



# Sites



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# Chapter 1

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## Overview

### Topics:

- [About Sites](#)
- [About Site Filtering](#)
- [Access the Sites Page](#)
- [Site Filtering Workflow](#)

## About Sites

Companies that use APM often have facilities at multiple sites, or locations, around the world. Sites can be defined by creating Site Reference records, where each record represents a different site. The sites can then be associated with the pieces of equipment, locations and other relevant data that belong to that site.

This topic provides a list of the all the procedures related to managing Sites and Site Filtering, as well as links to the related concept and reference topics.

## About Site Filtering

Site Filtering helps users who are assigned to specific sites find relevant records more easily. Site Filtering uses a Site Reference Key on families that have site filtering enabled. Site Filtering is a useful tool for companies that have facilities at multiple sites because users are prevented from viewing records associated with sites to which they are not assigned.

**Important:** Site Filtering is not a security feature. While Site Filtering can limit the number of results shown, it should not be considered a measure to block data access to certain users. Site Filtering improves the performance of APM so that the data shown is curated specifically to the data that is most useful and necessary for your needs.

The Site Filtering feature utilizes data stored in the Site Reference family (i.e. sites). Site Filtering filters data in APM according to the sites stored in Site Reference records. You can generally only see data assigned to the same sites to which you are assigned as a APM user.

If you are a user with access to multiple sites, you can choose the site to which the record should be assigned when creating records for families that are enabled for site filtering. Records of families which are not enabled for site filtering are assigned to Global and are considered global records, which can be seen by all APM users regardless of site assignments.

### What Can I Expect From Site Filtering in

- Site Filtering is enabled by default. It is not an optional configuration.
- APM families have site filtering enabled according to the following principles:
  - Most entity families are enabled for site filtering by default. Entity families that are not enabled for site filtering produce records that are available to all users.
  - Reference families are not enabled for site filtering.
  - Client-created custom families can be enabled or not enabled for site filtering.

### What Functionality Can Users Expect?

- Users can be assigned to single or multiple sites.
- All users will be assigned to a default site.
- Super Users will be able to access data for all sites.
- Site filtering will be applied based on a user's site assignments.

**Note:** Site Filtering is applied to all data handled in APM including data loaders, the Asset Hierarchy, global search, and queries.

## How Will Records Be Treated?

All records created have a Site Reference Key. If there is no Site Reference Key assigned then all records will be considered Null (Global). The data will then be accessible by all APM users.

All records have a Site Reference Key. When a record is created, a Site Reference Key will be assigned according to this logic in the following order:

1. The record inherits the Site Reference Key from the related Functional Location or Equipment.
2. The record inherits the Site Reference Key from the predecessor record.
3. The record inherits the Site Reference Key from user's default site.
4. The record is given a Site Reference Key from the site assigned via the **Site** control (user input).

**Note:** The Site control is only visible to the user if the database has two or more active sites.

5. The record is assigned a Null (Global) Site Reference Key by default.

**Note:** For details for information about global records, see the [Site Filtering topic in the End User Help](#).

## What Are the Site Filtering Restrictions?

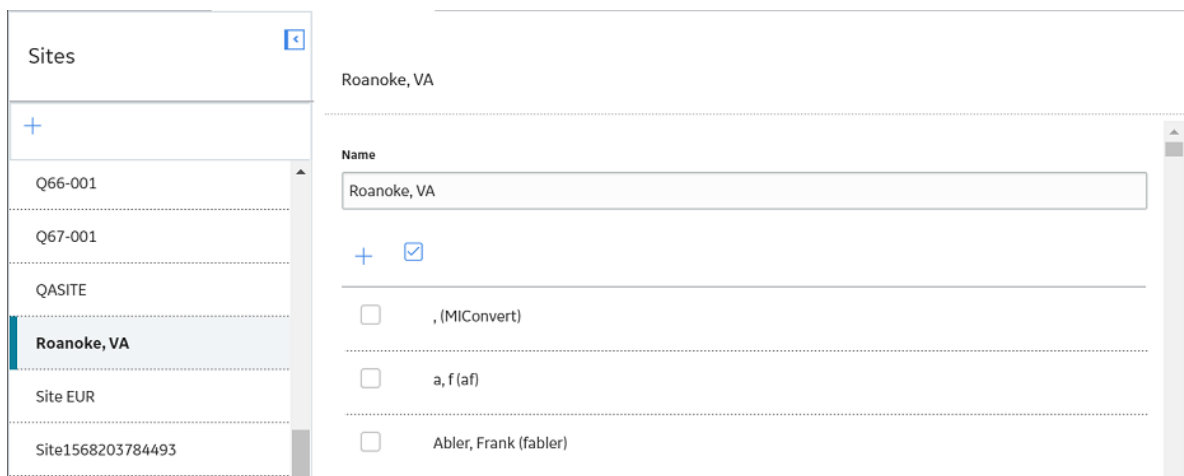
- The Site Filtering settings for baseline and system families cannot be changed. For example, if a baseline or system family is enabled for site filtering, the control is disabled and the setting cannot be changed.
- The Site Reference Key will only be able to be updated for records by a Super User via the following methods:
  - Datasheet entry in the user interface
  - Data Loader

**Note:** The Site Reference Key cannot be changed with an update query. The Site Reference Key for associated records will not cascade during the site filtering process. To change the Site Reference Key for all related records, use the APM Data Loader, or identify and individually update all related records as required.

# Access the Sites Page

## Procedure

In the **Applications** menu, navigate to **ADMIN > Configuration Manager > Sites**. The **Sites** page appears.



## Site Filtering Workflow

This workflow provides the basic, high-level steps for using Site Filtering. Site filtering helps prevent users from encountering irrelevant records, limiting the results displayed from searches and queries based on the sites associated with each user. Enabling site filtering in APM requires completing the following steps.

1. Enable site filtering for each family whose records should be filtered according to a site.

**Note:** Most baseline families are automatically enabled for site filtering. For more information about enabling site filtering, refer to the **Family Information** section of the documentation.

2. [Create one or more sites](#). You can also [assign users to existing sites](#), or assign existing sites to users.

**Note:** For more information about assigning existing sites to users, refer to the **Assign Sites to a Security User** section of the documentation.

3. Assign a default site to each user.

**Note:** For more information about assigning sites to users, refer to the **Assign Sites to a Security User** section of the documentation.



# Chapter 2

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## Manage Sites

### Topics:


- [Create a Site](#)
- [Assign Users to Sites](#)
- [Remove Users from Sites](#)

# Create a Site



## About This Task

**Note:** You cannot delete a site.

## Procedure

1. [Access the Sites Page](#) on page 3.
2. In the pane that displays the site names, select .  
The workspace for the new site appears.
3. In the **Name** box, enter a name for the new site.

**Important:** While creating sites to match EAM system records, if you use APM Connect EAM Adapters or Data Loaders, the name of the site must exactly match the value from your EAM system. For example, if your Maintenance Plant value in your EAM system is 1000, you must name the site 1000.

4. Select .  
The **Assign Users** window appears.
5. Select the check box next to each user to which you want to assign the site, and then select **Update**.  
The users have been added.
6. Select .  
The new site is saved.

# Assign Users to Sites

This topic describes how to assign multiple users to a site from the **Sites** page. You can also assign multiple sites to a user in the **Users** page.

**Note:** If you want to assign a default site to a user, refer to the **Assign Sites to a Security User** section of the documentation.


## Before You Begin


- Create a user.

**Note:** For more information about creating a user, refer to the **Create a Security User** section of the documentation.

- [Create a site](#).



## Procedure

1. [Access the Sites Page](#) on page 3.
2. In the left pane, select the site to which you want to add the user.  
The workspace for the selected site appears.
3. Select .  
The **Assign Users** window appears.
4. Select the check box next to each user to which you want to assign the site.

5. Select **Update**, and then .  
The selected users are assigned to the site.

## Remove Users from Sites

### Procedure

1. [Access the Sites Page](#) on page 3.
2. In the left pane, select the site from which you want to remove users.  
The workspace for the selected site appears.
3. In the workspace, select the check box next to each user that you want to remove from the site.
4. Above the list of users, select .  
A dialog box appears, asking if you want to remove the selected Security Users from the site.
5. Select **Yes**.  
The selected users are removed from the list.
6. In the upper-right corner of the workspace, select .  
The changes to the site have been saved.

### Results

After you remove a user from a site, the user will not be able to see any of the data for that site.