



**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-1400
Milepost	0.83548
Facility Currently Active	True
Days Until Delinquency	375
Latitude	
Longitude	

Atmospheric Inspections

Inspection Date	8/16/2022 11:01:08 AM
Technician	SG
Coating Point Condition	CE
Coating Type	
Condition of Pipe	
Damage Type	

Location Description

Inspection Remarks



AtmosphericCorrosion1

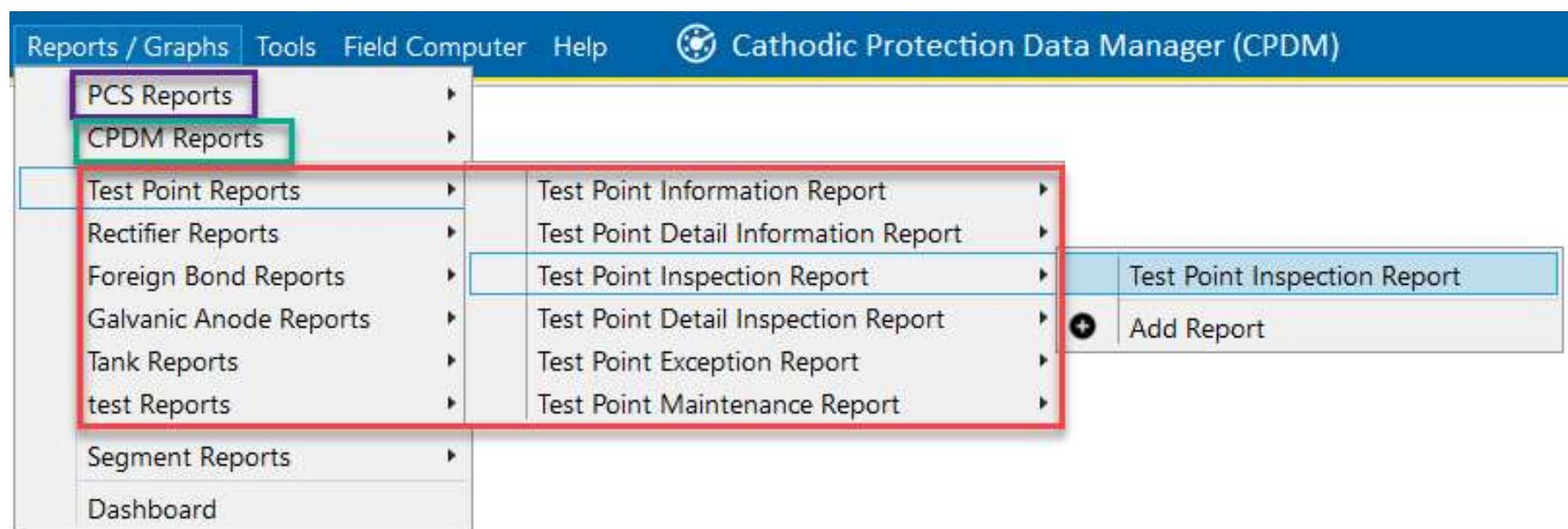
AtmosphericCorrosion1x1

AtmosphericCorrosion2

AtmosphericCorrosion2x2

- 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

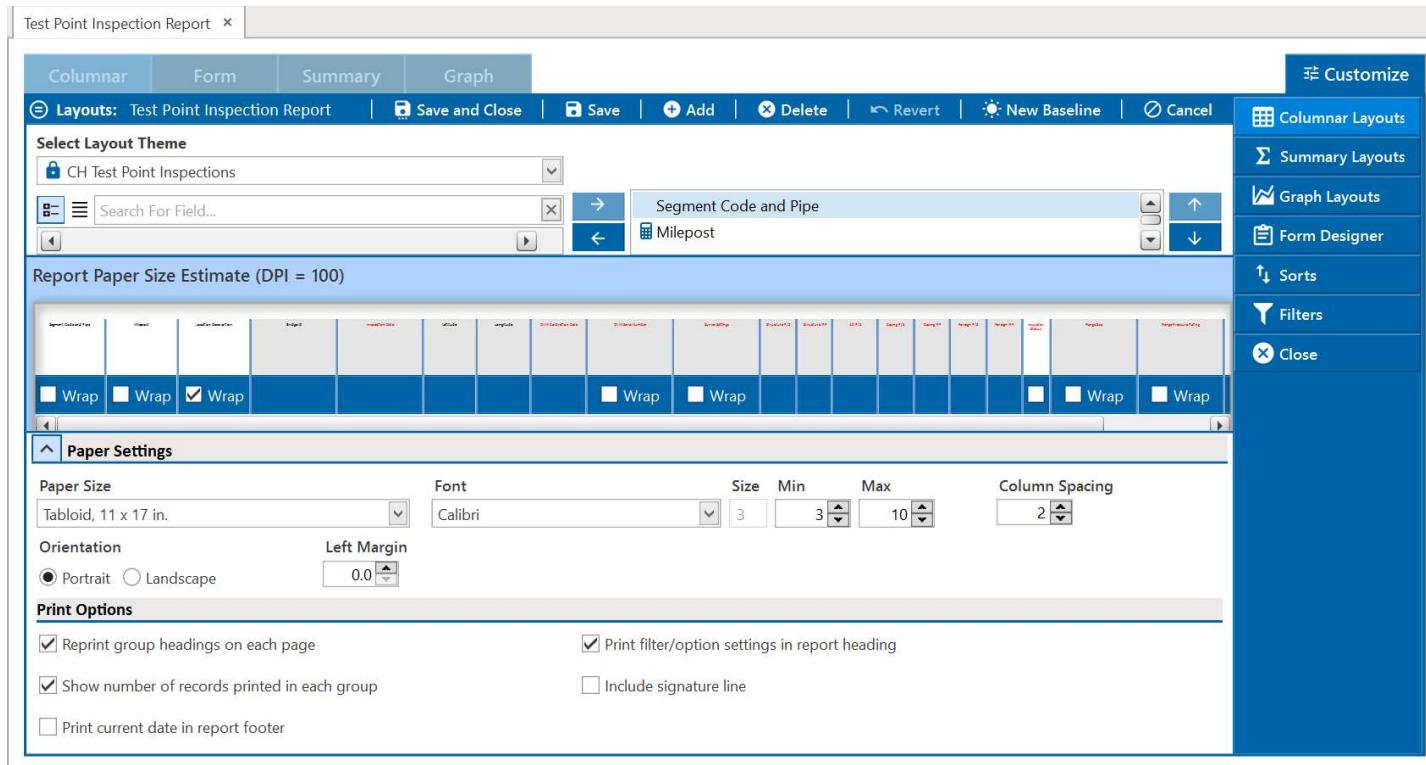


Customize what you see

Configure layout themes

Paper Setting Pro Tips:

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



The screenshot shows the 'Test Point Inspection Report' configuration screen. At the top, there are tabs for 'Columnar', 'Form', 'Summary', and 'Graph'. Below the tabs, the 'Layouts' section shows 'Test Point Inspection Report' selected. The 'Select Layout Theme' dropdown is set to 'CH Test Point Inspections'. The 'Report Paper Size Estimate (DPI = 100)' section shows a grid of columns with 'Wrap' checkboxes. The 'Paper Settings' section includes fields for 'Paper Size' (Tabloid, 11 x 17 in.), 'Font' (Calibri), 'Size' (3), 'Min' (3), 'Max' (10), and 'Column Spacing' (2). Under 'Print Options', there are checkboxes for 'Reprint group headings on each page', 'Print filter/option settings in report heading', 'Show number of records printed in each group', 'Include signature line', and 'Print current date in report footer'. A vertical toolbar on the right provides links to 'Columnar Layouts', 'Summary Layouts', 'Graph Layouts', 'Form Designer', 'Sorts', 'Filters', and 'Close'.

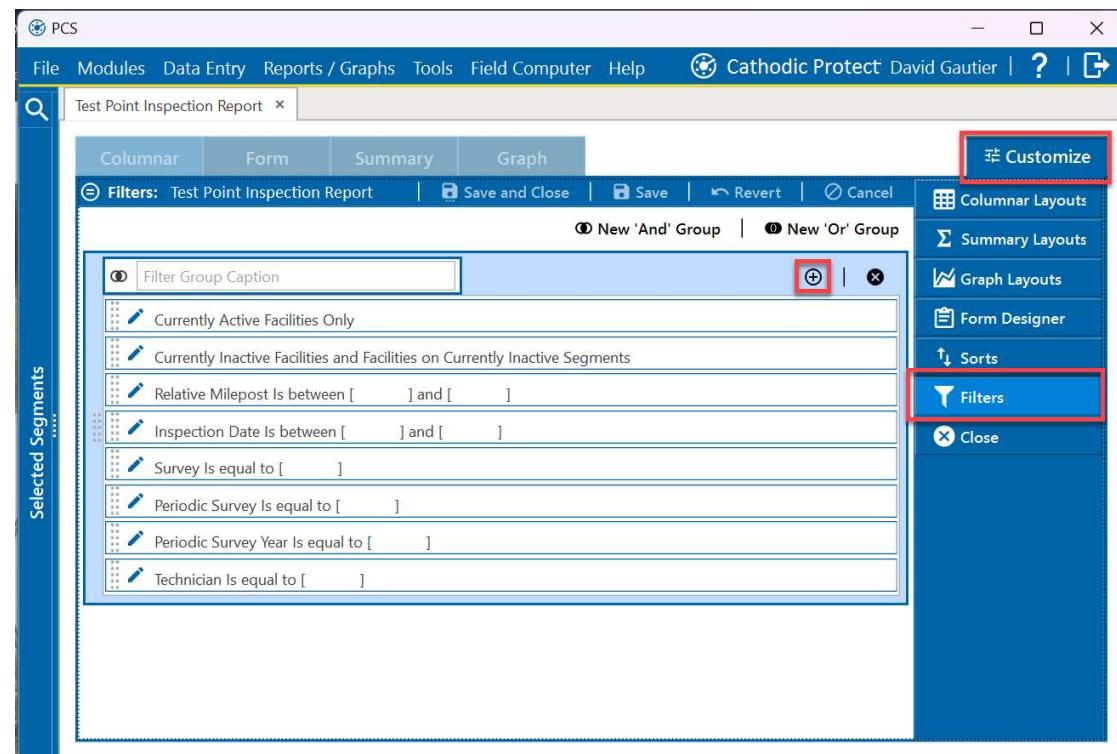
Ad Hoc vs Permanent Filters

ad hoc /ad 'häk/

Adjective Created or done for a particular purpose as necessary.

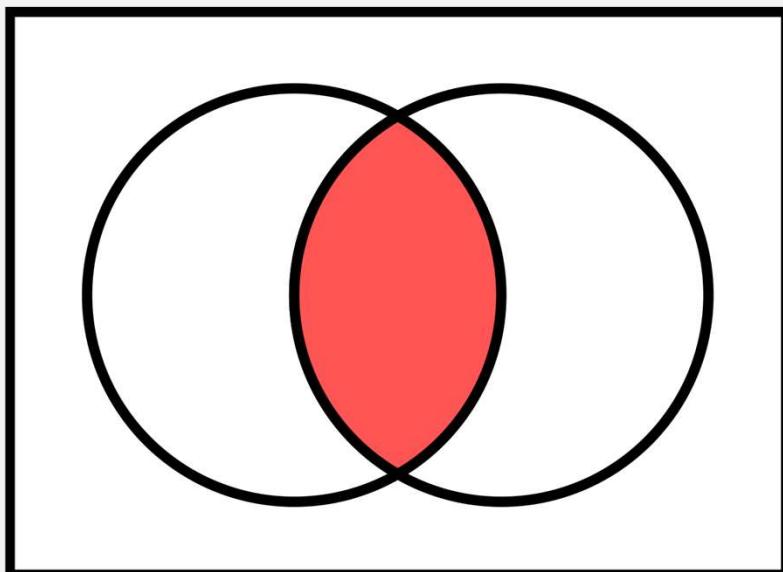
Permanent Filters persist

Change captions to **plain text**

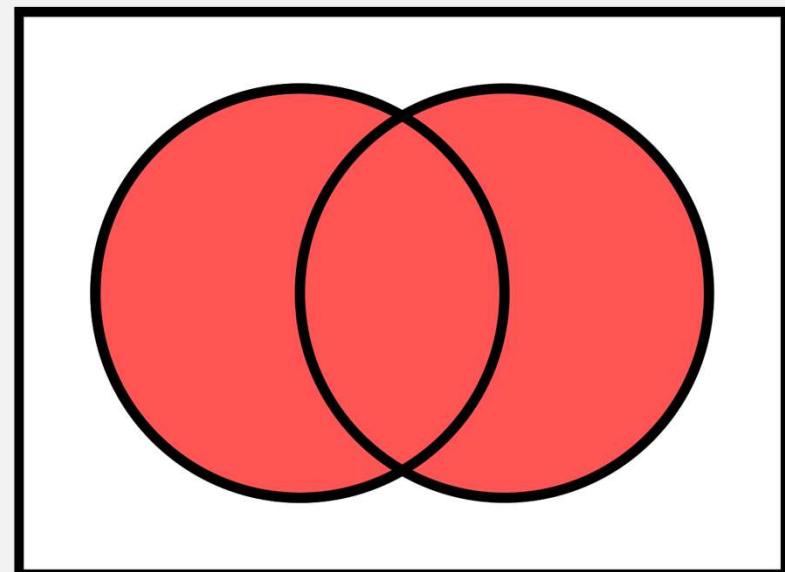


AND vs OR Filters

'And': All conditions must be met



'Or': Any condition may be met



‘And’ & ‘Or’ Groups

Test Point Exception Report

Columnar

Test Point Exception Report

Based On

Selected Segments
 Route

Indicate missing inspection readings

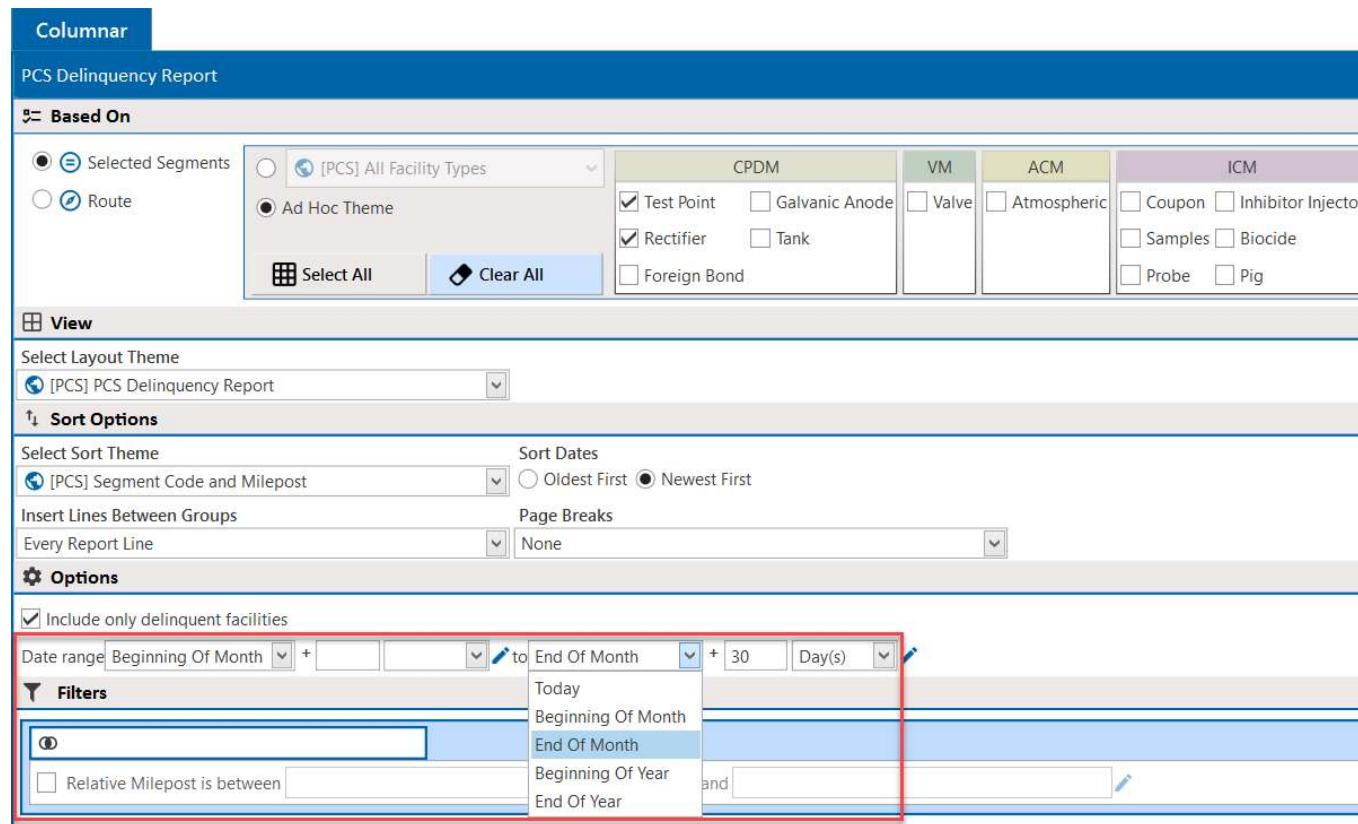
Filters

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



The screenshot shows the configuration interface for the PCS Delinquency Report. The top navigation bar is 'Columnar' and the report title is 'PCS Delinquency Report'. The 'Based On' section includes 'Selected Segments' (radio button selected), 'Route' (radio button unselected), and 'Ad Hoc Theme' (radio button selected). Below these are buttons for 'Select All' and 'Clear All'. The 'View' section shows 'Select Layout Theme' set to '[PCS] PCS Delinquency Report'. The 'Sort Options' section includes 'Select Sort Theme' set to '[PCS] Segment Code and Milepost', 'Sort Dates' set to 'Newest First', and 'Insert Lines Between Groups' set to 'Every Report Line' with 'Page Breaks' set to 'None'. The 'Options' section has a checked checkbox for 'Include only delinquent facilities'. The 'Filters' section is highlighted with a red box and contains the following fields:

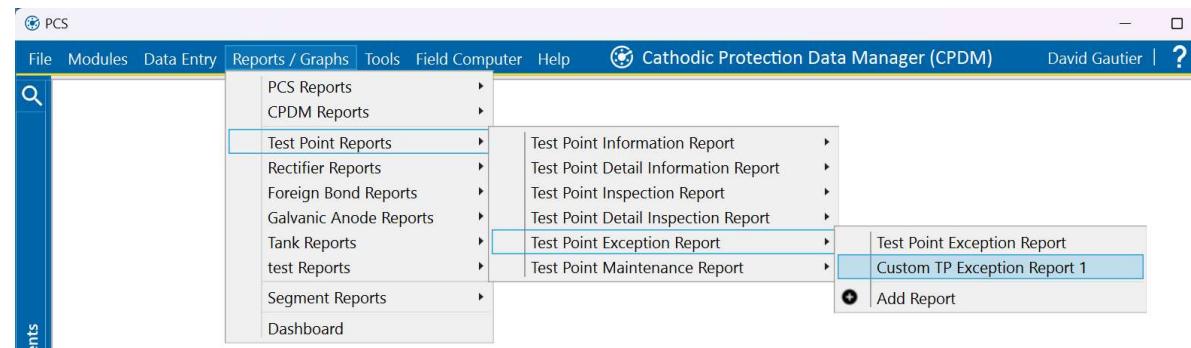
- Date range: Beginning Of Month + [] to End Of Month + [] 30 Day(s)
- Filters: []
- Relative Milepost is between [] and []

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



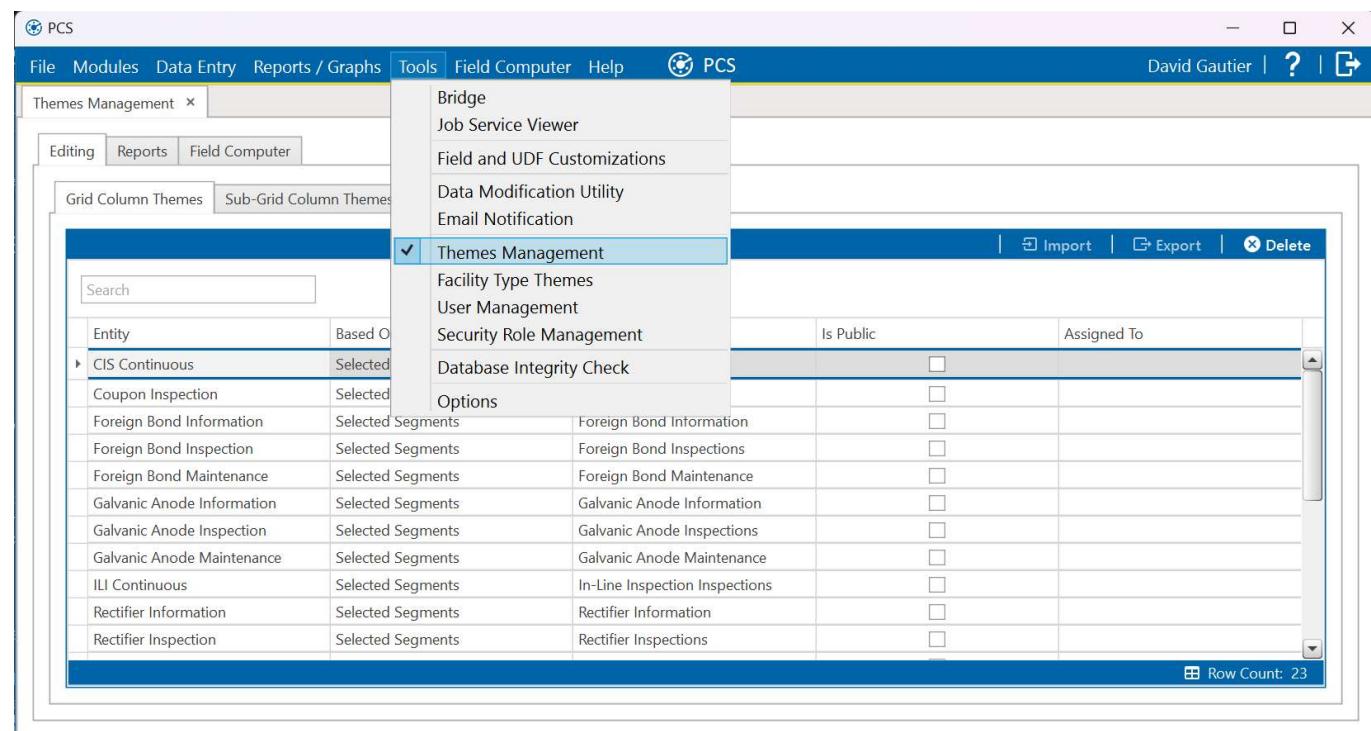
Public () or Private ()

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!