



# Asset Hierarchy



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# Chapter 1

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## Overview of Asset Hierarchy

### Topics:

- [Overview of Assets](#)
- [About the Asset Hierarchy](#)
- [Access the Assets Page](#)
- [Filter Assets](#)
- [Search for an Asset](#)

## Overview of Assets

The **Assets** page in APM contains the Asset Hierarchy and [Asset Groups](#) that provide a dynamic way to interact with and view your assets.

Simply, the Asset Hierarchy displays records in the database and how they relate to one another. It provides a dynamic view of asset records, which are typically functional locations and equipment, and their associated analyses by navigating through the system based on the assets themselves.

## About the Asset Hierarchy

APM is built on the premise that within your company, assets are organized in a hierarchical fashion, with each asset (for example, equipment, RBI component, etc.) having a parent functional location (for example, unit), which in turn is part of a higher-level functional location (for example, site). These parent-child relationships create the Asset Hierarchy.



### Navigating the Asset Hierarchy

The Asset Hierarchy allows you to browse your assets from the top-level functional location through the hierarchical structure, for example:

- Company
- Site
- Area
- Unit
- Functional Location
- Equipment

Your selection in the Asset Hierarchy is used as the default asset when you open an application from the main navigation menu or from a hyperlink in the **<Asset Name>** workspace. Your selection is retained when you log out of APM, and it is used as the default asset the next time you log in, until you select a different asset in the Asset Hierarchy.

#### Tip:

- To navigate to a parent-level equipment or functional location of an asset that is selected in the hierarchy, select the corresponding breadcrumb link in the breadcrumb path.
- To expand or collapse the Asset Hierarchy panel, select  or , respectively.
- To resize the Asset Hierarchy panel, drag the border of the panel to the required width.

#### Note:

- As a standard practice, we assume that your equipment is installed in locations that exist on the lowest level of your location hierarchy.
- By default, the Asset Hierarchy displays:
  - A maximum of 500 top-level records in the hierarchy.
  - A maximum of 500 child equipment or functional locations for a parent functional location.

### About the Hierarchy Filter

The Asset Hierarchy filter has three levels. As standard practice, these filter levels correspond with the asset taxonomy:

- Taxonomy Category: A list of asset categories (for example, Electrical is a category of asset).
- Taxonomy Class: A list of asset classifications (for example, Capacitor is a class of electrical assets).
- Taxonomy Type: A list of types of asset (for example, Series Capacitor is a type of capacitor).

You can select one or more levels in the filter panel, and the Asset Hierarchy is filtered to show only assets that match your selection.

### About the <Asset Name> Workspace

As you navigate through the Asset Hierarchy, in the <Asset Name> workspace, you can access information about the Health, Reliability, Strategy, Integrity and Safety for each level of equipment or functional location. The <Asset Name> workspace provides an overview of all the data available in APM related to the asset selected in the Asset Hierarchy. For each Health, Reliability, Strategy and Integrity item, a hyperlink is available, displaying the number and type of analysis performed against that asset. When selected, the hyperlinks open the analyses or inspections in a new tab while maintaining the selection in the Asset Hierarchy.

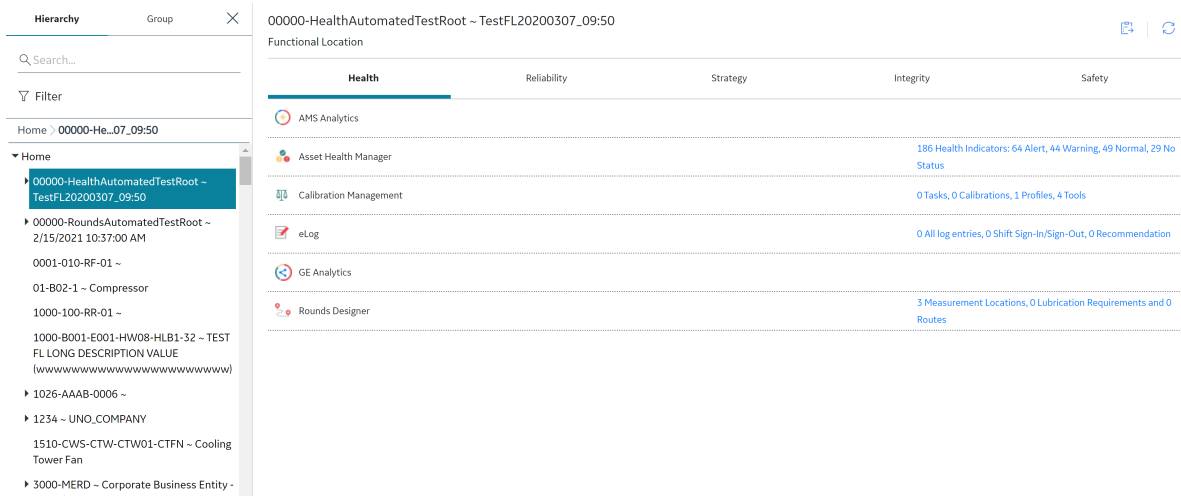
**Tip:** To refresh the <Asset Name> workspace, select .

## Access the Assets Page

### Procedure

In the top navigation bar, select .

The page displaying the Asset Hierarchy appears.




The screenshot shows the Asset Hierarchy workspace. On the left, there is a 'Hierarchy' panel with a search bar and a filter icon. Below it, a list of assets is shown, with the selected asset '00000-HealthAutomatedTestRoot - TestFL20200307\_09:50' highlighted. On the right, the workspace displays the 'Functional Location' for the selected asset, with tabs for Health, Reliability, Strategy, Integrity, and Safety. The 'Health' tab is active, showing a table of data:

Health	Reliability	Strategy	Integrity	Safety
AMS Analytics				
Asset Health Manager			186 Health Indicators: 64 Alert, 44 Warning, 49 Normal, 29 No Status	
Calibration Management			0 Tasks, 0 Calibrations, 1 Profiles, 4 Tools	
eLog			0 All log entries, 0 Shift Sign-In/Sign-Out, 0 Recommendation	
GE Analytics				
Rounds Designer			3 Measurement Locations, 0 Lubrication Requirements and 0 Routes	

## Filter Assets

### Procedure

1. Access the **Assets** page.
2. In the left pane, in the **Hierarchy** section, select . The **Filter** menu appears.


3. Optionally, in the **CATEGORY** drop-down list box, select a taxonomy category.
4. Optionally, in the **CLASS** drop-down list box, select a taxonomy class.
5. Optionally, in the **TYPE** drop-down list box, select a taxonomy type.
6. Select **Apply**.  
The hierarchy is filtered according to your selection.

## Search for an Asset

### Before You Begin

If you want to search for an asset in the filtered assets list, apply the filter before you search for an asset.

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Hierarchy**, select , and then, in the text box, enter at least two characters. For more information, refer to the Search section of the documentation. The search results appear in a list in the left pane.



# Chapter 2

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## Overview of Asset Groups

### Topics:

- [About Asset Groups](#)
- [About Asset Groups Based on Queries](#)
- [Create an Asset Group](#)
- [Create an Asset Group Based on a Query](#)
- [Create a Static Asset Group from an Asset Group Based on a Query](#)
- [Filter Asset Groups](#)
- [Search for an Asset Group](#)
- [Search for an Asset in an Asset Group](#)
- [Modify an Asset Group](#)
- [Add Assets to an Asset Group](#)
- [Remove Assets from an Asset Group](#)
- [Delete an Asset Group](#)

## About Asset Groups

Asset Groups are collections of assets, grouped together for analysis. Asset Groups, other than groups based on queries, can also be selected in the asset filter that appears in queries, dashboards, graphs, and maps.

You can create an Asset Group and add assets as needed in the **Asset Group** section, or use a query to define the assets in the group. Asset Groups are also created automatically when assets are selected in an analysis workflow. Asset Groups created in an analysis workflow are identified by the Relationship field.

An Asset Group can be saved and reused for different types of analyses. For example, if you wanted to perform an Asset Criticality analysis and a Risk Based Inspection analysis on the same 20 pieces of equipment, you can create an Asset Group containing those 20 equipment records and use the same group for each analysis.

## About Asset Groups Based on Queries

The ability to create an Asset Group based on a query allows a user to apply an analysis to a dynamic group of assets for example, equipment, functional locations, RBI components, etc. When a user bases a new Asset Group on a query, the Asset Group is dynamic in that it is subject to change as assets change with respect to the parameters of the query.

Every time you access an Asset Group that is based on a query, the query is freshly run. For example, the day you create an Asset Group using a query, the query it is based on may populate it with 10 assets. If you were to access the same Asset Group a month later, the query would run afresh and may populate the Asset Group with more or fewer than 10, depending on the number of assets that will meet the parameters of the query the second time around.

The base query that you specify for an Asset Group must contain the following columns:


- ENTY\_KEY
- ENTY\_ID
- FMLY\_KEY
- MI\_SITE\_KEY


When you apply an analysis to an Asset Group that is based on a query, the Asset Group is no longer dynamic. Instead, the assets returned by the base query at the time when you apply the analysis are the exact assets for which that analysis will always apply.

You cannot use an Asset Group that is based on a query as a filter in a module overview page or dashboard where asset filtering is available. You must convert the dynamic Asset Group to a static group to use it as a filter.

## Create an Asset Group

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select .  
The **New Asset Group** workspace appears.
3. In the **Group Name** box, enter a name for the new asset group.

4. In the **Group Description** box, enter a brief description for the group.
5. To add a Parent to the Asset Group, above the **Select a Parent** box, select  .  
The **Asset Finder** window appears.
6. In the **Asset Finder** window, select the Asset with which you want to associate the group, and then select **Done**.

**Note:** If you want to add a parent to the Asset Group, only child assets of the selected parent Asset can be added to the Asset Group.

The number of assets marked to be added to the group appears.

7. In the workspace heading, select **Save**.  
The group is saved, and appears in the **Asset Group** section.




**Note:** Relationships are determined while creating an Asset Group during an associated module workflow.

## Create an Asset Group Based on a Query

### Before You Begin

Before you can create an Asset Group based on a query, you must create a query on which you want to base your Asset Group, if it does not already exist. The query must conform with the requirements listed in the [About Asset Groups Based on Queries](#) on page 6 topic.

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select  .  
The **New Asset Group** workspace appears.
3. In the **Group Name** box, enter a name for the new asset group.  
If you do not specify a Group Name, the name of the Query that you select will be used as the name of the Asset Group.
4. In the **Group Description** box, enter a brief description for the group.  
If you do not specify a Group Description, the description of the Query that you select will be used as the description of the Asset Group.
5. To add a Parent to the Asset Group, above the **Select a Parent** box, select  .  
The **Asset Finder** window appears.
6. Above the **Select a Query** box, select  .  
The **Select a Query from the Catalog** window appears.
7. Navigate to the query on which you want to base the new Asset Group, and then select that query.  
The **Select a Query** box is populated with the query path.
8. Select **Save**.  
The group is saved, and appears in the **Asset Group** section.

# Create a Static Asset Group from an Asset Group Based on a Query

## Before You Begin

Before you can create a static Asset Group from an Asset Group based on a query, the system must contain an Asset Group that is based on a query.

## Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select the group that you want to copy.

The properties for the selected group appear in the **<Group Name>** workspace, where **<Group Name>** is the name of the group.

3. Select **Save As a Static Group**.

The Save Asset Group dialog appears.

4. Select **OK**

The asset group copy is created, and assets are added to the group according to the current results of the base query.

**Note:** Depending on the number of assets in the group and the number of pending static asset group creation requests in the queue, it may take some time for the asset group copy to appear.



5. In the left pane, select the newly created group to view it in the **<Group Name>** workspace.

## Next Steps

- [Add Assets to the Asset Group.](#)
- [Modify the Asset Group.](#)


# Filter Asset Groups

## Procedure

1. Access the **Assets** page.
2. In the left pane, in the **Group** section, select .  
The **Group Filter** window appears.
3. Optionally, in the **Relationship** box, select a relationship by which to filter.
4. Optionally, select **Hierarchy Filter**.  
The **Hierarchy Finder** window appears.
5. In the Asset Hierarchy, in the row for each asset by which you want to filter groups, select .
6. Select **OK**.  
The list of applied filters appears on the **Group Filter** window.
7. Select **Done**.  
The Asset Groups are filtered according to your selection.

## Search for an Asset Group

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**.
3. Select , and then, in the text box, enter your search criteria.  
The search results appear in the list in the left pane.
4. Select a group to view the details.

**Tip:** When you select an Asset Group, the first 25 assets in the group are displayed in the **Add Assets** box. You can scroll down to view the remaining assets.

## Search for an Asset in an Asset Group

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select the group in which you want to search for an asset.
3. In the right pane, enter your search criteria in the **Search** box.  
The search results appear in the **Add Assets** box.

## Modify an Asset Group

### Procedure


1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select the group that you want to modify.  
The selected group's properties appear in the **<Group Name>** workspace, where **<Group Name>** is the name of the group.
3. Modify the properties as needed.
4. Select **Save**.  
The changes are saved.

## Add Assets to an Asset Group

### About This Task

You can add assets to any Asset Group that is not based on a query.

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select the group to which you want to add assets.
3. In the **Add Assets** box, select .  
The **Choose assets to add to the group** window appears.

**Note:** Only the assets that are already displayed in the Asset Group page are counted in the <n> items selected filter chip in this window. If you want the complete list of selected assets to be available in the window, you must scroll to the bottom of the Add Assets box before selecting **+**.

4. Select the assets that you want to add to the group.

**Tip:**

- If you toggle the **Select Children** option, all the child assets of the next asset you select will be added to the group.
  - You can select the **Show Selected Only** check box to view the list of currently selected assets.
5. Select **Done**.  
The number of assets marked to be added to the Group appears.
  6. Select **Save**.  
The assets are added to the group.

## Remove Assets from an Asset Group

### About This Task

You can remove assets from any Asset Group that is not based on a query.

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select the group from which you want to remove assets.
3. In the list of assets in the group, select to remove an asset from the group. Or, if you want to search or filter assets, in the **Add Assets** box:
  - a) Select **+**.  
The **Asset Finder** window appears.
  - b) Clear the check boxes for the assets that you want to remove from the group.
4. Select **Done**.  
The number of assets marked for removal appears.
5. Select **Save**.  
The assets are removed from the group.

## Delete an Asset Group

### About This Task

You cannot delete an Asset Group that is linked to an analysis.

### Procedure

1. Access the **Assets** page.
2. In the left pane, select **Group**, and then select the group that you want to delete.
3. Select **Delete**.  
If the Asset Group is linked to an analysis, a message appears, displaying the list of linked analyses. You must unlink the Asset Group from all the analyses before deleting it.  
  
If the Asset Group is not linked to an analysis, a message appears, asking you to confirm that you want to delete the Asset Group.

4. Select **Yes**.  
The Asset Group is deleted.

# Chapter 3

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## Workflow

### Topics:

- [Core Analysis: Asset Event Analysis Workflow](#)
- [Start](#)
- [Search Asset](#)
- [Review Event History](#)
- [Opportunity Exists?](#)
- [Manage Performance Recommendations](#)

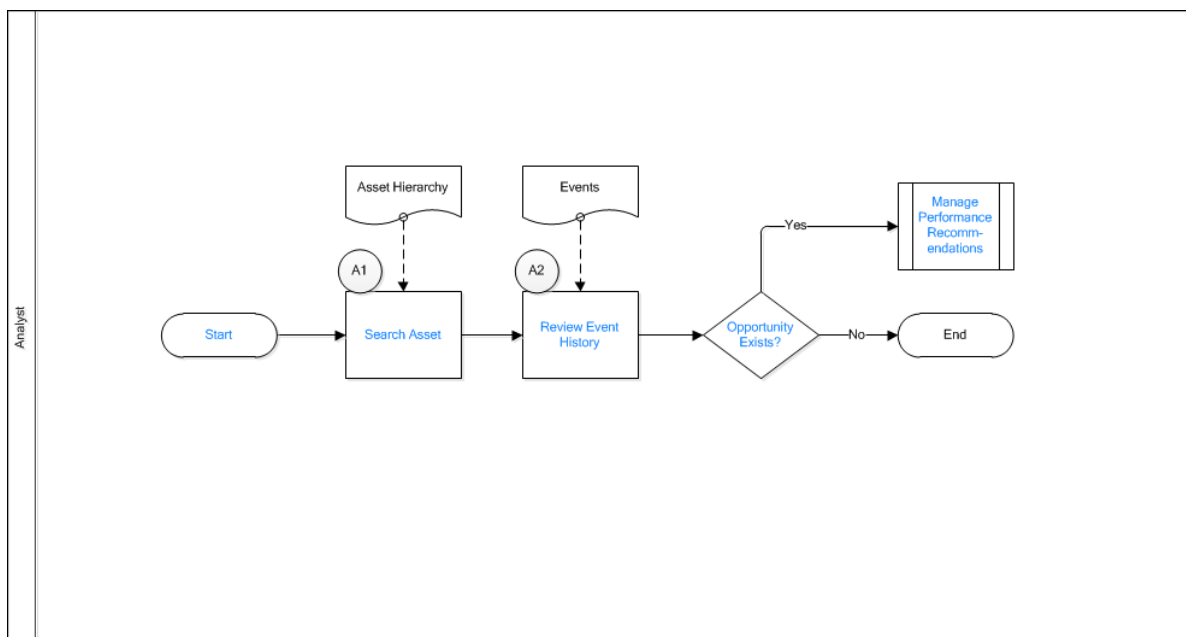


## Core Analysis: Asset Event Analysis Workflow

Core Analysis processes leverage APM data to identify opportunities for business improvement. When the process identifies such an opportunity, a Performance Recommendation is raised to communicate the need and track the required work. You can use the Asset Event Analysis Workflow process to identify opportunities or needs for improvement based on unexpected or undesirable events related to specific assets.

In the following workflow diagram, the blue text in a shape indicates that the corresponding description has been provided in the sections that follow the diagram. For more information, refer to the [Interpreting the Workflow Diagrams](#) topic in the [APM Product Workflows](#) documentation.

**Note:** For information on the personas associated with a APM module, refer to the [APM Product Workflows](#) documentation.



### Start

Persona: Analyst

To satisfy a specific business problem, a APM User initiates a core analysis that applies standard data analysis techniques.

### Search Asset

Persona: Analyst

Search for a specific asset (Functional Location or Equipment) for which Event records are required.

## **Review Event History**

Persona: Analyst

Review individual Event records for the selected asset. Identify unexpected or undesirable events that may require further analysis for elimination. Consult other forms of APM data in the analysis of Event records.

## **Opportunity Exists?**

Persona: Analyst

If a APM User identifies an opportunity or need for improvement, then a Performance Recommendation is raised to communicate the need and track the required work. Otherwise, the workflow ends.

## **Manage Performance Recommendations**

Persona: Analyst

If a APM User identifies an opportunity or need for improvement, then a Performance Recommendation is raised to communicate the need and track the required work.

# Chapter 4

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## Asset Hierarchy Configuration

### Topics:

- [Asset Hierarchy Configuration](#)
- [Access the Asset Hierarchy Configuration Page](#)
- [Modify the Asset Hierarchy Configuration](#)
- [Schedule an Asset Hierarchy Rebuild](#)
- [Configure the Asset Hierarchy Display](#)

## Asset Hierarchy Configuration

APM is built on the premise that, within your company, there are multiple asset records that can be organized into a hierarchy.

The baseline Asset Hierarchy configuration consists of Functional Locations and Equipment records. The highest level of the hierarchy is represented by Functional Location records which appear below the Home level of the hierarchy. Each of these Functional Locations may have any number of levels of child Functional Locations, and Equipment is found at the lowest level of the hierarchy. For example, the top level of Functional Locations might represent different sites within the organization; the second level might represent different areas within each site; the third level might represent specific machines within each area. A location representing a machine could be comprised of three pieces of equipment that make up the machine. In this example, equipment would not be directly related to locations that represent sites or areas; equipment would only be directly related to locations representing machines.

The Asset Hierarchy configuration can be modified to reflect non-baseline asset types and supports multiple relationships between assets, subject to certain constraints.

### More Details: Baseline Configuration

In the baseline configuration, there are two levels reflected in the Asset Hierarchy: the **Root** and a secondary level. The primary level of the Hierarchy, the **Root**, reflects the relationships between Functional Locations. The second level of the hierarchy reflects the relationships between Equipment and Functional Locations. The hierarchy first displays the **Root** Functional Location, and drills down to child Functional Locations based on your selections. The hierarchy will continue to do so until there are no child relationships for the selected Functional Location. Then, using the criteria defined in the second level, the hierarchy will display Equipment records related to the selected Functional Location.

The baseline configuration is as follows:

- **Root:** The primary level of the hierarchy.
  - **Parent Family:** Functional Location
  - **Relationship:** Functional Location Has Functional Location(s)
  - **Child Family:** Functional Location
  - **Parent Priority:** 0
  - **Display Field:** ENTY\_ID
  - **Taxonomy Category:** Taxonomy Category
  - **Taxonomy Class:** Taxonomy Class
  - **Taxonomy Type:** Taxonomy Type
- **Secondary Level:** The second level of the hierarchy.
  - **Parent Family:** Functional Location
  - **Relationship:** Functional Location Has Equipment
  - **Child Family:** Equipment
  - **Parent Priority:** 0
  - **Display Field:** ENTY\_ID
  - **Taxonomy Category:** Taxonomy Category
  - **Taxonomy Class:** Taxonomy Class
  - **Taxonomy Type:** Taxonomy Type

**Important:** Asset records with multiple parent records are not supported in Asset Hierarchy, except when both the following conditions are satisfied:

- The link to each parent uses a different relationship family.
- A priority has been defined for each relationship family in the Asset Hierarchy configuration.

## Access the Asset Hierarchy Configuration Page

### Procedure

Access the **Operations Manager** page, and then select **Asset Hierarchy Configuration**. The **Asset Hierarchy Configuration** page appears, displaying the Asset Hierarchy configuration.

## Modify the Asset Hierarchy Configuration

### About This Task

**Note:** You only need to modify the Asset Hierarchy if you want to change the baseline configuration.

### Procedure

1. Access the **Asset Hierarchy Configuration** page.
2. In each section, select a value for the following as necessary:
  - **Root:** Selected for the assets that appear at the highest level of the Asset Hierarchy. Unselected for the assets that appear at lower levels of the Asset Hierarchy.
  - **Parent Family:** The Entity family of parent assets. The list contains all entity families in the database.
  - **Relationship:** The Relationship family that links the parent asset family to the child asset family. The list contains the relationship families for the selected parent family.
  - **Child Family:** The Entity family of child assets. The list contains entity families that are linked to the selected parent family through the selected relationship family.


**Note:** The parent family and the child family can be the same if allowed by the selected relationship.

- **Parent Priority:** The number that defines which relationship is used to determine the parent record that is displayed in the Asset Hierarchy for a child record with multiple parent records. For example, suppose an Equipment record satisfies the following conditions:
  - It is a child to a Functional Location record using the Functional Location Has Equipment relationship family.
  - It is a child to another Equipment record using the Equipment Has Equipment relationship family.



In this case, if the Equipment Has Equipment relationship family has the highest Parent Priority in the Asset Hierarchy configuration, the Equipment record will be displayed as the child to the parent Equipment record, but not as a child to the Functional Location record.

- **Display Field:** The field that contains the value to display as the asset ID in the Asset Hierarchy. The list contains all the fields in the selected Child Family, excluding Long Text fields.
- **Taxonomy Category:** The field that contains the value to use as the Taxonomy Category in the Asset Hierarchy filter section. The list contains all the fields in the selected Child Family.
- **Taxonomy Class:** The field that contains the value to use as the Taxonomy Class in the Asset Hierarchy filter section. The list contains all the fields in the selected Child Family.
- **Taxonomy Type:** The field that contains the value to use as the Taxonomy Type in the Asset Hierarchy filter section. The list contains all the fields in the selected Child Family.

**Tip:** In APM, taxonomy refers to the classification systems used for identifying assets. Asset taxonomy is broken down into three sections: Category, Class, and Type.

3. If you want to add another level to the Asset hierarchy, select , and then configure the settings as described in the previous step.
4. If you want to remove a level from the Asset Hierarchy, select **Delete**.

**Note:** You cannot delete the Root section.

5. To save the changes, select .  
The changes are saved and an Asset Hierarchy rebuild is scheduled. The changes are applied and are reflected on the Assets page when the build is complete. Select  to view the latest build status.


## Schedule an Asset Hierarchy Rebuild

### About This Task

You can schedule an Asset Hierarchy rebuild to occur on a one-time or recurring basis. When you schedule the rebuild, the Asset Hierarchy is rebuilt based on the schedule. If you have scheduled jobs to import asset data from an external system, we recommend that you schedule the Asset Hierarchy to rebuild when the imports are complete. Otherwise, the Asset Hierarchy will be rebuilt every time a record in an entity or relationship family in the Asset Hierarchy is created, updated, or deleted..

For information on scheduling a job, refer to [Schedule a Job](#).

### Procedure

1. In the **Applications** menu, navigate to **ADMIN > Operations Manager > Asset Hierarchy Configuration**.
2. Select the **Enable Schedule** check box.  
A message appears, stating that the schedule configuration is not found.
3. Select .  
The **Edit Schedule** window appears.
4. Provide values in the available fields.
5. Select **Save**.
6. In the **Asset Hierarchy Configuration** page, select **Save**.  
The Asset Hierarchy rebuild is scheduled.

## Configure the Asset Hierarchy Display

### About This Task

By default, the Asset Hierarchy displays 500 assets at any given level, or in the list of search results. You can configure the number of assets to be displayed from 100 to 2500 assets.

**Note:** You may experience longer times to display the hierarchy if you select a higher number.

### Procedure

1. In the **Applications** menu, navigate to **ADMIN > Operations Manager > Asset Hierarchy Configuration**.
2. In the **Asset Hierarchy Browser Configuration** section, enter the number of assets to be displayed.

3. Select .
- The configuration is saved.

# Chapter 5

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## Data Loader

### Topics:

- [About the Custom Asset Hierarchy Data Loader](#)
- [About the Custom Asset Hierarchy Data Loader Requirements](#)
- [About the Custom Asset Hierarchy Data Loader Data Model](#)
- [About the Custom Asset Hierarchy General Loading Strategy](#)
- [About the Custom Asset Hierarchy Data Loader Workbook Layout and Use](#)
- [About Populating Site Reference Data](#)
- [About the Custom Asset Hierarchy Data Loader Load Verification](#)



## About the Custom Asset Hierarchy Data Loader

The Custom Asset Hierarchy Data Loader is designed to load data into the Asset Hierarchy Entity family in APM, and is also used to relate records in that family to other families in APM based on the relationship definitions defined in Family Management. You can create Custom Asset Hierarchy Data Loader workbooks for the following purposes:

- Entity Family Data: Used to load data or records.  
-and-
- Relationship Family Data: Used to relate a record in an entity family to another record in different entity family.

The data loader workbooks used by the Custom Asset Hierarchy Data Loader are created using the metadata definitions configured in your APM system. When the data is loaded, the Custom Asset Hierarchy Data Loader will trigger all of the associated field and family level rules, to ensure that the data is valid, but no further validation is done to the data. You should, however, verify that the intended data, records, or relationships are present in the APM system after a data load has been completed.

## About the Custom Asset Hierarchy Data Loader Requirements

### Determine Which Families and Relationships to Populate

You can determine which families are available and how families are related in Family Management. To access Family Management:

1. Log in to APM.
2. In the **Applications** menu, select **Admin**, and then select **Family Management**.

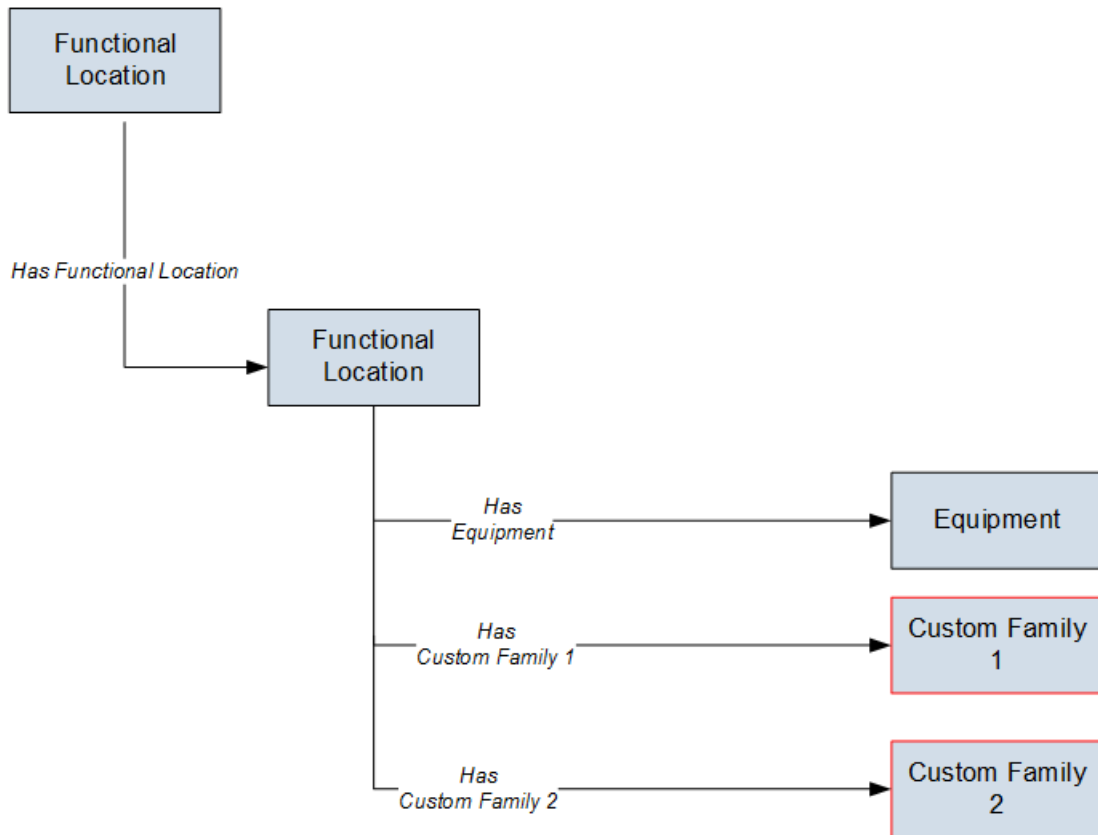
### Security Settings

The Security User performing the data load operation must be associated with either the MI Data Loader User or MI Data Loader Admin Security Role. Depending on the type of data that the Security User wants to load, the user may need to be associated with additional Security Roles to grant privileges to create the necessary records. To determine if additional Security Role association is needed to create a particular type of record, refer to the About Roles section of the APM Administrative User Help documentation.

## About the Custom Asset Hierarchy Data Loader Data Model

The following data model illustrates the records that the Custom Asset Hierarchy Data Loader supports. The Family records illustrated with a red border are customizable.

## Custom Asset Hierarchy Data Loader Data Model



## About the Custom Asset Hierarchy General Loading Strategy

This section describes any prerequisites to loading the data and the order in which the data will be loaded.

### General Loading Strategy Workflow

1. Determine what families and or relationships you want to populate using the Custom Asset Hierarchy Data Loader.
2. Populate the **Configuration** worksheet.

This data loader may run on a schedule as part of the EAM data load service.

## About the Custom Asset Hierarchy Data Loader Workbook Layout and Use

This section provides a high-level overview and explanation of how the data loader workbook is constructed.

In order to import data using the Custom Asset Hierarchy Data Loader, APM provides an Excel workbook that must be used to perform the data load.

The following table lists the worksheets that are included in the **MI\_AH\_Entity\_Dataloader.xlsx** workbook.

Worksheet	Description
Configuration	The <b>Configuration</b> worksheet is needed to describe the type of data that you will be loading and how that data should be handled during the data load.
AHEntity	Where you specify the actual Asset Hierarchy entities that you want to load.
LinkAHEntitytoEntity	Where you can connect an Asset Hierarchy entity to another Asset Hierarchy entity.
LinkAHEntitytoFL	Where you can connect an Asset Hierarchy entity to a Functional Location, Equipment, or some other asset concept defined by the Family Management settings.

Each worksheet in the Custom Asset Hierarchy Data Loader workbook contains field values that can be mapped to the appropriate APM family/field.

### Configuration Worksheet

The Configuration worksheet tells the Custom Asset Hierarchy Data Loader what types of data are being loaded and how the data is to be loaded, and is standard for all data loads regardless of the type of data that you are loading. The following table outlines the options that are valid or the values that are expected in each of the columns on the Configuration worksheet.

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Load Data From Worksheet	LOAD_DATA_WORKSHEET	Boolean	<ul style="list-style-type: none"> <li>True</li> <li>False</li> </ul>	The value in this column will determine whether or not the data should be loaded from the worksheet.
Data Worksheet ID	DATA_WORKSHEET_ID	Character	<ul style="list-style-type: none"> <li>AHEntity</li> <li>LinkAHEntitytoEntity</li> <li>LinkAHEntitytoFL</li> </ul>	This column contains the name of the worksheet where the actual data is located. It needs to have the same name as the worksheet in the data loader workbook.
Batch Filter Column	BATCH_FILTER_COL_ID	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY_PRNT_ID_CHR</li> <li>'&lt;PRED_FAMILY_ID&gt; MI_AH_ENTITY_ID_CHR</li> </ul>	When the data is loaded into APM, it is processed in a series of batches. This column contains the Data Column ID that will be used for the batching of the data. All of the records will be grouped together by the unique values in the column specified in the worksheet. This column must also be the first column that exists in the worksheet. It must be the Column ID, which is in the second row on the worksheet and not the Field ID.

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Primary Family ID	PRIMARY_FAMILY_ID	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY</li> <li>MIR_ENTYHSENTY</li> <li>MIR_ENTYHSASSET</li> </ul>	<p>Depending on the type of data that you are working with, this will contain the Relationship Family ID or the Entity Family ID. You can also allow the data in source file to determine the Family ID by encapsulating the Field ID that contains the Family ID data in brackets (&lt;&gt;).</p> <p>For example, if in the worksheet there is a column with an ID of PRIMARY_FAMILY_ID, where each row contains the corresponding Family ID, then in this column you should put the value of &lt;PRIMARY_FAMILY_ID&gt;.</p> <p>If the Family ID in the APM metadata contains spaces, then you have to use this feature.</p>
Primary Family Key Fields	PRIMARY_FAMILY_KEY_FIELDS	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY_ID_CHARACTER</li> </ul>	<p>This column contains the Field IDs associated with the Primary Family that are used to uniquely identify a record. If more than one field is to be used, then each Field ID needs to be separated by a   (Pipe) character. In the case where you are loading data into a relationship, if no keys fields exist or are used, use the &lt;none&gt; constant.</p> <p>If the Primary Action is ACTION_INSERTONLY, then no key fields need to be specified, so you can use the &lt;none&gt; constant.</p>
Family Type	FAMILY_TYPE		<ul style="list-style-type: none"> <li>Entity</li> <li>Relationship</li> </ul>	<p>The value in this column should be Entity or Relationship depending on the type of data that is being loaded.</p>
Predecessor Family ID	PRED_FAMILY_ID	Character	<ul style="list-style-type: none"> <li>&lt;PRED_FAMILY_ID&gt;</li> </ul>	<p>When the Family Type is Relationship, this column will contain the value of the Entity Family ID that is the predecessor in the relationship. Otherwise, it should contain the &lt;none&gt; constant. You can also use the data in each of the rows to determine the Predecessor Family ID.</p>

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Predecessor Family Key Fields	PRED_FAMILY_KEY_FIELDS	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY_ID_CHR</li> </ul>	<p>This column contains the Field ID or IDs associated with the Predecessor Family that are used to uniquely identify the predecessor record. If more than one field is to be used, then each Field ID needs to be separated by a   (Pipe) character.</p> <p>If the Predecessor Action is ACTION_INSERTONLY, then no key fields need to be specified, so you can use the &lt;none&gt; constant.</p>
Successor Family ID	SUCC_FAMILY_ID	Character	<ul style="list-style-type: none"> <li>&lt;SUCC_FAMILY_ID&gt;</li> </ul>	<p>When the Family Type is Relationship, this column will contain the value of the Entity Family ID that is the successor in the relationship. Otherwise, it should contain the &lt;none&gt; constant. You can also use the data in each of the rows to determine the Successor Family ID.</p>
Successor Family Key Fields	SUCC_FAMILY_KEY_FIELDS	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY_ID_CHR</li> <li>MI_FNCLOC00_FNC_LOC_C</li> </ul>	<p>This column contains the Field ID or IDs associated with the Successor Family that are used to uniquely identify the successor record. If more than one field is to be used, then each Field ID needs to be separated by a   (Pipe) character.</p> <p>If the Successor Action is ACTION_INSERTONLY, then no key fields need to be specified, so you can use the &lt;none&gt; constant.</p>

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Primary Action	PRIMARY_ACTION	Character	<ul style="list-style-type: none"> <li>ACTION_INSERTUPDATE</li> </ul>	<p>The value in this column will determine the action that will be applied to the Primary Family records. If the Family Type is Entity, then the possible values are:</p> <ul style="list-style-type: none"> <li>ACTION_INSERTONLY</li> <li>ACTION_INSERTUPDATE</li> <li>ACTION_UPDATEONLY</li> <li>ACTION_DELETE</li> <li>ACTION_PURGE</li> </ul> <p>Deleting a record and purging a record will both delete the current record, the difference being that the purge action will delete the record and all of the links or relationships tied to that record. The delete action will attempt to delete the record, and if it is related to another record, the delete will fail. If the Family Type is Relationship, then the possible values are:</p> <ul style="list-style-type: none"> <li>ACTION_INSERTONLY</li> <li>ACTION_INSERTUPDATE</li> <li>ACTION_UPDATEONLY</li> <li>ACTION_DELETE</li> </ul>
Predecessor Action	PRED_ACTION	Character	<ul style="list-style-type: none"> <li>ACTION_NONE</li> <li>ACTION_LOCATE</li> </ul>	<p>The value in this column will determine the action that will be applied to the Predecessor Family records. The possible values are:</p> <ul style="list-style-type: none"> <li>ACTION_INSERTONLY</li> <li>ACTION_INSERTUPDATE</li> <li>ACTION_UPDATEONLY</li> <li>ACTION_DELETE</li> <li>ACTION_PURGE</li> <li>ACTION_LOCATE</li> </ul> <p>If the Family Type is Entity then the value needs to be:</p> <ul style="list-style-type: none"> <li>ACTION_NONE</li> </ul>

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Successor Action	SUCC_ACTION	Character	<ul style="list-style-type: none"> <li>ACTION_NONE</li> <li>ACTION_LOCATE</li> </ul>	<p>The value in this column will determine the action that will be applied to the Successor Family records. The possible values are:</p> <ul style="list-style-type: none"> <li>ACTION_INSERTONLY</li> <li>ACTION_INSERTUPDATE</li> <li>ACTION_UPDATEONLY</li> <li>ACTION_DELETE</li> <li>ACTION_PURGE</li> <li>ACTION_LOCATE</li> </ul> <p>If the Family Type is Entity then the value needs to be:</p> <ul style="list-style-type: none"> <li>ACTION_NONE</li> </ul>
Insert with Null Values?	OPTION_INSERT_ON_NULL	Boolean	<ul style="list-style-type: none"> <li>True</li> <li>False</li> </ul>	When setting field values on a new record, if a value coming across is NULL, the field values will be set to NULL if this option is set to True.
Update with Null Values?	OPTION_UPDATE_ON_NULL	Boolean	<ul style="list-style-type: none"> <li>True</li> <li>False</li> </ul>	When setting field values on an existing record, if a value coming across is NULL, the field values will be set to NULL if this option is set to True.
Replace an Existing Link?	OPTION_REPLACE_EXISTING_LINK	Boolean	<ul style="list-style-type: none"> <li>True</li> <li>False</li> </ul>	<p>The Replace Existing Relationship option is used to determine how a relationship is to be maintained by its cardinality definition.</p> <p>For example, the relationship Location Contains Asset that is defined in the Configuration Manager. It has a cardinality defined as Zero or One to Zero or One, has a Location LP-2300, and contains the Asset P-2300. If, in the data load, you assign the Asset P-5000 to be contained in the Location LP-2300, and you have set the Replace Existing Link property to True, then the data loader will link P-5000 to LP-2300 and unlink P-2300 from LP-2300. This assumes that P-5000 is not currently linked to another location. The same is true for a relationship that is defined as Zero or One to Zero or Many, or Zero or Many to Zero or One.</p>

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Allow Change of Family?	OPTION_ALLOW_CHANGE_OF_FAMILY	Boolean	<ul style="list-style-type: none"> <li>• True</li> <li>• False</li> </ul>	<p>Allows the data loader to move an entity from one family to another.</p> <p>For example, this would allow an entity that is currently assigned to the Centrifugal Pump family to be moved to the Reciprocating Pump family.</p> <p>All relationships will be maintained as long as the family to which the entity is being moved allows the same relationships.</p> <p><b>Note:</b> Because of the extra processing required, by selecting this option, the interface performance will decrease.</p>
Process Each Row as a Transaction?	OPTION_TRANSACTION_P ER_ROW	Boolean	<ul style="list-style-type: none"> <li>• True</li> <li>• False</li> </ul>	<p>When this value is set to True, each row in the spreadsheet is committed before the next row is processed.</p> <p>If this is set to False, then all of the records in the batch are processed in one transaction.</p> <p>In general, you will get better performance when processing data in a batch, assuming that the data being loaded is clean, meaning that the vast majority of records will not be rejected.</p>

### Asset Hierarchy Entity (AHEntity) Worksheet

The following table outlines the options that are valid or the values that are expected in each of the columns on the Asset Hierarchy worksheet.

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Entity Parent ID	MI_AH_ENTY_PRINT_ID_ C	Character	<ul style="list-style-type: none"> <li>• MRD-PER</li> </ul>	This is the unique identifier of the parent value that you want to link to your entity.
Entity ID	MI_AH_ENTY_ID_C	Character	<ul style="list-style-type: none"> <li>• MRD-PER</li> <li>• MRD-PER-ABC</li> <li>• MRD-PER-DEF</li> </ul>	This is the unique identifier for the entity that you are adding to the worksheet.



Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Entity Name	MI_AH_ENTY_NAME_C	Character	<ul style="list-style-type: none"> <li>Perth</li> <li>ABC Perth</li> <li>DEF Perth</li> </ul>	The name of the asset that you are adding to the worksheet.
Site Reference	MI_SITE_NAME	Character	<ul style="list-style-type: none"> <li>Perth, Australia</li> </ul>	The site reference associated with the entity.

### Link an Asset Hierarchy Entity to Another Entity (LinkAHEntityToEntity) Worksheet

The following table outlines the options that are valid or the values that are expected in each of the columns on the Asset Hierarchy Entity to Entity worksheet.

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Parent ID	<PRED_FAMILY_ID> MI_AH_ENTY_PRINT_ID_C	Character	<ul style="list-style-type: none"> <li>MRD-PER</li> </ul>	This is the unique identifier of the parent value that you want to link to your entity.
Predecessor Family ID	PRED_FAMILY_ID	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY</li> </ul>	When the Family Type is Relationship, this column will contain the value of the Entity Family ID that is the predecessor in the relationship. Otherwise, it should contain the <none> constant. You can also use the data in each of the rows to determine the Predecessor Family ID.

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Entity ID	<SUCC_FAMILY_ID>  MI_AH_ENTY_ID_C	Character	<ul style="list-style-type: none"> <li>MRD-PER-ABC</li> <li>MRD-PER-DEF</li> </ul>	The unique identifier of the asset that is being loaded into the Asset Hierarchy.
Successor Family ID	SUCC_FAMILY	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY</li> </ul>	When the Family Type is Relationship, this column will contain the value of the Entity Family ID that is the successor in the relationship. Otherwise, it should contain the <none> constant. You can also use the data in each of the rows to determine the Successor Family ID.

### Link an Asset Hierarchy Entity to a Functional Location (LinkAHEntitytoFL) Worksheet

The following table outlines the options that are valid or the values that are expected in each of the columns on the Asset Hierarchy Entity to Functional Location worksheet.

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Entity_ID	<PRED_FAMILY_ID>  MI_AH_ENTY_PRINT_ID_ C	Character	<ul style="list-style-type: none"> <li>MRD-PER-ABC</li> <li>MRD-PER-DEF</li> </ul>	The unique identifier of the asset that is being loaded into the Asset Hierarchy.
Predecessor Family ID	PRED_FAMILY_ID	Character	<ul style="list-style-type: none"> <li>MI_AH_ENTITY</li> </ul>	When the Family Type is Relationship, this column will contain the value of the Entity Family ID that is the predecessor in the relationship. Otherwise, it should contain the <none> constant. You can also use the data in each of the rows to determine the Predecessor Family ID.

Field Caption	Field ID	Data Type	Potential Value(s)	Comments
Functional Location	<SUCC_FAMILY_ID>  MI_FNCLOC00_FNC_LO C_C	Character	<ul style="list-style-type: none"> <li>MRD-ROA-ABC-XYZ-FCV1005</li> <li>MRD-ROA-ABC-XYZ-FCV1006</li> <li>MRD-ROA-ABC-XYZ-PCV1001</li> <li>MRD-ROA-ABC-XYZ-PCV1002</li> </ul>	The location of the asset that you are loading into the Asset Hierarchy.
Successor Family ID	SUCC_FAMILY	Character	<ul style="list-style-type: none"> <li>MI_FNCLOC00</li> </ul>	When the Family Type is Relationship, this column will contain the value of the Entity Family ID that is the successor in the relationship. Otherwise, it should contain the <none> constant. You can also use the data in each of the rows to determine the Successor Family ID.

## About Populating Site Reference Data

The Custom Asset Hierarchy Data Loader can be used to populate the Site Reference on Equipment and Functional Location records in APM. The Custom Asset Hierarchy Data Loader populates the ENTY\_KEY system field and the MI\_SITE\_KEY system field associated with the Site Reference value to be populated. On asset records, the Site Reference is stored in the MI\_SITE\_KEY field, a system field in APM. The Custom Asset Hierarchy Data Loader uses the Site Name (MI\_SITE\_NAME) to translate the value to the corresponding Site Key and populate the MI\_SITE\_KEY field; therefore, you do not need to know the key to be able to populate the site reference. This functionality is important because this value can change from one database to another.

### Steps: Populate Site Reference Using the Site Name


1. On the data worksheet, add a column that contains MI\_SITE\_NAME in the column name.  
For example, if you are working with a relationship, where a distinction needs to be made regarding which family is associated with each column, then the column name will be prefaced with the Family ID. The column name might take the form 'MI\_EQUIP000|MI\_SITE\_NAME', where MI\_EQUIP000 is the Family ID.
2. Enter the site name to designate the site by which the asset record, once loaded into APM, will be filtered.
3. Continue populating the source workbook, and then run the data loader.  
The site reference value will filter the equipment records as determined in the source workbook.

## About the Custom Asset Hierarchy Data Loader Load Verification

After loading data, you must perform the following steps in APM to ensure the integrity and accuracy of the data imported from the data loader workbook:

- Review the details of the import job. These details will indicate any errors that occurred during the data load. The log helps you identify any records that are not loaded.
- Run a query on the relevant family to ensure that the records have been created and populated as expected.
- Verify the imported records in Asset Hierarchy to ensure that the relationships between families have been created.
- Verify that the assets in a Functional Location of the Custom Asset Hierarchy Data Loader exist.

To view the assets, perform the following steps:

1. Log in to APM.
2. On the top navigation bar, select .  
The **Assets** page appears.
3. Select a Functional Location of Custom Asset Hierarchy Data Loader.

# Chapter 6

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## Troubleshooting

### Topics:

- [Troubleshooting Scenarios](#)

# Troubleshooting Scenarios

## Troubleshooting Scenarios

The following topics can help you troubleshoot issues that you may have with the Asset Hierarchy module:

- ["Entities with multiple parents" message appears in the hierarchy page](#)
- [Assets not found in hierarchy search but appear in Global Search results](#)

## Entities with Multiple Parents

### Description

In APM, when you attempt to access the Asset Hierarchy, a message with `Entities with multiple parents exist` appears and the hierarchy does not display.

Note that this issue is possible if you include a Many-to-Many relationship in the asset hierarchy configuration, which is not recommended, or if a relationship priority is not correctly configured in the asset hierarchy configuration. See [Asset Hierarchy Configuration](#) on page 16 for more information.

### Cause

An Asset in the hierarchy that you are attempting to access may have multiple parent relationships.

### Solution


Perform the following steps:

1. Run the following query and analyze the results.

```
SELECT enty_key, fmly_key, enty_id
from MIV_MI_AST_HRCY_MV
```

2. If only one row appears with an error message `Entities with multiple parents exist`, run the following query.

```
SELECT MIV_MI_AST_HRCY_MV_DUP.parent_enty_key
, MIV_MI_AST_HRCY_MV_DUP.parent_fmly_key
, MIV_MI_AST_HRCY_MV_DUP.enty_key
, MIV_MI_AST_HRCY_MV_DUP.enty_id
, mi_families.fmly_id
FROM MIV_MI_AST_HRCY_MV_DUP
JOIN mi_families ON MIV_MI_AST_HRCY_MV_DUP.fmly_key =
mi_families.FMLY_KEY
ORDER BY MIV_MI_AST_HRCY_MV_DUP.enty_key Asc
```

3. All the assets with multiple parents will be listed.
4. Access the parent record in the Record Manager that has the duplicate relationship to be removed.
5. Navigate to the child record and select > to view the child record datasheet.
6. Select  and select **Unlink this record**.
7. Repeat steps 4-6 for each duplicate relationship.
8. Rebuild the asset hierarchy.
9. Repeat step 1 to validate that duplicate relationships no longer exist in the hierarchy.

**Note:** If asset data is automatically synched from the EAM system, you may need to correct the asset hierarchy in the EAM system as well, otherwise the relationships that were deleted in step 6 may be recreated next time the sync runs.

## Assets Not Found in Hierarchy Search

### Description

In APM, when you attempt to search for an asset in the Asset Hierarchy, no matching results are displayed, even though the asset is found when using Global Search.

Assume you have the following three relationships configured in Asset Hierarchy Configuration:

- Functional Location Has Functional Location as Root
- Functional Location Has Equipment
- Equipment Has Equipment

In the following scenario:

- Functional Location FL1 is linked to another Functional Location FL2 using the Functional Location has Functional Location relationship, where FL1 is the predecessor and FL2 is the successor.
- Functional Location FL2 is linked to another Functional Location FL3 using the Functional Location has Functional Location relationship, where FL2 is the predecessor and FL3 is the successor.
- Functional Location FL1 is linked to Functional Location FL3 using the Functional Location has Functional Location relationship, where FL3 is the predecessor and FL1 is the successor.

This results in a circular relationship in the asset hierarchy. Functional Location FL3 and any child assets below FL3 in the hierarchy are discounted by the asset hierarchy build process and do not appear in the hierarchy or the hierarchy search results.

### Cause

An asset that you are attempting to search for, or a predecessor to that asset, has a circular relationship in the hierarchy.

### Solution

**Note:** You must be signed into APM as a super user to perform the following steps.

1. In the Queries tool, run the following query to identify the relationship families used in the asset hierarchy:

```
SELECT DISTINCT [MI_AST_HRCY].[MI_AST_HRCY_REL_FMLY_C] "Relationship
Family"
FROM [MI_AST_HRCY]
```


2. Run the following query, replacing **MIV\_MIR\_FLHSFL** with the relevant view ID, for each relationship family identified in step 1, to identify any records with circular relationships:

```
WITH FindRoot (PRED_ENTY_KEY, SUCC_ENTY_KEY, Path, Distance) AS
(
    SELECT P1.PRED_ENTY_KEY "PRED_ENTY_KEY"
    , P1.SUCC_ENTY_KEY "SUCC_ENTY_KEY"
    , CASTCHAR(P1.PRED_ENTY_KEY, 50) "Path"
    , 0 "Distance"
    FROM MIV_MIR_FLHSFL P1
    UNION ALL
    SELECT C.PRED_ENTY_KEY
    , P.SUCC_ENTY_KEY
```

```

, CASTCHAR((C.Path & ' > ' & CASTCHAR(P.PRED_ENTY_KEY, 20)), 50)
"Path"
, (C.Distance + 1) "Distance"
FROM MIV_MIR_FLHSFL P
JOIN FindRoot C
ON (C.SUCC_ENTY_KEY = P.PRED_ENTY_KEY AND P.SUCC_ENTY_KEY <>
P.PRED_ENTY_KEY AND C.SUCC_ENTY_KEY <> C.PRED_ENTY_KEY)
)
SELECT R.PRED_ENTY_KEY
, R.SUCC_ENTY_KEY
, R.Path
, R.Distance
FROM FindRoot R
WHERE (R.PRED_ENTY_KEY = R.SUCC_ENTY_KEY AND R.SUCC_ENTY_KEY
<> 0 AND R.Distance > 0)

```

3. Access the record of the parent asset of an asset identified as having a circular relationship in Record Manager.
4. Navigate to the asset having the circular relationships and select > to view the datasheet.
5. Select  and select **Unlink this record** to remove the circular relationship.
6. Rebuild the asset hierarchy.
7. Repeat step 2 to validate that circular relationships no longer exist in the hierarchy.
8. Validate that any previously missing assets are now visible in the asset hierarchy.

**Note:** If asset data is automatically synced from the EAM system, you may need to correct the asset hierarchy in the EAM system as well, otherwise the relationships that were deleted in step 5 may be recreated next time the sync runs.