



**Virtual Brew:  
Mornings with AI**

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## Optimize PCS Report Configuration to Streamline Enterprise-Wide Compliance Reporting

# Agenda

- Report Basics
- Advanced Filtering
- Themes Management Best Practices
- Automated Report Creation

# PCS Reports Overview

## Atmospheric Inspection Report

### Facility Information

Segment Code and Pipe T-1402

Milepost 0.18348

Facility Currently Active True

Days Until Delinquency 375

Latitude

Longitude

Location Description

### Atmospheric Inspections

Inspection Date 8/19/2022 11:05:08 AM Technician DG

Coating/Paint Condition CE Condition of Pipe

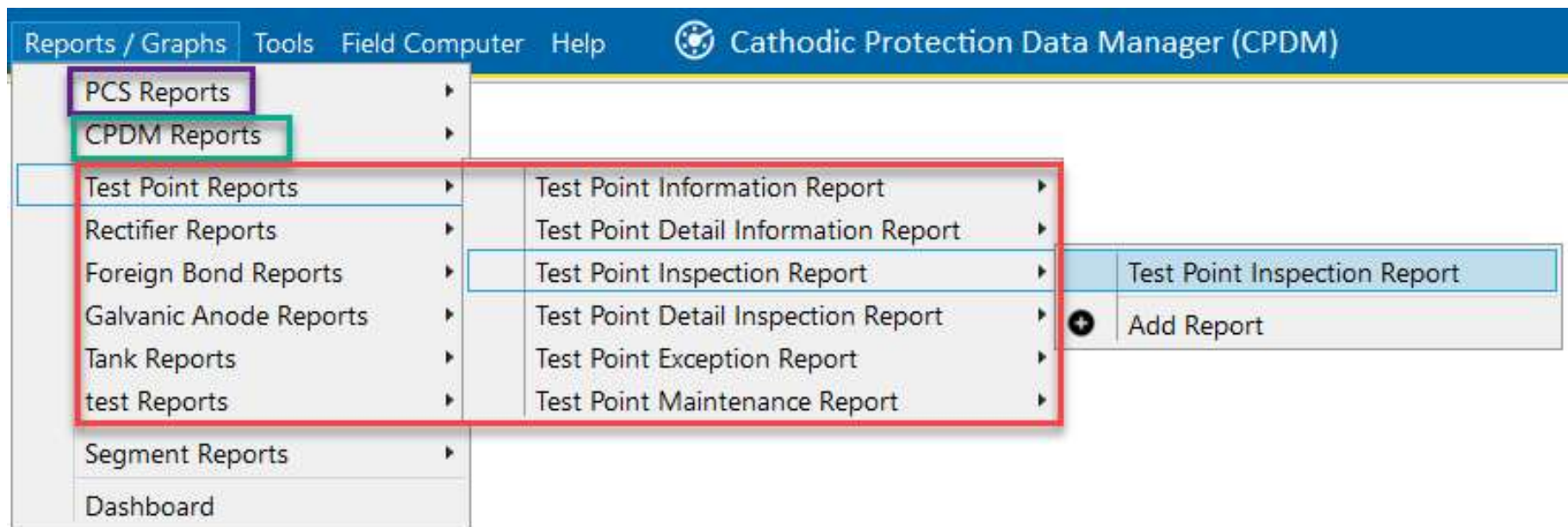
Coating Type Damage Type

Inspection Remarks



- Essentially an exportable view of your data in template form
- Pre-Built and Customizable Templates
- Report Template Formats:
  - Columnar (pdf or CSV)
  - “Paper” Form
  - Graph (Time or Distance)
  - Summary

# Report Types



# Customize what you see

## Configure layout themes

## Paper Setting Pro Tips:

- Set maximum paper size
- Adjust 'Min' Font Size
- Show record counts

**Test Point Inspection Report**

Columnar Form Summary Graph

Layouts: Test Point Inspection Report Save and Close Save Add Delete Revert New Baseline Cancel

Select Layout Theme

CH Test Point Inspections

Search For Field... Segment Code and Pipe Milepost

Report Paper Size Estimate (DPI = 100)

Segment Label Type	Offset	Label Description	Budget	Inspection Date	Latitude	Longitude	Installation Date	Diameter (inches)	Material	Depth (ft)	Flow Rate (GPM)	Pressure (PSI)	Temperature (°F)	Humidity (%)	Wind Speed (MPH)	Direction (°)	Notes
<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap	<input checked="" type="checkbox"/> Wrap						<input type="checkbox"/> Wrap	<input type="checkbox"/> Wrap								<input type="checkbox"/> Wrap

Paper Settings

Paper Size: Tabloid, 11 x 17 in.

Font: Calibri

Size: 3 Min Max

Column Spacing: 2

Orientation: Portrait Landscape

Left Margin: 0.0

Print Options

- ☒ Reprint group headings on each page
- ☒ Print filter/options settings in report heading
- ☒ Show number of records printed in each group
- ☐ Include signature line
- ☐ Print current date in report footer

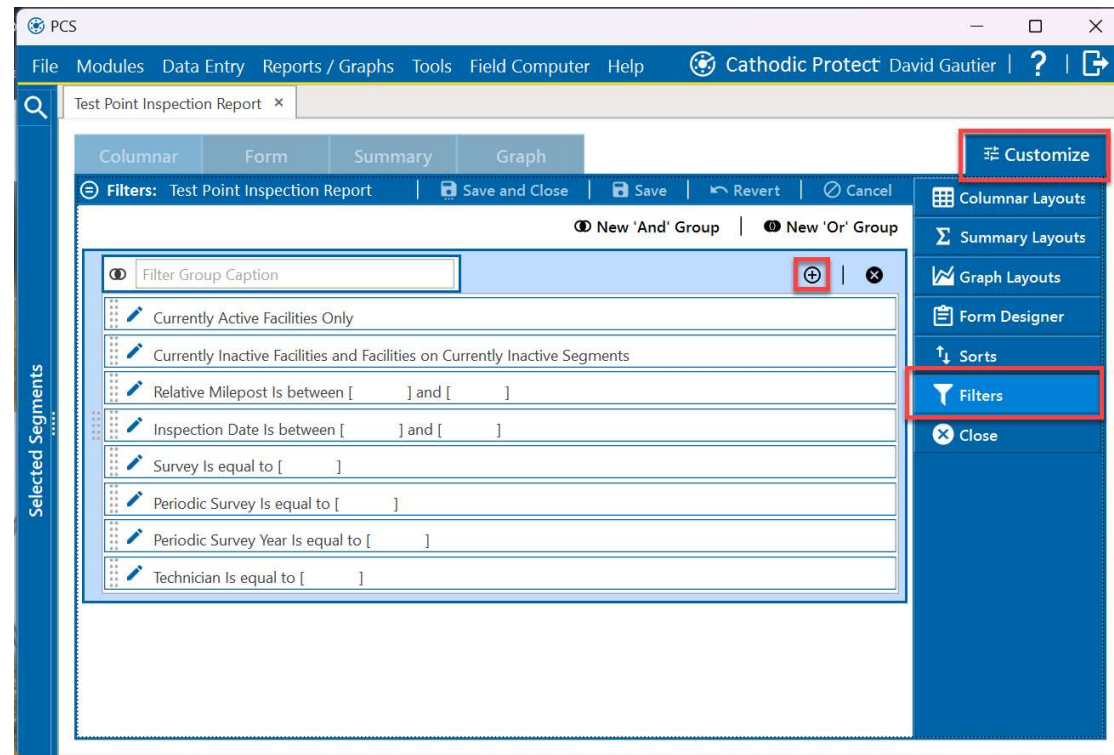
# Ad Hoc vs Permanent Filters

**ad hoc** /,əd 'hæk/

*Adjective* Created or done for a particular purpose as necessary.

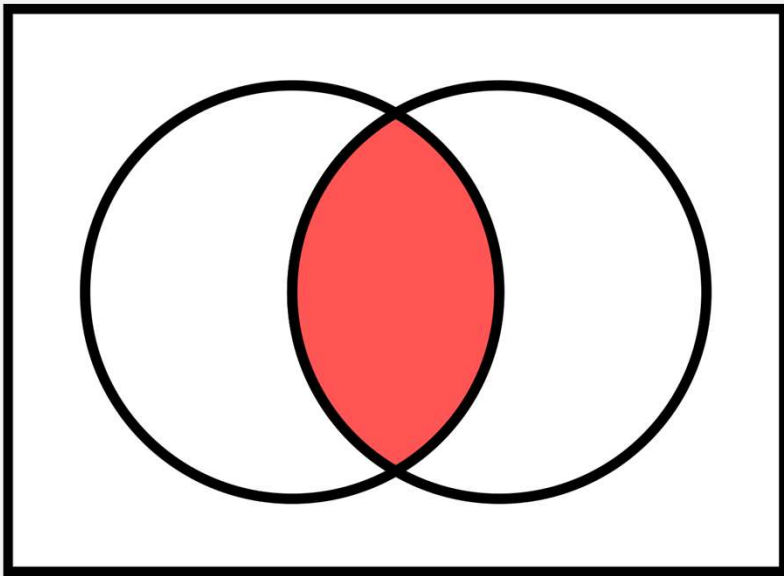
**Permanent Filters** persist

Change captions to **plain text**

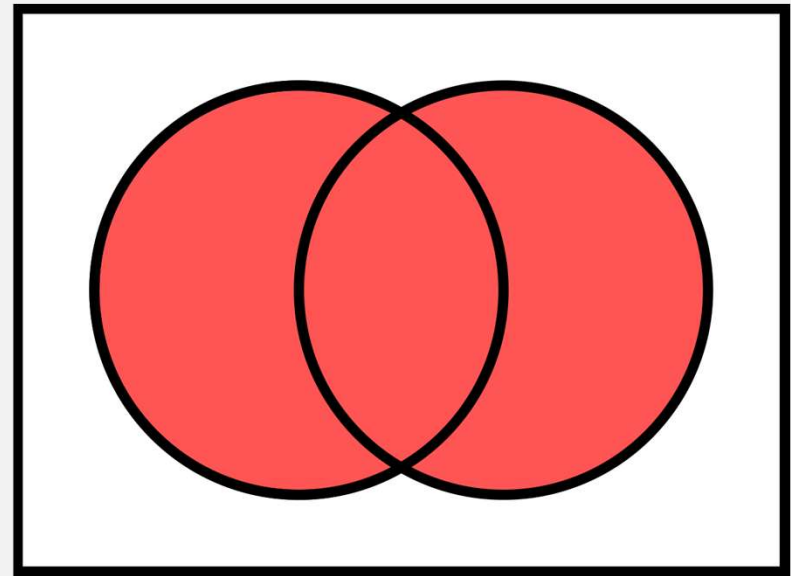


# AND vs OR Filters

‘And’: All conditions must be met



‘Or’: Any condition may be met



# 'And' & 'Or' Groups

Test Point Exception Report x

**Columnar**

Test Point Exception Report

**Based On**

☒ Selected Segments

☐ Route

☒ Indicate missing inspection readings

**Filters**

☒ Currently Active Facilities Only

☐ Relative Milepost is between [ ] and [ ]

☒ Inspection Date is between Beginning Of Year [ ] + [ ] and End Of Year [ ] + [ ]

☐ Technician is equal to [ ]

**Exception Filters**

☒ AC Exception contains Exception

☐ Structure P/S (Volts) is less negative than [ ]

☐ Structure P/S (Volts) is more negative or equal to [ ]

☐ Structure P/S (Volts) is expected, but not recorded

☐ Structure P/S - Casing P/S (Volts) is less than or equal to [ ]

☒ Structure IRF (Volts) is less negative than -0.850

☐ Structure IRF (Volts) is more negative or equal to [ ]



# Dynamic Date Filters

**Columnar**

PCS Delinquency Report

**Based On**

☒ Selected Segments ☐ [PCS] All Facility Types

☐ Route ☒ Ad Hoc Theme

CPDM	VM	ACM	ICM
<input checked="" type="checkbox"/> Test Point <input type="checkbox"/> Galvanic Anode	<input type="checkbox"/> Valve	<input type="checkbox"/> Atmospheric	<input type="checkbox"/> Coupon <input type="checkbox"/> Inhibitor Injector
<input checked="" type="checkbox"/> Rectifier <input type="checkbox"/> Tank			<input type="checkbox"/> Samples <input type="checkbox"/> Biocide
<input type="checkbox"/> Foreign Bond			<input type="checkbox"/> Probe <input type="checkbox"/> Pig

**View**

Select Layout Theme  
[PCS] PCS Delinquency Report

**Sort Options**

Select Sort Theme  
[PCS] Segment Code and Milepost

Sort Dates  
☐ Oldest First ☒ Newest First

Insert Lines Between Groups  
Every Report Line

Page Breaks  
None

**Options**

☒ Include only delinquent facilities

Date range: Beginning Of Month + [ ] to End Of Month + 30 Day(s)

**Filters**

☐ Relative Milepost is between [ ] and [ ]

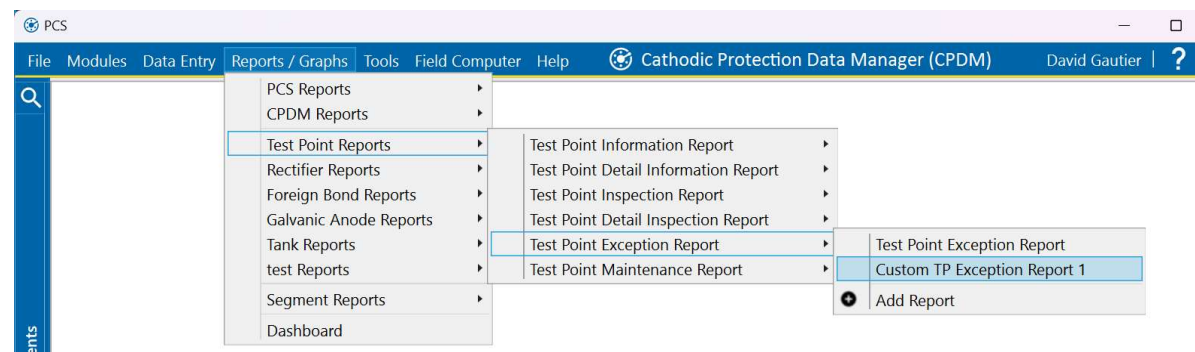
Today  
Beginning Of Month  
End Of Month  
Beginning Of Year  
End Of Year

# Build Custom Reports to Minimize Clicks

Save all configurations to a custom report, including:

- Layouts
- Permanent Filters
- Sorts
- Print Options

Then click one-button to reload your save report



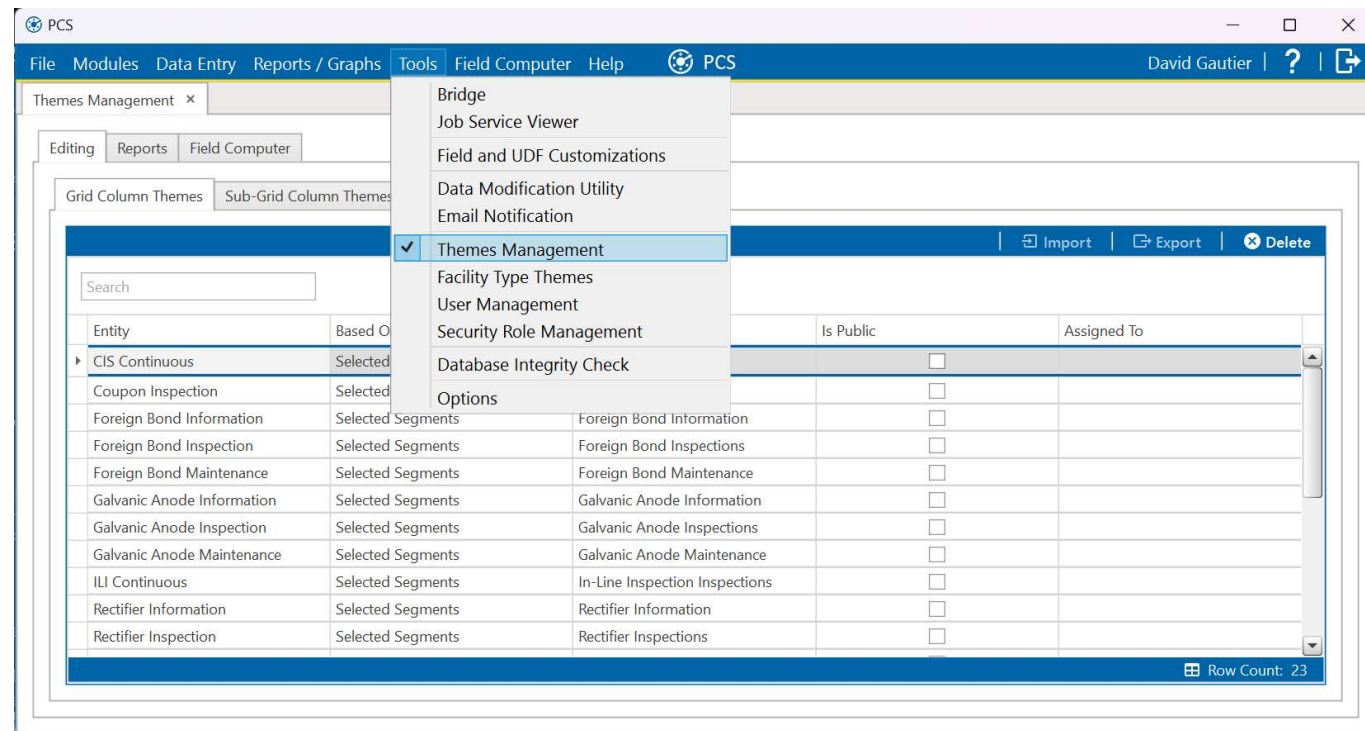
**Public** (🌐) or **Private** (🔒)

# Themes Management

Clean up custom themes periodically to:

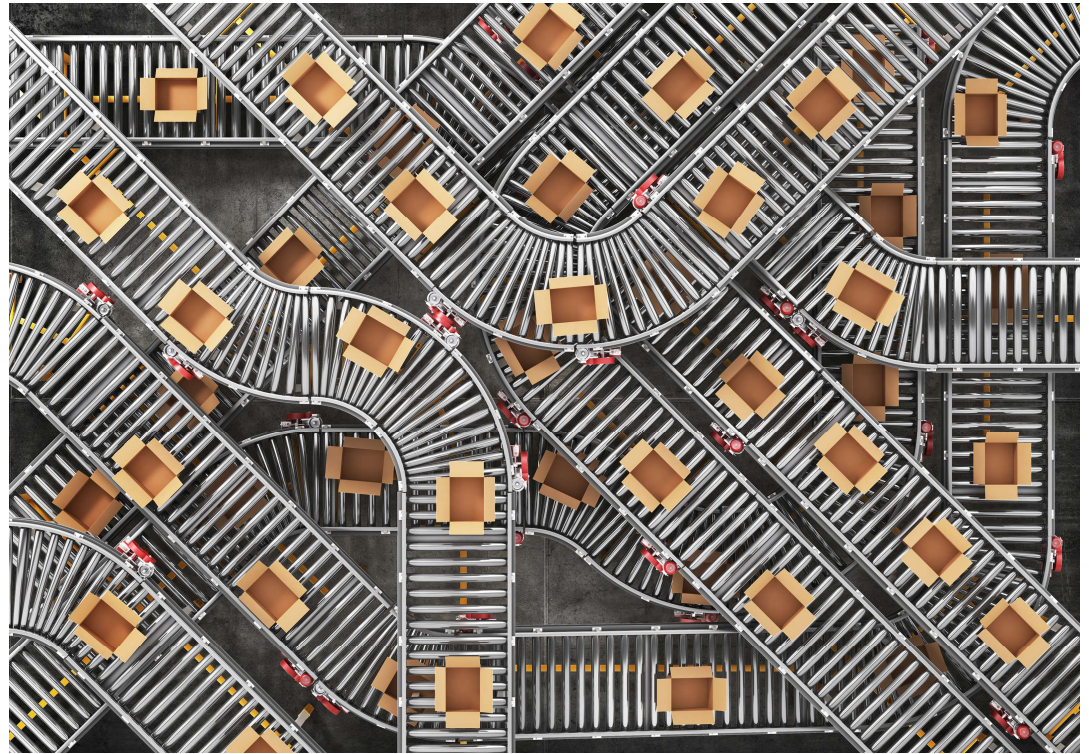
- Improve report consistency
- Streamline report menu selections

Or hijack private reports for public use



# Email Reports

- Automate any Public columnar report
- Include custom business rules for frequency and distribution lists
- Accounts for hierarchical security– the same report can be run for any PCS user
- Include non-PCS users as well





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# Thanks for attending!