

# Managing Themes

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Information in this section explains how to work with facility type themes in *Facility Type Themes Management* and how to manage all themes in the system using *Themes Management*. The information is intended for users with *SysAdmin* user permissions unless noted otherwise.

Topics in this section include those in the following list:

- *Working with a Facility Type Theme*
- *Managing Themes* (page 703)

## Working with a Facility Type Theme


A facility type theme is a named set of one or more facility types, such as test point, rectifier, valve, and atmospheric facility types. Certain features in PCS Axis require you to select a facility type theme to complete an operation, such as selecting a facility type theme when working in *Define Routes* (Data Entry > Define Routes) or *Field Computer Send* (Field Computer > Send).

Two types of facility type themes are available for use. They include *installed* and *addition* facility type themes. An installed facility type theme is one that has been installed during the PCS Axis software installation. A facility type theme addition is one that you create.

Information in this section explains how to work with a facility type theme in *Facility Type Themes Management*. Topics include those in the following list:


- *Editing an Installed Facility Type Theme* (page 698)
- *Adding a Facility Type Theme Addition* (page 699)
- *Editing a Facility Type Theme Addition* (page 702)

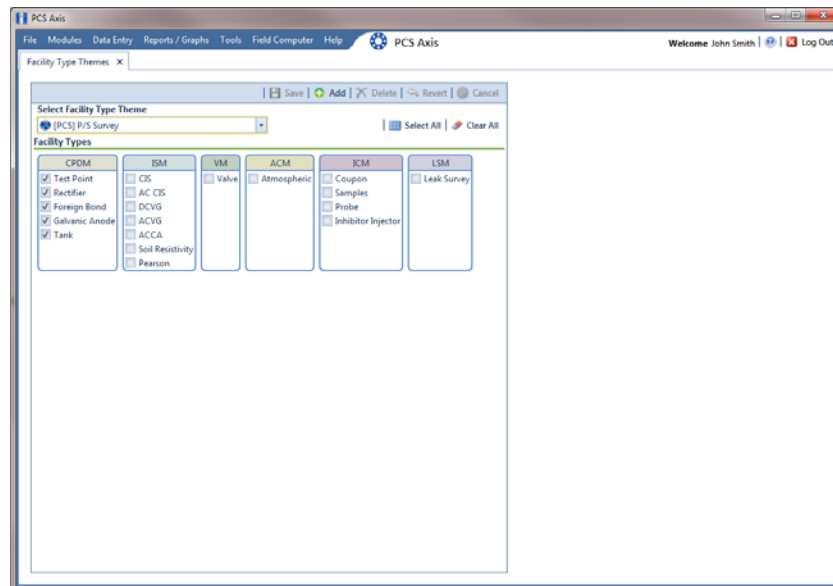
## Editing an Installed Facility Type Theme

An installed facility type theme includes [PCS] in the name of the theme, such as  [PCS] **Rectifier Survey**. The procedure in this section explains how to complete the following tasks to edit an installed facility type theme:





- add a facility type
- remove a facility type
- revert an installed facility type theme

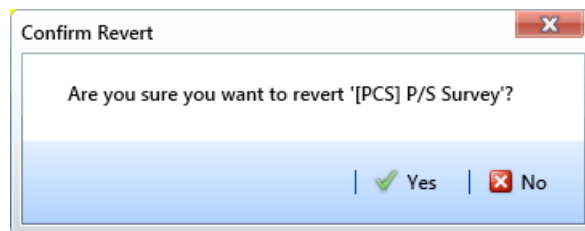
To edit an installed facility type theme, follow these steps:

- 1 Click **Tools** > **Facility Type Themes** to open the *Facility Type Themes* window (Figure 15-1).
- 2 Click the down arrow in **Select Facility Type Theme** and select a PCS Axis installed theme, such as  [PCS] **P/S Survey**.



**Figure 15-1. Facility Type Themes**

- 3 To add one or more facility types in an installed theme:
  - Click the check box for each facility type you want to add, then click  **Save**. A check mark inside a check box indicates a selection (Figure 15-1).
- 4 To remove one or more facility types in an installed theme:
  - Click the check box to clear the check mark for each facility type you want to remove. Click  **Save** to save changes.
- 5 To revert a facility type theme and restore settings prior to editing:
  - Click  **Revert**, then click  **Yes** when the *Confirm Revert* message displays (Figure 15-2).

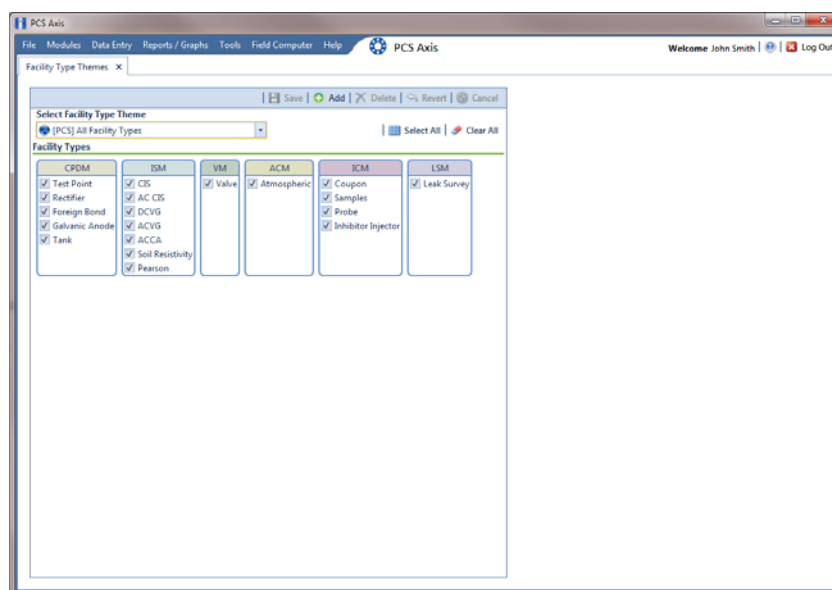


**Figure 15-2. Confirm Revert**


## Adding a Facility Type Theme Addition

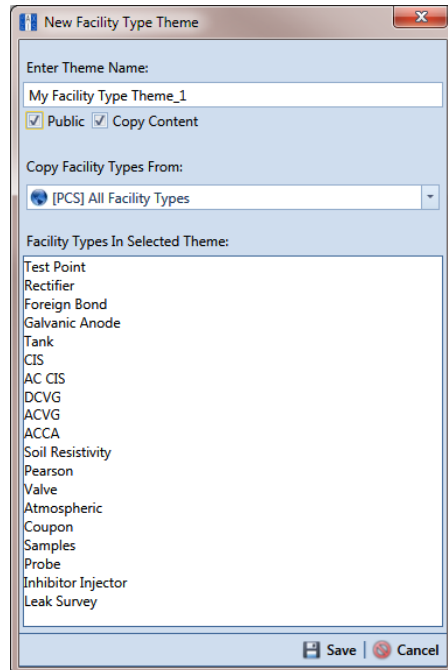
To add a facility type theme addition, follow these steps:

- 1 If the *Facility Type Themes* window is not open, click **Tools > Facility Type Themes** (Figure 15-3).



**Figure 15-3. Facility Type Themes Management**


- 2 Click  **Add** to open the *New Facility Type Theme* dialog box (Figure 15-4).
- 3 Type a name for the new theme in the field **Enter Theme Name**.




**Figure 15-4. New Facility Type Theme**



- 4 Select the **Public** check box if you want the new theme available to all PCS Axis users.

When a theme is not public, it is a private theme. A public theme is available for use by all PCS Axis users. A private theme is available only to the user who creates it.

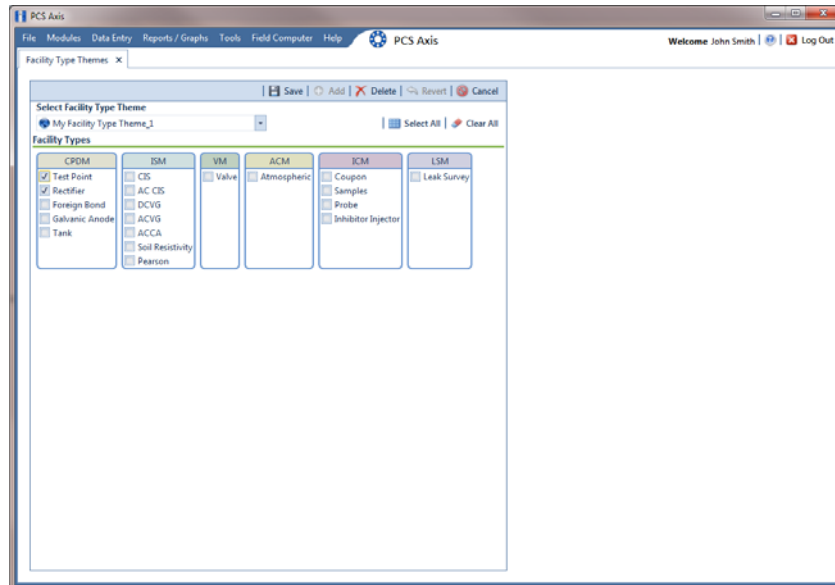
- 5 Click the down arrow in **Copy Facility Types From** and select an existing facility type theme with facility types you want to copy to the new theme.
- 6 Click  **Save** to save changes and close the dialog box.
- 7 To add one or more facility types in the new theme:
  - Click the check box for each facility type you want to add.

Clicking  **Select All** adds all facility types in the new theme. A check mark inside a check box indicates a selection (Figure 15-5, page 701).

- 8 To remove one or more facility types from the new theme:
  - Click the check box to clear the check mark for each facility type you want to remove.

Clicking  **Clear All** removes all facility types in the new theme.
- 9 Click  **Save** to save changes.

The facility type theme is now available for selection in *Define Routes* and *Field Computer Send*.



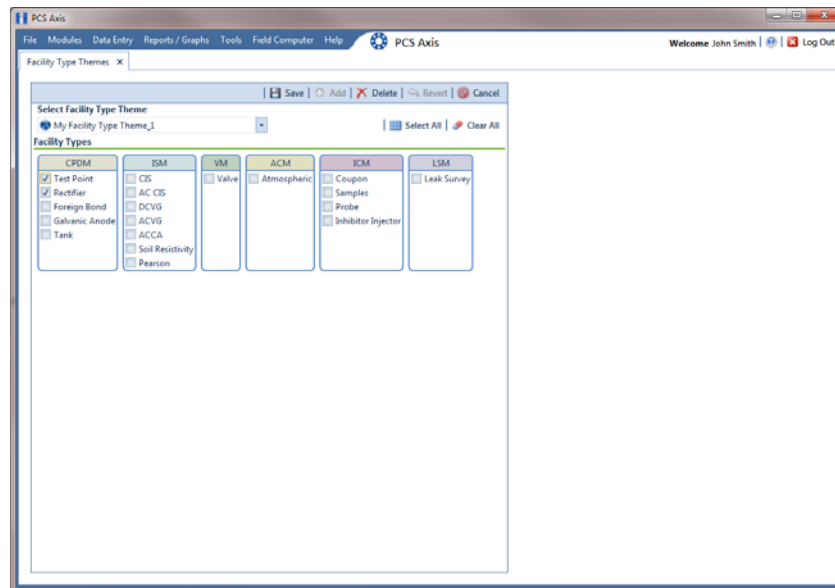
**Figure 15-5. Facility Types**

## Editing a Facility Type Theme Addition








The following procedure describes how to add and remove facility types in a facility type theme addition and how to delete a facility type theme addition.

Complete the following steps:

- 1 If the *Facility Type Themes* window is not open, click **Tools > Facility Type Themes** (Figure 15-6).
- 2 Click the down arrow in **Select Facility Type Theme** and select a facility type theme addition.



**Figure 15-6. Facility Type Themes Management**

- 3 To add one or more facility types:
  - Click the check box for each facility type you want to add. Clicking  **Select All** adds all facility types. A check mark inside a check box indicates a selection. Click  **Save** to save changes.
- 4 To remove one or more facility types:
  - Click the check box to clear the check mark for each facility type you want to remove. Clicking  **Clear All** clears all selections. Click  **Save** to save changes.
- 5 To revert a facility type theme and restore settings prior to editing:
  - Click  **Revert**, then click  **Yes** when the *Confirm Revert* message displays.
- 6 To delete a facility type theme addition:
  - Click  **Delete** and then click **Yes** when the *Confirm Delete* message opens.

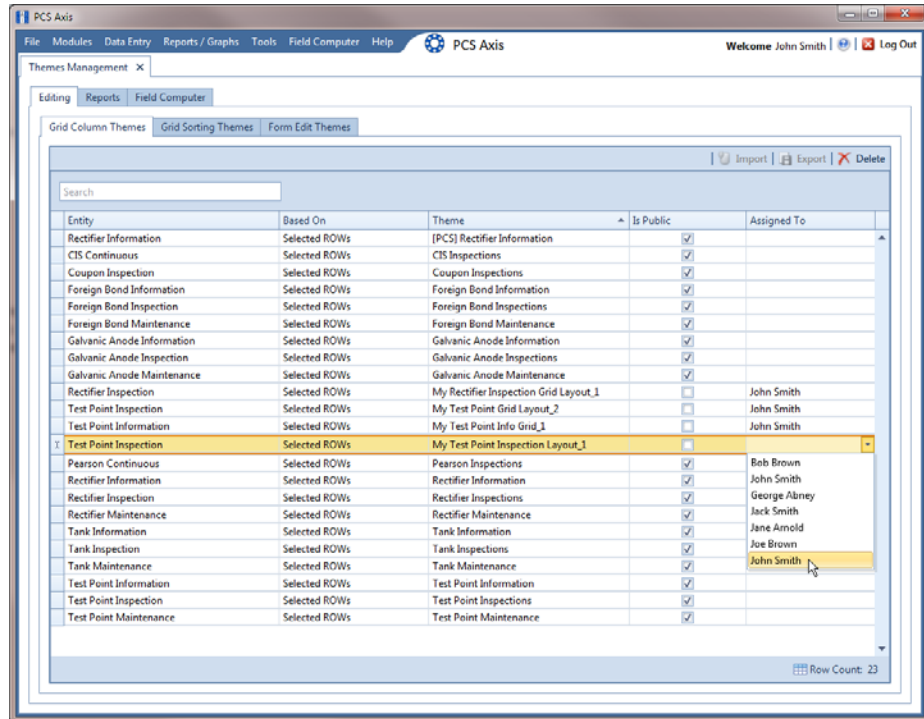
## Managing Themes

*Themes Management* allows you to perform the following tasks for any PCS Axis installed and user-created theme in the system:

- change the *Based On* method for working with facility records
- rename a theme
- change a theme from *Public* to *Private* and vice versa
- assign a *Private* theme to a user
- delete a theme

To manage themes in the system, follow these steps:


- 1 Click **Tools** > **Themes Management** to open the *Themes Management* window (Figure 15-7).



**Figure 15-7. Themes Management**

- 2 Open a grid with the theme you want to edit. For example, to edit a grid layout theme, click the **Editing** tab and then the **Grid Column Themes** tab.
- 3 To edit the *Based On* method for a theme:
  - a Select a theme in the grid. For example, a *Test Point Inspections* theme addition is selected in Figure 15-7.
  - b Select a mode for displaying facility records in a data entry grid, report, or survey file sent to the Allegro Field PC. Click the **Based On** field and then select one of the following options in the selection list: *Selected ROWs*, *Route*, *Schedule*, or *Exported*.
- 4 To rename a theme:
  - a Select a theme in the grid and then type a name in the **Theme** field.
- 5 To change a theme from *Public* to *Private*:
  - a Select a theme in the grid and then click the check box **Is Public** to remove the check mark.
  - b Assign the *Private* theme to a user. Click the **Assigned To** field and select a user name in the selection list.



- 6 To change a theme from *Private* to *Public*:
  - a Select a theme in the grid and then click the check box **Is Public** to place a check mark inside the check box. PCS Axis automatically removes the user name associated with the private theme in the *Assigned To* field.
- 7 To delete a theme, select a theme in the grid and then click  **Delete**. When the *Confirm Delete* message opens, click **Yes**.

