Managing Themes

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.

Axis			
	raphs Tools Field Computer H	Help 🚯 PCS Axis	Welcome John Smith
Type Themes X			
	🗎 Save 🕻 🔾	Add 🔀 Delete 🥱 Revert 🛞 Cancel	
ect Facility Type Theme			
[PCS] P/S Survey	•	🔠 Select All 🧈 Clear All	
iity Types			
CPDM ISM	VM ACM	ICM LSM	
Test Point CIS Rectifier AC CIS		Coupon Leak Survey Samples	
Foreign Bond		Probe	
Galvanic Anode 🔲 ACVG		Inhibitor Injector	
Tank ACCA			
Soil Resistivi	ty		
Pearson			

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 Severt, then click Ves when the Confirm Revert message displays (Figure 15-2).

Co	nfirm Revert
	Are you sure you want to revert '[PCS] P/S Survey'?
	🖋 Yes 🛛 🔀 No

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).

PCS Axis		
File Modules Data Entry Reports / Graphs To	ools Field Computer Help 🚯 PCS Axis	Welcome John Smith 🕺 🔀 Log Out
Facility Type Themes X		
	🗄 Save 🔿 Add 🔀 Delete 🖘 Revert 🎯 Cancel	
Select Facility Type Theme		
(PCS) All Facility Types Facility Types	🔹 🔤 Select All 🛛 🤣 Clear All	
CPDM ISM VM	Ve V Atmospheric Coupon V Lesk Survey	
Rectifier AC CIS	Samples	
Foreign Bond 🗹 DCVG	V Probe	
Galvanic Anode ACVG Tank ACCA	🗹 Inhibitor Injector	
Soil Resistivity		
Pearson		

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**.

New Facility Type Theme	J
Enter Theme Name:	
My Facility Type Theme_1	
✓ Public ✓ Copy Content	
Copy Facility Types From:	
[PCS] All Facility Types	h
Facility Types In Selected Theme:	
Test Point	
Rectifier	
Foreign Bond	
Galvanic Anode	
Tank	
CIS	
AC CIS	
DCVG	
ACVG	
ACCA	
Soil Resistivity	
Pearson	
Valve	
Atmospheric	
Coupon	
Samples	
Probe	
Inhibitor Injector	
Leak Survey	
🔚 Save 🚳 Cancel	-

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*.

PCS Axis	
File Modules Data Entry Reports / Graphs Tools Field Computer Help 🔗 PCS Axis	Welcome John Smith 🔨 🔀 Log Out
Facility Type Themes X	
💾 Save 🔿 Add 🗡 Delete 😪 Revert 🍪 Cancel	
Select Facility Type Theme	
🗣 My Facility Type Theme_1 🔹 👘 Select All 🧳 Clear All	
Facility Types	
CPDM ISM VM ACM ICM LSM VTest Point CIS Valve Atmospheric Coupon Leak Survey	
Rectifier AC CIS Samples	
Foreign Bond DCVG Probe Galvanic Anode ACVG Inhibitor Injector	
Tank ACCA	
Soil Resistivity	
	1

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.

PCS Axis			
Modules Data Entry Reports / Graph	is Tools Field Computer He	PCS Axis	Welcome John Smith 😢 🔀 Lo
cility Type Themes X			
	💾 Save 🔿 A	dd 🟋 Delete 🖘 Revert 🚳 Cancel	
Select Facility Type Theme		1	
My Facility Type Theme_1 acility Types	•	📗 Select All 🛛 🧈 Clear All	
CPDM ISM	VM ACM Valve Atmospheric	ICM LSM Coupon LSM	
Rectifier AC CIS		Samples	
Foreign Bond		Probe	
Galvanic Anode ACVG		Inhibitor Injector	
Soil Resistivity			
Pearson			
			1

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 Severt, then click Ves when the Confirm Revert message displays.
- 6 To delete a facility type theme addition:
 - Click X 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:

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

es Management 🗙				
ing Reports Field Computer				
rid Column Themes Grid Sorting Them	es Form Edit Themes			
,				
			1	🖞 Import 🛛 📄 Export 🛛 🗙 🛛
forest				
Search				
Entity	Based On	Theme	▲ Is Public	Assigned To
Rectifier Information	Selected ROWs	[PCS] Rectifier Information	1	
CIS Continuous	Selected ROWs	CIS Inspections	1	
Coupon Inspection	Selected ROWs	Coupon Inspections	1	
Foreign Bond Information	Selected ROWs	Foreign Bond Information	1	
Foreign Bond Inspection	Selected ROWs	Foreign Bond Inspections	1	
Foreign Bond Maintenance	Selected ROWs	Foreign Bond Maintenance	1	
Galvanic Anode Information	Selected ROWs	Galvanic Anode Information	1	
Galvanic Anode Inspection	Selected ROWs	Galvanic Anode Inspections	1	
Galvanic Anode Maintenance	Selected ROWs	Galvanic Anode Maintenance	1	
Rectifier Inspection	Selected ROWs	My Rectifier Inspection Grid Layout_1		John Smith
Test Point Inspection	Selected ROWs	My Test Point Grid Layout_2		John Smith
Test Point Information	Selected ROWs	My Test Point Info Grid_1		John Smith
Test Point Inspection	Selected ROWs	My Test Point Inspection Layout_1		
Pearson Continuous	Selected ROWs	Pearson Inspections	1	Bob Brown
Rectifier Information	Selected ROWs	Rectifier Information	1	John Smith
Rectifier Inspection	Selected ROWs	Rectifier Inspections	×	George Abney
Rectifier Maintenance	Selected ROWs	Rectifier Maintenance	1	Jack Smith
Tank Information	Selected ROWs	Tank Information	1	Jane Arnold
Tank Inspection	Selected ROWs	Tank Inspections	1	Joe Brown
Tank Maintenance	Selected ROWs	Tank Maintenance	1	John Smith
Test Point Information	Selected ROWs	Test Point Information	1	
Test Point Inspection	Selected ROWs	Test Point Inspections	1	
Test Point Maintenance	Selected ROWs	Test Point Maintenance	1	

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.
 - 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 **X Delete**. When the *Confirm Delete* message opens, click **Yes**.