

Using Survey Folder Maintenance

This section explains how to add, delete, and manage facility and continuous survey folders in *Survey Folder Maintenance*. The information is intended for users with *SysAdmin* security permissions unless noted otherwise. Topics in this section include those in the following list:

- *Working with a Facility Survey Folder* (page 193). Information applies to all modules except Indirect Survey Manager.
- *Working with a Continuous Survey Folder* (page 196). Information applies only to Indirect Survey Manager (ISM).

Working with a Facility Survey Folder

A facility survey folder is a group of inspection readings in a facility survey. PCS Axis uses facility survey folders to organize and track facility survey data. Facility survey folders are used throughout PCS Axis, including data entry grids, reports, Bridge, and Field Computer. You can also use a facility survey folder as an optional filter in a grid or report to easily retrieve a specific set of inspection records.

Names of facility survey folders typically follow regulatory requirements for surveying pipeline segments and facilities. For example, when you create an annual survey folder labeled *2012 Annual Survey*, you can then assign inspection readings to the facility survey folder throughout the year as they are completed. Names of facility survey folders are editable allowing you to name a survey folder using a naming convention that best suits your business needs. Examples of typical survey folder names include *2012 Feb Monthly Survey* and *2001-2010 Ten Year Survey* (Figure 6-1, page 194).

Continue with the following topics for information about how to add, delete, and manage a facility survey folder:


- *Adding a Facility Survey Folder* (page 193)
- *Deleting a Facility Survey Folder* (page 195)
- *Using a Facility Survey Folder* (page 195)

Adding a Facility Survey Folder

A facility survey folder is typically added in PCS Axis before entering inspection readings in a data entry grid or importing inspection readings using Bridge or Field Computer. Adding a survey folder requires that you enter a survey folder name; select a survey start date; and then select a survey frequency. Based on this information PCS Axis automatically calculates the survey end date.

If no survey folders exist when adding a new survey folder, PCS Axis names the survey folder using the current year, such as *2013 Annual Survey*. When other survey folders do exist, PCS Axis increments the year by 1. For example, if the latest annual survey folder is *2002 Annual Survey*, PCS Axis names the next new survey folder as *2003 Annual Survey*. Survey folder names are editable allowing you to name a survey folder based on your company's standards.

To add a survey folder, follow these steps:

- 1 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window (Figure 6-1).
- 2 Click the  **Add** button to add a row in the grid.

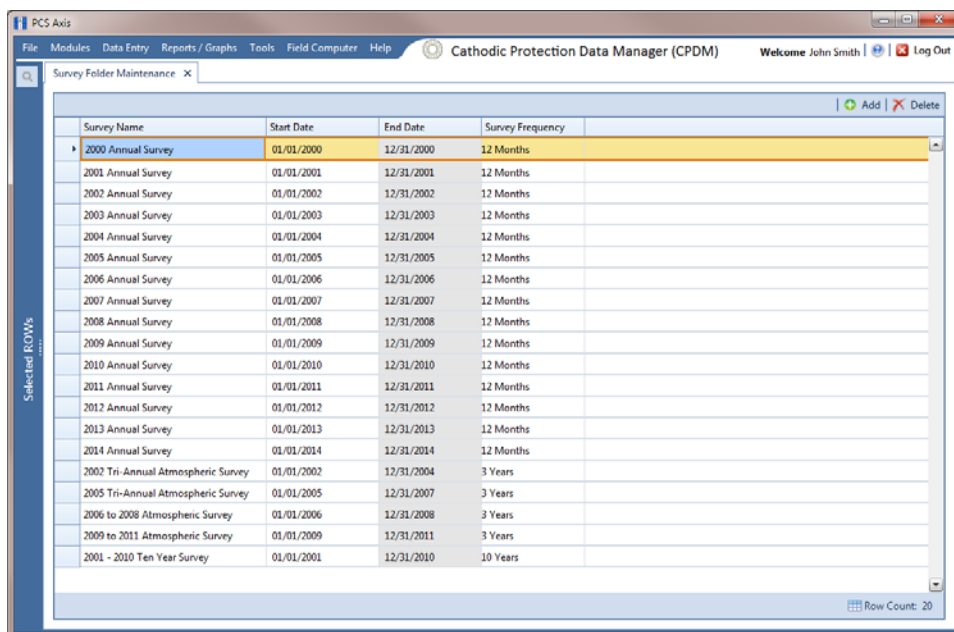


Figure 6-1. Survey Folder Maintenance

- 3 If you want to rename the newly added survey folder, type a name in the **Survey Name** field.
- 4 Type the survey start date in the **Start Date** field. Or, click the down arrow in the field to choose a date using a calendar.
- 5 Select a survey frequency in the field **Survey Frequency** field. Click the field to display a drop-down arrow, then click the drop-down arrow and select an option in the selection list.

The new survey folder is now available for use in data entry grids, reports, Bridge, Field Computer, and as an optional filter selection. For more information, see *Using a Facility Survey Folder* (page 195).

Deleting a Facility Survey Folder

Deleting a survey folder removes all references to the survey folder throughout PCS Axis. For example, when facility inspection records have been assigned to a survey folder you plan to delete, PCS Axis removes references to the survey folder for each inspection record assigned to the survey folder. Inspection records are not deleted however, only references to the survey folder are deleted.

Deleting a survey folder typically occurs when you want to clean up data that is no longer needed or when a survey folder has been created accidentally. A message displays listing all facility records assigned to the survey folder allowing you to either cancel the operation or delete the survey folder (Figure 6-2).

To delete a survey folder, follow these steps:

- 1 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window (Figure 6-1, page 194).
- 2 Select a survey folder in the grid, then click the **Delete** button.
- 3 When the *Delete* message displays, click **Yes** to delete the survey folder or **No** to cancel the operation (Figure 6-2).

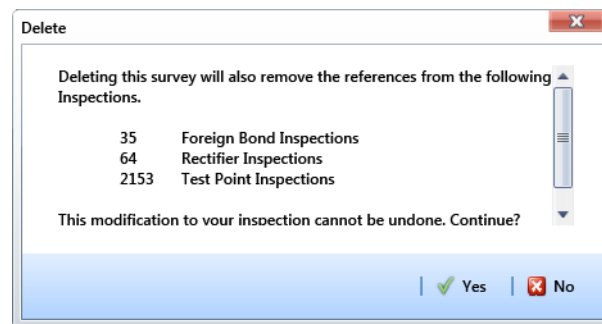


Figure 6-2. Example of Survey Folder Delete Message

Using a Facility Survey Folder

You can assign inspection readings to a survey folder in any of the following areas of PCS Axis:

- *Inspection data entry grid.* Assign an inspection record to a survey folder using the *Survey* field in the *Inspection* data entry grid.
- *Bridge import file.* Use the options in the *Add Data Item* group box to assign inspection readings to an annual and/or periodic survey folder. PCS Axis assigns inspections to the appropriate survey folder based on the survey inspection date.

- *Receiving survey files from the Allegro.* Use the *Options* group box in the *Field Computer Receive Data* window to assign inspection readings to a survey folder. Choosing *Automatic Assignment* allows PCS Axis to assign inspections to the appropriate survey folder based on the survey inspection date.
- *Filter option in the Inspection data entry grid.* To view a set of inspection records for a particular survey in the *Inspection* data entry grid, select a survey folder option in the *Filters* group box of the *Customize Options* page.
- *Filter option in Reports.* To view a set of inspection records for a particular survey in a report, select a survey folder option in the *Filters* group box of the *Options* page.

Working with a Continuous Survey Folder

A continuous survey folder is a container for a group of survey readings associated with a continuous survey, such as survey readings in a close interval (CI) survey or other type of above ground indirect survey. Continuous survey folders are used throughout PCS Axis when working with a data entry grid, report, or graph in the Indirect Survey Manager module. They allow PCS Axis to organize and track continuous survey readings.

Information in this section explains how to use the most common features of *Survey Folder Maintenance*. Topics include those in the following list. For information about other features, see *Working with Themes and Filter Groups* (page 203).

- *Adding a Continuous Survey Folder*
- *Deleting a Continuous Survey Folder* (page 200)
- *Using a Continuous Survey Folder* (page 202)
- *Working with Themes and Filter Groups* (page 203)

Adding a Continuous Survey Folder



A continuous survey folder must first be added in *Survey Folder Maintenance* before working with survey readings in an ISM data grid, report, or graph. Adding a continuous survey folder includes the following tasks:

- Choosing the type of continuous survey, such as CIS, AC CIS, DCVG, ACVG, ACCA, Soil Resistivity, or Pearson.

For a description of the different types of continuous surveys supported in PCS Axis, see *Appendix B* (see page 845).

- Providing the survey start date and survey name. These property settings allow you to identify the correct survey folder when adding survey readings or working with reports and graphs in ISM.
- As an option, providing the name of the surveyor and/or the vendor performing the survey.

To add a continuous survey folder, follow these steps:

- 1 Click the **Select ROWs** button  to open the *Select ROWs* window (Figure 6-3). Select the pipeline segment(s) with the facilities you want to work with, then click  **Save** to close the window.

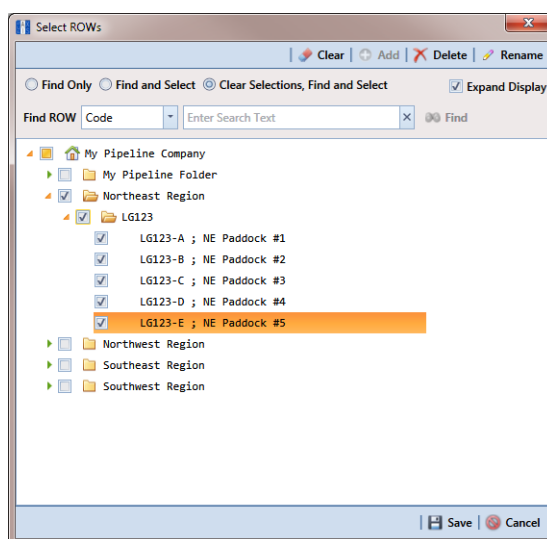


Figure 6-3. Select ROWs

- 2 Click **Modules > Indirect Survey Manager (ISM)** to open the ISM module.
- 3 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window (Figure 6-4).

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.

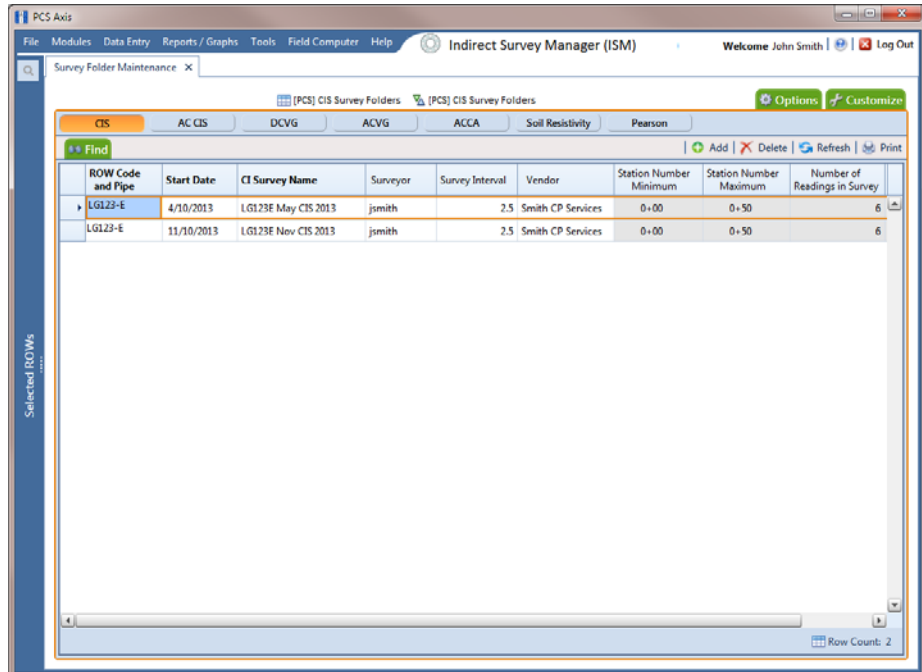



Figure 6-4. Survey Folder Maintenance

- 4 Click a button labeled with the type of continuous survey that you want to add a survey folder. For example, clicking the **CIS** button adds a survey folder for close interval survey readings (Figure 6-4).
- 5 Click the  **Add** button to open the *Add Record* dialog box (Figure 6-5, page 198).
- 6 Select the pipeline segment that you want to add a continuous survey folder. In the following example, pipeline segment *LG123-E* is selected.

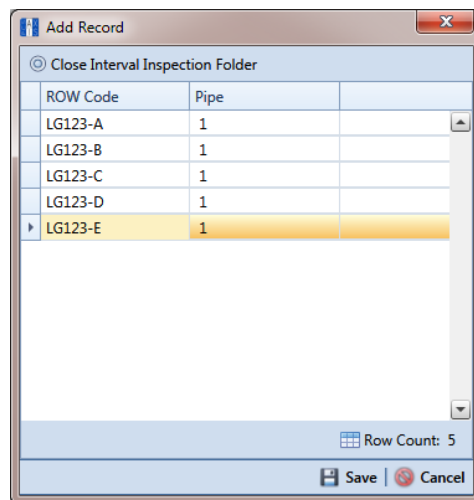




Figure 6-5. Add Record

- 7 Click  **Save** to display required fields for data entry. Required fields are identified with the  icon, such as *Start Date* and *CI Survey Name* in the next figure (Figure 6-6).
- 8 Type a survey start date in the **Start 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.
- 9 Type a name for the survey folder in the field CI Survey Name. The field accepts up to 50 alphanumeric characters.

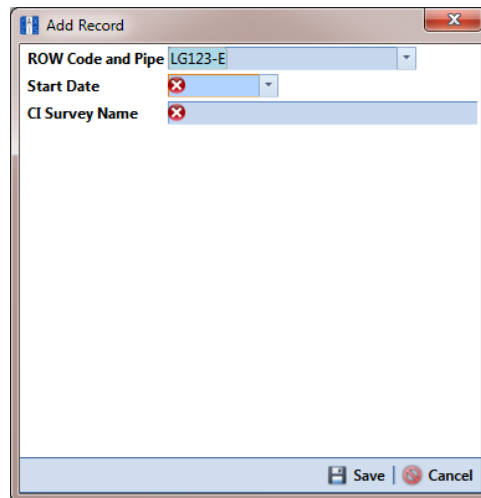




Figure 6-6. Add Record

- 10 Click  **Save** to close the *Add Record* dialog box and add a row of records in the grid for the new continuous survey folder (Figure 6-7).
- 11 Provide other information about the survey folder as needed. For example, type the surveyor's name in the **Surveyor** field; the survey interval in the **Survey Interval** field; and the name of the company performing the survey in the **Vendor** field.
- 12 Click  **Refresh** to update the grid.

The survey folder is now available for selection when working with survey readings in Edit ISM Data (*Data Entry > Edit ISM Data*), reports, and graphs.

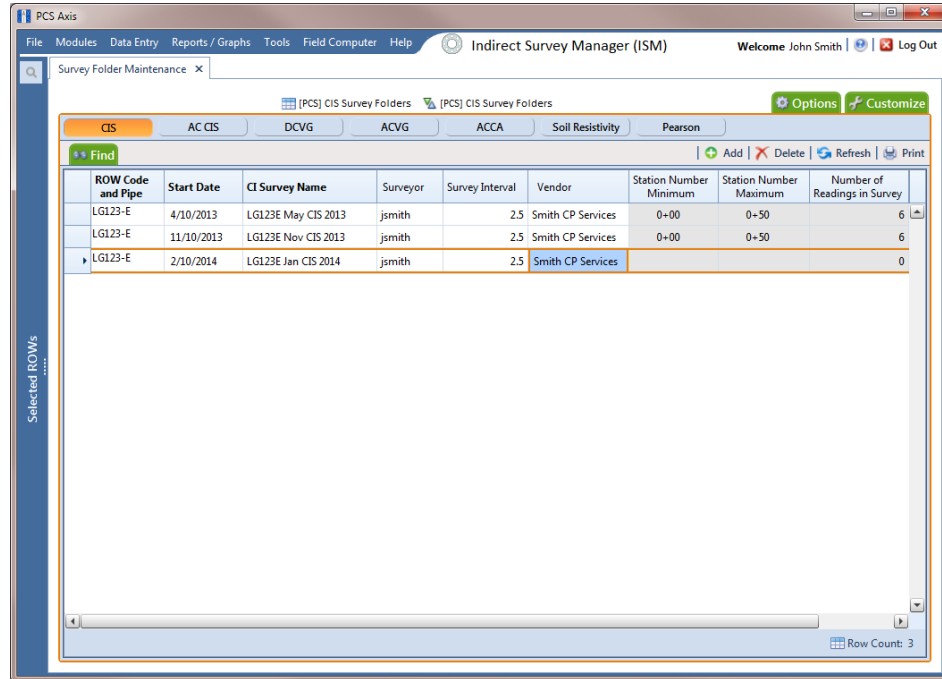




Figure 6-7. Survey Folder Maintenance

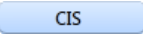
Deleting a Continuous Survey Folder

Deleting a continuous survey folder in *Survey Folder Maintenance* also deletes survey readings associated with the survey folder.

To delete a continuous survey folder, follow these steps:

- 1 Click the **Select ROWs** button  to open the *Select ROWs* window. Select the pipeline segment(s) associated with the continuous survey folder you want to delete. Then click  **Save** to close the window (Figure 6-3, page 197).
- 2 Click **Modules > Indirect Survey Manager (ISM)** to open the ISM module.
- 3 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window.

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 a button labeled with the type of continuous survey folder you want to delete. For example, click the **CIS** button  to delete the survey folder and associated survey readings for a close interval survey (Figure 6-7, page 200).

- 5 Select a pipeline segment in the grid that includes the continuous survey folder you want to delete. For example, the row of records for pipeline segment *LG123-D* are selected in the following figure (Figure 6-8, page 201).

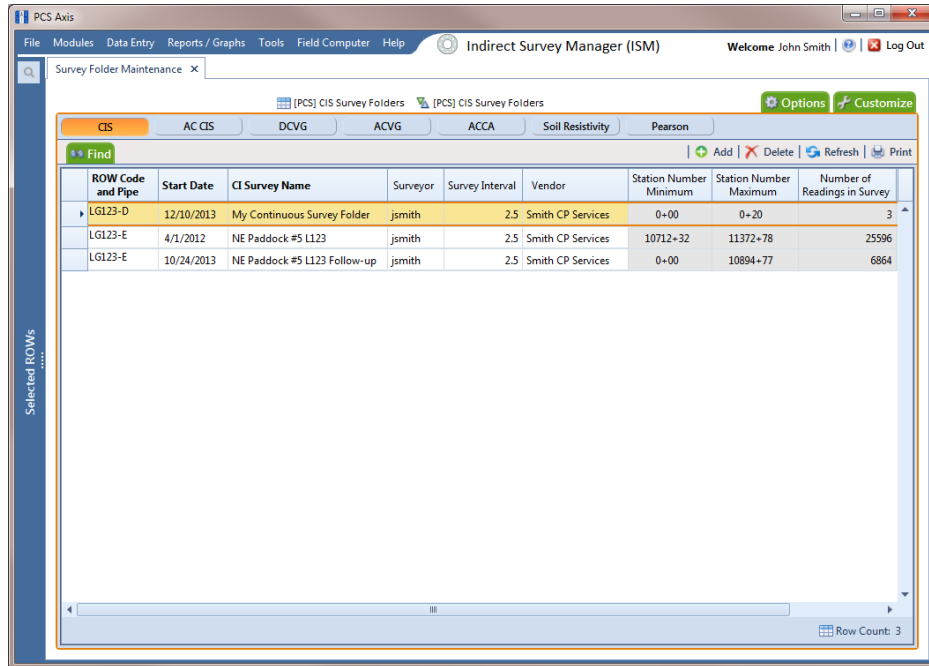


Figure 6-8. Survey Folder Maintenance

- 6 Click **Delete**. When the message *Delete Record* displays, click **Delete** again (Figure 6-9).

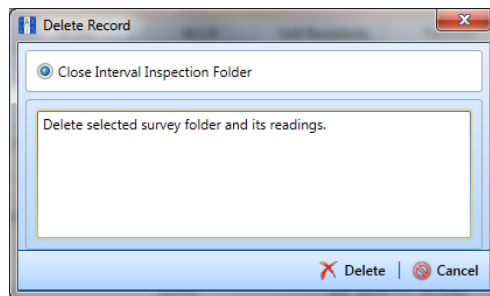



Figure 6-9. Delete Record

- 7 Click  **Yes** when a warning displays asking if you want to continue deleting the survey folder and associated survey readings (Figure 6-10).

The survey folder and associated survey readings are now deleted from PCS Axis.

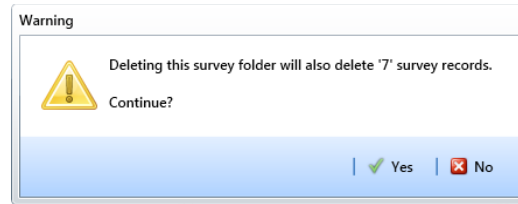


Figure 6-10. Warning


Using a Continuous Survey Folder

You can use a continuous survey folder in any of the following areas of the Indirect Survey Manager module:

- *Data entry grid.* Add survey readings in a continuous survey folder associated with a pipeline segment using Edit ISM Data (*Data Entry > Edit ISM Data*).
- *Filter option in Criteria Report.* View survey readings based on a survey folder selected in *Options* when working with a columnar *Criteria Report*.
- *Filter option in PCS Axis Inspections Graph.* View a graph of survey readings based on a survey folder selected in *Survey Selections* when working with a *PCS Axis Inspections Graph*.
- *Receiving survey files from the Allegro.* Use the *Options* group box in the *Field Computer Receive Data* window to assign survey readings to a continuous survey folder associated with a pipeline segment.

Working with Themes and Filter Groups

A theme is a group of named settings saved for later use, such as grid layout or sorting themes. 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] CIS Survey Folders**.

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 *Survey Folder Maintenance* 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 *Survey Folder Maintenance* 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 *Survey Folder Maintenance* grid. Topics include those in the following list:

- *Adding a Layout Theme* (page 204)
- *Adding a Sort Theme* (page 207)
- *Adding an AND Filter Group* (page 210)
- *Adding an OR Filter Group* (page 213)
- *Editing and Arranging Filters and Filter Groups* (page 216)

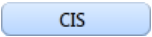


Adding a Layout Theme

A layout theme is a group of fields in a grid layout. Adding a new *Layouts* theme allows you to choose which fields you want to include in the grid layout and then save the layout as a theme for later use.

To add a layout theme in *Survey Folder Maintenance*, follow these steps:

- 1 Select one or more pipeline segments in the *Select ROWs* window. Click  **Save** to close the window (Figure 6-3, page 197).
- 2 Click **Modules > Indirect Survey Manager (ISM)** to open the ISM module.
- 3 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window.

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 a button labeled with the type of continuous survey that you want to add a layout theme. For example, click the **CIS** button  to add a layout theme for a continuous survey associated with close interval survey readings (Figure 6-8, page 201).
- 5 Click the **Customize** tab  then the  **Add** button to open the *New Layout Theme* dialog box (Figure 6-11).

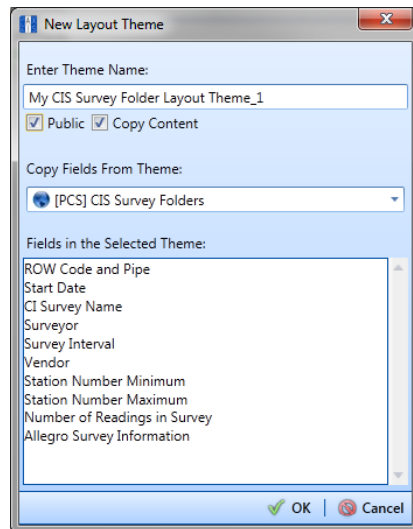



Figure 6-11. New Layout Theme

- 6 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.

- 7 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.
- 8 Click  **OK** to save changes and return to the *Layouts* page (Figure 6-12).

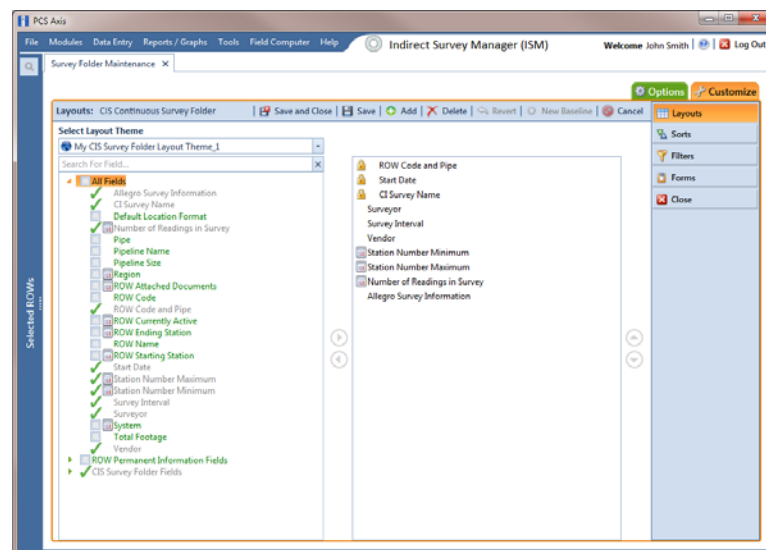








Figure 6-12. Layouts

- 9 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 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.

NOTE: Fields with a lock icon  are required and cannot be removed from the theme, such as  **ROW Code and Pipe** shown in the previous example (Figure 6-12, page 205).

- 10 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.

- 11 Click  **Save** to save changes.

- 12 To apply the new layout theme to the data entry grid in *Survey Folder Maintenance*, follow these steps:

- a Click the **Options** tab  to open the options page (Figure 6-13).
- b Click the down arrow in the field **Select Layout Theme** and select the new layout theme in the selection list.
- c Choose a method for sorting survey folders in the data entry grid based on the survey date in the *Start Date* field. Click **Oldest First** or **Newest First** in *Sort Dates* to sort survey folders with the oldest or newest survey *Start Date* first.
- d Click  **Apply** to save and apply changes. If you want to cancel changes instead, click  **Cancel**. PCS Axis closes the options page and returns to the *Survey Folder Maintenance* window.

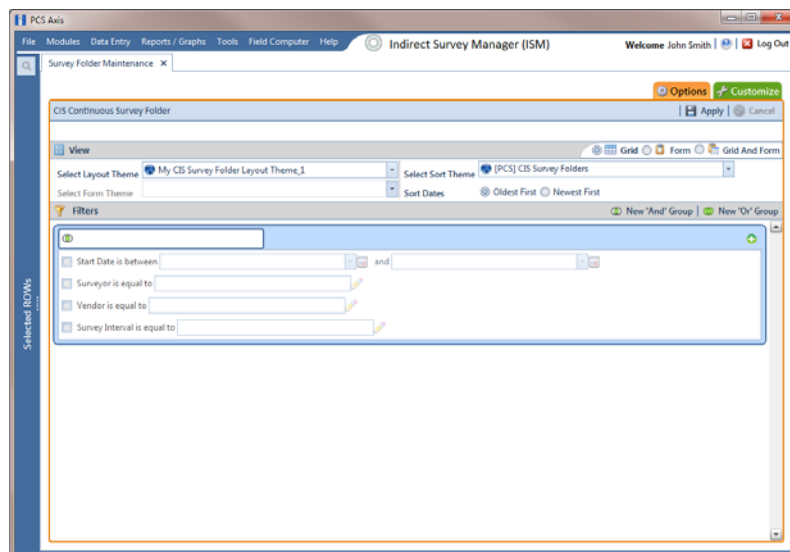



Figure 6-13. Options

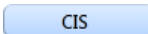

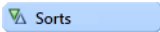
Adding a Sort Theme

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 for a continuous survey in *Survey Folder Maintenance*, follow these steps:

- 1 Select one or more pipeline segments in the *Select ROWs* window. Click  **Save** to close the window (Figure 6-3, page 197).
- 2 Click **Modules > Indirect Survey Manager (ISM)** to open the ISM module.
- 3 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window.

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 a button labeled with the type of continuous survey that you want to add a sorting theme. For example, click the **CIS** button  to add a sorting theme for a continuous survey associated with close interval survey readings (Figure 6-8, page 201).
- 5 Click the **Customize** tab  then the **Sorts** button  to open the *Sorts* page (Figure 6-14).

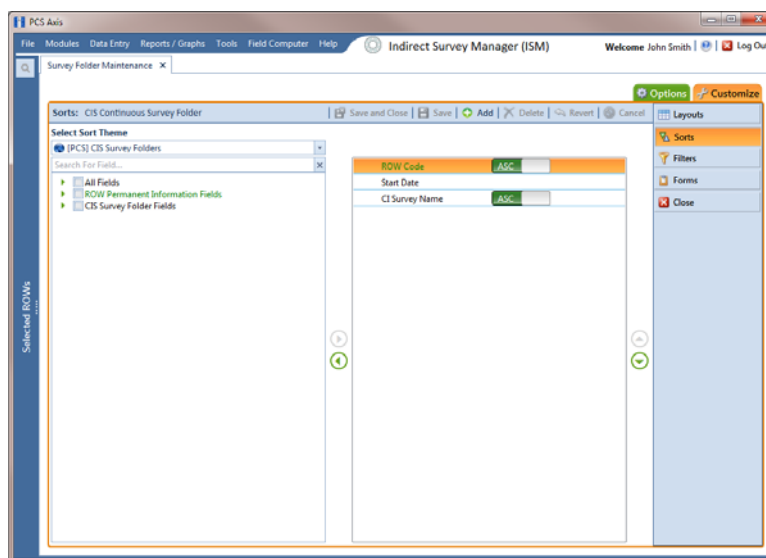


Figure 6-14. Sorts

- 6 Click the **+** **Add** button to open the *New Sort Theme* dialog box (Figure 6-15).

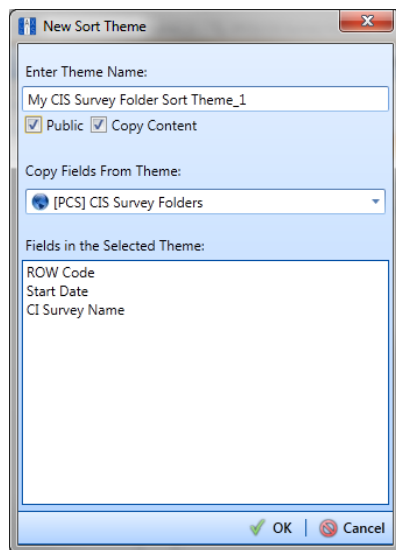


Figure 6-15. New Sort Theme

- 7 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.

- 8 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.
- 9 Click **OK** to save changes and return to the *Sorts* page (Figure 6-16, page 209).
- 10 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.

- 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** . To sort in descending order, click the toggle button to select **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.

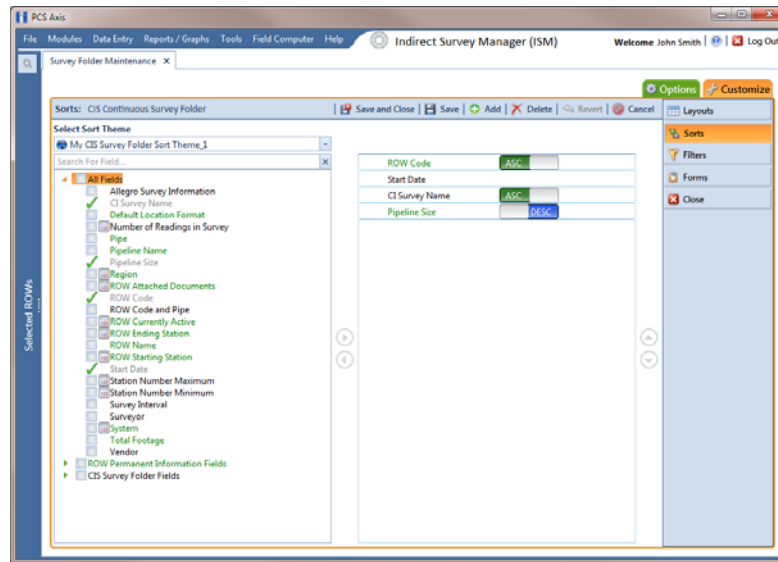


Figure 6-16. Sort Theme

- 13 Click **Save** to save changes.
- 14 To apply the new sort theme in the data entry grid of *Survey Folder Maintenance*, follow these steps:
 - a Click the **Options** tab to open the options page (Figure 6-17, page 210).
 - b Click the down arrow in the field **Select Sort Theme** and select the new sorting theme in the selection list.
 - c Choose a method for sorting survey folders in the data entry grid based on the survey date in the *Start Date* field. Click **Oldest First** or **Newest First** in *Sort Dates* to sort survey folders with the oldest or newest survey *Start Date* first.
 - d Click **Apply** to save and apply changes. If you want to cancel changes instead, click **Cancel**. PCS Axis closes the options page and returns to the *Survey Folder Maintenance* window.

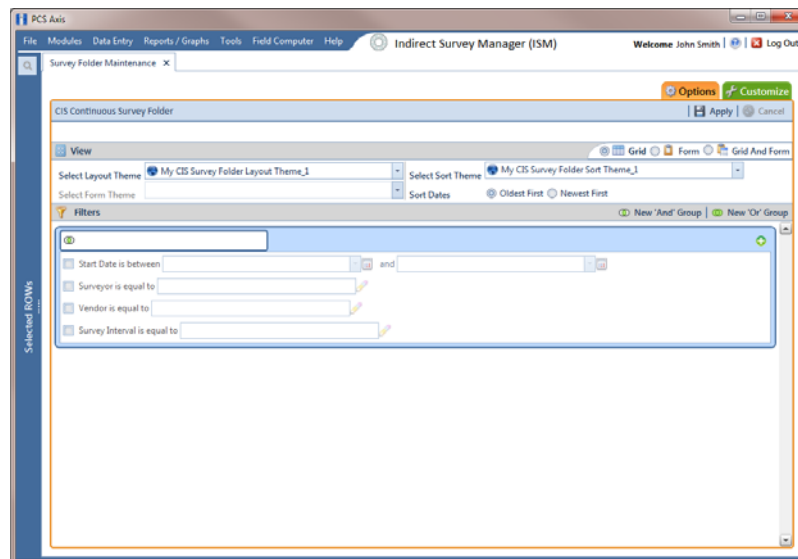



Figure 6-17. Options

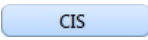
Adding an AND Filter Group





An AND filter group is a named set of one or more filters that affect the data output in the *Survey Folder Maintenance* 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 6-3, page 197).
- 2 Click **Modules > Indirect Survey Manager (ISM)** to open the ISM module.
- 3 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window.

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 a button labeled with the type of continuous survey that you want to add an AND filter group. For example, click the **CIS** button  to add a filter group for a continuous survey associated with close interval survey readings (Figure 6-8, page 201).

- 5 Select a survey in the *Survey Folder Maintenance* grid, then click the **Customize** tab .
- 6 Click the **Filters** button  to open the *Filters* page. Then click  **New 'And' Group** to open a filter properties group box (Figure 6-18).
- 7 Type a name for the filter group in the field **Filter Group Caption**.
- 8 Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.
- 9 If the AND filter group includes a date filter, such as *Start Date Is Between* shown in Figure 6-18, set a date range using a calendar or dynamic dates in the following manner:
 - To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a date. Repeat this step for the end date field.
 - 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.
- 10 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.
- 11 Type a name for the filter in the field **Enter Custom Filter Caption**.

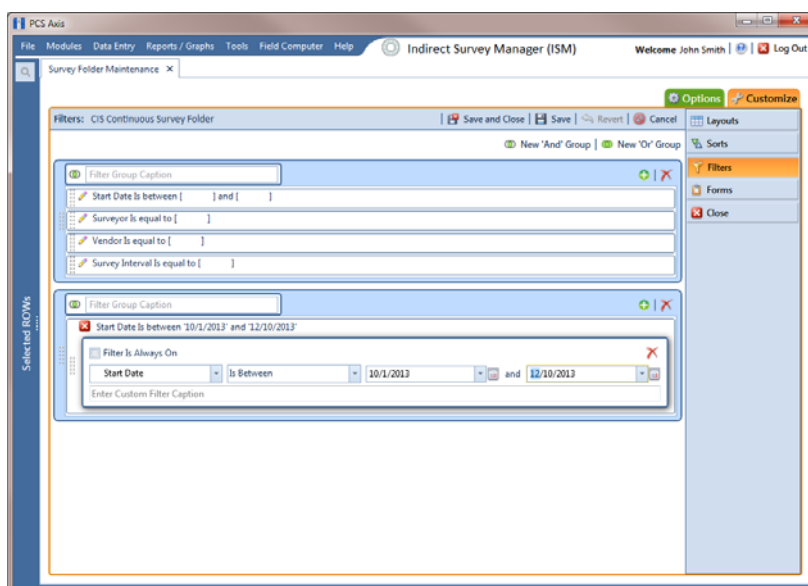









Figure 6-18. Filters


- 12** If you want to set up additional filter criteria for the filter group:
- a** Click  **Add** to open another filter properties group box.
 - b** Repeat **step 8** through **step 11** to set up filter criteria.
- 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.

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

- 14** Click  **Save**.

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

- 15** To apply one or more custom filter groups to the *Survey Folder Maintenance* grid (Figure 6-19, page 213):
- a** Click the **Options** tab  to open the options page.
 - b** Click the check box for each filter you want to apply to the grid.
- 16** Choose a method for sorting records in the grid. Click **Oldest First** or **Newest First** in *Sort Dates* to sort records with the oldest or newest inspection dates first.
- 17** Click  **Apply** to save changes and return to the grid. If you want to cancel changes and return to the grid, click  **Cancel**.

Clicking the **Options** tab  also allows you to save changes and return to the grid.

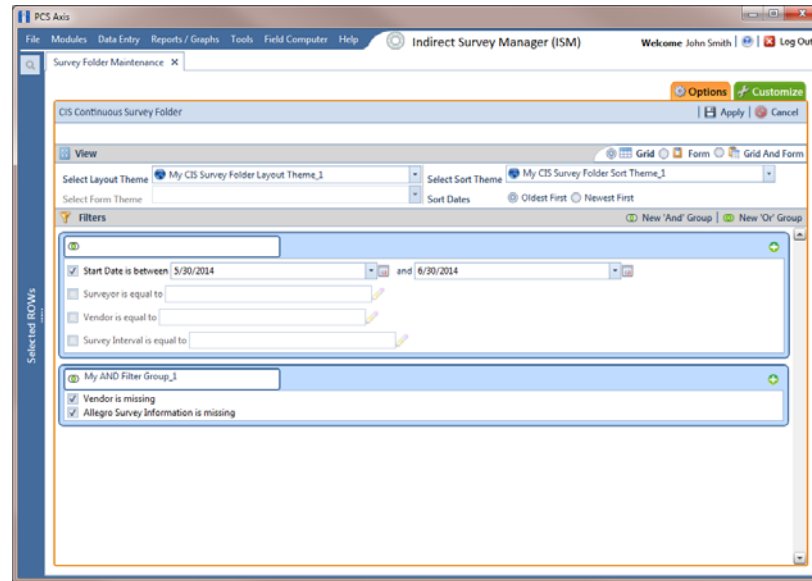



Figure 6-19. Options

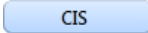
Adding an OR Filter Group


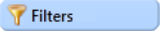


An OR filter group is a named set of one or more filters that affect the data output in the *Survey Folder Maintenance* grid. Adding an OR filter group produces a subset of records that meet any filter condition. PCS Axis processes filters in a filter group in descending order beginning with the filter 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 6-3, page 197).
- 2 Click **Modules > Indirect Survey Manager (ISM)** to open the ISM module.
- 3 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window.

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 a button labeled with the type of continuous survey that you want to add an AND filter group. For example, click the **CIS** button  to add a filter group for a continuous survey associated with close interval survey readings (Figure 6-8, page 201).

- 5 Select a survey in the *Survey Folder Maintenance* grid, then click the **Customize** tab .
- 6 Click the **Filters** button  to open the *Filters* page. Then click  **New 'Or' Group** to open a filter properties group box (Figure 6-20).
- 7 Type a name for the filter group in the field **Include records that match any of these conditions**.
- 8 Use filter selection fields to set up filter criteria. Select a PCS Axis field, operator, and one or more filter conditions.
- 9 If the OR filter group includes a date filter, such as *Start Date Is Between* shown in Figure 6-20, set a date range using a calendar or dynamic dates in the following manner:
 - To set a date range using a calendar, click the down arrow in the start date field to open a calendar and select a date. Repeat this step for the end date field.
 - 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.
- 10 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.
- 11 Type a name for the filter in the field **Enter Custom Filter Caption**.

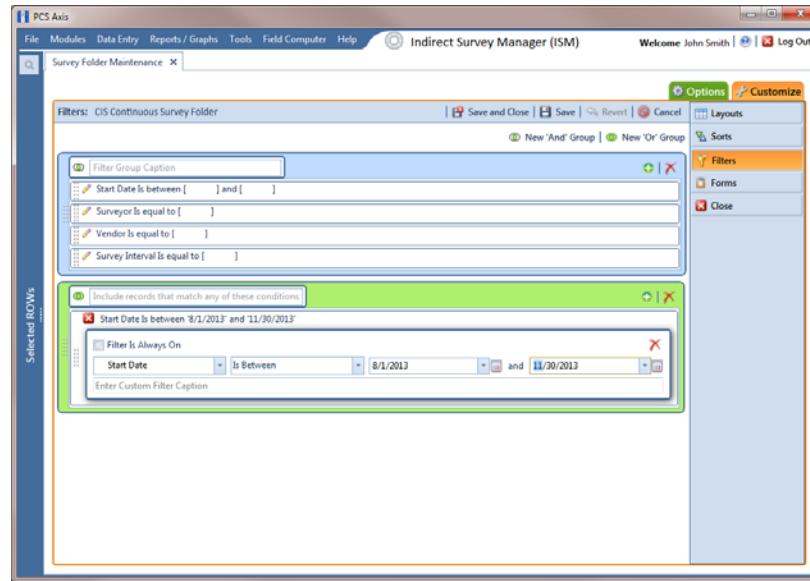








Figure 6-20. Filters


- 12 If you want to set up additional filter criteria for the filter group:
 - a Click **+** **Add** to open another filter properties group box.
 - b Repeat **step 8** through **step 11** to set up filter criteria.
- 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.

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

- 14 Click  **Save**.

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

- 15 To apply one or more custom filter groups to the *Survey Folder Maintenance* grid (Figure 6-21, page 216):
 - a Click the **Options** tab  to open the options page.
 - b Click the check box for each filter you want to apply to the grid.
- 16 Choose a method for sorting records in the grid. Click **Oldest First** or **Newest First** in *Sort Dates* to sort records with the oldest or newest inspection dates first.
- 17 Click  **Apply** to save changes and return to the grid. If you want to cancel changes and return to the grid, click  **Cancel**.

Clicking the **Options** tab  also allows you to save changes and return to the grid.

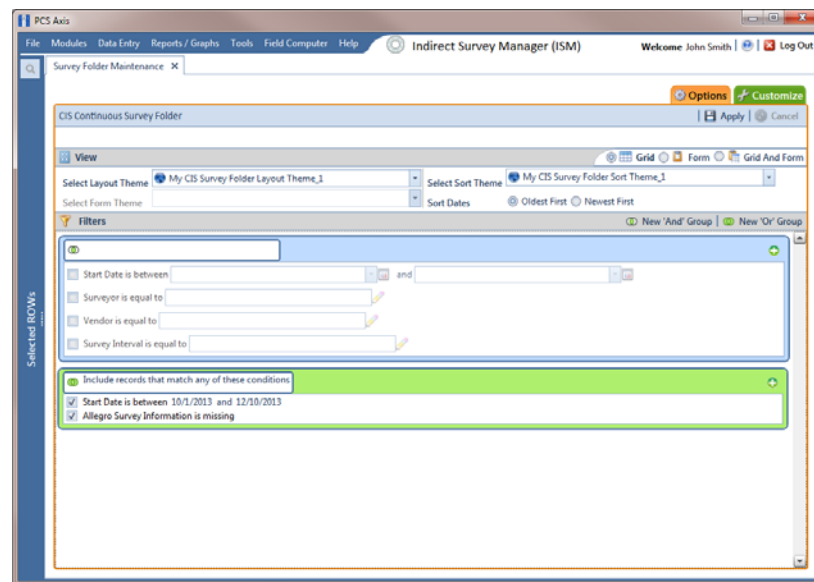



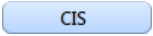



Figure 6-21. Options

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 6-3, page 197).
- 2 Click **Modules > Indirect Survey Manager (ISM)** to open the ISM module.

- 3 Click **Data Entry > Survey Folder Maintenance** to open the *Survey Folder Maintenance* window.
- 4 Click a button labeled with the type of continuous survey you want to work with, such as the **CIS** button .
- 5 Select a survey in the *Survey Folder Maintenance* grid.
- 6 Click the **Customize** tab , then the **Filters** button  to open the *Filters* page.
- 7 Click a filter's edit icon  to display filter property settings (Figure 6-22).

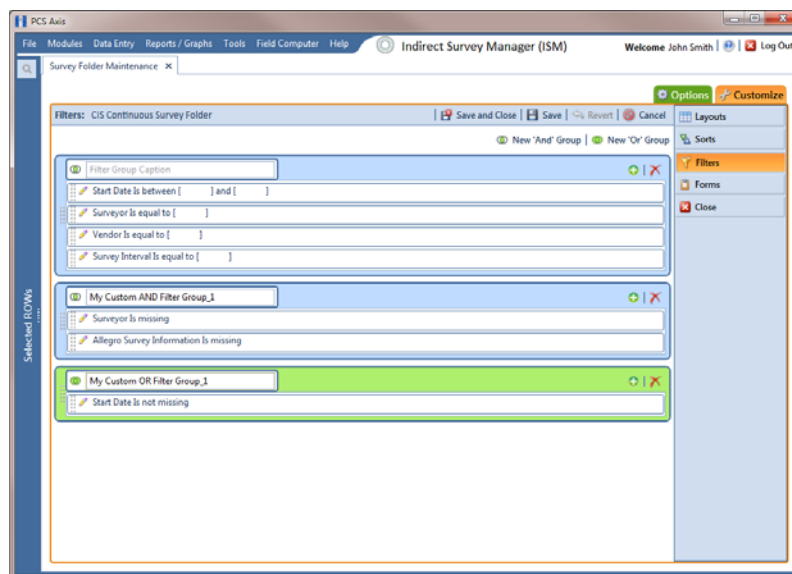




Figure 6-22. Filters

- 8 To delete a filter in a filter group, click the filter's  delete button (Figure 6-23). Then click  **OK** when the *Delete* message displays.

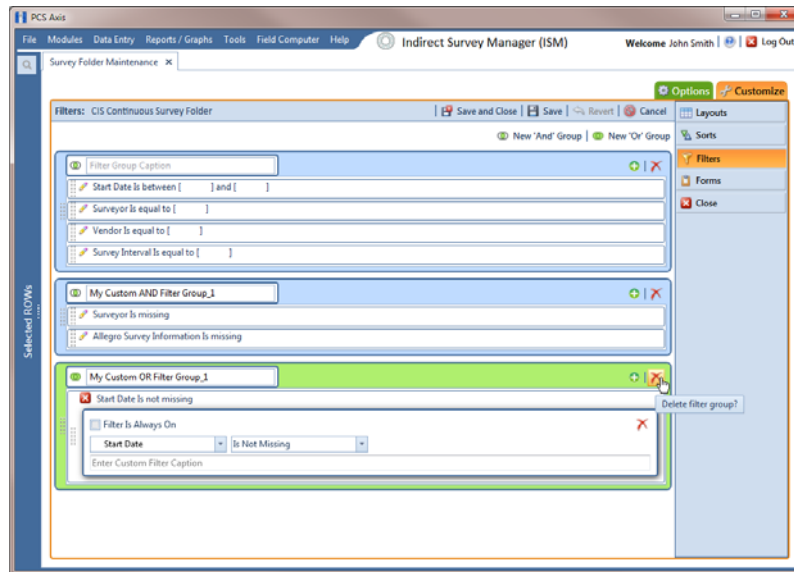






Figure 6-23. Filters

- 9 To rename a filter, type a description in the filter's name field.
- 10 To change filter criteria, use filter selection fields to select a PCS Axis field, operator, and one or more filter conditions.
- 11 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.
- 12 Click the  close button to close the filter's property settings group box (Figure 6-23, page 218).
- 13 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.

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

