Working with Pipeline Records

This section explains how to work with folders and pipelines in the system hierarchy tree. The information is intended for users with *SysAdmin* user permissions unless noted otherwise.

Topics in section include those in the following list:

Adding a Folder in the Hierarchy

The hierarchy is an organizational structure of one or more folders. Folders are organized in a tree structure based on the number of hierarchy levels set up in the system. The top level of the hierarchy is the root level that identifies your company's name. All hierarchy folders are added below the root level. The lowest level of the hierarchy includes a folder with pipelines added in the system (Figure 4-1, page 140).

NOTE: The names of hierarchy folders as well as *ROW Code* and *ROW Name* support up to 100 characters.

To add a folder in the hierarchy, follow these steps:

1. Click **File** > **Select ROWs** to open the *Select ROWs* window (Figure 4-1).

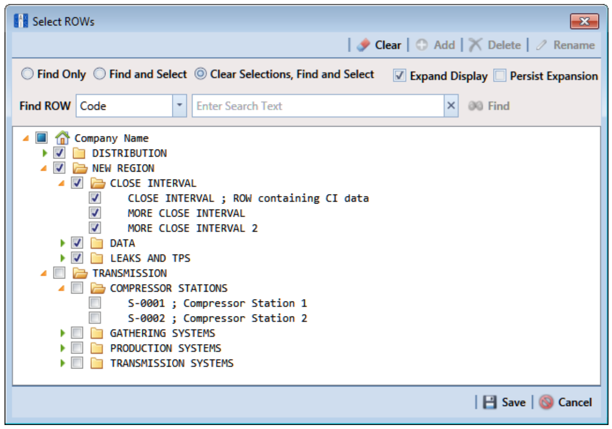

Figure 4-1. Select ROWs

2. Select a level in the hierarchy to which you want to add a folder.

3. Click **Add** to open the *Add New Node* dialog box (Figure 4-2, page 140).

NOTE: You can also open the *Add New Node* dialog box by right-clicking a selection in the hierarchy tree and selecting *Add* in the shortcut menu that opens.

---

4. Add information for the new hierarchy folder. Fields requiring information include a icon, such as *System* and *ROW Code* shown in the next figure.

5. Click the option **Expand After Adding** if you want to expand the selection tree after clicking *Apply*.

6. Click **Apply**. Repeat **step 3** through **step 5** as needed to add additional folders in the hierarchy tree.

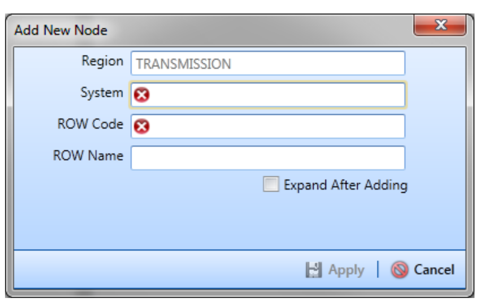

Figure 4-2. Add New Node

Adding a Pipeline in the Hierarchy

To add a pipeline in the hierarchy, follow these steps:

1 If the *Select ROWs* window is not open, click **File** > **Select ROWs** (Figure 4-3).

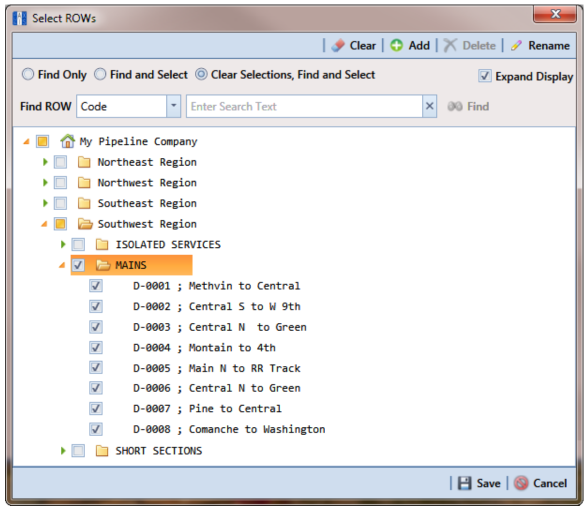

Figure 4-3. Select ROWs

2 Select a folder in the hierarchy you want to add a pipeline. In the following example, another pipeline will be added in the *Mains* folder.

3 Click **Add** to open the *Add New Node* dialog box (Figure 4-4). Right-clicking the selected hierarchy folder and selecting *Add* in the shortcut menu also opens the *Add New Node* dialog box.

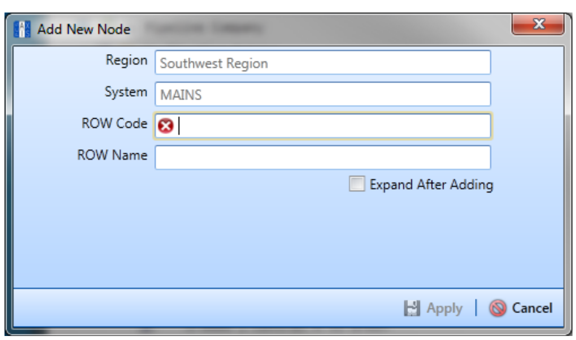

Figure 4-4. Add New Node

4 Enter a pipeline code for the new pipeline in the **ROW Code** field. Fields requiring information include a red icon, such as *ROW Code* in the previous figure (Figure 4-4).

NOTE: The names of hierarchy folders as well as *ROW Code* and *ROW Name* support up to 100 characters.

5 Type a name for the pipeline in the **ROW Name** field.

6 Click the option **Expand After Adding** if you want to expand the selection tree after clicking *Apply*.

7 Click **Apply**. Repeat **step 2** through **step 6** as needed to add another pipeline in the selected hierarchy folder.

8 Continue with *Understanding Default Location Formats* (page 146) for information about setting this required field for all pipelines in the system.

Using Find in Select ROWs

Use the Find drop-down list in the *Select ROWs* window when searching for a particular pipeline segment in the hierarchy. The Find drop-down list includes the following options for locating and selecting a pipeline segment in the hierarchy:

- **Code:** searches the hierarchy by ROW Code.
- **Name:** searches the hierarchy by ROW Name.
- **Code and Name:** searches the hierarchy by ROW Code and Name. Using this option requires that you include the semi-colon separator between the ROW Code and ROW Name, *such as LG123A ; NE Paddock LG123*.

To search the hierarchy for a particular pipeline segment in the *Select ROWs* window, follow these steps:

1 Click **File** > **Select ROWs** to open the *Select ROWs* window (Figure 4-5).

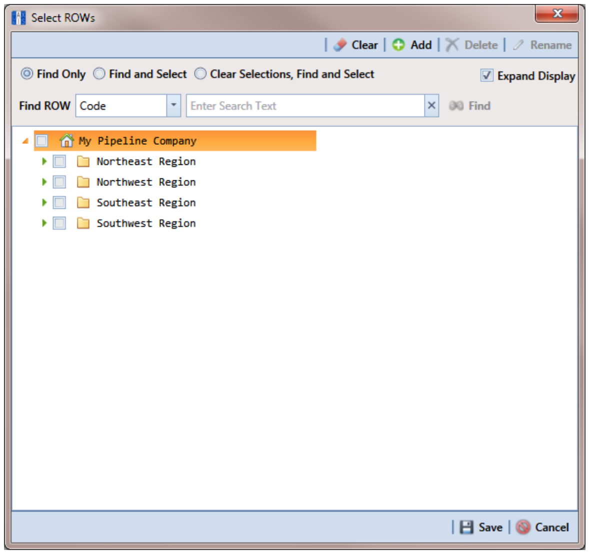

Figure 4-5. Select ROWs

2 Choose an option in the *Find Now* drop-down list to search for a pipeline segment in the hierarchy. Click the down arrow in **Find ROW** and select **Code**, **Name**, or **Code and Name**.

3 Based on the selected search option, type the *ROW Code*, *ROW Name*, or the *ROW Code and Name* of the pipeline segment in the field **Enter Search Text**.

4 Select one of the following options to choose how search results are handled: **Find Only**, **Find and Select**, **Clear Selections, Find and Select**. Hovering the mouse over an option displays a tooltip with a description of option.

5 Click the check box **Expand Display** if you want PCS Axis to expand the hierarchy when a search match is located.

6 Click **Find**.

Moving and Renaming a Pipeline

Complete the following steps to move or rename a pipeline in the hierarchy:

1 If the *Select ROWs* window is not open, click **File** > **Select ROWs** and then select a pipeline in the hierarchy (Figure 4-6).

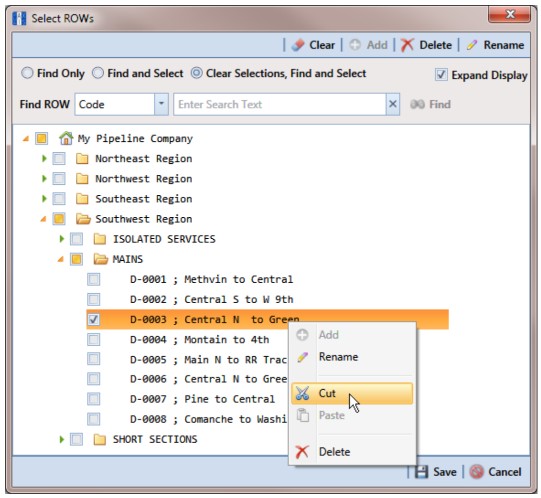

Figure 4-6. Move Pipeline

2 To move the selected pipeline to a different hierarchy folder, right-click the pipeline and select **Cut** in the shortcut menu that opens. Right-click the hierarchy folder you want to move the pipeline to and then select **Paste** in the shortcut menu that opens (Figure 4-6).

3 To rename the selected pipeline, follow these steps:

a Click **Rename** to open the *Rename* dialog box (Figure 4-7). Right-clicking the selected pipeline and selecting *Rename* in the shortcut menu also opens the dialog box.

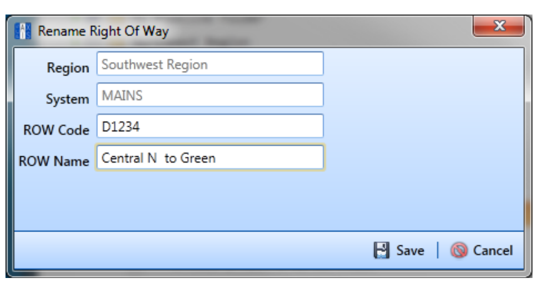

Figure 4-7. Rename Pipeline

b Type a name for the pipeline in the pipeline *Code* field. In the following example, *D-1234* has been entered in the *ROW Code* field. Click **Save** to apply the change and close the dialog box.

Deleting a Pipeline

The procedure in this section explains how to delete a pipeline in the hierarchy. Deleting a pipeline also deletes all facilities and history records associated with the pipeline.

IMPORTANT: Instead of deleting a pipeline, consider creating a new hierarchy folder labeled *Sold*, *Abandoned*, or something similar and then moving the pipeline to that folder. Another option is to change the operational status of the pipeline by disabling the *Active* check box in *Edit ROW Detail* (Data Entry > Edit ROW Detail). Using either of these methods will preserve data for future references.

To delete a pipeline, follow these steps:

1 Click **File** > **Select ROWs** to open the *Select ROWs* window. Select a pipeline in the hierarchy you want to delete (Figure 4-8).

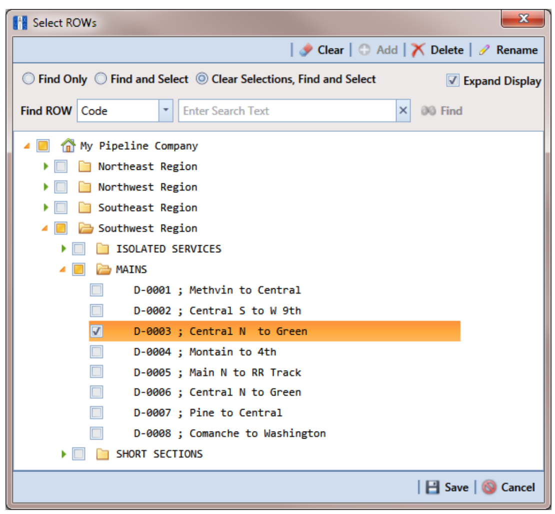

Figure 4-8. Select ROWs

2 Click **Delete** to open the *Confirm Delete* dialog box (Figure 4-9, page 146). Or, right-click the selected pipeline in the hierarchy tree and select **Delete** in the shortcut menu to open the *Confirm Delete* dialog box.

NOTE: The *Confirm Delete* dialog box identifies the pipeline and number of associated facilities to be deleted in the *Count* column (Figure 4-9, page 146).

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3 Click **Delete** to delete the pipeline or **Cancel** to cancel the operation.

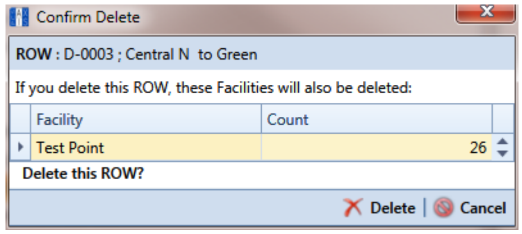

Figure 4-9. Confirm Delete

Understanding Default Location Formats

The following table (Table 4-1) identifies milepost formats available for selection when setting the *Default Location Format* for a pipeline in *Edit ROW Detail*. Choosing a *Default Location Format* allows PCS Axis to automatically apply the correct formatting to milepost values you enter for a facility location on a pipeline.

Table 4-1. Description of Default Location Formats

Location Format	Format Example	Description
Metric Milepost	1.234AB, 1,234AB, or 1+234AB	Measurements are in metrics. This format can include two alpha characters at the end of the milepost and can also be graphed. Measurements are in kilometers and meters. Based on the metric delimiter set in system *Options*, this format supports a Period, Comma, or Plus sign. For example, 1.234AB is 1 kilometer (km) and 234 meters (m).
Milepost (3 Decimals)	12345.567 -or- 1234.567AB	Format supports two alpha characters at the end of the milepost and can also be graphed. This format uses the U.S. Standard measurement system.
Milepost (4 Decimals)	123.5678 -or- 1234.5678A	Format supports one alpha character at the end of the milepost and can also be graphed. This format uses the U.S. Standard measurement system.

Table 4-1. Description of Default Location Formats

Location Format	Format Example	Description
Reading Number	12345678AB	This is an alphanumeric format with support for two alpha characters at the end. It is typically used for stations. The format also uses the U.S. Standard measurement system. This format cannot be graphed and the *CP Compliance Report* does not calculate total feet, total miles, or miles below criteria.
Location ID	1234567891 -or- ABCDEFGHIJ	**NOTE:** Location ID cannot be changed once it is set up. Use *Location ID* when footages are not applicable. This format is typically used in distribution systems. Other features include those in the following list: • Uses the U.S. Standard measurement system; accepts alphanumeric characters; and cannot be graphed. • *CP Compliance Report* does not calculate total feet, total miles, or miles below criteria when using this format.
Station Number	12345+67AB	Measurements are in feet. This format can be graphed; supports two alpha characters at the end of the milepost; and uses the U.S. Standard measurement system.

Table 4-1. Description of Default Location Formats

Location Format	Format Example	Description
Miles+100 Feet	12345+12 -or- 12345+12AB	Format uses miles plus two digits to the right to indicate hundreds of feet. For example, 110+12 indicates 110 miles and 1,200 feet. Do not enter values greater than 53 feet; doing so indicates another mile. Other characteristics include: • Format can be graphed. • Two alpha characters can be used after the first 3 numbers. • *CP Compliance Report* does not calculate total feet, total miles, or miles below criteria. • Uses the U.S. Standard measurement system.
Miles/Station Number	123A 45+67 -or- 123A 12+34	Format uses Miles<space>Station Number with Milepost (3 Decimals) in graphs. This format uses the U.S. Standard measurement system.

Selecting a Default Location Format

Information in this section explains how to set up *Default Location Format* and other pipeline information. A *Default Location Format* must be set for each pipeline added in the system hierarchy.

Complete the following steps:

1. Click **File** > **Select ROWs** to open the *Select ROWs* window (Figure 4-10).

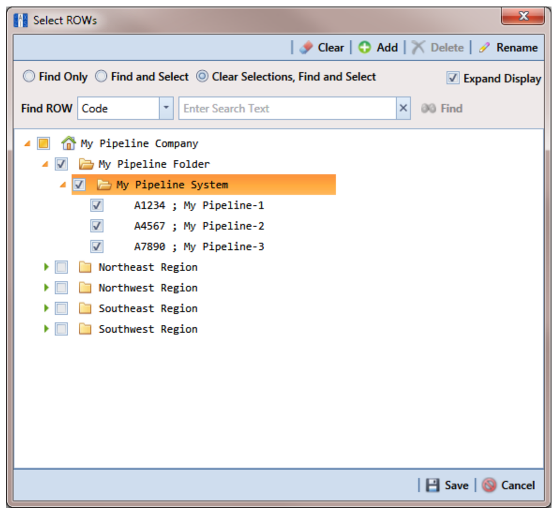

Figure 4-10. Select ROWs

2. Select one or more pipelines and then click **Save** to close the window.

3. Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window (Figure 4-11, page 149).

Click the Selected ROWs bar to expand and collapse the Selected ROWs panel.

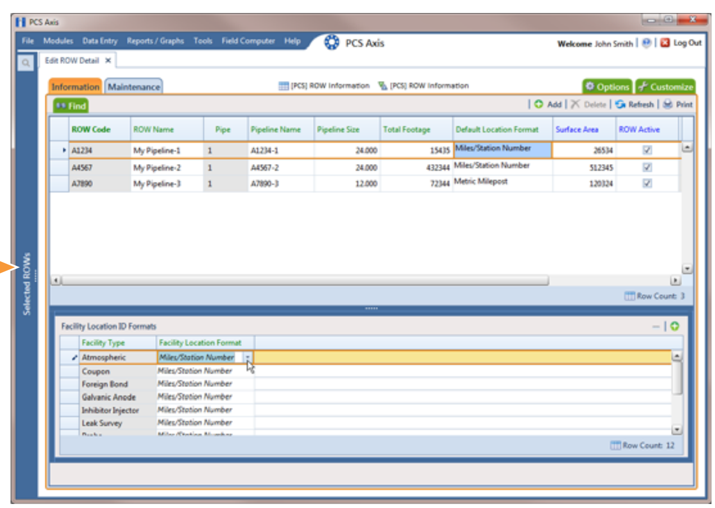

Figure 4-11. Edit ROW Detail

4 If you want to collapse the *Selected ROWs* panel to view more of the *Edit ROW Detail* grid, click **Selected ROWs**. To expand the panel, click **Selected ROWs** again.

5 Select a pipeline in the *Information* grid.

6 Select the field **Default Location Format** to display a drop down arrow. Click the arrow and select a location format in the selection list. (See *Understanding Default Location Formats* (page 146) for a description of available choices.)

7 Click **Add** in the *Facility Location ID Formats* mini-grid. A list of all facility types display in the mini-grid with the location format selected in **step 6**. If you want to change the location format for a particular facility type listed in the mini-grid, follow these steps:

   a Select a row of records in the mini-grid with the facility type you want to change the location format.

   b Select the field **Facility Location Format** to display a drop down arrow. Click the arrow and select a location format in the selection list.

8 Set up other pipeline information as needed then click **Refresh**. When you finish, click the close icon to close the *Edit ROW Detail* window.

Adding a Pipeline Information Record

Use the *Information* grid in *Edit ROW Detail* to add an information record for a pipeline selected in the *Select ROWs* window. Adding an information record allows you to maintain history records when important permanent information changes, such as when a pipeline is taken out of service or is sold to another business.

NOTE: If you are working with the optional *Telluric Compensation* feature, the required field labeled *Telluric Compensation Required* must be added in the *Information* grid and enabled for each pipeline segment requiring telluric compensation. For more information refer to *Adding a Layout Theme* (page 168).

To add a pipeline information record, follow these steps:

1 Click the **Select ROWs** button to open the *Select ROWs* window (Figure 4-12).

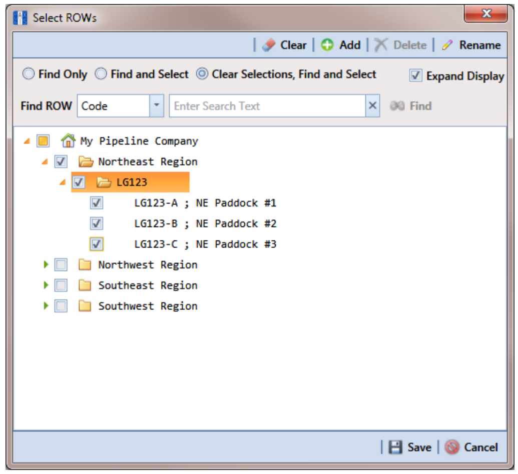

Figure 4-12. Select ROWs

2 Select one or more pipeline segments you want to work with by clicking the check box for each pipeline segment. Click **Save** to close the window.

NOTE: A check mark inside a check box indicates a selection. To clear a selection, click the check box again to remove the check mark. A shaded check box indicates selection of some, not all, child folders, ROWs, and pipelines.

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3 Open the *Edit ROW Detail* grid. Click **Data Entry** > **Edit ROW Detail** (Figure 4-13).

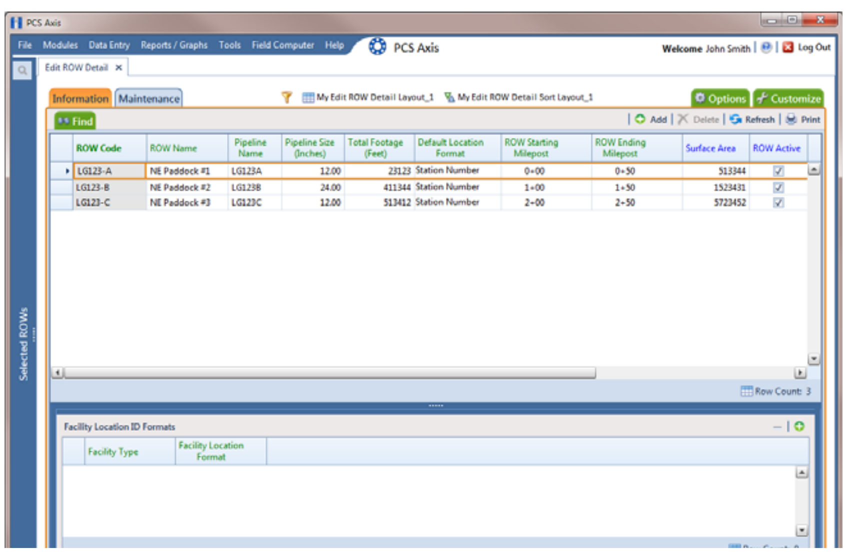

Figure 4-13. ROW Detail Information Grid

4 If you want to collapse the *Selected ROWs* panel to view more of the grid, click the **Selected ROWs** bar. Clicking the bar again expands the panel.

5 If the *Information* grid is not visible, click the **Information** tab Information.

6 Click **Add** to open the *Add Record* dialog box (Figure 4-14).

HINT: Alternatively, you can use a keyboard shortcut key to add records. Press **F4** to add an information record for an existing pipeline in the grid.

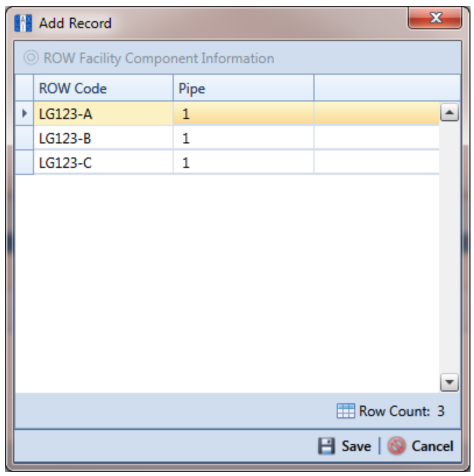

Figure 4-14. Add Record

7 Select the pipeline in the dialog box that you want to add an information record. For example, pipeline *IS-0767-01* is selected in Figure 4-14.

8 Click **Save** to display required field(s) for data entry (Figure 4-15).

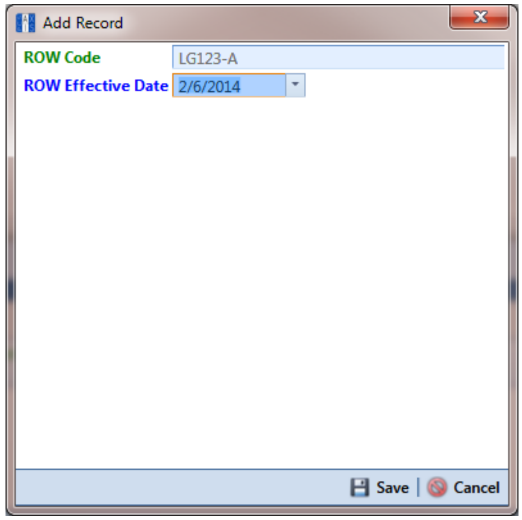

Figure 4-15. Add Record

9 Type a date in the **Effective Date** field using the format MM/DD/YYYY to indicate the month, day, and year. Or click the down arrow in the field and select a date using a calendar.

Effective Date is the date a history record becomes effective, such as when a pipeline becomes inactive or is taken out of service. See *Creating History Records Using an Effective Date* (page 245) for more information.

10 Click **Save** to close the *Add Record* dialog box and add the new information record in the grid for the existing pipeline (Figure 4-15).

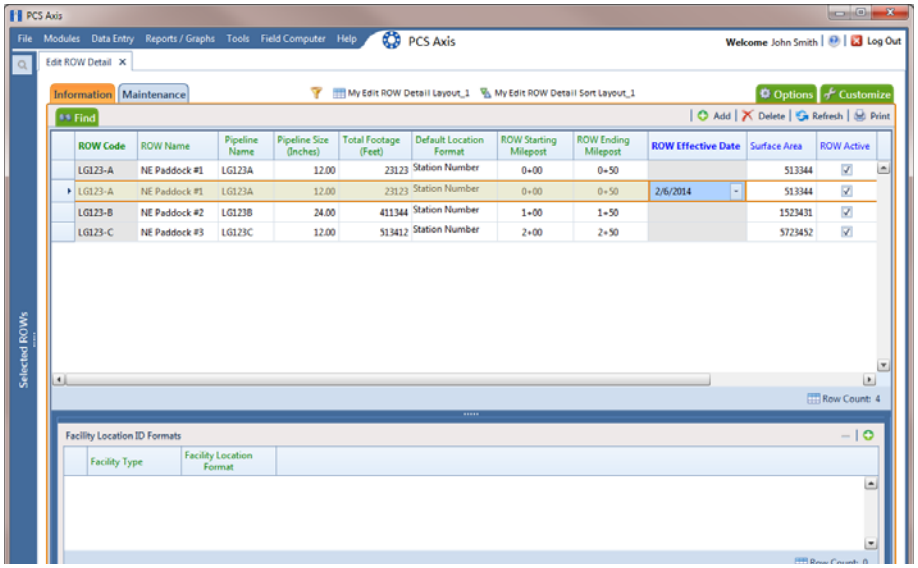

Figure 4-16. ROW Detail Information Grid - New Record

11 Provide other pipeline data in the grid as needed, such as *Permanent Comments*.

12 Click **Refresh** to update the grid.

Adding a Pipeline Maintenance Record

Use the *Maintenance* grid in *Edit ROW Detail* to add a maintenance record for a pipeline selected in the *Select ROWs* window. Adding pipeline maintenance records allows you to examine the effectiveness of a maintenance program. You can either view data in the maintenance grid of *Edit ROW Detail* or run a ROW maintenance report.

To add a pipeline maintenance record, follow these steps:

1 Click the **Select ROWs** button to open the *Select ROWs* window (Figure 4-12, page 151). Select one or more pipeline segments you want to work with by clicking the check box for each pipeline segment. Then click **Save** to close the window.

2 Open *Edit ROW Detail*. Click **Data Entry** > **Edit ROW Detail** (Figure 4-17).

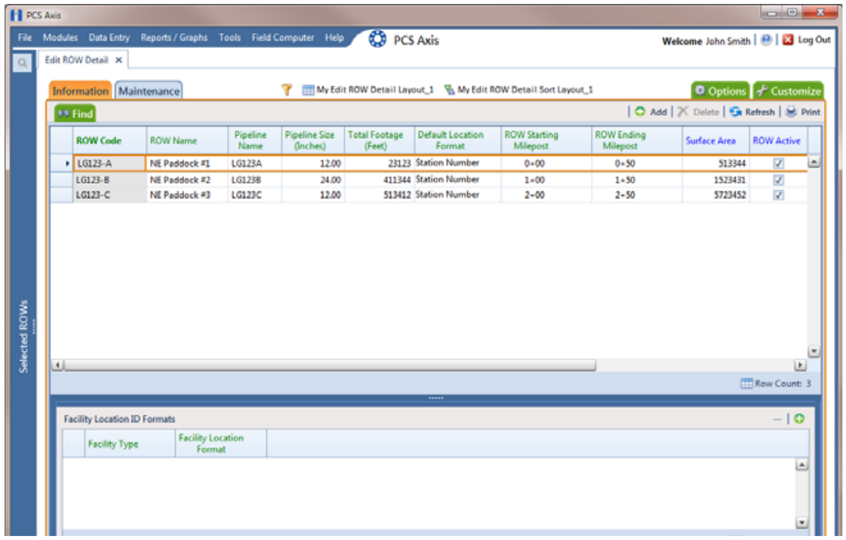

Figure 4-17. Row Detail Information Grid

3 If you want to collapse the *Selected ROWs* panel to view more of the grid, click the **Selected ROWs** bar. Clicking the bar again expands the panel.

4 Click the **Maintenance** tab Maintenance to open the *Maintenance* grid (Figure 4-17).

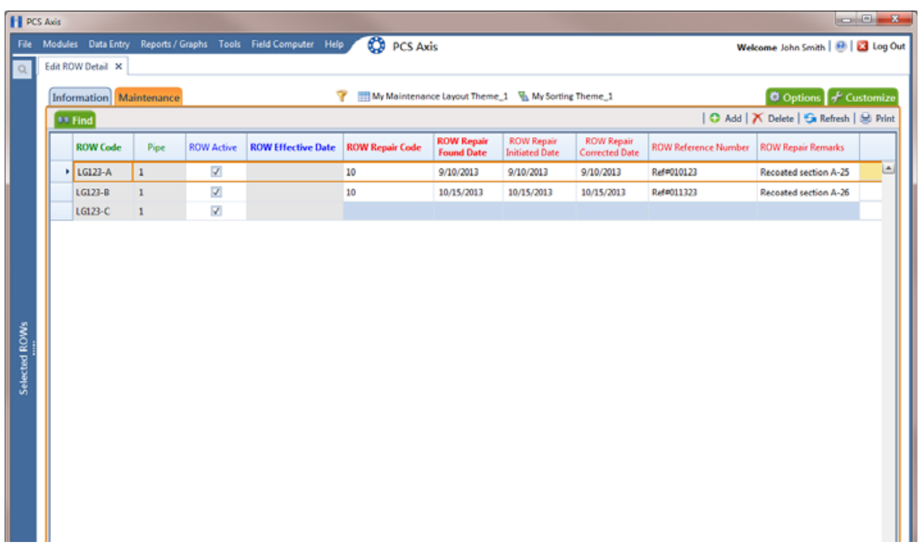

Figure 4-18. ROW Detail Maintenance Grid

5 Click **Add** to open the *Add Record* dialog box (Figure 4-14).

HINT: Alternatively, you can use a keyboard shortcut key to add records. Press **F4** to add a maintenance record for an existing pipeline in the grid.

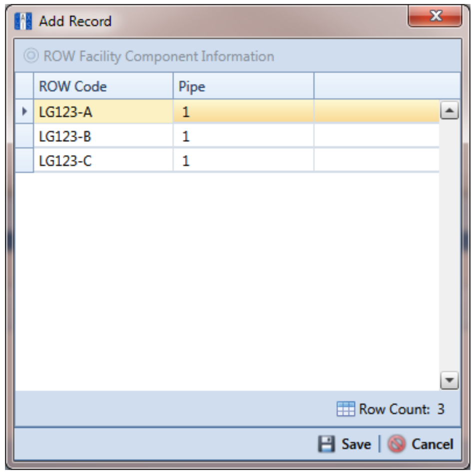

Figure 4-19. Add Record

6 Select the pipeline in the dialog box that you want to add an information record. For example, pipeline *IS-0767-01* is selected in Figure 4-14.

7 Click **Save** to display required field(s) for data entry (Figure 4-15). Required fields are identified with the icon, such as *ROW Repair Code*.

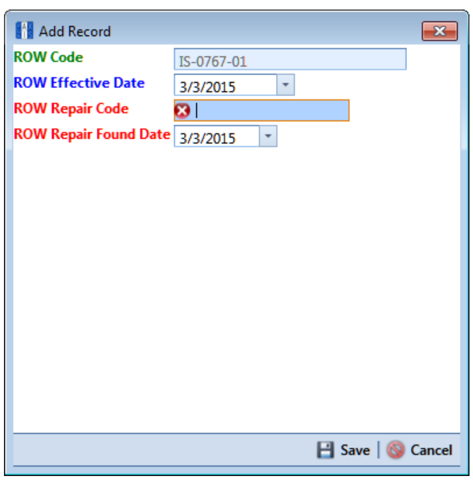

Figure 4-20. Add Record

8 Type a repair code in the field **ROW Repair Code**. Repair code is a designation used by your company to identify the type of repair. The field accepts up to 15 alphanumeric characters including special characters such as the pound sign (#), asterisk (*), or hyphen (-).

9 Type a date in the field **ROW Repair Found Date** using the format MM/DD/YYYY to indicate the month, day, and year. Or click the down arrow in the field and select a date using a calendar.

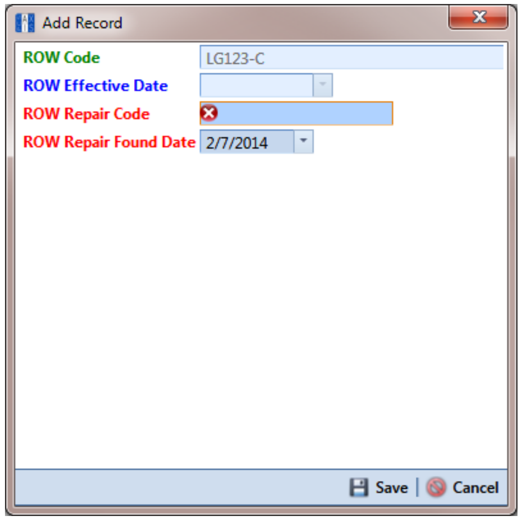

Figure 4-21. Add Record

10 Click **Save** to close the *Add Record* dialog box and add a pipeline maintenance record in the grid (Figure 4-22).

11 Provide other maintenance data in the grid as needed. For example, provide a date in the fields *ROW Repair Initiated Date* and *ROW Repair Corrected Date*; a maintenance reference number in the field *ROW Reference Number*; and remarks about the repair in the field *ROW Repair Remarks*.

12 Click **Refresh** to update the grid.

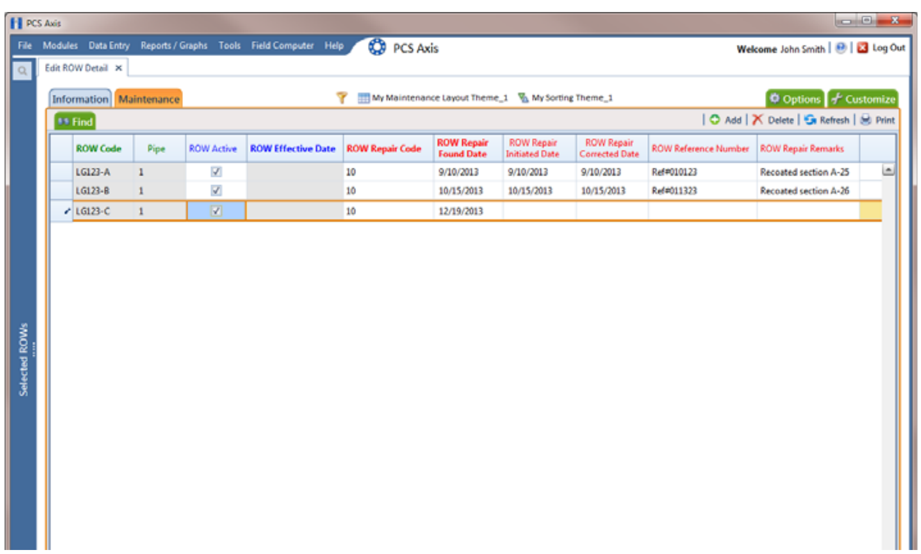

Figure 4-22. ROW Detail Maintenance Grid - New Record

Attaching a Document to a Pipeline Record

Attaching a document to a pipeline record in *Edit ROW Details* is similar to attaching a document to a record in a data entry grid. Use the *Attached Document* field in the *Information* and *Maintenance* grid of *Edit ROW Details* to link or embed a file or webpage address to a pipeline record. Supported file types include image, video, HTML, XML, music, and text files (such as Microsoft Word, WordPad, Notepad, or PowerPoint files).

As an example, you can attach an image of a pipeline; a document describing your company's safety procedures; or a document identifying a manufacturer's specification for a piece of equipment.

Linking a document identifies the file location on a local computer, company network, FTP site, or webpage on the Internet. Linking documents stored on a local computer are accessible only from that computer. Embedding a document stores a copy of the file in the PCS Axis database.

NOTE: Storing copies of documents in the PCS Axis database increases the size of the database.

If the file type of an attached document is associated with a default software program on the local computer, you can preview the file in the *Preview Attached Documents* window. Additionally, clicking *Open* opens the attached document for editing or viewing purposes.

Editing an embedded document applies changes only to the copy stored in the PCS Axis database; changes do not apply to the source file stored outside of PCS Axis. Likewise, editing a source file applies changes only to the source file, not the copy stored in PCS Axis.

Topics in this section include those in the following list:

NOTE: For information about how to attach a document to a record in a data entry grid, *Using Data Entry Grids and Forms* (page 221).

Adding the Attached Document Field in the Grid

If the *Attached Document* field is not present in the *Information* or *Maintenance* grid of *Edit ROW Details*, complete the following steps to add the field:

1 Select one or more pipeline segments you want to work with in the *Select ROWs* window. Click **Save** to close the window.

2 Click **Data Entry** > **Edit ROW Details** to open the *Edit ROW Detail* window (Figure 4-23).

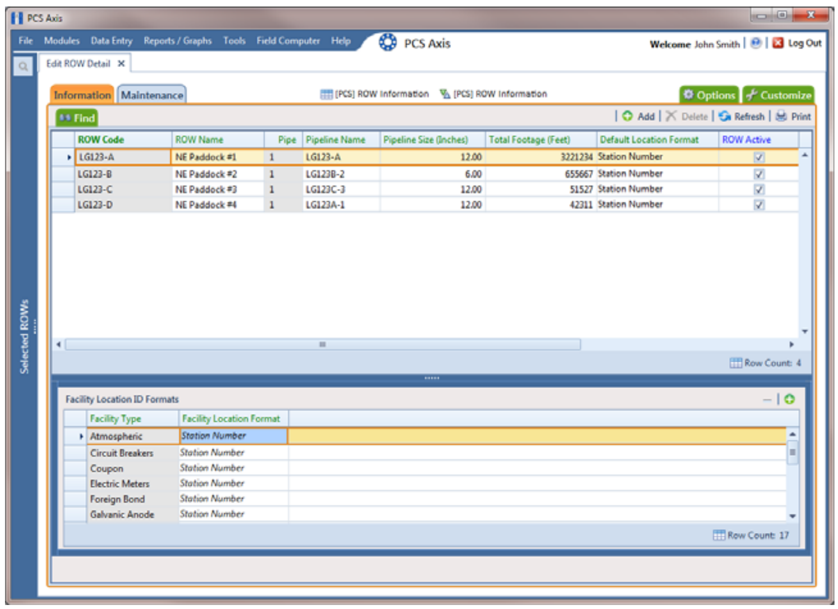

Figure 4-23. Edit ROW Detail

3 If you want to collapse the *Selected ROWs* panel to view more of the *Edit ROW Detail* grid, click **Selected ROWs**. To expand the panel, click **Selected ROWs** again (Figure 4-23, page 159).

4 Based on the grid you want to add the *Attached Document* field, click the **Information** Information or **Maintenance** Maintenance tab if either of these grids is not visible.

5 Click the **Customize** tab Customize to view the *Layouts* page (Figure 4-24, page 160).

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

7 Double-click **All Fields** in the left pane of the window to view a list of fields available for selection.

8 Add the field *ROW Attached Documents* in the layout theme. Double-click **ROW Attached Documents** in the left pane of the *Layouts* page to move it to the right pane. Add other fields as required. The layout theme includes all fields listed in the right pane (Figure 4-24).

9 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.

10 Click **Save and Close** to save changes and return to the grid.

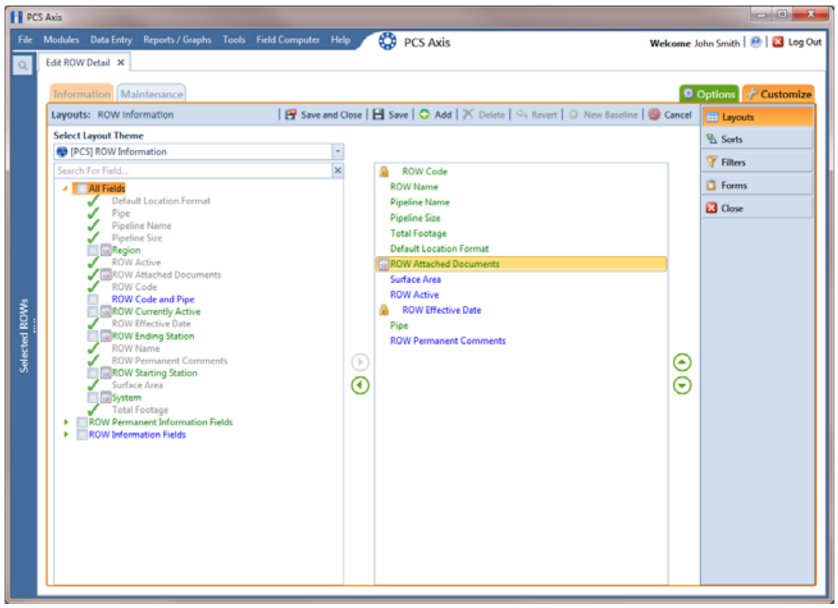

Figure 4-24. Layouts

Attaching a Document to a Pipeline Record

Complete the following steps to attach a document to a pipeline record in the *Information* or *Maintenance* grid of *Edit ROW Detail*:

1 Select one or more pipeline segments you want to work with in the *Select ROWs* window. Click **Save** to close the window.

2 Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window (Figure 4-25).

3 If you want to collapse the *Selected ROWs* panel to view more of the *Edit ROW Detail* grid, click **Selected ROWs**. To expand the panel, click **Selected ROWs** again.

4 If you want to attach a document to a pipeline record in the *Information* grid, click the **Information** tab if the grid is not visible.

To attach a document to a pipeline record in the *Maintenance* grid, click the **Maintenance** tab to display the *Maintenance* grid.

5 Click the edit icon in the **ROW Attached Document** field for the pipeline record you plan to attach a document (Figure 4-25).

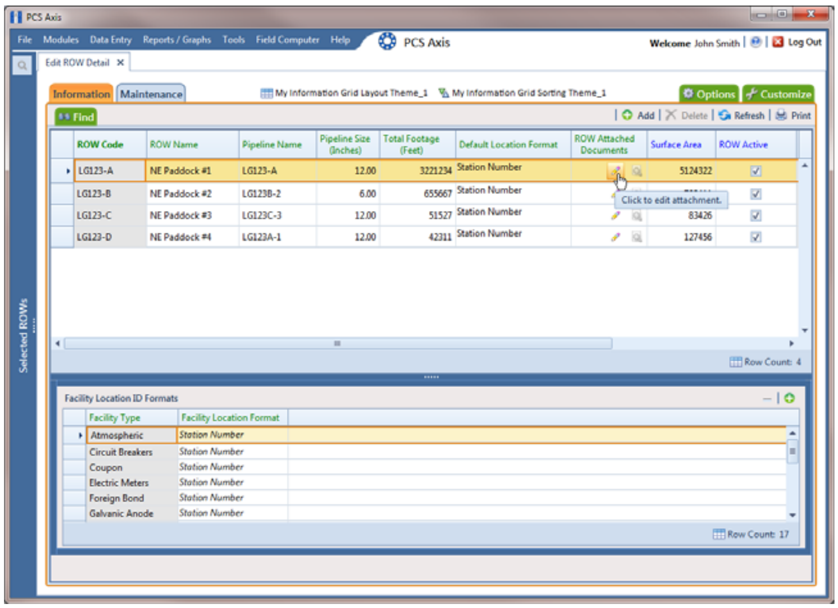

Figure 4-25. Edit ROW Detail

6 When the *Maintain Attached Documents* dialog box opens, click **Attach** and then select one of the following options (Figure 4-26, page 162):

- **Link Document**: Select *Link Document* if you plan to link to a document on a local computer or company network, or want to add a link to a webpage on the Internet. Then continue with **step 7** (page 162) or **step 8** (page 163).
- **Embedded Document**: Select *Embedded Document* if you want to store a copy of an attached document in the PCS Axis database. Then continue with **step 9** (page 164).

NOTE: Storing copies of attached documents in the database increases the size of the database.

---

7 If you selected *Link Document* in **step 6** and want to link to a file on a local computer or company network, follow these steps (Figure 4-26):

a Click the ellipsis button **...** in the **Document** field to open the *Link File* dialog box. Then navigate to the file and select it. Click **Open** to link to the file and close the dialog box.

b Type a description for the linked file in the **Description** field of the *Maintain Attached Documents* dialog box. When a description is not provided, PCS Axis uses the filename of the linked document as the description.

NOTE: A list of attached documents display in the dialog box. Selecting an item in the list displays its location in the *Document* field.

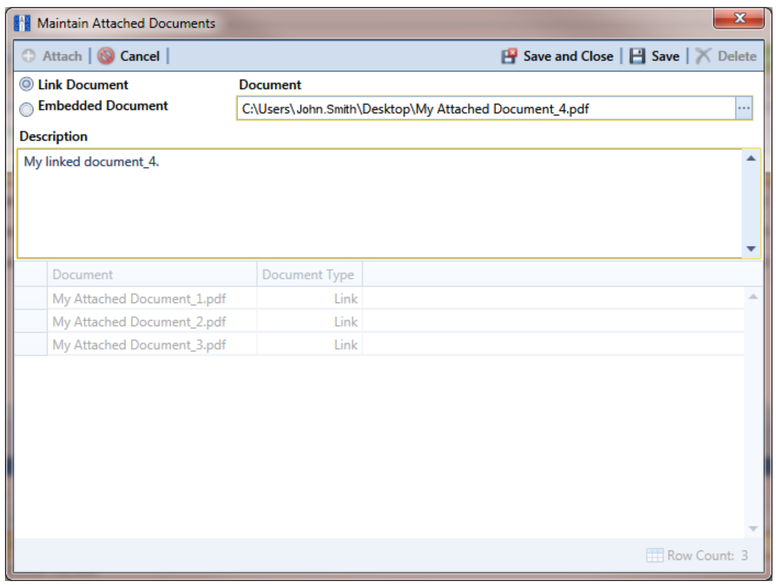

Figure 4-26. Maintain Attached Documents

c Click **Save and Close** to save changes and close the dialog box. When the following message displays click **OK**:

Linked Document won't be replicated. Do you want to continue?

NOTE: Linked documents are not copied and stored in the PCS Axis database as noted in the previous message. To store a copy of an attached document in the database, use the *Embedded Document* option instead.

---

8 If you selected *Link Document* in **step 6** and want to add a link to a webpage on the Internet, follow these steps (Figure 4-27):

a Type an Internet address in the **Document** field. For example, type http://www.aiworldwide.com in the field.

b Type a description for the link in the **Description** field. When a description is not provided, PCS Axis uses the Internet address in the *Document* field as the description.

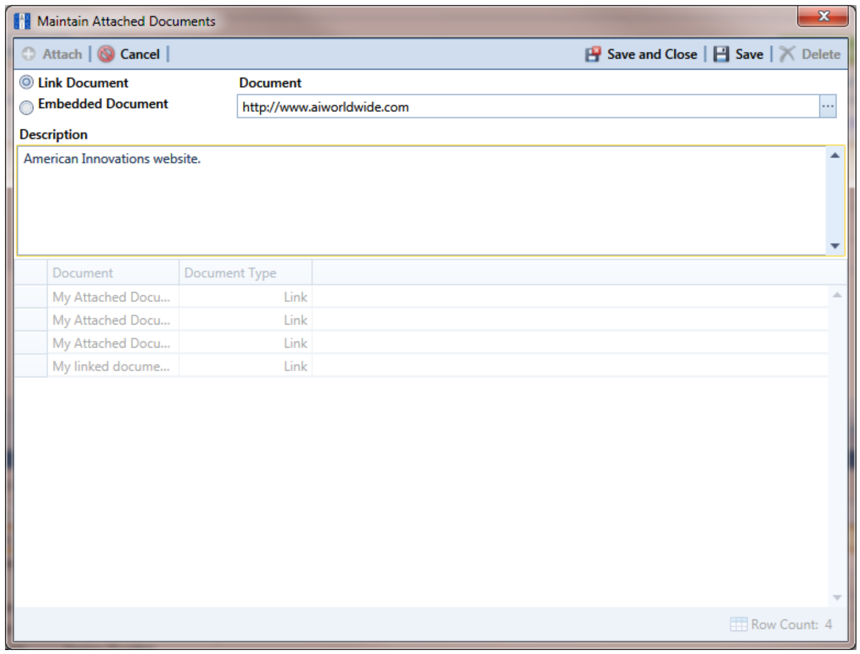

Figure 4-27. Maintain Attached Documents

c Click **Save and Close** to save changes and close the dialog box. When the following message displays click **OK**:

Linked Document won't be replicated. Do you want to continue?

NOTE: Linked documents are not copied and stored in the PCS Axis database as noted in the previous message. To store a copy of an attached document in the database, use the *Embedded Document* option instead.

---

9 If you selected *Embedded Document* in **step 6**, complete the following steps (Figure 4-28):

a Click the ellipsis button **...** in the **Document** field to open the *Embed File* dialog box. Then navigate to the file and select it. Click **Open** to embed a copy of the file and close the dialog box.

b Type a description for the embedded file in the **Description** field. If a description is not provided, PCS Axis uses the filename of the embedded file as the description.

NOTE: A list of attached documents display in the dialog box. Selecting an item in the list displays its location in the *Document* field.

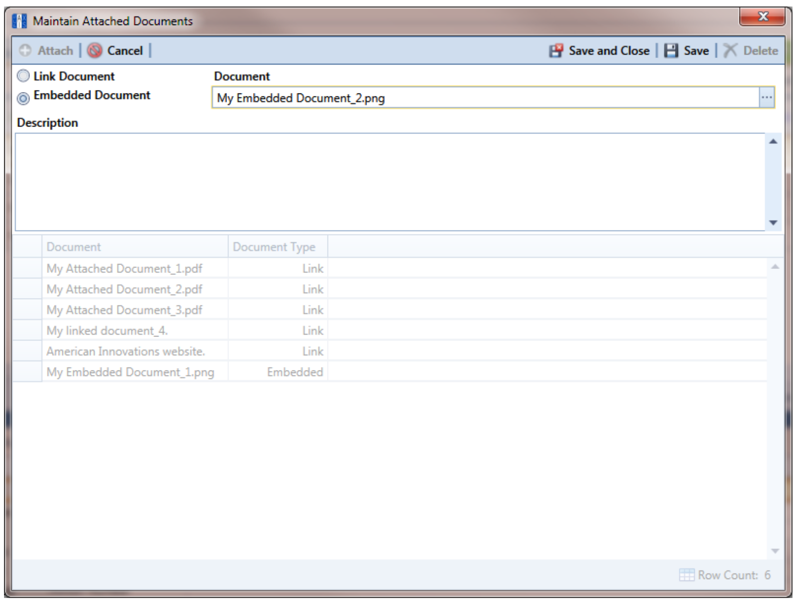

Figure 4-28. Embedded Document

c Click **Save and Close** to save changes and close the dialog box. When the following message displays click **OK**:

Local changes made to embedded documents won't be saved into PCS. Do you want to continue?

NOTE: Editing an embedded document applies changes only to the copy stored in the PCS Axis database; changes do not apply to the source file stored outside of PCS Axis. Likewise, editing a source file applies changes only to the source file, not the copy stored in PCS Axis.

Viewing an Attached Document

If the file type of an attached document is associated with a default software program on the local computer, you can preview the file in the *Preview Attached Documents* window. Additionally, clicking *Open* opens the attached document for editing or viewing purposes.

To view or open an attached document, follow these steps:

1 Select one or more pipeline segments you want to work with in the *Select ROWs* window. Click **Save** to close the window.

2 Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window (Figure 4-29).

3 If you want to collapse the *Selected ROWs* panel to view more of the *Edit ROW Detail* grid, click **Selected ROWs**. To expand the panel, click **Selected ROWs** again.

4 Open the grid that includes the pipeline record with the attached document by clicking either the **Information** Information or **Maintenance** Maintenance tab.

5 Click the preview icon for the pipeline record with the attached document you want to view.

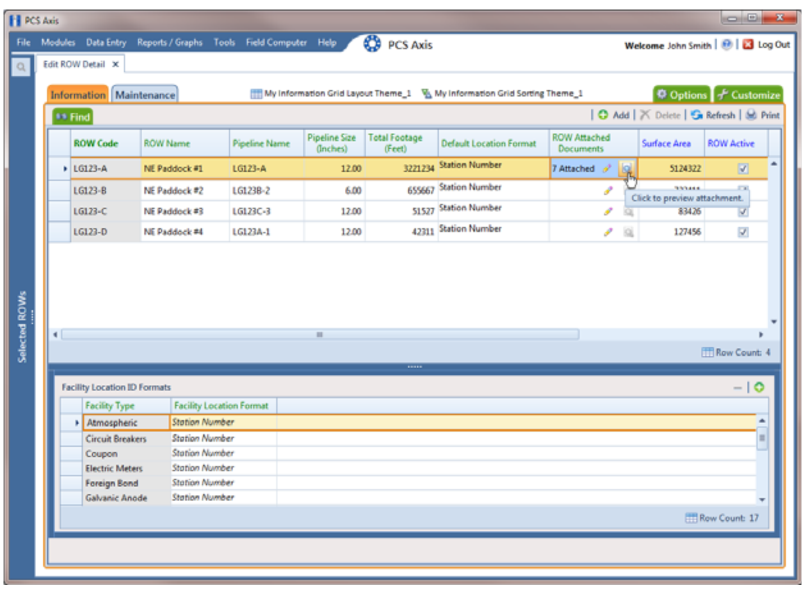

Figure 4-29. Edit ROW Detail

6 Select a file in the list on the left side of the window to view the file in the *Preview Attached Documents* window (Figure 4-30).

7 If the file type of the attached document is associated with a default software program on the local computer, click **Open** to open the file.

8 Click the close button to close the *Preview Attached Documents* window.

NOTE: When you open and then edit an embedded document, changes apply only to the copy stored in the PCS Axis database; changes do not apply to the source file stored outside of PCS Axis. Likewise, editing the source file applies changes to the source file, not the copy stored in the PCS Axis database.

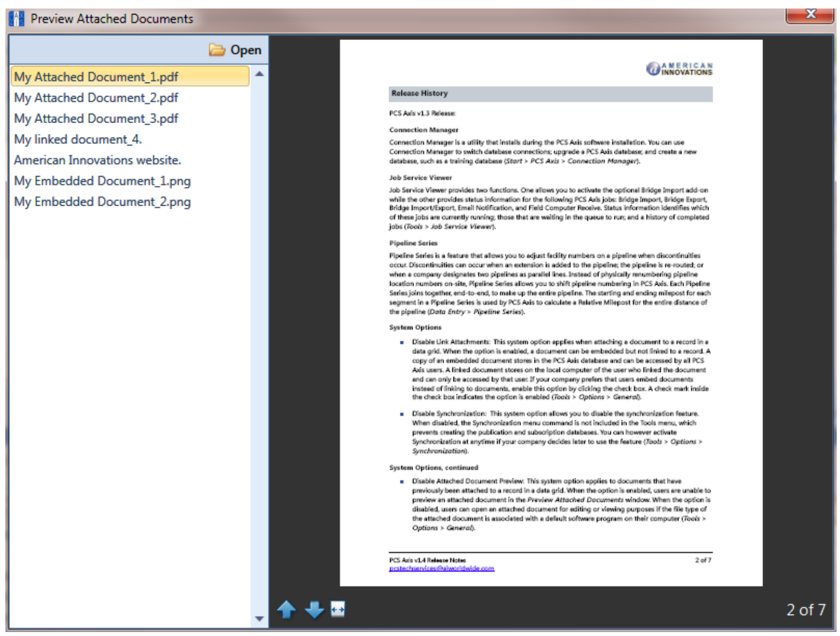

Figure 4-30. Preview Attached Documents

Working with Themes and Filter Groups

A theme is a group of named settings saved for later use, such as 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] ROW Information**.

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 *Edit ROW Detail* grid. 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 in the *Edit ROW Detail* grid. 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 to the grid, 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 an optional filter group in the *Information* and *Maintenance* grids of *Edit ROW Detail*. Topics include those in the following list:

- *Adding a Layout Theme*
- *Adding a Sort Theme* (page 172)
- *Adding an AND Filter Group* (page 175)
- *Adding an OR Filter Group* (page 178)
- *Editing and Arranging Filters and Filter Groups* (page 180)

NOTE: Also see *Filtering Data in a Grid* (page 183) for information about filtering the data output in a data entry grid.

Adding a Layout Theme

A layout theme is a group of fields that determine which fields are available for use in the *Information* and *Maintenance* data grid of *Edit ROW Detail*. Adding a new *Layouts* theme allows you to choose which fields to include in the data grid and then save the layout as a theme for later use.

IMPORTANT: If you are working with the optional *Telluric Compensation* feature, you can add a layout theme that includes the required field *Telluric Compensation Required*. This field must be enabled in the *Information* data grid of *Edit ROW Detail* for each pipeline segment requiring telluric compensation.

To add a layout theme for the *Information* or *Maintenance* data entry grid in *Edit ROW Detail*, follow these steps:

1 Select one or more pipeline segments in the *Select ROWs* window. Click **Save** to close the window (Figure 4-31).

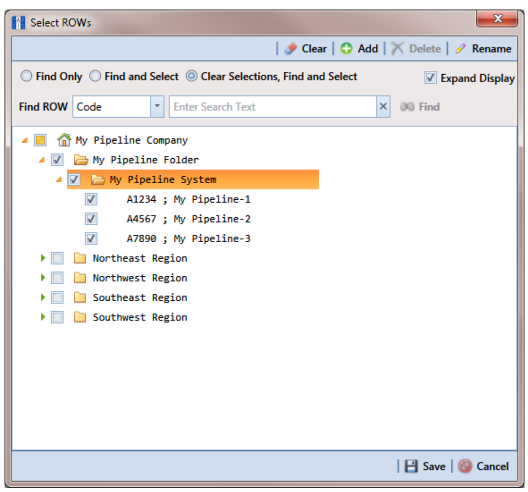

Figure 4-31. Select ROWs

2 Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window. If you want to collapse the *Selected ROWs* panel to view more of the *Edit ROW Detail* grid, click **Selected ROWs**. To expand the panel, click **Selected ROWs** again (Figure 4-32, page 169).

3 To add a layout theme for the *Information* grid, click the **Information** tab Information if the grid is not visible. Click the **Maintenance** tab Maintenance to display the *Maintenance* grid if you want to create a layout theme for this grid.

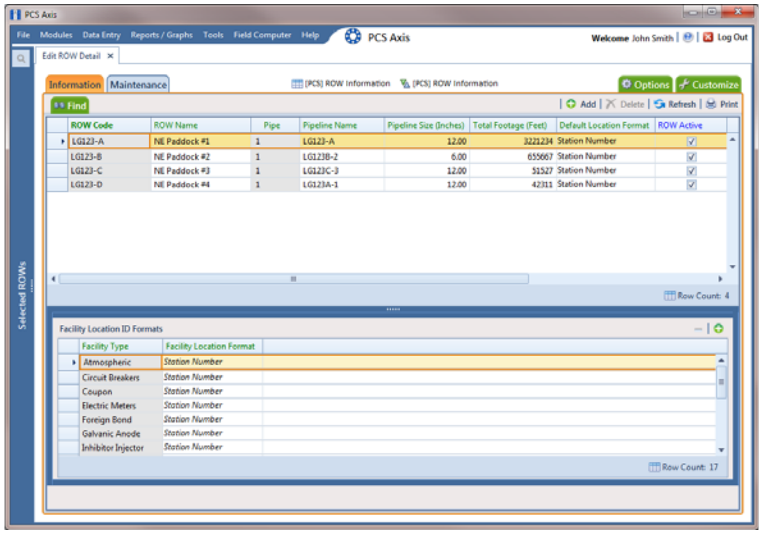

Figure 4-32. Edit ROW Detail

4 Click the **Customize** tab Customize then **Add** to open the *New Layout Theme* dialog box. The following figure shows an example when adding a layout for the *Information* grid (Figure 4-33).

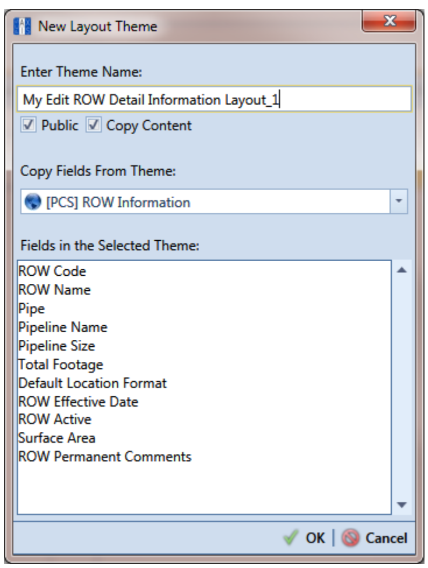

Figure 4-33. New Layout Theme

5 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.

NOTE: 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.

---

6 Select a layout theme with fields you want to copy to the new layout theme. Click the **Copy Content** check box and then click the down arrow in **Copy Fields From Theme** and select a theme in the selection list.

7 Click **OK** to save changes and return to the *Layouts* page (Figure 4-34).

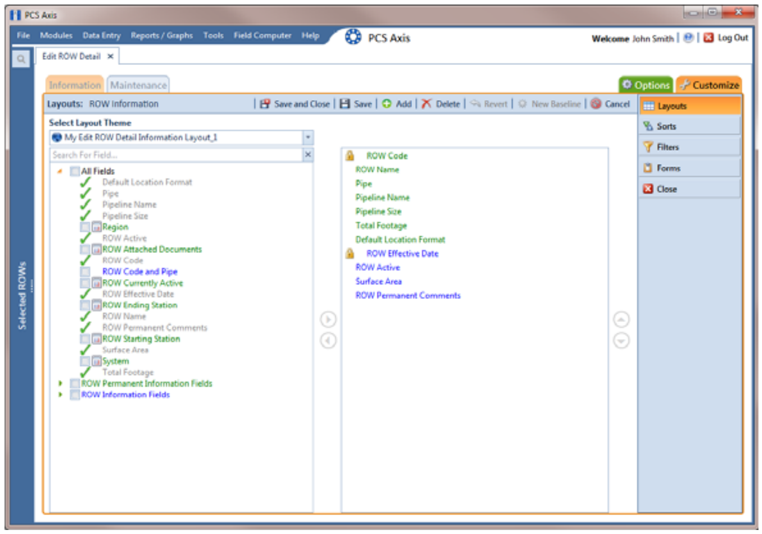

Figure 4-34. Layouts

8 Complete the following steps in the *Layouts* page 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 **All 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 If telluric compensation is required for the selected pipeline segment(s), add the field labeled **Telluric Compensation Required** in the layout theme.

d 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.

NOTE: Fields with a lock icon are required and cannot be removed from the theme, such as **ROW Code** shown in the previous example (Figure 4-34, page 170).

---

9 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.

10 Click **Save** to save changes.

11 To apply the new layout theme to the data entry grid:

- **a** Click the **Options** tab Options to open the options page (Figure 4-35).
- **b** Click the down arrow in the field **Select Layout Theme** and select the new layout theme in the selection list.
- **c** Click **Apply** to save changes and return to the data entry grid.

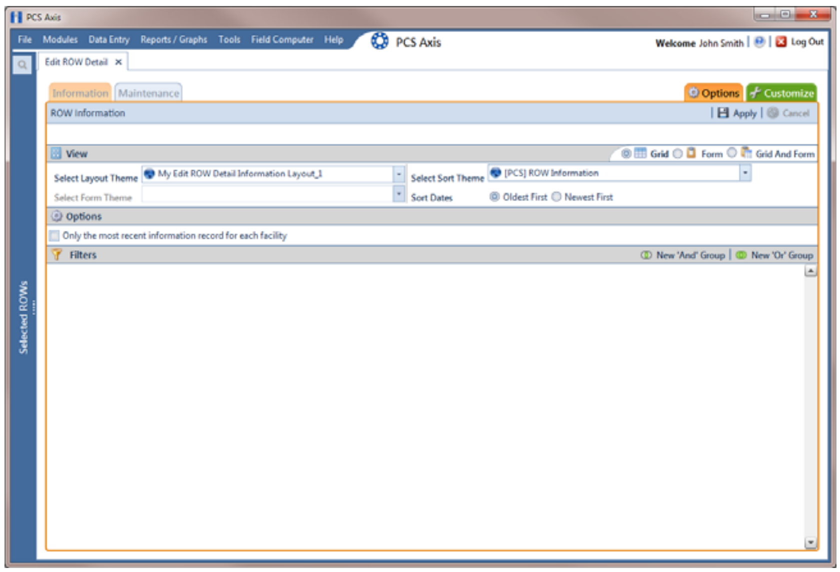

Figure 4-35. Options

12 If telluric compensation is required for the selected pipeline segment(s), click the **Telluric Compensation Required** check box for each pipeline segment requiring compensation.

A check mark inside the check box indicates the option is enabled. To disable the option, click the check box again to remove the check mark.

Adding a Sort Theme

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

To add a sort theme, follow these steps:

1. Select one or more pipeline segments in the *Select ROWs* window. Click **Save** to close the window (Figure 4-31, page 168).
2. Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window (Figure 4-32, page 169).

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.

---

3. To add a sort theme for the *Information* grid, click the **Information** tab Information if the grid is not visible. Click the **Maintenance** tab Maintenance to display the *Maintenance* grid if you want to create a sort theme for this grid.
4. Click the **Customize** tab Customize then the **Sorts** button Sorts to open the *Sorts* page (Figure 4-36).

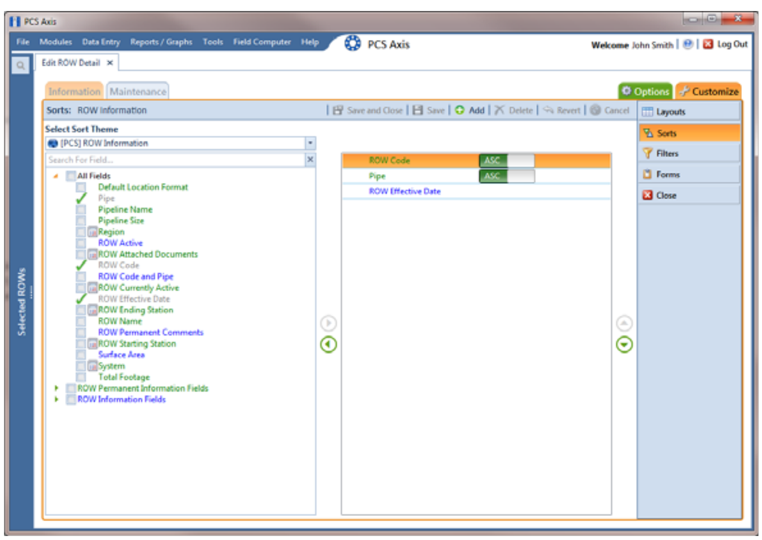

Figure 4-36. Sorts

5 Click **Add** to open the *New Sort Layout* dialog box (Figure 4-37).

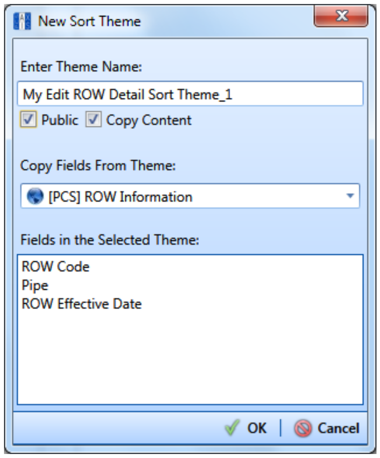

Figure 4-37. New Sort Layout

6 Type a name for the sort 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 sort theme saves as a *private* theme.

NOTE: 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.

---

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

8 Click **OK** to save changes and return to the *Sorts* page (Figure 4-38, page 174).

9 Complete the following steps in the *Sorts* page to add and remove fields in the new sorting 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 **All 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.

10 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.

11 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.

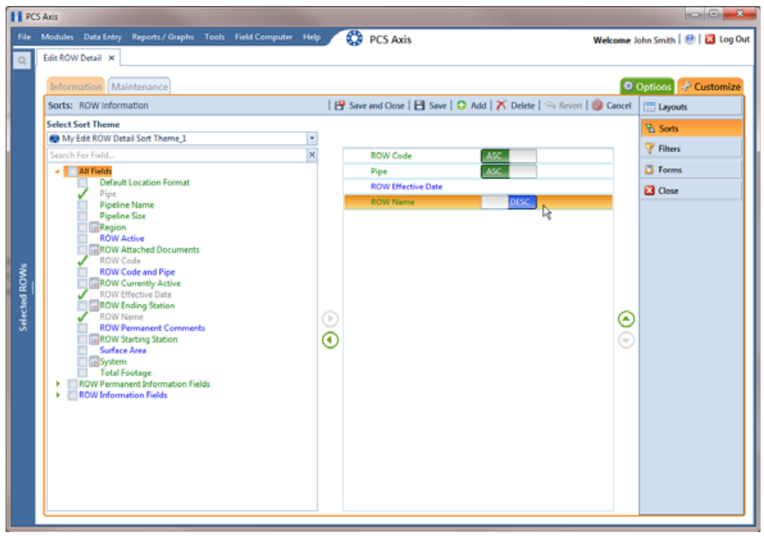

Figure 4-38. Sorts

12 Click **Save** to save changes.

13 To apply the new sort theme to the data entry grid, follow these steps:

a Click the **Options** tab Options to open the options page (Figure 4-39, page 175).

b Click the down arrow in the field **Select Sort Theme** and select the new sort theme in the selection list.

c Click **Apply** to save and apply changes and then return to the data entry grid. To cancel changes, click the **Options** tab Options or **Cancel** to return to the grid.

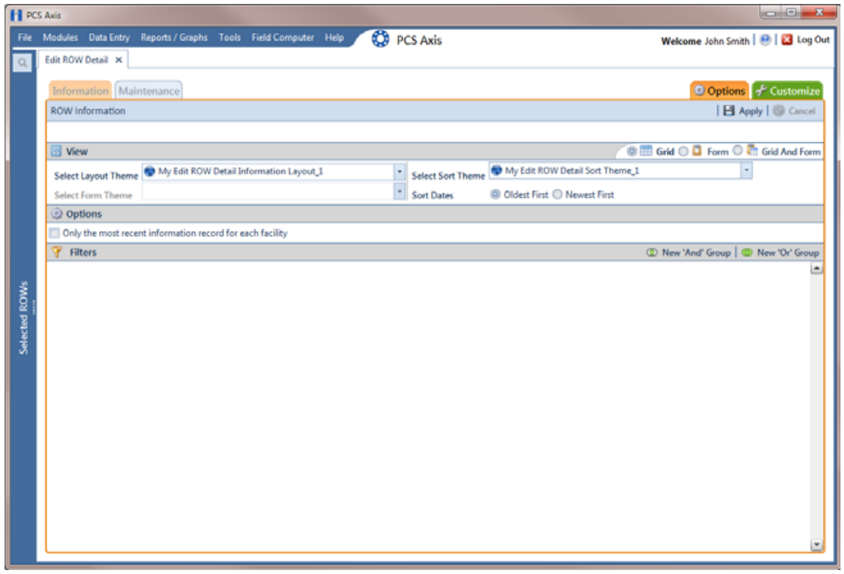

Figure 4-39. Options

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 *Edit ROW Detail* grid. 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. Click **Save** to close the window (Figure 4-31, page 168).

2. Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window (Figure 4-32, page 169).

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.

---

3. Select the grid you want to work with by clicking the **Information** tab Information or the **Maintenance** tab Maintenance.

4. Click the **Customize** tab Customize then the **Filters** button Filters to open the *Filters* page (Figure 4-40, page 176).

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

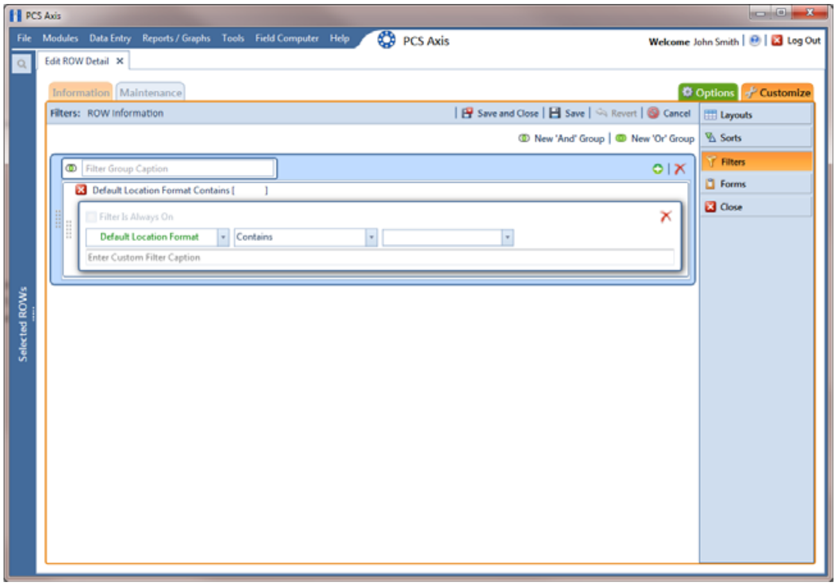

Figure 4-40. Filters

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 you want the filter to remain on for all sessions of the data entry grid, select the check box **Filter is Always On**. When this check box is not selected, toggle the filter on and off in the *Options* page using the filter's check box.

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

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

- **a** Click **Add** to open another filter properties group box. Then click the edit icon to display selection fields.
- **b** Type a name for the filter in the field **Enter Custom Filter Caption**. Then repeat **step 7** through **step 9** to set up filter criteria.

11 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.

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

---

12 Click **Save**.

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

13 To apply one or more custom filter groups to the data entry grid of *Edit ROW Detail*, follow these steps (Figure 4-41, page 177):

- **a** Click the **Options** tab Options to open the options page.
- **b** Click the check box for each filter you want to apply.
- **c** Click **Apply** to save changes and return to the data entry grid. To cancel changes, click the **Options** tab Options or **Cancel** to return to the data entry grid.

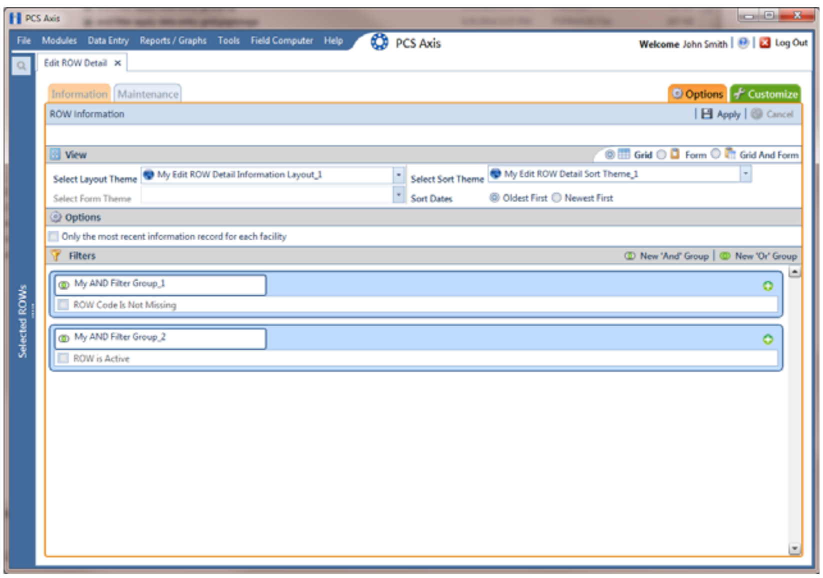

Figure 4-41. Options

Adding an OR Filter Group

An OR filter group is a named set of one or more filters that affect the data output of a report. 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. Click **Save** to close the window (Figure 4-31, page 168).

2 Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window (Figure 4-32, page 169).

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.

---

3 Select the grid you want to work with by clicking the **Information** tab Information or the **Maintenance** tab Maintenance.

4 Click the **Customize** tab Customize then the **Filters** button Filters to open the *Filters* page (Figure 4-42).

5 Click **New 'Or' Group** to open the filter properties group box.

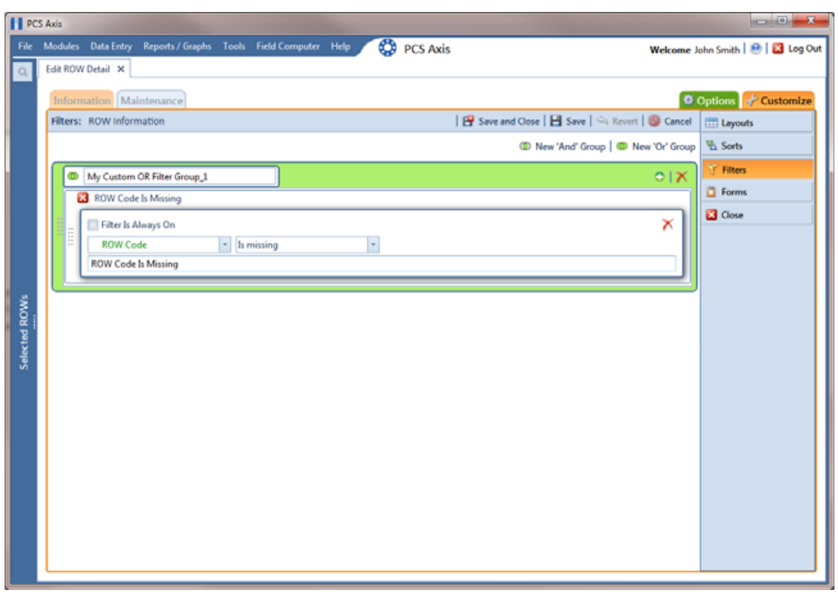

Figure 4-42. Filters

6 Type a name for the filter group in the field **Include records that match any of these conditions** (Figure 4-42, page 178).

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

8 If you want the filter to remain on for all sessions of the data entry grid, select the check box **Filter is Always On**. When this check box is not selected, toggle the filter on and off in the *Options* page using the filter's check box.

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

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

- **a** Click **Add** to open another filter properties group box.
- **b** Type a name for the filter in the field **Enter Custom Filter Caption**. Then repeat **step 7** and **step 8** to set up filter criteria.

11 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.

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

---

12 Click **Save**.

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

---

13 To apply one or more custom filter groups to the data entry grid of *Edit ROW Detail*, follow these steps (Figure 4-43, page 180):

- **a** Click the **Options** tab Options to open the options page.

b Click the check box for each filter you want to apply.

c Click **Apply** to save changes and return to the data entry grid. To cancel changes, click the **Options** tab Options or **Cancel** to return to the data entry grid.

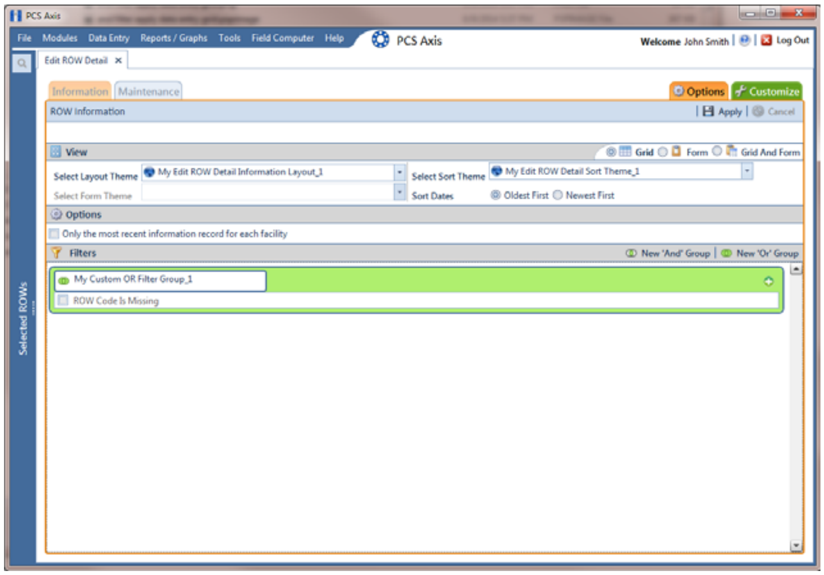

Figure 4-43. Options

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. Click **Save** to close the window (Figure 4-31, page 168).

2 Click **Data Entry** > **Edit ROW Detail** to open the *Edit ROW Detail* window (Figure 4-32, page 169).

3 Select the grid you want to work with by clicking the **Information** tab Information or the **Maintenance** tab Maintenance.

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

5 Click the edit icon to display a filter's property settings.

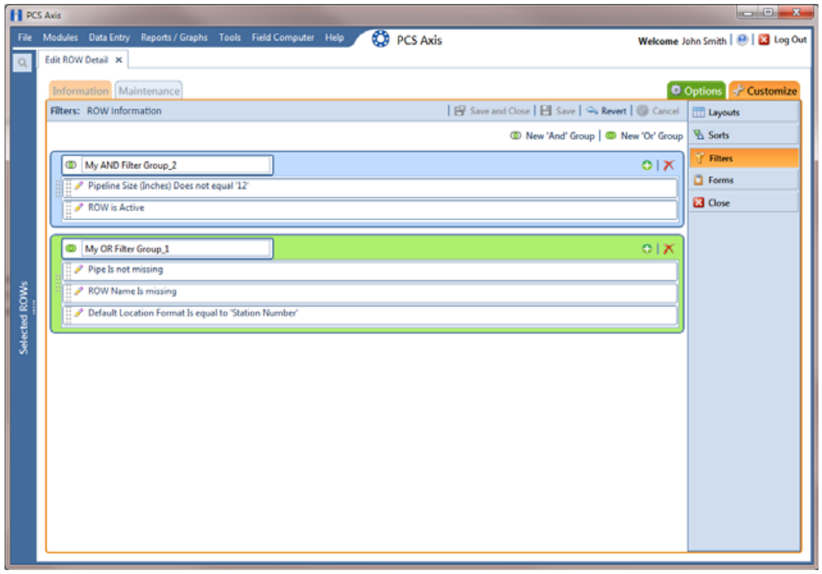

Figure 4-44. Filters

6 To delete a filter in a filter group, click the filter's delete button (Figure 4-45). Then click **Yes** 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.

---

12 Click **Save and Close** to save changes and return to the data entry grid.

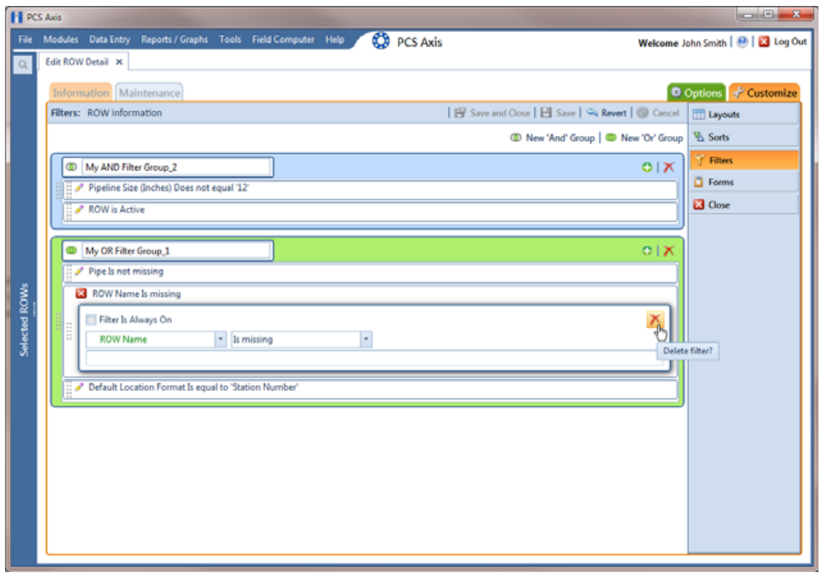

Figure 4-45. Filters

Filtering Data in a Grid

Information in this section explains how to filter the data output in any data entry grid in *Edit ROW Detail*. It includes a description of the options and filters available in the *Options* page when working with the *Information* and *Maintenance* grids. Filtering data allows you to work with only those records you are interested seeing in the grid.

Topics in this section include those in the following list:

- *Filtering Data in the Information Grid*
- *Filtering Data in the Maintenance Grid* (page 184)

Filtering Data in the Information Grid

To filter the data output in the *Information* grid of *Edit ROW Detail*, follow these steps:

1 Click **Data Entry** > **Edit ROW Detail**.

2 Click the **Information** tab, then the **Options** tab to open the *Options* page (Figure 4-46).

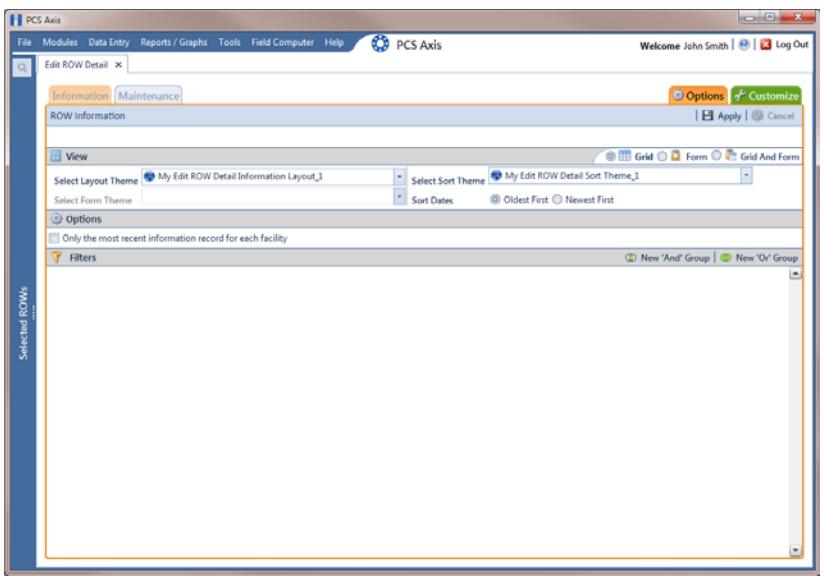

Figure 4-46. Options/Information Grid

3 To include only the most recent information record for each pipeline, select the check box **Only the most recent information record for each facility**. This option uses the *Effective Date* to filter the data output.

NOTE: When using the *Filters* group box to apply additional filters to the data output, the most recent information record is found first, and then all other filters are applied to the data output. For more information about filters, see *Adding an AND Filter Group* (page 175) and *Adding an OR Filter Group* (page 178).

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4 Click **Apply** to save and apply changes and then return to the *Information* grid. To cancel changes, click the **Options** tab Options or **Cancel** to return to the grid.

Filtering Data in the Maintenance Grid

To filter the data output in the *Maintenance* grid of *Edit ROW Detail*, follow these steps:

1 Click **Data Entry** > **Edit ROW Detail**.

2 Click the **Maintenance** tab Maintenance, then the **Options** tab Options to open the *Options* page (Figure 4-47).

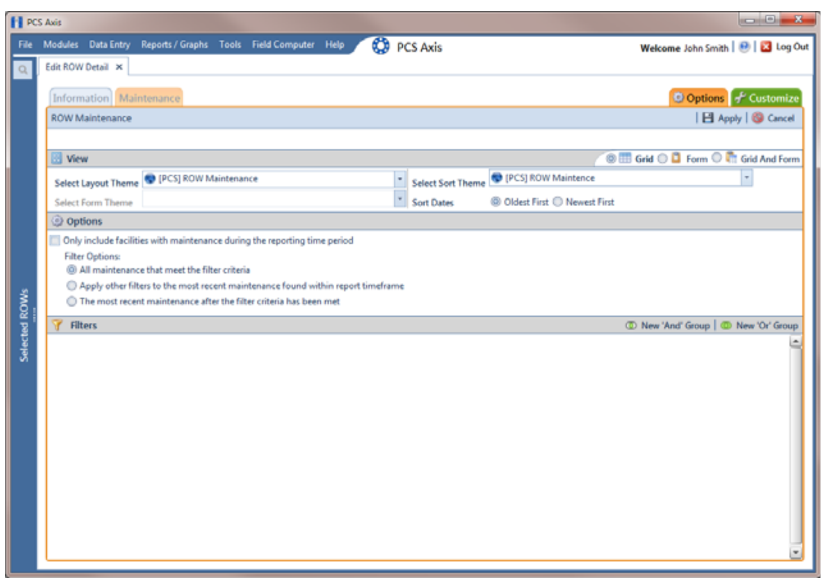

Figure 4-47. Options/Maintenance Grid

3 Review the following descriptions and then select one or more filter options as required:

- *Only include facilities with maintenance during the reporting time period*: The data output for this option only includes those maintenance records that meet the filter criteria defined for a particular date or date range. Filter criteria is defined by filter settings in the *Filters* group box for any of the following time period fields: *Effective Date*, *Repair Found Date*, *Repair Initiated Date*, and *Repair Corrected Date*.

- *All maintenance that meet the filter criteria*: This option includes all maintenance records in the data output that meet filter criteria based on filter settings in the *Filters* group box.

- *Apply other filters to the most recent maintenance found within the report timeframe*: This option finds the most recent maintenance record within the reporting time frame first, and then applies other filter settings to the data output. Filter criteria for both of these are defined in the *Filters* group box. Use any of the following fields when defining filter criteria for the reporting time frame: *Effective Date*, *Repair Found*, *Repair Initiated*, and *Repair Complete*.

- *The most recent maintenance after the filter criteria has been met*: The data output for this option includes the most recent maintenance record only for those pipeline records that meet all other filter criteria first. Filter criteria for both of these are defined in the *Filters* group box. Use any of the following fields when defining a time period for the most recent maintenance record: *Effective Date*, *Repair Found*, *Repair Initiated*, and *Repair Complete*.

NOTE: For more information about filters, see *Working with Themes and Filter Groups* (page 167).

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4 Click **Apply** to save and apply changes and then return to the *Maintenance* grid. To cancel changes, click the **Options** tab Options or **Cancel** to return to the grid.