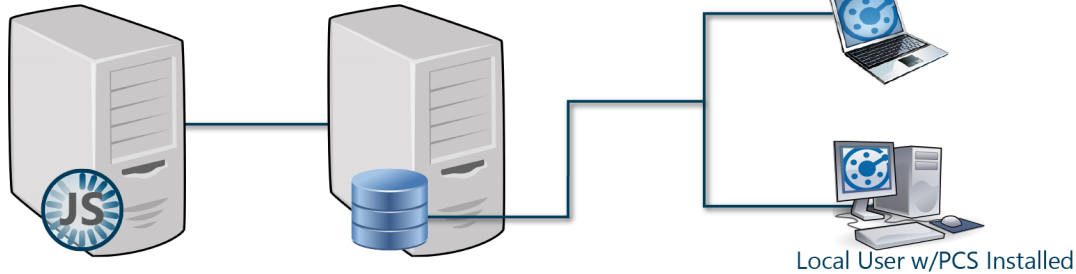


American Innovations (AI) is pleased to announce version 2.3 of our PCS software. This document explains how to perform administrative functions for PCS in a client/server network.

Network Servers w/Database & Job Service



**Figure 1-1. PCS Standard Client/Server Installation**

The separate [Installation Checklist](#) provides both a breakdown of the steps required for installation and configuration of PCS as well as a recommendation for which tasks should be performed by an IT System Administrator, Database Administrator (DBA), PCS Administrator, or PCS User.

A separate [PCS Server Installation](#) document details the configuration of the server and installation of the PCS Job Service and should be completed prior to performing the *PCS Administrator Setup* instructions.

The [PCS Administrator Setup on page 2](#) section of this document details the configuration of the PCS application on a local client or on the server for the PCS Administrator. These tasks are typically performed by the IT System Administrator or the PCS Administrator.

The [PCS Client Installation](#) document details the steps required to install and configure all client machines. The *PCS Client Installation* document will be needed for installation of PCS on the PCS Administrator's machine.

If you have questions or need assistance with the installation, refer to [Technical Support on page 5](#) for contact information.

## Product Compatibility

PCS integrates with other products in the American Innovations product line to support additional methods of collecting cathodic protection data. The following table describes the compatibility between PCS version 2.3 and other American Innovations products.

**Table 1-1. American Innovations Product Compatibility**

AI Product	Compatibility with PCS v2.3	Integration Overview
CartoPac Cathodic Protection App	v1.6 and later	Send survey files to the Allegro AX and Mesa 3 and receive the completed survey data and images.
Allegro QX	CartoPac version 7.2.1 or newer	Send survey files to the Allegro QX and receive the completed survey data.
PCS Viewer	PCS Viewer version 2.1 or newer	Review survey data from the Allegro prior to importing into PCS.
Bullhorn Web	Using the Bullhorn token	Receive data from Bullhorn Web using the PCS Bullhorn Bridge.
PCS Survey Manager	Compatible with .pss/.psh, .psx, and .zsvy file types	Facility Surveys are transferred wirelessly using the Integration token and Indirect Surveys are transferred using .zsvy.

## License Requirements

Before installing PCS on client or PCS Administrator machines, verify the PCS product key is available with enough licenses for all users. If you have a product key from PCS versions prior to 1.12, you must contact AI Support for a new product key.

If your company purchased the optional Bridge add-on to import data from a third-party application, activating Bridge import for operation requires the license file provided by American Innovations. The Bridge license file is assigned only once for the PCS database; once it is assigned it functions for all users.

A Bridge license file is not required to import data from Bullhorn Web or the allegro.

## PCS Administrator Setup

Once the server is prepared, PCS should be installed on the PCS Administrator's machine. Then the PCS Administrator can set up change tracking and manage the PCS users.

### *Install PCS for the Administrator*

PCS can be installed on either a client machine or the server for the PCS Administrator and must be activated with a product key prior to use.

For instructions detailing the installation of PCS, refer to the [PCS Client Installation](#) document.

## Activate the Bridge Import License (optional)

If your company purchased the optional Bridge import add-on, running a Bridge import for the first time requires you to activate Bridge using the license file provided by American Innovations.

A Bridge license is required only for those operations that use the Basic Bridge function to import data. Operations to import data from a field computer or Bullhorn Web, including those using the Bullhorn Bridge function, do not require a Bridge import license. Likewise, exporting data from PCS also does not require a Bridge license.

Complete the following steps with PCS open to activate Bridge import for operation:

1. Start PCS if the software is not running.
2. Click **Tools > Job Service Viewer** in the header bar to open the *Job Service Console* window.

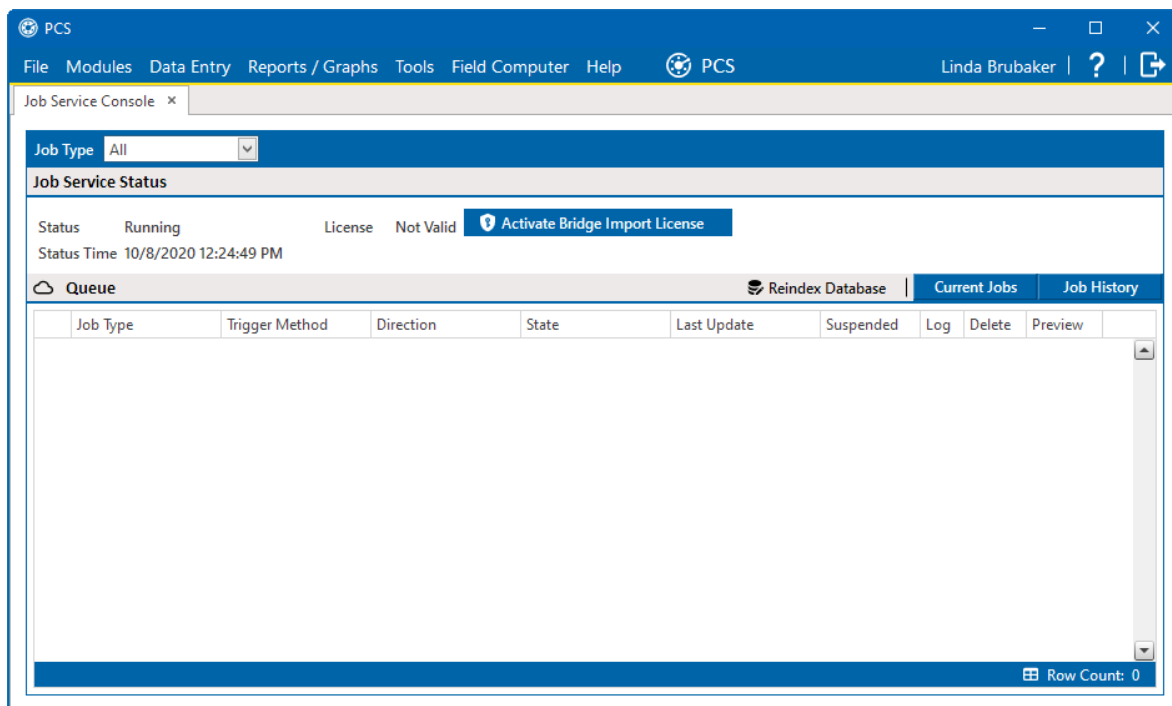
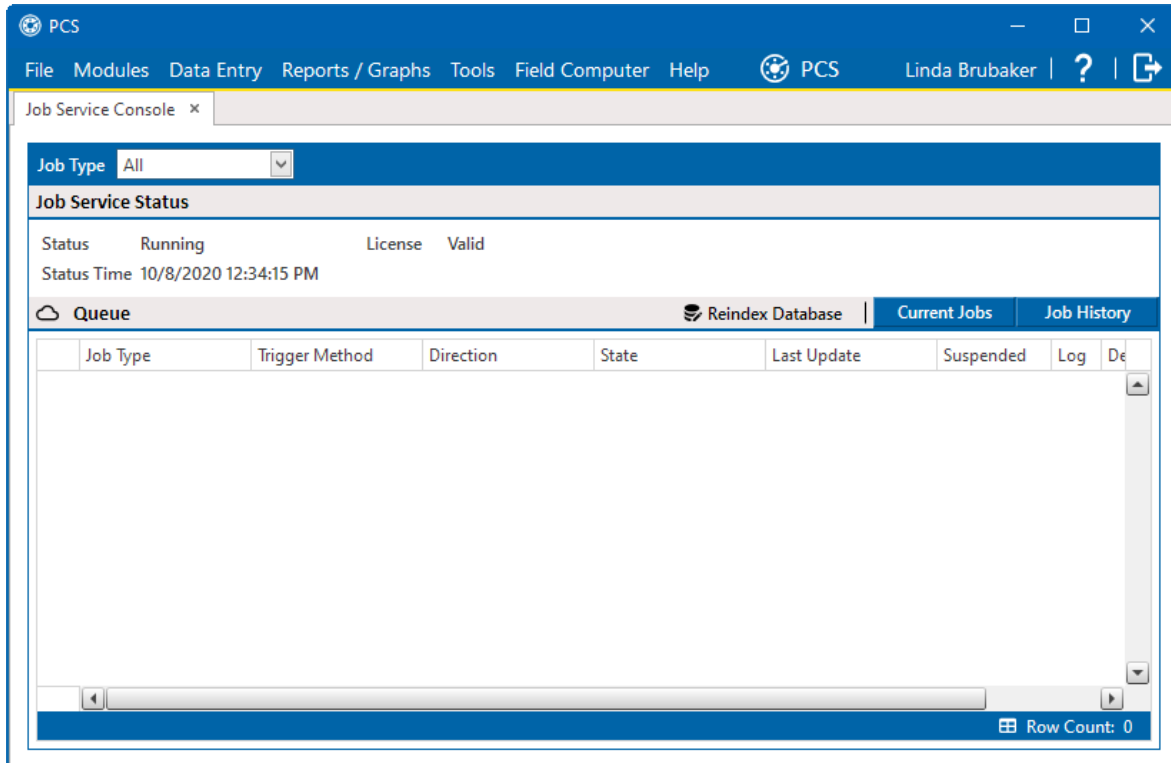


Figure 1-2. Job Service Console

3. Click **Activate Bridge Import License**. When the *Activation Key* window opens, navigate to the license file and select it.
4. Click **Open** to open the license file and return to the *Job Service Console* window.
5. Verify that **Running** displays in the **Status** field and **Valid** displays in the **License** field. If these messages are not currently displayed, please contact Technical Support for assistance at [support@aiworldwide.com](mailto:support@aiworldwide.com).



**Figure 1-3. Valid Bridge License**

For information about how to set up and use Bridge, refer to the [Bridge](#) section of the User Guide.

## Configure Change Tracking


If enabled in *Options*, PCS will keep a log of all changes made to PCS data. When data changes are tracked, additions, modifications, and deletions of data are stored in the PCS database. Additional information about the data change is recorded, such as who made the change, what tool was used to make the change, when the change was made, and what the data was before the change. With this information, data audits become more reliable and troubleshooting data abnormalities is made easier.

Configuring PCS to track data changes with a trigger can be done from within PCS using the *Field and UDF Customizations* and *Options* windows. It is recommended that change tracking configurations are only made during the initial configuration of PCS or while performing system maintenance.

Perform the following steps to track data changes using a trigger:

1. Modify change tracking settings for each individual field as needed by doing the following in the *Field and UDF Customizations* window (**Tools > Field and UDF Customizations**):
  - a. Select a table in the *Properties* panel that includes the field you want to modify for change history.
  - b. Select the field you want to set up for change tracking.



- c. In the System-Track Changes column, select **Yes** to track changes made in the selected field while change history is enabled. Select **No** to not record any changes made in the field, even if change history is enabled in *Options*.

Repeat these steps to modify change tracking for additional fields. When you finish, click the  close icon to close the *Field and UDF Customizations* window.

2. Enable change history for PCS by clicking to select the **Turn On Change Tracking** check box in *Options*. If change history was already enabled, update the setting by clicking to clear the **Turn On Change Tracking** check box and then clicking to re-select the check box.

## Grant Users Access to PCS

Start PCS and open User Management (**Tools > User Management**) to grant users access to PCS. Perform the following steps for each user that needs access to PCS:

1. Click  **Add**.
2. Verify the **Active** check box is selected.
3. Type the user's Windows domain user name in the **User Name** field and press **Tab**. PCS attempts to populate the remaining fields based on the entered user name.
4. Review the values entered in the **Email**, **First Name**, **Last Name**, **M.I.**, and **Display Name** fields. Enter the correct values as needed.
5. Select a role from the **Parent Role** drop-down field.
6. Make sure the Role that shows in the **Role** drop-down is the correct PCS role for the current user.
7. Decide if the user should have the ability to create surveys that allow new facilities to be created on the field computer. If the user should have this ability, select the **Can Create New Facilities On Field Computer** check box.
8. If desired, add comments and an image for the user.
9. Click  **Save**.

## Technical Support

AI Support is available to provide assistance with PCS, accept feedback about PCS, or discuss your organization's training needs. Use the following information to contact AI Support:

### Telephone:

1-800-229-3404

**Email:**

[support@aiworldwide.com](mailto:support@aiworldwide.com)

**Address:**

American Innovations, Ltd.  
Attn: AI Support  
12211 Technology Blvd.  
Austin, TX 78727