



NIAGARA NOTES

Built on Niagara 4

Installation & User Guide

Hawkeye Energy Solutions

Ver 4.10.2.1

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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

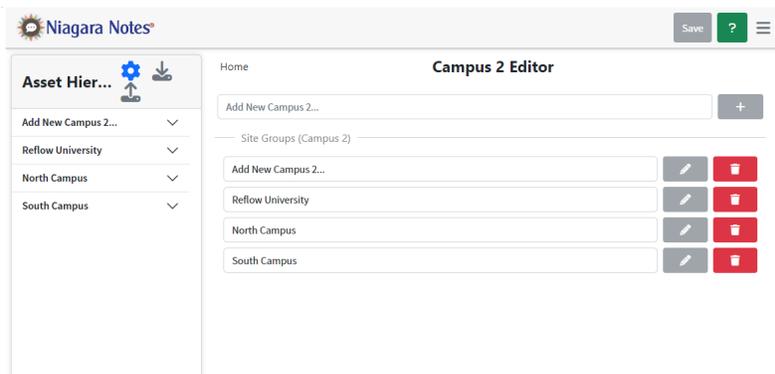
User Guide

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.

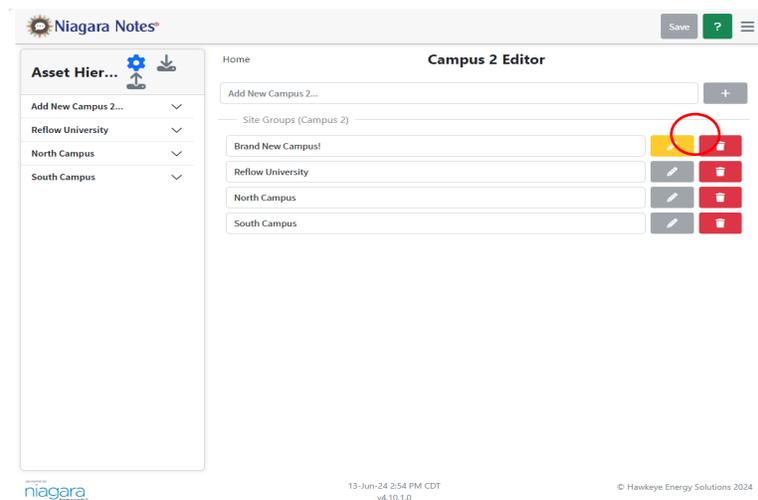
Notes Configuration View

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.

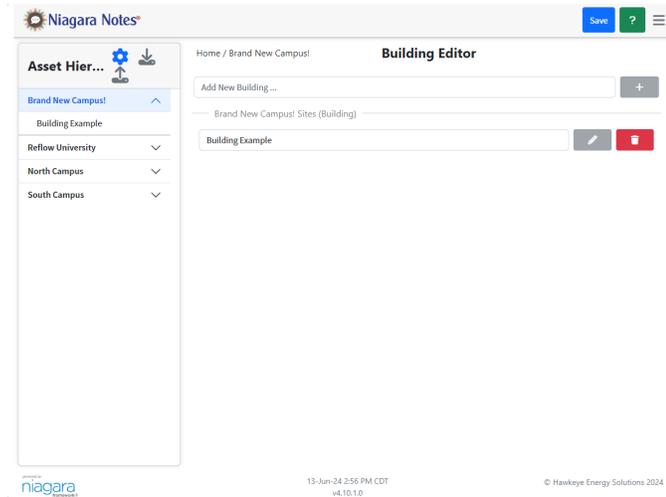


2. To change the name of a site, edit the name in the box, and click the pencil logo to save your changes. It would be beneficial to also save your work by clicking the blue button in the top right corner to ensure that the changes are saved across versions.

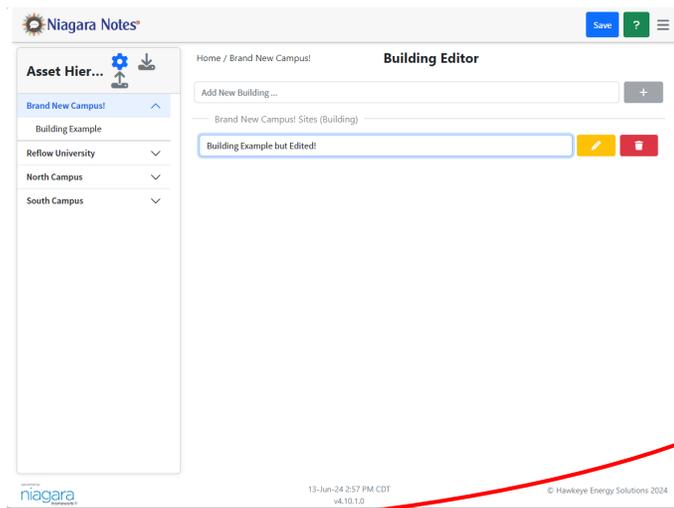


Configuring Sites

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



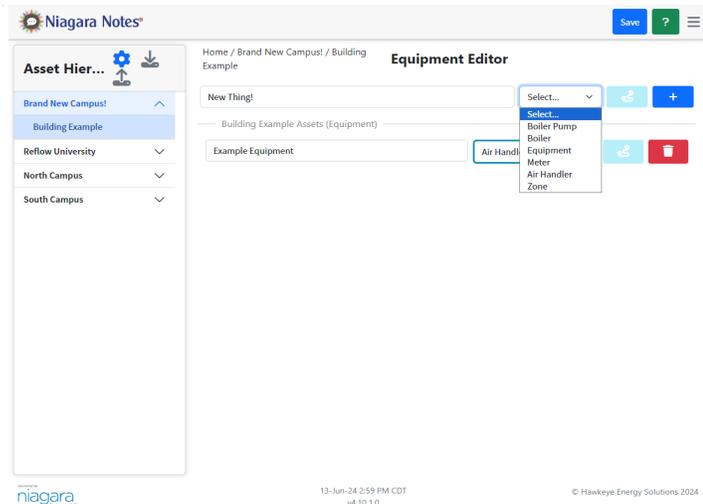
2. Edit the Site name and then click the now yellow symbol to save your changes (also make sure to hit the blue save button in the top right every once in a while, too!)



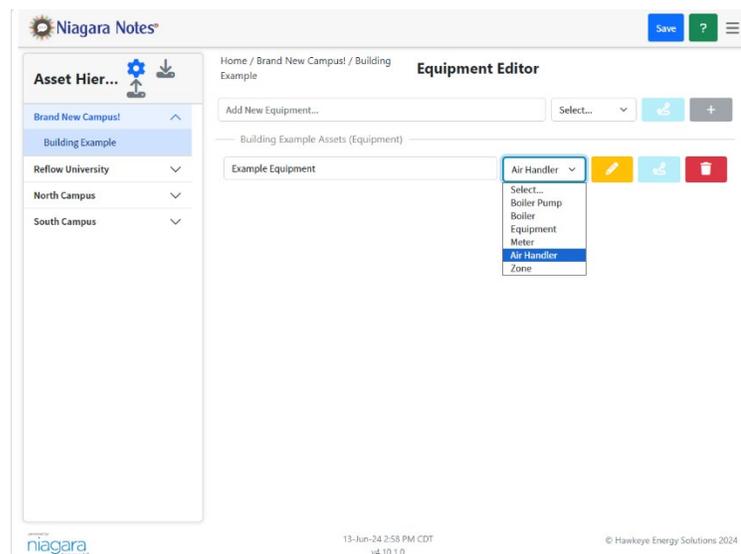
3. Similarly to the Site Group view, it is very simple to make changes to or delete the buildings if desired

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



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.

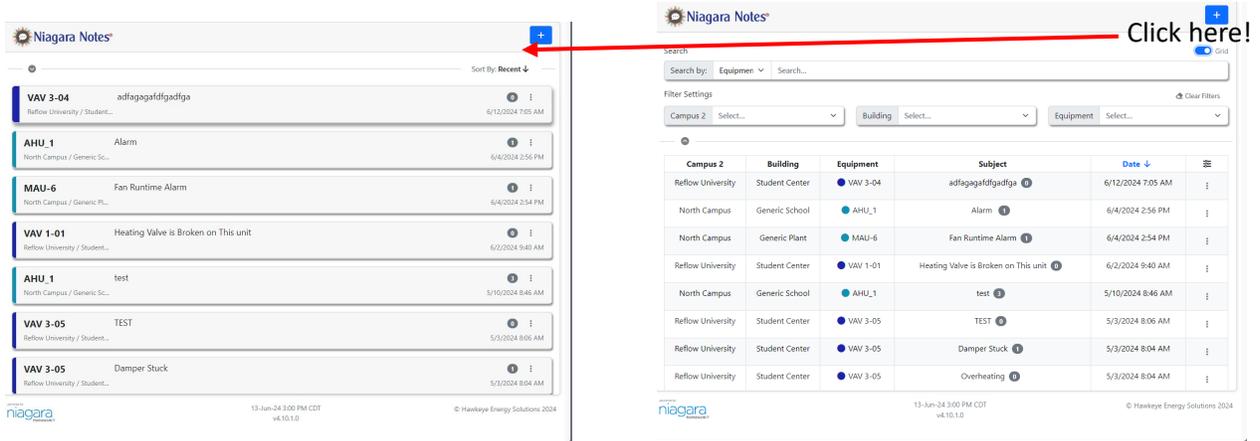


3. Deleting has the same functionality as the other sections, and it cannot be undone. Notes can be made on each piece of asset listed in this section.

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.

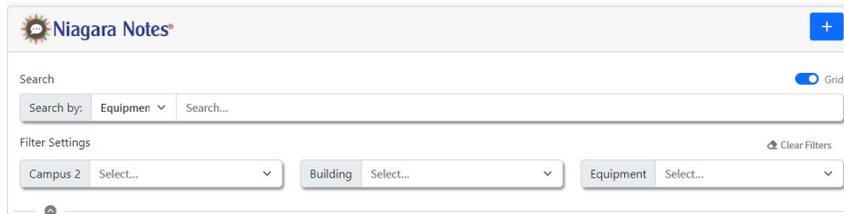


Click here!

Campus 2	Building	Equipment	Subject	Date
Reflow University	Student Center	WAV 3-04	adfagagafdfgadfga	6/12/2024 7:05 AM
North Campus	Generic School	AHU_1	Alarm	6/4/2024 2:56 PM
North Campus	Generic Plant	MAU-6	Fan Runtime Alarm	6/4/2024 2:54 PM
Reflow University	Student Center	WAV 1-01	Heating 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	WAV 3-05	TEST	5/3/2024 8:06 AM
Reflow University	Student Center	WAV 3-05	Damper Stuck	5/3/2024 8:04 AM
Reflow University	Student Center	WAV 3-05	Overheating	5/3/2024 8:04 AM

Filter Settings

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



Filtering

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

Sorting

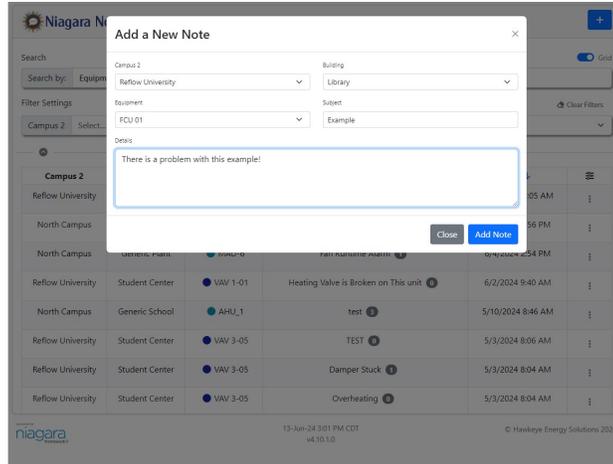
It is possible to sort by the Subject Name, Asset, Asset Group, or Site

Searching

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

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.



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	4/11/2024 11:36 AM	:
Joe	Speed Reference is not getting read correctly. Fan is is hand			4/11/2024 11:36 AM	
Ian	Hey Joe, is this the new style VFD?			4/11/2024 11:37 AM	
Ian	Has a tech gone to review it?			4/11/2024 11:37 AM	
John	I took a look			4/16/2024 10:39 AM	
John	New reply			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.