

# **NIAGARA NOTES**

Built on Niagara 4

Installation & User Guide

Hawkeye Energy Solutions Ver 4.10.2.1



# Contents

Overview
Requirements2
Installation2
Prerequisites
JACE/Supervisor Installation2
License Manager Configuration (Product Key)2
User Guide
Notes Configuration View
Configuring Site Groups3
Configuring Sites3
Configuring Assets5
Notes View6
Card View vs. Grid View
Filter Settings6
Creating a Note7
Replying to Notes7
Troubleshooting7
Release Notes7
Ver 4.10.2.1
Ver 4.10.1.4 (Niagara Marketplace Release)8



# Overview

Niagara Notes is a dynamic messaging and notes application built right into the Niagara Framework. The notes application allows system operators and site managers to communicate key operational issues right within the BAS front end. This enhanced collaboration reduces downtime, resolves issues sooner, reduces maintenance costs and improves comfort. With notes, gone are the days of cryptic handwritten logbooks, sporadic email chains, and verbal miscommunications.

# Requirements

• Niagara 4.10+ (Contact Hawkeye Energy Solutions for lower versions)

# Installation

## Prerequisites

- ✓ Purchase license for Host ID
- ✓ Download the latest module files (hesNiagaraNotes.jar)
- ✓ Receive the Product Key from Hawkeye Team

## JACE/Supervisor Installation

- 1. Connect to the station using Workbench
- 2. Using the License Manager, update licenses from the License Server
- 3. Ensure the Hawkeye Certificate was also added from the License Server
- 4. Install the modules using the Software Manager
- 5. Restart the Station
- 6. Open the "hesNiagaraNotes" palette and drag the "NotesService" component under the Station's "Service" bucket.
- 7. Installation is completed.

## License Manager Configuration (Product Key)

- 1. Open the "NotesService" in the AX Property Sheet view
- 2. Expand the "License Manager"
- 3. Copy/Paste the Product Key
- 4. Right-Click on the License Manager and invoke "Load License"
- 5. Ensure the slots, "Licensed" and "Product Key Valid" are "true"
- 6. License Manager is Configured



## User Guide

Niagara Notes primarily has two views used to manipulate notes: Notes Configuration View and Notes View. The Notes Configuration View establishes the Asset Hierarchy which is needed to categorize and match notes to building and equipment.

### Notes Configuration View

#### Configuring Site Groups

1. From the main view, you can add and edit the Site Groups, which are the groupings of sites/buildings that you will later configure.

💐 Niagara Note	es°		Save ?
Asset Hier 😤	*	Home Campus 2 Ed	litor
Add New Campus 2	~	Add New Campus 2	+
Reflow University	$\sim$	Site Groups (Campus 2)	
North Campus	$\sim$	Add New Campus 2	
South Campus	$\sim$	North Campus	
		South Campus	/

2. To change the name of a site, edit the name in the box, and click the pencil logo to save your changes. It would be beneficial to also save your work by clicking the blue button in the top right corner to ensure that the changes are saved across versions.

🔯 Niagara Notes			Save ?
Asset Hier 🈤 🖣	Home	Campus 2 Editor	
Add New Campus 2	Add New Campus 2		+
eflow University	Site Groups (Camp	us 2)	$\cap$
orth Campus	Brand New Campus!		
outh Campus	Reflow University		
	North Campus		
	South Campus		/ 1
iagara		13-Jun-24 2:54 PM CDT v4.10.1.0	© Hawkeye Energy Solutions 202

#### Configuring Sites

1. When configuring the Sites, it is possible to add as many as you would like, and the layout is the same as adding a Site Group



Niagara Notes

Asset Hier  Asset	🗭 Niagara Notes			Save ? =	
krand New Campus   Building Example     Building Example     Building Example     Image: Compute States (Building)     Building Example     Image: Compute States (Building)     Image: Compute	Asset Hier 🌻 坐	Home / Brand New Campus!	Building Editor		$\frown$
Baiding Example         kellow University         v         South Campus         v	Brand New Campus!	Add New Building		+	$\bigcirc$
kelov University  vorth Campus  v isouth Campus  v	Building Example	Brand New Campus! Sites (Buildi	ng)		
torth Campus V	Reflow University	Building Example		/	
iouth Campus 🗸	North Campus	/			
	South Campus	/			
13-Jun-24 2:56 PM CDT © Hawkeye Energy Solutions 2024		13-Jun-24	2:56 PM CDT	© Hawkeye Energy Solutions 2024	

2. Edit the Site name and then click the now yellow symbol to save your changes (also make sure to hit the blue save button in the top right every once in a while, too!)

🔅 Niagara Not	es*			Save ?	
Asset Hier	*	Home / Brand New Campus!	Building Editor		
Brand New Campus!	~	Add New Building		+	
Building Example		Brand New Campus! Sites (Buildin	ng)		$\sim$
Reflow University	$\sim$	Building Example but Edited!			
North Campus	$\sim$				
South Campus	$\sim$				
					)
niagara		13-Jun-24 v4.1	2:57 PM CDT 0.1.0	© Hawkeye Energy Solutions 2024	

3. Similarly to the Site Group view, it is very simple to make changes to or delete the buildings if desired



#### Configuring Assets

1. This is the area of Niagara Notes where you can choose the Asset that is operating in your system. Choose the type that best fits your equipment. Additionally, it is possible to link that equipment with a real data point, which can be done by clicking the blue path button and providing the Niagara path to the point

🔯 Niagara Notes		Save ? =
Asset Hier 😤 峚	Home / Brand New Campus! / Building Equip	oment Editor
Brand New Campus!	New Thing! Building Example Assets (Equipment)	Select > e <sup>2</sup> + Select Boiler Pump Boiler
Reflow University     \vdots       North Campus     \vdots	Example Equipment	Air Handli Equipment Meter Air Handler Zone
South Campus V		
niagara,	13-Jun-24 2:59 PM CDT v4.10.1.0	© Hawkeye Energy Solutions 2024

2. Editing works the same way as the other views. Edit the Asset and click the yellow pencil icon to save your changes. Click the blue Save button.

🙋 Niagara Notes					Save	? =
Asset Hier 😤 🗎	ř	Home / Brand New Campus! / Building Example	Equipment Editor			
Brand New Campus!	^	Add New Equipment		Select v		+
Building Example		Building Example Assets (Equipment)				
Reflow University	$\sim$	Example Equipment	Air Han	idler 🗸 🥖	ತೆ	
North Campus	$\sim$		Select Boiler F	Pump		
South Campus	~		Boiler Equipm Meter Air Han Zone	nent dler		
		13-Jun-24 2:58 F v4.10.1.0	PM CDT	© Hav	rkeye Energy St	olutions 2024

3. Deleting has the same functionality as the other sections, and it cannot be undone. Notes can be made on each piece of asset listed in this section.



#### Notes View

### Card View vs. Grid View

The default view shows each note as a card. Open the Filter Setting to switch to the Grid View which presents the notes as a table instead.

		_	💭 Niagara Not	es*			Clist.	+
Niagara Notes	5	+	Search					nere
0		Sort By: Recent 4	Search by: Equipment	✓ Search				
VAV 3-04 Reflow University / Student	adfagagafdfgadfga 	6/12/2024 7:05 AM	Filter Settings Campus 2 Select	~ ]	Building Select		æ	Clear Filters
AHU_1	Alarm		0					
	1	0.42004.0001.00	Campus 2	Building Eq	ipment	Subject	Date 🗸	*
MAU-6	Fan Runtime Alarm	0 :	Reflow University	Student Center	VAV 3-04	adfagagafdfgadfga 💿	6/12/2024 7:05 AM	1
North Campus / Generic Pl.,	-	6/4/2024 2:54 PM	North Campus	Generic School	AHU_1	Alarm 🕕	6/4/2024 2:56 PM	1.1
VAV 1-01 Reflow University / Student.	Heating Valve is Broken on This unit	6/2/2024 9:40 AM	North Campus	Generic Plant	MAU-6	Fan Runtime Alarm 🕕	6/4/2024 2:54 PM	1
	test	<b>0</b> :	Reflow University	Student Center	VAV 1-01 H	eating Valve is Broken on This unit 🜘	6/2/2024 9:40 AM	1
North Campus / Generic Sc.		5/10/2024 8:46 AM	North Campus	Generic School	AHU_1	test 📵	5/10/2024 8:46 AM	1
VAV 3-05	TEST	<b>O</b> :	Reflow University	Student Center	VAV 3-05	TEST 💿	5/3/2024 8:06 AM	1
Reflow University / Student.	-	5/3/2024 8:06 AM	Reflow University	Student Center	VAV 3-05	Damper Stuck 🕕	5/3/2024 8:04 AM	:
VAV 3-05 Reflow University / Student	Damper Stuck	5/3/2024 8:04 AM	Reflow University	Student Center	VAV 3-05	Overheating 📵	5/3/2024 8:04 AM	1
iagara	13-Jun-24 3:00 PM CDT v6.10.1.0	C Hawkeye Energy Solutions 2024	niagara		13-1	Jun-24 3:00 PM CDT v4.10.1.0	© Hawkeye Energy	Solutions 2024

#### Filter Settings

The Filter Settings area allows the user to filter, search and sort the notes.

🗭 Niaga	ara Notes <sup>®</sup>							+
earch								CO Gri
Search by:	Equipmen 🗸	Search						
ilter Settings								Clear Filters
	Colort	~	Building	Select	~ ]	Equipment	Select	×

#### Filtering

You can select one or more of these filters to list the desired equipment on display.

#### Sorting

It is possible to sort by the Subject Name, Asset, Asset Group, or Site

#### Searching

It is possible to search for a note directly by the name, Asset, Site, or Site Group



Niagara Notes

#### Creating a Note

- 1. Start by clicking the plus button in the top right of the screen
- 2. There are dropdowns to select the appropriate Site Group, Site, and Asset. Enter the subject, or a short summary of the issue and other necessary details.

Search						
Search by: Equipm	Reflow Lloiversity		×	Library		
ilter Settings	Fouloment			Sillert		A (1)
	FCU 01		~	Example		CE CIVILI PILL
Campus z Select.	Details					-
•	There is a problem	n with this example!				
Campus 2					P	
Reflow University					:05 AM	
North Campus				Close	e Add Note 56 PM	:
North Campus	Generic Plant	MAU-0		Pari Kunume Asarin 😈	0/4/2024 2:54 PM	
Reflow University	Student Center	• VAV 1-01	Heating	g Valve is Broken on This unit 💿	6/2/2024 9:40 AM	
North Campus	Generic School	AHU_1		test 🕚	5/10/2024 8:46 AM	
Reflow University	Student Center	• VAV 3-05		TEST 🔘	5/3/2024 8:06 AM	
Reflow University	Student Center	• VAV 3-05		Damper Stuck 🕕	5/3/2024 8:04 AM	
Reflow University	Student Center	• VAV 3-05		Overheating 🕕	5/3/2024 8:04 AM	

#### Replying to Notes

Notes are cataloged by user. Each note can be expanded and replied to in order to communicate timelines of events. The number of replies is located shown in the gray circle on each note.

North Campus	Generic School	AHU_1	Return Fan VFD AI Fault 🕢	4/11/2024 11:36 AM	÷				
Joe		Speed Reference is not getting read correctly. Fan is is hand							
lan		Hey Joe, is this the new style VFD?							
lan		4/11/2024 11:37 AM							
John		4/16/2024 10:39 AM							
John		4/16/2024 10:56 AM							
Reply									

# Troubleshooting

Contact Hawkeye Energy Solutions at (815) 744-0505.

## **Release Notes**

#### Ver 4.10.2.1

#### Features Added:

• Added License Manager to provide subscription and trial licensing types.

#### Bug Fixes:

• Minor Bug fixes.



## Ver 4.10.1.4 (Niagara Marketplace Release)

Features Added:

• First release.

#### Bug Fixes:

• First release.

#### Known Limitations:

• HTTP connections do not fully support screenshot functionality. Files can be uploaded over HTTP. On HTTPS, Files can be uploaded and screenshot can be captured.