Tivoli.

IBM Maximo Asset Management
IBM Tivoli Asset Management for IT
IBM Tivoli Service Request Manager

Version 7.1

IBM
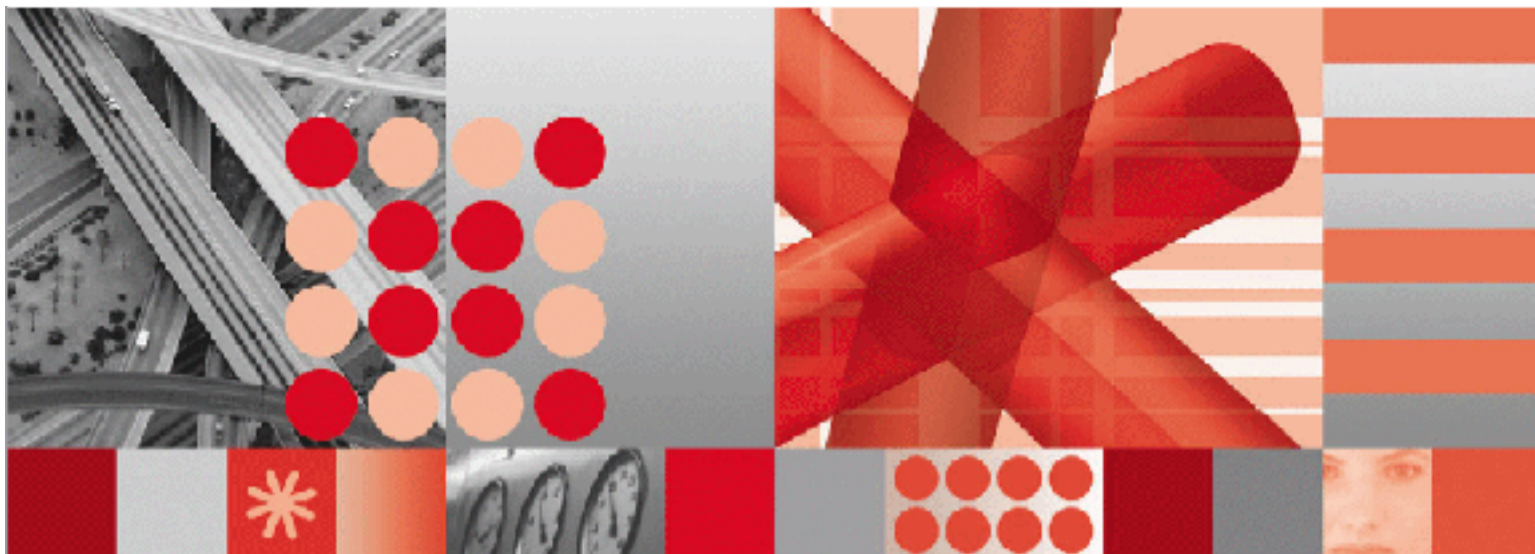
Multisite Administrator Guide

Note
Before using this information and the product it supports, read the information in "Notices" on page 35.

Contents

About This Publication

Setting up a multisite implementation involves planning with regard to integrating the application architecture with the structure of your business practices. The *Multisite Administrator Guide* provides an overview of multisite capabilities, reviews some multisite topics to think about as you set up the environment, and presents several implementation scenarios.

Some of the information contained in this guide may not pertain to your specific product.

Intended Audience

The *Multisite Administrator Guide* is designed for the system administrator, network administrator, database manager, and other individuals involved with implementation and application administration.

Overview

<div style="text-align: right; font-size: 3em; font-weight: bold;">1</div>

Large businesses, government agencies, and other types of enterprises often have multiple facilities. Some customers install a separate instance of the software and the Maximo® database at each facility. However, these different facilities often have common business practices or share common data, and separate databases do not meet the needs of the business or public enterprise.

There is increasingly a need to centralize data and software management even when an enterprise is spread over multiple locations. The multisite functionality provides large enterprises a way to standardize and share certain kinds of data between facilities while keeping other kinds of data, such as work management data, unique to a particular site. The multisite capability also allows you to selectively give users access to data at different sites.

What is Multisite?

A multisite environment includes the following properties:

▼ Users access applications via a Web browser—they can be at any site, not just where the applications and Maximo database are installed.

▼ All sites use the same Maximo database.

▼ All sites use the same instance running on an application server.

▼ Different sites keep certain of their operations separate, according to the needs of their business practices and the constraints of the application architecture.

Rather than implementing multiple instances at different sites, a company installs the application software once, has multiple sites access it, and still maintains site-specific independence for certain kinds of data. For example, different sites can use the same application server and the same Maximo database while keeping their work order and inventory records separate.

The basic units of a multisite environment are **organizations** and **sites**. An enterprise can have multiple organizations; each organization can have multiple sites.

It is important to understand that organizations and sites are virtual entities designed to accommodate many different kinds of business practices. They do not necessarily correspond to physical sites or facilities.

What is Multisite?

Organizations

An organization is typically a financial entity within an enterprise in which all financial transactions are maintained in one base currency. Each organization maintains its own chart of accounts, which is available to all sites belonging to that organization.

In a large enterprise, multiple business functions can also be configured as different organizations. For example, a company can define two organizations: one to maintain the company's own assets, and another to maintain the assets of its clients.

Sites

A site is typically a facility in an organization where work management activities are performed. These activities include managing assets and physical locations through preventive maintenance schedules and work orders; managing inventory in storerooms; processing stock replenishment; and other supply chain related activities

Because a site is a virtual entity that you create in an application, it may or may not correspond to a physical site. The following may help illustrate this:

▼ Two sites might correspond to two different facilities in two different countries.

▼ Two sites might correspond to two subdivisions within the same large facility at a single location—subdivisions you want to keep separate for business reasons.

▼ Two or more facilities (physical locations) might be considered a single site because they all use the same data (work orders and PMs, for example) that the application software treats as site-level data.

The following figure illustrates the basic multisite concept:

Example of a Basic Multisite Configuration
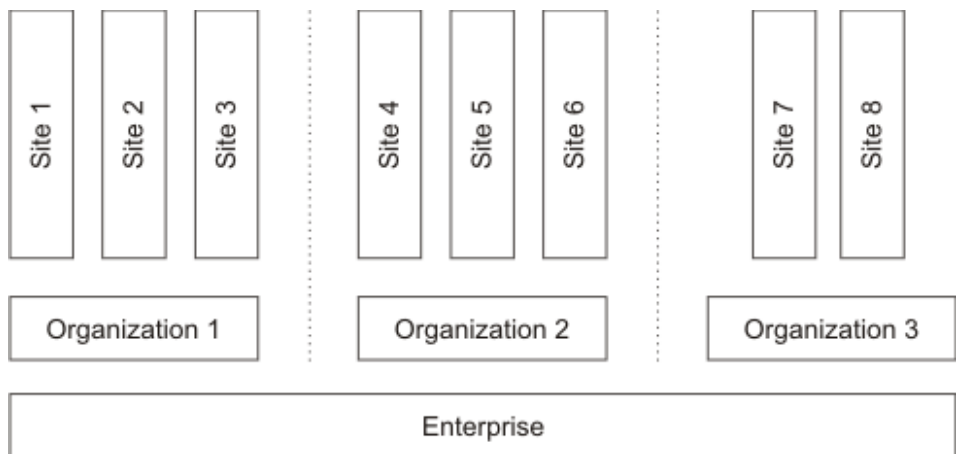
It is important also to know what multisite is ***not***. It is ***not*** intended to duplicate the standard organizational structure within a company (CEO, Vice Presidents, middle management, and various other levels generally used for reporting purposes). Reporting applications are all at the enterprise level. You tailor reports to fit your company's reporting requirements. Furthermore, you can not simply move a site from one organization to another. You can, however, change reports to reflect management changes.

When Do You Use Multisite?

You might implement the multisite features for a variety of reasons. First, you must decide whether you want to set up multiple organizations. Then, for each organization, you must decide whether to set up multiple sites.

The following examples illustrate some typical multisite situations.

Separate Organizations

▼ Your enterprise has multiple legal entities, each of which maintains its own general ledger accounts. You define each legal entity as an organization.

▼ You have multiple businesses, for example, a utilities operations and a fleet of vehicles. The maintenance operations are independent of each other and have their own charts of accounts. You create two organizations, one for the utilities and one for the fleet operations.

▼ You maintain both EAM assets and IT assets. These assets are maintained by two different departments, each having a unique set of general ledger accounts and cost centers. You create two organizations, one for EAM assets and one for IT assets.

Separate Sites

You typically create multiple sites within an organization when you want the work management to be separate—independent sequence of work orders, separate assets and inventory, separate PMs, and so forth.

▼ You have a North American organization with facilities in three cities, each with independent maintenance operations. You set up three sites within the North American organization.

▼ You have a service enterprise that maintains assets in several countries and sites. Even though you deal in multiple currencies, you use one general ledger system with a single base currency. You create a single organization and make each facility a separate site.

▼ In one of your organizations you have maintenance operations in five facilities in five different locations, but three of the facilities use the same inventory, work orders, and so forth. You create three sites, one of which serves for the three locations that use the same inventory and work orders.

The above examples illustrate just a few of the considerations to keep in mind in setting up a multisite environment. What you can and cannot do is determined by the application architecture and the way it stores data for the various applications. The next chapter presents this information in detail.

NOTE   You do not have to set up a multisite environment. If your business is relatively small, with a single GL accounting system, and you have no specific reason for setting up a multisite environment, then the best solution may be to create a single organization with a single site, one company set, and one item set—the minimum implementation requirements.

When Do You Use Multisite?

Multisite Architecture

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The most significant aspect of the multisite architecture is how an application's data is stored relative to the following four levels:

▼ Enterprise
▼ Set
▼ Organization
▼ Site

Enterprise

The enterprise level (sometimes referred to as System level) encompasses the entire implementation. A single installation, or instance, of the software comprises one enterprise. An enterprise can have multiple organizations, and each organization can have multiple sites.

Enterprise-level data is unique for the entire implementation, which means there can only be one record with that ID for that application across all organizations and sites. It also means that enterprise-level data is available to all organizations and sites. For example, the People application is an enterprise-level application. Therefore, person records are unique at the enterprise level and all organizations and sites can access them.

Set

The set level is a special category below the enterprise level, but above the organization level, which allows multiple organizations to share item data and vendor information. The set level includes two kinds of sets: item and company (for vendor information).

An enterprise can have multiple item and company sets. Each organization uses only one company set and one item set, but you can assign the same set to multiple organizations, thereby allowing those organizations to share the item data or vendor information.

Organization

Organizations and sites are the two categories you use most often in setting up a multisite environment. They correspond to logical divisions within the company and determine how data is shared or not shared.

An organization contains one or more sites. If an application is at the organization level, then all sites within that organization access and use the same data from that application. For organization-level applications, different organizations can maintain separate data.

For example, Chart of Accounts is an organization-level application. Two organizations can each maintain independent chart of accounts systems. The corollary is that different organizations can use the identical GL account code to refer to different accounts. For example, account code 2000-300-400 might identify a tax debit account in one organization and an expense account in another organization.

Site

A site is a division within an organization that maintains certain kinds of data independently from other sites. For example, Assets is a site-level application. The same asset number might identify a pump at one site and a computer at another site. Site-level applications primarily involve work management activities.

You can also use sites in administering security. You can give users different rights at different sites. For example, a user with management responsibility at one site might need full rights to Work Order Tracking and other work management applications at that site. The same user might only need to view how work is being performed at a second site. Therefore, you grant that user read-only access to the relevant applications at the second site.

Data Sharing

The basic concept of data sharing in the multisite architecture is embodied in the Applications and Multisite Architecture table, later in this section. For each application, you see the level at which the data is stored.

▼ Data stored at the site level is unique at the site level. Depending on the application, data may be accessible from other sites.

▼ Data stored at the organization level is unique at the organization level and can be made available to all sites within that organization, and in some cases to sites in other organizations.

▼ Data stored at the set level is available to all organizations (and their included sites) for which the Company or item set has been specified.

▼ Data stored at the enterprise level is unique at the enterprise level and is available to all organizations and sites.

In the table, several applications show multiple levels of data storage. As discussed later in this chapter, those applications allow you to choose the level at which you want the data to apply.

While data may, for example, be available to all sites within an organization, this does not necessarily mean that users at one site will automatically have access to all the data. In setting up security and user privileges, an administrator has additional flexibility in determining what data users access. For example, an administrator specifies a default insert site for a user and can further specify that for that user only the records for the default insert site be displayed.

The table lets you view the relationships of applications within the various modules. For example:

▼ All of the Administration, Configuration, Security, and Reporting applications are at the enterprise level (though there are options for site and organization specificity within Domains).

▼ In the Financial module, currency codes are at the enterprise level, but exchange rates and GL accounts (Chart of Accounts) are all at the organization level. You establish currency codes for the whole enterprise, but each organization maintains its own exchange rates and GL accounts.

The following Applications and Multisite Architecture table shows the data storage level for each application and several Select Action menu items. The sequence of modules and applications follows the sequence on the Go To menu. For each application, the table specifies the level at which records are defined and at which the records are unique. For example, the table indicates that the Assets application is a site-level application. Therefore, assets are defined at the site level and the asset identifiers are unique at that level. Some of the applications may not pertain to your specific product.

Applications and Multisite Architecture

| *Module* / Application | Enterprise | Sets | | Org. | Site | Notes |
		Comp.	Item			
Administration						
Sets	●					
Organizations	●					
Calendars	●					
Resources						
Labor				●		
Qualifications				●		
People	●					
Person Groups	●			●	●	Person group records are defined at the enterprise level and the identifiers are unique at that level. Person groups contain people records, which can be restricted to a site or an organization.
Crafts				●		
Bulletin Board	●					
Communication Templates	●					
Reporting						
KPI Manager	●					

Data Sharing

Module / Application	Enterprise	Sets		Org.	Site	Notes
		Comp.	Item			
Report Administration	●					
Deployed Assets						
Adapter Conversion	●					
Manufacturer Conversion	●					
Operating System Conversion	●					
Processor Conversion	●					
Software Conversion	●					
Software Suite Setup	●					
Software Usage Setup	●					
Reconciliation						
Reconciliation Tasks	●					
Task Filters	●					
Link Rules	●					
Comparison Rules	●					
Asset Link Results	●					
Asset Reconciliation Results	●					
Conditional Expression Manager	●					

| _Module_ / Application | Enterprise | Sets | | Org. | | Notes |
		Comp.	Item		Site	
Classifications	●			●	●	Exists at enterprise level but can be restricted to a particular organization or site.
Work View	●					
Assets						
Assets					●	Though assets are defined at the site level, a user can issue items from a storeroom located in one site to an asset located in another site. The user must have access to both sites, and the two sites must belong to the same organization.
Locations					●	Though locations are defined at the site level, a user can issue items from a storeroom located in one site to a location in another site. The user must have access to both sites, and the two sites must belong to the same organization.
Features	●					
Meters	●					Defined items, assets and locations can access all the meters defined in the Meters application.
Meter Groups	●					Defined items, assets and locations can access all meter groups defined in the Meter Groups application.
Condition Monitoring					●	Condition monitoring points are defined against an asset or location and hence are accessible only in the site where the asset or location is defined.
Failure Codes				●		The problems, causes, and remedies associated with failure codes are also defined at the organization level and are unique at that level.
Deployed Assets						
Computers	●					
Network Devices	●					
Network Printers	●					

Data Sharing

Module / Application	Enterprise	Sets		Org.	Site	Notes
		Comp.	Item			
Software License View	●					
Change						
Activities and Tasks					●	
Contracts						
Purchase Contracts				●		Though purchase contracts are defined at the organization level, you must explicitly specify the sites to which a purchase contract applies using the **Authorize Sites** action. The sites must belong to the organization in which the contract is created or to an organization that uses the same item set and company set as the organization in which the contract is created.
Lease/Rental Contracts				●		Though lease/rental contracts are defined at the organization level, you must explicitly specify the sites to which a lease/rental contract applies using the **Authorize Sites** action. The sites must belong to the organization in which the contract is created or to an organization that uses the same item set and company set as the organization in which the contract is created.
Labor Rate Contracts				●		Labor rate contracts are accessible to all the sites in the organization in which the contract was created.
Master Contracts				●		Though master contracts are defined at the organization level, you must explicitly specify the sites to which a master contract applies using the **Authorize Sites** action. The sites must belong to the organization in which the contract is created or to an organization that uses the same item set and company set as the organization in which the contract is created.

| *Module* / Application | Enterprise | Sets | | Org. | | Notes |
		Comp.	Item		Site	
Warranty Contracts				●		Though warranty contracts are defined at the organization level, you must explicitly specify the sites to which a warranty contract applies using the **Authorize Sites** action. The sites must belong to the organization in which the contract is created or to an organization that uses the same item set and company set as the organization in which the contract is created.
Software Contracts				●		
Terms and Conditions				●		Terms and conditions are accessible to all sites in the organization in which the terms and conditions were created.
Financial						
Currency Codes	●					All sites and organizations can access the currency codes.
Exchange Rates				●		Exchange rates are accessible to all sites in the organization in which the exchange rates were defined.
Chart of Accounts				●		GL Accounts are accessible to all sites in the organization in which the GL accounts were defined.
Cost Management					●	
Integration						
Object Structures	●					
Publish Channels	●					
Invocation Channels	●					
Enterprise Services	●					
Web Services Library	●					
End Points	●					
External Systems	●					

Data Sharing

Module / Application	Enterprise	Sets		Org.	Site	Notes
		Comp.	Item			
Logical Management Operations	●					
Integration Modules	●					
Launch in Context	●					y
Message Tracking	●					
Message Reprocessing	●					
Inventory						
Item Master			●			Items are defined at the item set level and the identifiers are unique at that level. An organizations can use only one item set, and all sites in that organization can access all the items defined in that item set.
Service Items			●			Service Items are defined at the item set level and the identifiers are unique at that level. An organizations can use only one item set, and all sites in that organization can access all the service items defined in that item set.
Tools			●			Tools are defined at the item set level and the identifiers are unique at that level. An organizations can use only one item set, and all sites in that organization can access all the tools defined in that item set.
Stocked Tools					●	Tools can be transferred from a storeroom in one site to a storeroom in another site, provided the two sites belong to the same organization or the organizations of the two sites use the same item set.
Inventory					●	Items in a storeroom are defined at the site level. Items can be transferred from a storeroom in one site to a storeroom in another site, provided the two sites belong to the same organization or the organizations of the two sites use the same item set.
Issues and Transfers					●	
Condition Codes			●			All condition enabled items in an item set can use the codes.

| *Module* / Application | Enterprise | Sets | | Org. | | Notes |
		Comp.	Item		Site	
Storerooms					●	
IT Infrastructure						
Configuration Items	●					
Relationships	●					
Collections	●					
Planning						
Job Plans	●			●	●	Job plans can be defined at the enterprise level, organization level or site level. When a job plan is defined at the enterprise level, the identifier is unique at that level and there cannot be a job plan at the site level or the organization level with the same identifier. Similarly, when a job plan is defined at the organization level, the identifier is unique at that level and there cannot be a job plan at the site level within that organization with the same identifier.
Routes					●	Only assets and locations that belong to a route's site can be part of that route. Any specified job plans must either belong to the route's site or be at the enterprise level.
Safety						
Hazards				●		The Precautions associated with the hazards are defined at the site level
Precautions					●	
Lock Out / Tag Out					●	
Safety Plans					●	
Preventive Maintenance						
Preventive Maintenance					●	

Data Sharing

Module / Application	Enterprise	Sets		Org.	Site	Notes
		Comp.	Item			
Master PM	●					PM records from any site can be associated with a master PM.
Purchasing						
Purchase Requisitions					●	You can create purchase requests (both internal and external) for storerooms that belong to the site in which you create the request. When you create an internal PR, you can request items from a storeroom belonging to a different site than the one in which you create the PR, provided the two sites are in the same organization or the organizations for the two sites use the same item set.
Purchase Orders					●	You can create purchase orders (both internal and external) for storerooms that belong to the site in which you create the purchase order. For an external PO, you can request items for storerooms in multiple sites, provided the PO site and all the storeroom sites belong to the same organization. When you create an internal PO, you can request items from a storeroom belonging to a different site than the one in which you create the PO, provided the two sites are in the same organization or the organizations for the two sites use the same item set.
Receiving					●	
Invoices					●	
Request for Quotations					●	
Companies				●		Company records are defined at the organization level. However, they are unique at the company set level because a company record must exist in the Company Master application before it can be defined for an organization.
Company Master		●				Company master records are defined at the company set level and are unique at that level.

| *Module* / Application | Enterprise | Sets | | Org. | | Notes |
		Comp.	Item		Site	
Terms and Conditions				●		
Release						
Releases					●	
Activities and Tasks					●	
Security						
Security Groups	●					
Users	●					
Self Service						
Desktop Requisitions						
Create Requisition					●	
View Requisition					●	
View Templates					●	
View Drafts					●	
Service Request Manager Search	●					
Service Requests						Transactions can reside at enterprise, organization, or site level. This applies to all applications listed under Service Requests.
Create Service Requests	●			●	●	
View Service Requests	●			●	●	
Search Solutions	●			●	●	

Data Sharing

Module / Application	Enterprise	Sets		Org.	Site	Notes
		Comp.	Item			
Service Desk						
Incidents	●					Incidents are defined at the enterprise level. The incident can specify an asset or location that belongs to any site. The incident can also be handled at any site, not just the site specified for the asset or location.
Problems	●					Problem records are defined at the enterprise level. The problem can specify an asset or location that belongs to any site. The problem can also be handled at any site, not just the site specified for the asset or location.
Activities and Tasks					●	
Process Requests	●					
Service Requests	●					Service requests are defined at the enterprise level. The requested service can specify an asset or location that belongs to any site. The service request can also be handled at any site, not just the site specified for the asset or location.
Solutions	●					
Ticket Templates	●					Ticket templates can contain job plans that can be from any level.
Global Search	●					
Priority Matrix	●					
Service Level						
Service Level Agreements	●					SLA records can be defined at the enterprise level, organization level or at the site level. The SLA identifier is unique at the enterprise level.
Service Groups			●			
Service Request Manager Catalog						
Offering Catalog			●			

Module / Application	Enterprise	Sets		Org.	Site	Notes
		Comp.	Item			
View Shopping Carts					●	
Service Order Management						
Catalog Orders					●	
View Catalog Requests					●	
Catalog Purchase Requisition					●	
Service Inventory						
Catalogs			●			
Service Fulfillment			●			
Offerings			●			
Fulfillment Options			●		●	
System Configuration						
Platform Configuration						
System Properties	●					
Logging	●					
Domains	●			●	●	Domains are defined at the enterprise level, but individual values can be restricted to an organization or site.
Database Configuration	●					
Application Designer	●					
Communication Templates	●					
Actions	●					

Data Sharing

Module / Application	Enterprise	Sets		Org.	Site	Notes
		Comp.	Item			
Roles	●					
Escalations	●					
Workflow Designer	●					
Workflow Administrations	●					
Cron Task Setup	●					
E-mail Listeners	●					
Object Structures	●					
Web Services Library	●					
Launch in Context	●					
Migration						
Migration Manager	●					
Migration Groups	●					
Object Structures	●					
Task Management						
Activities and Tasks					●	
Work Orders						
Work Order Tracking					●	
Labor Reporting					●	
Quick Reporting					●	
Activities and Tasks					●	

| *Module* / Application | Enterprise | Sets | | Org. | | Notes |
		Comp.	Item		Site	
Assignment Manager					●	
Service Requests	●			●	●	Transactions can reside at enterprise, organization, or site level.
Action Items						
Commodity Codes			●			
Conversion Values			●			
Tax Codes				●		
Units of Measurement	●					

Data Sharing

Multisite Data Sharing and Transactions

3

This chapter describes how data can be shared across organizations in a multisite environment, including how transactions are affected by the multisite architecture.

Data Sharing Across Organizations

You can configure a multisite implementation so that item data and vendor information can be shared across organizations.

Items

You use the Item Master application, which stores data at the set level, to specify a unique ID and description for an item; to assign several properties to the item, such as a commodity group, lot type, and whether the item is a rotating one; and to add the item to the inventory of one or multiple sites by using the **Add Items to Storeroom** action.

When you create an item master record, it becomes part of the item set for the organization to which your default insert site belongs. The items are unique within the set, and because you can assign the same item set to multiple organizations, you can use the same item definitions for all sites within those organizations.

Using item sets provides the following benefits:

▼ You can transfer items across organizations.

▼ You can standardize your item definition so that all organizations and the sites they include share the same item catalog and item assembly structure.

▼ The Item Master application provides an item catalog from which to set up inventory at multiple sites.

If one or more organizations in your enterprise requires its own item definition, you can create multiple item sets. You can assign a separate item set to each organization, or to each group of organizations that you want to share the same item definition.

The following figure illustrates an example of an enterprise with three organizations and eight sites. Two organizations, and their six sites, share the same item set. The third organization has its own item set.

Data Sharing Across Organizations

Multisite Configuration With Multiple Organizations Sharing One Item Set
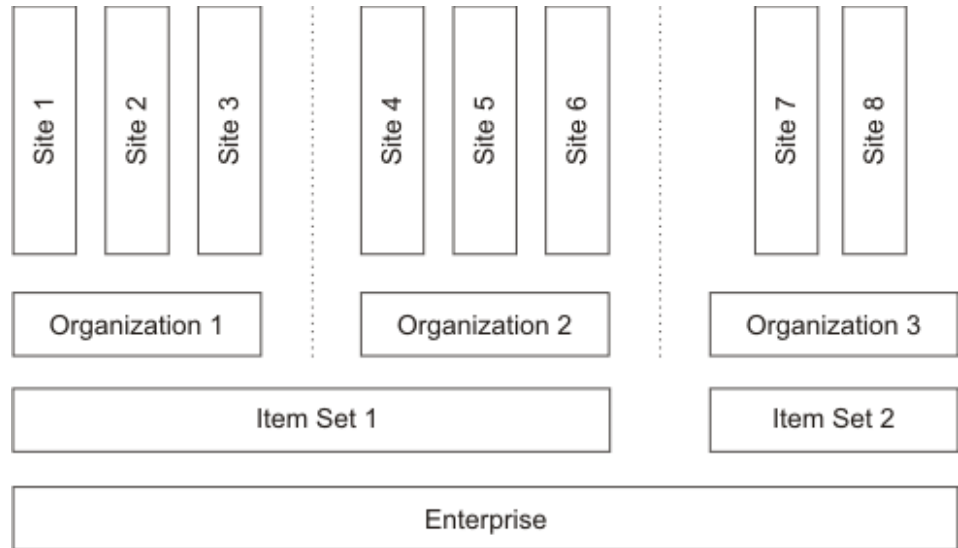
Service Items and Tools

Service Items and Tools records are also stored at the item set level. If, for example, Item Set 1 is specified as the item set for Organization 1, then service items and tools will also be unique to Set 1 and can be shared by any organizations that have Set 1 specified as their item set.

Vendors

The Company Master application, in which you maintain a master list of vendors, stores data at the company set level. The companies—the vendors you do business with—are unique within the company set, and one or more organizations can share the same set.

Using company sets provides the following benefits:

▼ You can standardize your list of approved vendors.

▼ You can create global contracts that can be shared by multiple organizations.

The relationship between the Company Master and Companies applications is similar to, but not identical to, the relationship between the Item Master and Inventory applications. In the Company Master application, you create a catalog of companies and you associate individual companies with specific organizations using the **Add Company Master to Organization** action. In the Companies application, which is at the organization level (not site, as with Inventory), a user accesses the vendor information associated with their organization.

The Companies and Company Master records have many fields in common; a user can edit these fields in the Companies application without changing the values in the Company Master application. For example, while the Ship Via field in the Company Master record might be one shipping vendor, one of the organizations using that company set might want to specify a different vendor.

In the Sets application, when you create a company set, you have the option of selecting the **Automatically Add Companies to Company Master** check

box. By default, this check box is cleared, and users must enter new companies in the Company Master application. However, if you want users to be able to enter new companies in the Companies application, select the check box and the system will automatically add a record in the Company Master application.

You apply a company set to one or more organizations. If an organization requires its own list of vendors and contracts, you can create a separate company set for it.

The following figure illustrates an example of an enterprise with three organizations and eight sites. Two organizations, and their five sites, share the same company set. The third organization has its own company set.

Multisite Configuration With Multiple Organizations Sharing One Company Set
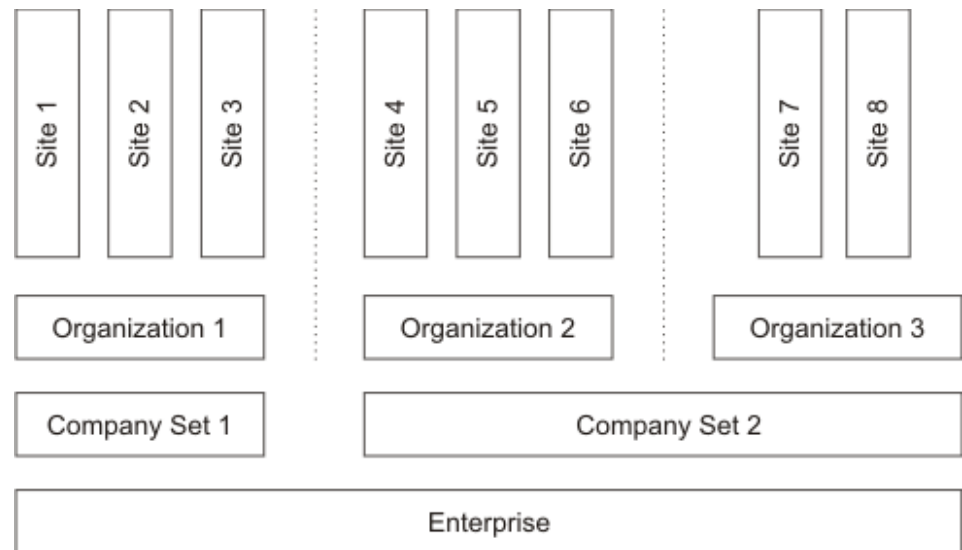
Item and company sets are independent of each other. The following figure illustrates such an example. There are four organizations and eight sites. Organizations 1 and 2 share Item Set 1; Organizations 3 and 4 share Item Set 2. Organizations 1 and 2 each have their own company set. Organizations 3 and 4 share Company Set 3.

Multisite Configuration Illustrating Use of Both Item and Company Sets
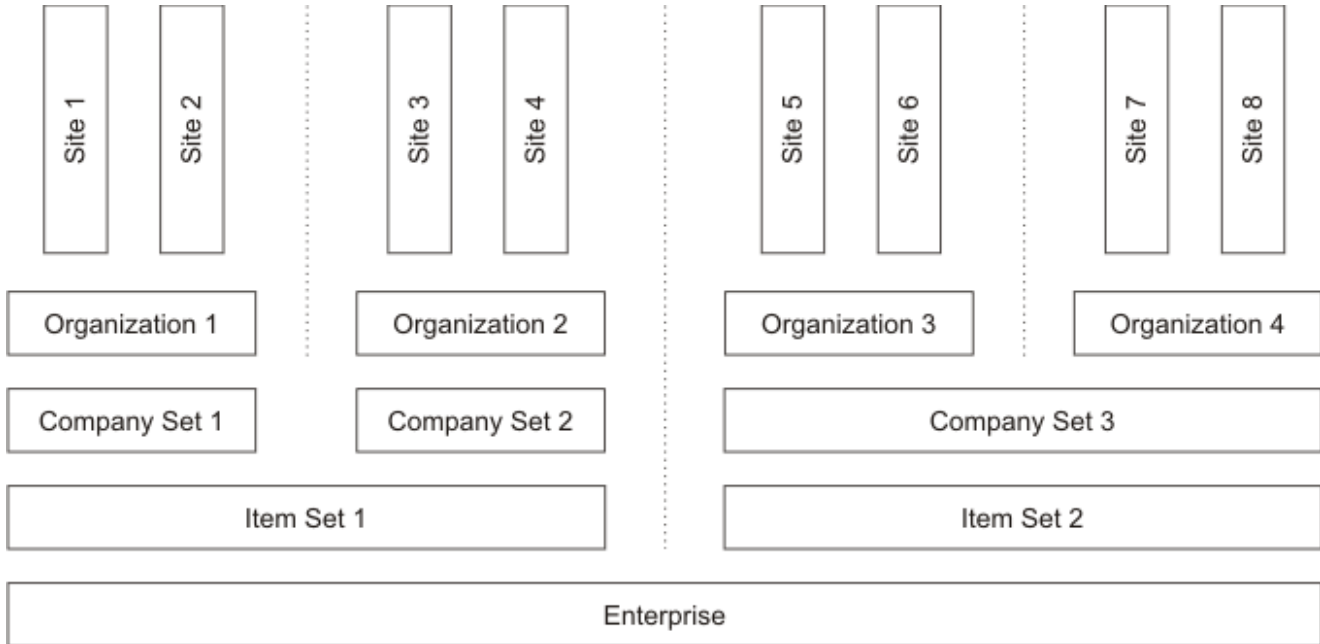
Selective Data Sharing

Some applications provide you a choice of what level to store the data at, and thereby a choice of how you want to share the data. Generally, the record allows you to specify organization or site. These applications are:

▼ Job Plans
▼ Classifications
▼ Domains
▼ Person Groups

Job Plans

Some enterprises require their personnel to follow standard operating procedures when performing maintenance. If you have a centralized engineering department that creates these operating procedures for optimal maintenance, then you might want the sites to access a common job plan.

You can create enterprise-level job plans that all organizations and sites can access. You can also create job plans that are organization- or site-specific.

When you create enterprise-level job plans, you also have the option of specifying organization- or site-specific tasks, labor, materials, services, and tools. Organization-specific tasks, labor, and so forth are copied only to those work orders that are created in a site belonging to that organization. Site-specific tasks, and so forth are copied only to those work orders created at that site.

The option to choose enterprise, organization, or site works as follows. When you create a new job plan, you can specify an organization, a site, or neither. If you specify neither, the job plan is enterprise-level. If you specify an organization, the job plan is available to all sites within the organization. If you specify site, the job plan is available only to that site (the system automatically enters the parent organization in the Organization field).

NOTE   If you specify a site, the job plan can not be accessed by other sites; if you specify an organization, the job plan can not be accessed by other organizations.

Classifications

By default, classification records are at the enterprise level and can be accessed by all organizations and sites. However, when you add a new classification record, you have the option of specifying an organization or site—but only if the **Items** check box in the Use With section is not selected. Any classification used with items must be at the enterprise level.

You can similarly add child classifications in the Children table window. If the parent classification is enterprise-level, you can restrict the child classification to an organization or site. But if the parent classification is restricted to an organization or site, then all the children must be restricted to the lowest level of the parent classification. For example, if the parent classification is restricted to an organization, a child classification can be further restricted to a specific site. If the parent classification is restricted to a site, then all the children must be restricted to that site.

Domains

The Domains application enables you to create several kinds of domains, including value lists and crossover fields. By default, domains apply at the enterprise level and all sites can access them. You have the option of applying domain values to a particular organization or site. The synonym domain works differently than other domain types when you specify an organization or site for a domain value:

▼ For a synonym domain, if you add a new value and specify an organization or site, the records in that organization or site that access that domain will show the new value as well as the existing enterprise-level values. This behavior occurs because synonym domains are part of the product and have existing business rules. You cannot add new synonym domains, just new synonym values.

▼ For other domain types, once you specify an organization or site for one value in a domain, records in that organization and/or site will no longer have access to values in that domain that have *no* organization or site specified. Therefore, the best practice for non-synonym domains is to either leave the **Organization** and/or **Site** fields empty for all values in a domain (users in all organizations and sites can access them) or specify an organization and/or site for all values in the domain (only users in the specified organizations and/or sites can access them).

Person Groups

Person Groups apply at the enterprise level and can be accessed by all sites, but you can restrict individual persons in the group to particular organizations or sites. When you add a person to a person group, you can specify an organization or site for that person. You can add multiple rows for the same person to specify multiple sites or organizations, but if you do, you must use multiple sites *or* multiple organizations, not both.

For information on data transfer in the Service Requests, Incidents, and Problems applications, refer to the next section, Multisite Transactions.

Multisite Transactions

Purchase Requisitions

You can create a purchase requisition at one site that requests items from a storeroom at a different site. The storeroom site must belong to the same organization as the requesting site, or the requesting site and the supplying site must belong to organizations that share the same item set.

Purchase Orders

You can create an internal purchase order at one site that requests parts from a storeroom at a different site. The storeroom site must belong to the same organization as the requesting site, or the requesting site and the supplying site must belong to organizations that share the same item set.

To facilitate centralized purchasing, the system allows you to create a purchase order at one site that requests items from a storeroom at a different site. The storeroom must belong to a site that is in the same organization as the site in which you create the purchase order.

Asset Moves

You can move assets from one site to another. The destination site can belong to a different organization if the asset is nonrotating.

If the asset is rotating, the organizations for the originating and destination sites must share the same item set. If the site to which you want to move an asset already has an asset with the same asset identifier, the system prompts you to assign a new asset identifier to the asset you are moving.

Issues

You can issue an item from a storeroom in Site A, for example, to a work order created in Site B. When performing this transaction you must have access to both sites and the storeroom. The two sites must belong to the same organization.

If you need to issue an item to a site in a different organization, you must use the internal transfer capability to transfer the item and then issue the item.

Work Planning

On the Work Order Tracking Plans tab, you can specify the storeroom from which to obtain an item. The storeroom site can be different than the work order site providing that both sites belong to the same organization and that you have access to both sites.

Multisite Options

4

In addition to creating organizations and sites, you use the Organizations application to set a variety of multisite options. These options primarily specify business rules for how an application functions, but also include some default settings and values.

If you are on the List tab in the Organizations application (no organization selected), the only Select Action menu item for setting options is System Settings. To specify other options from the Select Action menu you must first select an organization.

Rules for how an application functions are not necessarily related to the level at which an application stores data. An application might be site-level in terms of data storage, but the settings you specify for how it functions might apply at the organization level. For example, though Work Order Tracking is a site-level application in terms of data storage, the choices you make with the Edit Rules action (under Work Order Options) apply to using Work Order Tracking at all sites within the organization you selected from the List tab.

The Organizations Help system describes the procedures for using each of the Select Action menu items. This chapter describes the levels at which the various options take effect—enterprise, set, organization, or site.

Select Action Menu Items

With the exceptions of the System Settings action and some of the Autonumber Setup actions, all the Select Action options you set in the Organizations application apply to either the organization or site level. You can tell the level from their corresponding dialog boxes as follows:

▼ If the dialog box does not display a list of sites to select from, then the settings apply at the organization level, specifically to the organization you selected from the list tab. You can select a different organization and specify different settings. The settings apply to all sites within the selected organization.

▼ If the dialog box provides a list of sites to select from, then the settings you specify apply only to the selected site. The dialog box displays all the sites for the selected organization and you can specify different settings for different sites.

The following table summarizes this information for all the Organizations options.

Select Action Menu Items

Organizations Options and the Levels to Which They Apply

Select Action Menu Items	Enterprise	Sets		Org.	Site	Notes
		Company	Item			
Word Order Options						
Work Type				●		
Edit Rules				●		
Other Organization Options				●		
Site Options					●	
Inventory Options						
Inventory Defaults				●		
Reorder				●		
Inventory Costs					●	
Asset Options				●		
Drilldown Options				●		
PM Options					●	
Safety Plan Options					●	
Purchasing Options						
PO Options				●		
Contract Options				●		
Tax Options				●		
PO Labor Options				●		
Labor Options				●		
Service Desk Options						
Global Ticket Solution Options				●		
SLA Options					●	
Ownership Assignment Options					●	
Workflow Options					●	
E-Commerce Setup					●	

Select Action Menu Items	Enterprise	Sets		Org.	Site	Notes
		Company	Item			
Autonumber Setup						
System Level	●					
Set Level		●	●			
Organization Level				●		
Site Level					●	
System Settings	●					

Select Action Menu Items

Strategies and Scenarios

5

The preceding chapters detailed the concepts and architecture behind the multisite feature. This chapter presents some scenarios that may more closely reflect real-life situations with your own enterprise.

Scenarios

The following scenarios illustrate multisite environments and how you might create sites, organizations, and sets to reflect the needs of the enterprise.

Two Organizations Reflecting Two Charts of Accounts

Enterprise Configuration   The relevant enterprise factors are the following:

▼ Your enterprise comprises two distinct business operations run from a central location in Denver, Colorado, each with its own Chart of Accounts: a utilities operation and a fleet of vehicles.

▼ The Utilities operation also has a unit in Laramie, Wyoming.

▼ All units use the same list of vendors.

▼ The utilities and fleet operations use different items and storerooms.

Multisite Configuration   You accommodate your enterprise structure as follows:

▼ You create two organizations: Utilities and Fleet

▼ The Utilities organization has two sites: Util-Denver and Util-Laramie.

▼ Utilities and Fleet use the same company set but separate item sets.

Scenarios

Multisite Configuration With Two Organizations Reflecting Separate Charts of Accounts for Utilities and Fleet
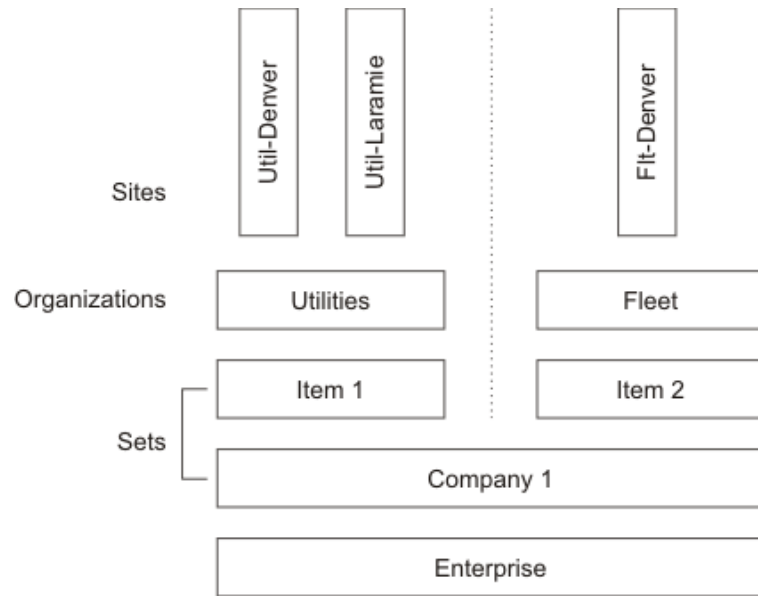
Four Organizations With Separate Maintenance and IT Operations

**Enterprise Configuration** The relevant enterprise factors are the following:

▼ You have production facilities in the United States and the Republic of South Africa, each with two locations or units that maintain separate work orders.

▼ In both the United States and South Africa you have separate maintenance and IT/service desk operations, each with its own GL chart of accounts covering both local facilities.

▼ You want to maintain two sets of item definitions, one for maintenance operations and one for the IT/service desk departments.

▼ You also use different sets of vendors for maintenance and for IT/service desk, and you want to be able to create global contracts so that, for example, the South African and United States maintenance facilities can buy from the same vendors.

Multisite Configuration You accommodate your enterprise structure as follows:

▼ You define four organizations: U.S. Maintenance, R.S.A Maintenance, U.S. IT/service desk, and R.S.A. IT/service desk. Each covers two facilities.

▼ You create one maintenance item set to cover both maintenance organizations, and one IT/service desk item set to cover both IT/service desk organizations.

▼ Similarly, you create separate company sets for maintenance and IT/service desk.

Multisite Configuration With Four Organizations Reflecting Separate Maintenance and IT Operations
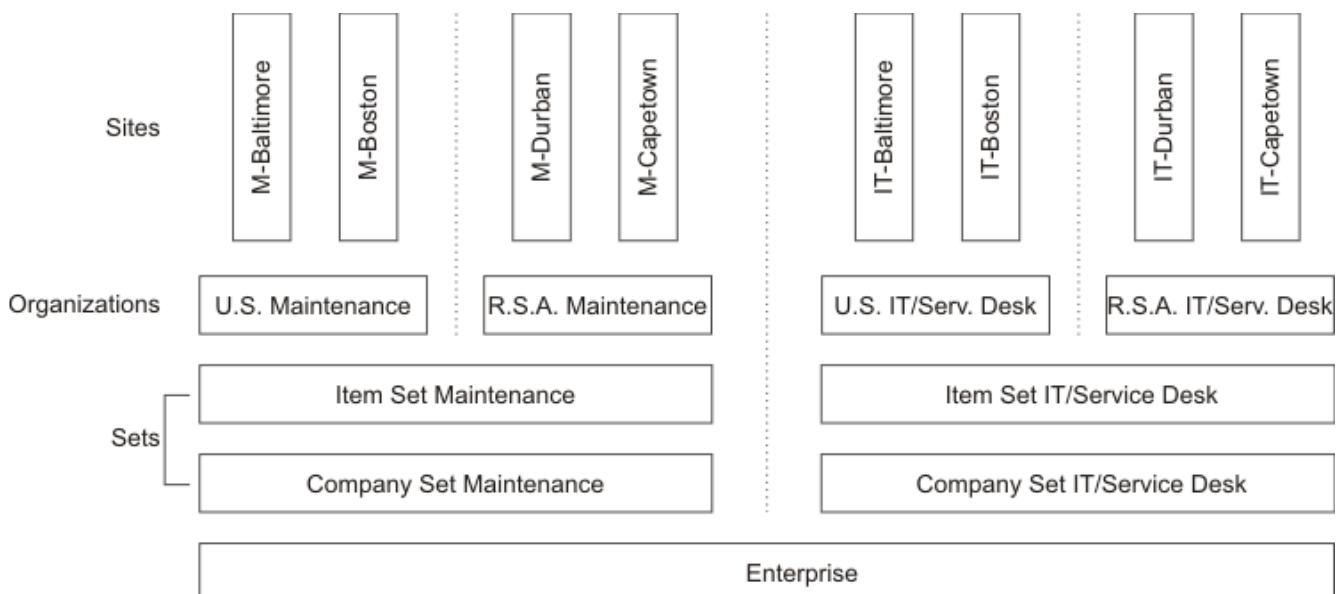
Four Organizations Using Local Vendors

This scenario is the same as the previous, except that each organization uses separate vendor lists. For example, the maintenance operations in the United States and South Africa each use local vendors. You create separate company sets for each organization.

Multisite Configuration With Four Organizations Using Local Vendors
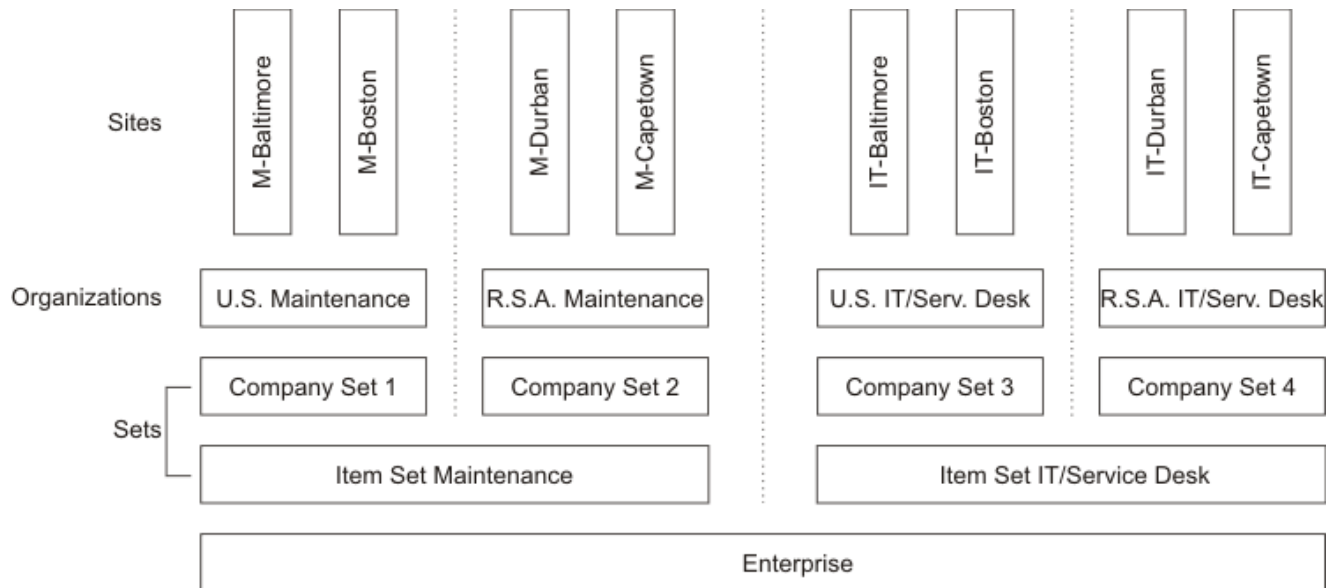
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