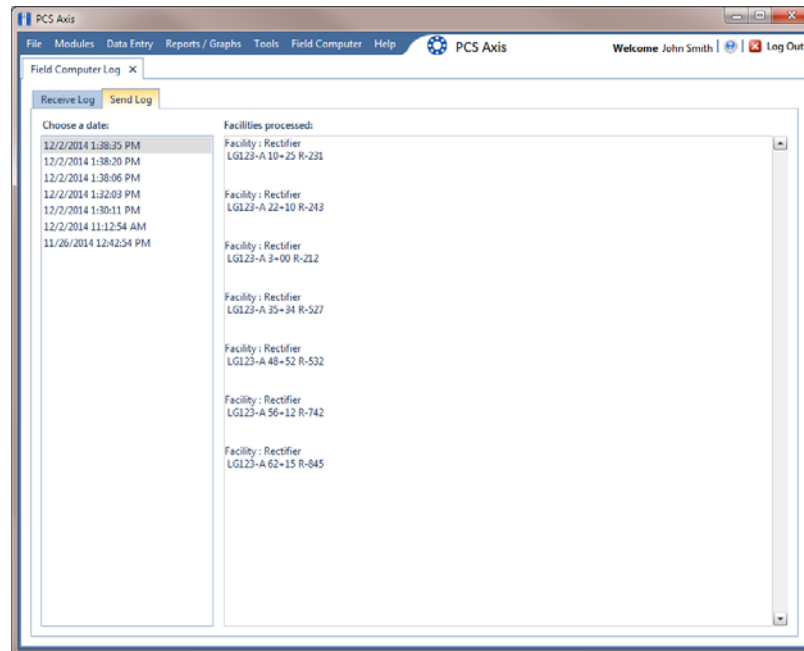**3** Click the **Send Log** tab to view facility records sent to the Allegro (Figure 13-49).

Figure 13-49. Field Computer Log / Send Log