Technical Document

NCS Customer Guide

niagara

Connecting to NCS requires that you sign up and authenticate with Salesforce MFA.

The following topic describes how to get started with connecting to NCS .
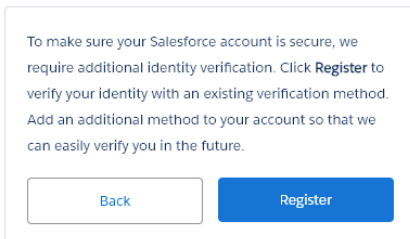
- **Signing up for NCS Salesforce MFA**
  For all Niagara Cloud Management Portal users, multi-factor authentication (MFA) is needed to meet high security standards. The following section describes how you can sign up for the Salesforce MFA for Niagara Cloud Management Portal.

For all Niagara Cloud Management Portal users, multi-factor authentication (MFA) is needed to meet high security standards. The following section describes how you can sign up for the Salesforce MFA for Niagara Cloud Management Portal.

- You have credentials to sign in to Niagara Community for NCS associated with an email address whose account you can access.

- The Salesforce Authenticator app or a generic authenticator app is installed on your mobile device.

1. Sign in to the Niagara Cloud Management Portal (https://www.niagara-cloud.com) using your Niagara Community credentials.

The **Register for Identity Verification** window opens.

2. Click **Register**.

The **Verify Your Identity** window opens.

3. Get the verification code from the associated email account, enter it in the Verification Code field, and click **Verify**.
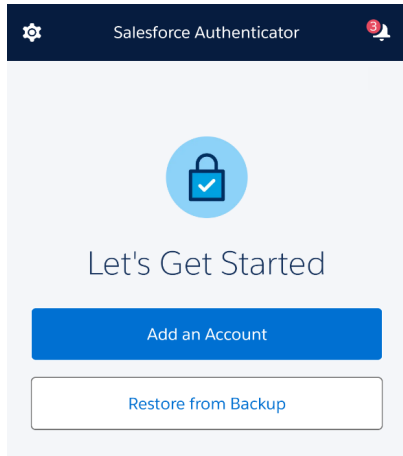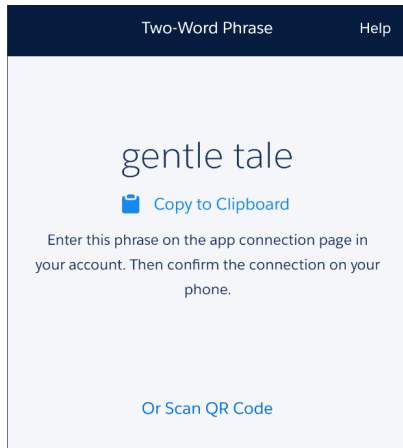The **Connect Salesforce Authenticator** window opens.

4. Continue with the setup of the Salesforce Authenticator, or click **Choose Another Verification Method** to use a generic authenticator app.

Continuing with Salesforce Authenticator

5. From the Apple App Store or Google Play Store, download the Salesforce Authenticator app, open the app, and click **Add an Account**.
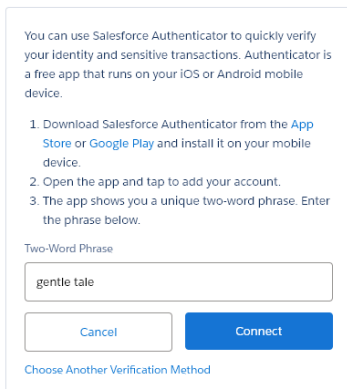
The **Salesforce Authenticator** window displays a two-word phrase.
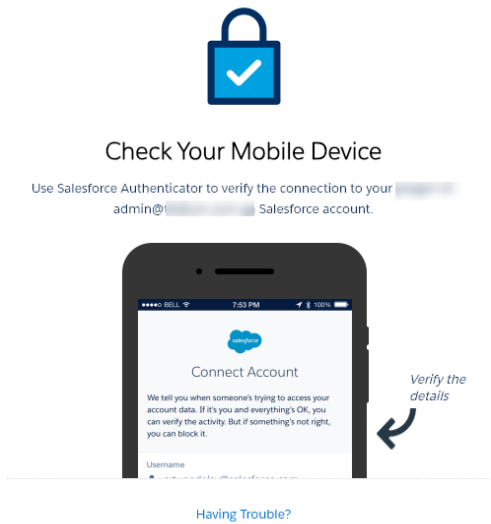

6. Navigate back to your browser and enter the phrase in the Two-Word Phrase field.

The browser displays a message to check your mobile device.

The app updates with the account information of the sign-up account.
7. On the **Connect Account** window, click **Connect**.
The **Account Added** message confirms that the procedure was performed successfully.
8. On the push notification that you receive, click **Approve** to approve the sign-up.
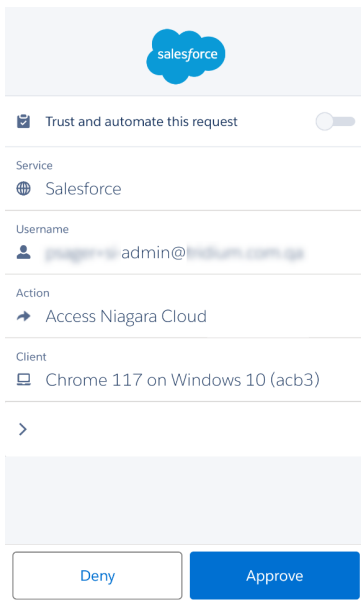

At this point, the enrollment process is complete and your browser continues to the NCS user interface.

Note: The authenticator app will prompt you to enable the location, which is an optional step that you can complete if you want the Salesforce Authenticator to auto-approve logins based on source device and mobile location.

Each time you log in to NCS, you will receive a push notification from Salesforce Authenticator. You can approve the logins from your mobile device.

Continuing with a generic authenticator

9. On the **Choose a Verification Code** window, select **Use verification codes from an authenticator app** option and click **Continue**.
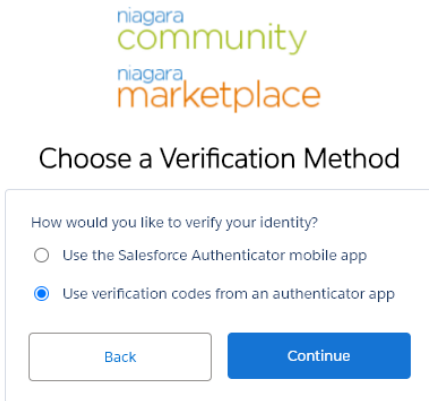
You will be prompted to scan a QR code with your authenticator app.

10. Open your authenticator app and scan the code.
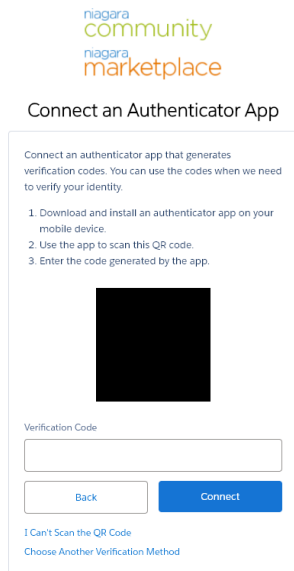
Your authenticator app displays a six-digit token for the newly added account.

11. Enter the six-digit token in the **Verification Code** field and click **Connect**.
    You are asked to enter the verification code again to verify the login.

12. Enter the code from your authenticator app and click **Verify**.
    The enrollment is complete. You will be asked for the verification code at each login.

Parent topic: Connection preparation

The Niagara Cloud Suite (NCS) is a collection of services to support and augment existing Niagara systems. These services represent the next step to expand the functionality of Niagara.

The Niagara Cloud Management Portal, niagara-cloud.com provides visibility to the devices a systems integrator (SI) has registered with the Niagara Cloud for a given customer.

The Niagara Data Service uses histories stored in the Niagara Cloud to monitor trends. A Niagara Community login authorizes you to view these charts at https:\\www.niagara-cloud.com.

- **Users**
  A wide variety of people use the Niagara Cloud Management Portal to configure the cloud system, manage the uploading of data, create reports, and use reports.
- **NCS role-based access control - customer**
  The following tables give you an overview of the permitted actions that a specific role has within Niagara Cloud Suite.
- **Niagara Data Service**
  This service is used by an SI to generate charts (reports). The charts are available at niagara-cloud.com.
- **Assigning customer user access**
  As a customer admin, you can assign access to a customer user at the project level.
- **Viewing and exporting reports**
  Saved reports identify trends in the collected station data.
- **Viewing saved backups**
  As a customer user of the Niagara Cloud Management Portal, you may view the current list of up to five backup files for each device. You need an Partner Admin user to create, restore, add notes and designate a backup as the preferred backup for your station.

A wide variety of people use the Niagara Cloud Management Portal to configure the cloud system, manage the uploading of data, create reports, and use reports.

Figure 1. Types of users
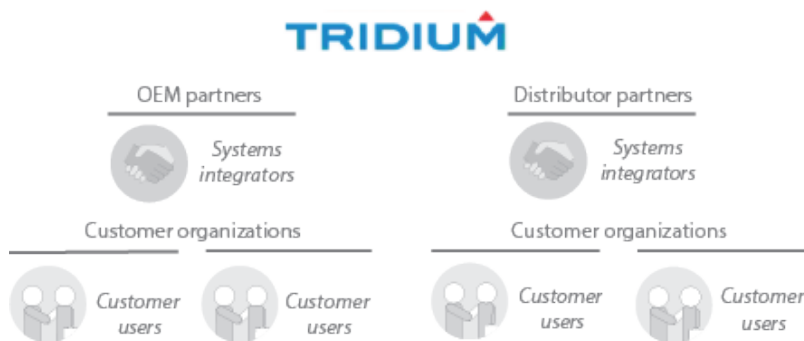
A Tridium *partner* is an original equipment manufacturer or distributor that resells the Niagara Framework to its *customer organizations*.

The members of a partner's staff who install and configure the Niagara Framework at customer organization sites are *systems integrators* (SIs).

Six *roles* determine the functions an individual can perform:

- The *Partner Admin* role provides complete functionality for the systems integrator who functions as the administrator on a partner's staff.

- The *Partner User* role provides limited functionality for other people who are members of a partner's staff.

- The *Customer Admin* role provides access to other customer users.

- The *Customer User* role lets the customer's facility manager or building owner view reports.

- The *Nds Operator* role provides a moderate level of access to Niagara Data Service components.

- The *Niagara Remote* role provides remote access to the stations web interface.

Parent topic: Niagara Cloud Suite

The following tables give you an overview of the permitted actions that a specific role has within Niagara Cloud Suite.

Niagara Cloud Management Portal

Action	Customer Admin	Customer User	Niagara Remote	NDS Operator
View customer	❌	❌	✅	✅
View project	✅	✅	✅	✅
Create project	❌	❌	❌	❌
Edit project	❌	❌	❌	❌
Delete project	❌	❌	❌	❌
View device	✅	✅	✅	✅
Register device	❌	❌	❌	❌
Edit device	❌	❌	❌	❌
Delete device	❌	❌	❌	❌
View user	✅	❌	❌	❌
Modify user role	✅	❌	❌	❌

Action	Customer Admin	Customer User	Niagara Remote	NDS Operator
View service account	❌	❌	❌	❌
Create service account	❌	❌	❌	❌
Edit service account	❌	❌	❌	❌
Delete service account	❌	❌	❌	❌
Regenerate service account secret	❌	❌	❌	❌
Modify service account role	❌	❌	❌	❌

Niagara Data Service

Action	Customer Admin	Customer User	Niagara Remote	Nds Operator
Query model API	✅	✅	❌	✅
Query egress API	✅	✅	❌	✅
Create report	✅	❌	❌	❌
Delete report	✅	❌	❌	❌
View report	✅	✅	❌	✅
Export history	✅	✅	❌	✅

Niagara Recover

Action	Customer Admin	Customer User	Niagara Remote	Nds Operator
View backups	✅	✅	❌	❌
Edit backup details	❌	❌	❌	❌

Action	Customer Admin	Customer User	Niagara Remote	Nds Operator
Download backup	✓	✗	✗	✗
Delete backup	✗	✗	✗	✗

Niagara Remote

Action	Customer Admin	Customer User	Niagara Remote	Nds Operator
Connect to station	✓	✗	✓	✗

Live Read / Write

Action	Customer Admin	Customer User	Niagara Remote	Nds Operator
Read point	✓	✓	✗	✓
Write point	✓	✗	✗	✓

Parent topic: Niagara Cloud Suite

This service is used by an SI to generate charts (reports). The charts are available at niagara-cloud.com.

The Niagara Data Service provides:

- Report creation implemented by an SI.

- Report viewing, which is available to all users.

Parent topic: Niagara Cloud Suite

As a customer admin, you can assign access to a customer user at the project level.

You are a customer admin. You have credentials to sign in to the Niagara Community.

Note: Customers can be supported by multiple system integrators. To avoid that one system integrator can grant access to projects that are managed by another system integrator, you cannot modify the access at the customer level.

1. Sign in to the Niagara Cloud Management Portal (https://www.niagara-cloud.com) using your Niagara Community credentials.
   The **Customer** view opens.
2. To select the desired customer, navigate to **Users & Roles** from the Niagara cloud menu.

3. Navigate to the customer of interest in the ACCESS BY CUSTOMER section, and click **Manage**.
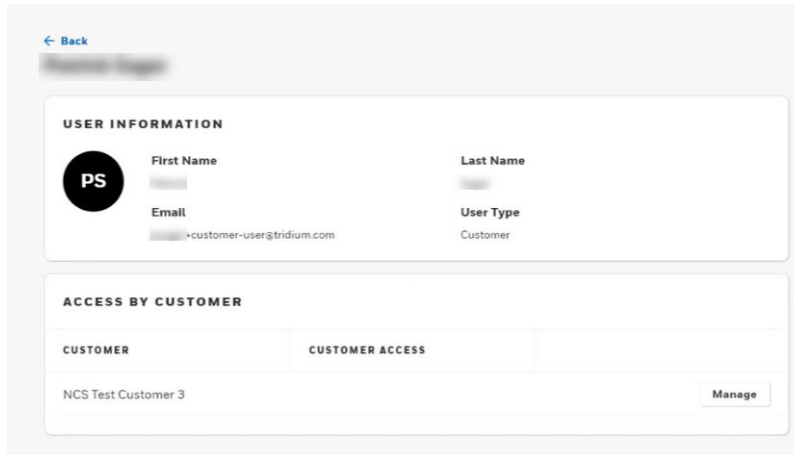
The **Manage Access** page opens.
4. Select from the drop-down menu if you want to grant **Custom** access or **No Access**.
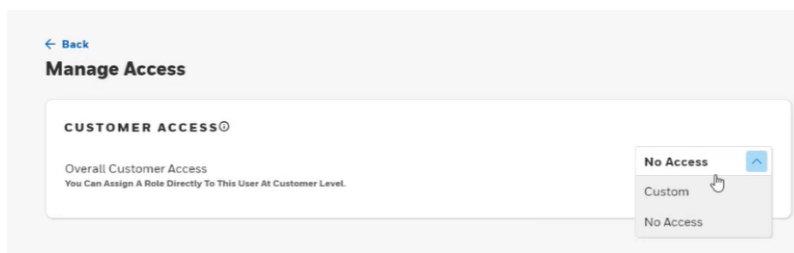
Parent topic: Niagara Cloud Suite

Saved reports identify trends in the collected station data.

You are a customer user. You have credentials to sign in to the Niagara Community.

1. Sign in to the Niagara Cloud Management Portal (`https://www.niagara-cloud.com`) using your Niagara Community credentials.
The **Customer** view opens
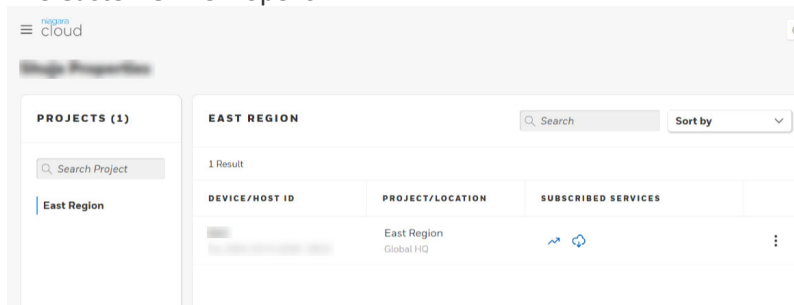
.
2. Click the menu button (≡) and click **Saved Reports**.

The **Saved Reports** view opens.
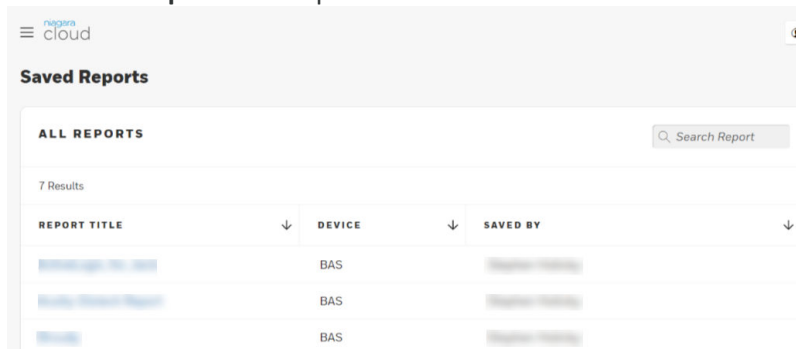
3. Select the **REPORT TITLE**.
   The report opens.

   Each report can include data from more than one device.

4. To view the value for an individual point, move the cursor along the displayed line in the center of the chart.

   Passing the cursor over a time instance causes the tooltip to display the point's value at that time. When you select multiple points, the tooltip displays the values for all the points at the selected time.

5. To export this on-demand chart, click the export button ( ) in the upper right of the view (upper right of the view).
   The **EXPORT AS** window opens.
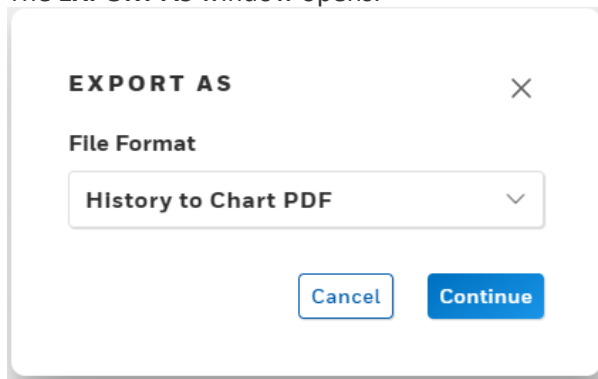
   Your choices are **Export Chart as PDF** and **Export Histories as CSV**.

6. Select the type of export from the drop-down list and click **Continue**.
   The system saves the PDF or CSV file in your computer's **Downloads** folder.

Parent topic: [Niagara Cloud Suite](#)

As a customer user of the Niagara Cloud Management Portal, you may view the current list of up to five backup files for each device. You need an Partner Admin user to create, restore, add notes and designate a backup as the preferred backup for your station.

You are a customer user with access to the Niagara Cloud Management Portal.

1. Sign in to the Niagara Cloud Management Portal (https://www.niagara-cloud.com) using your Niagara Community credentials.
The **Customer** view opens.
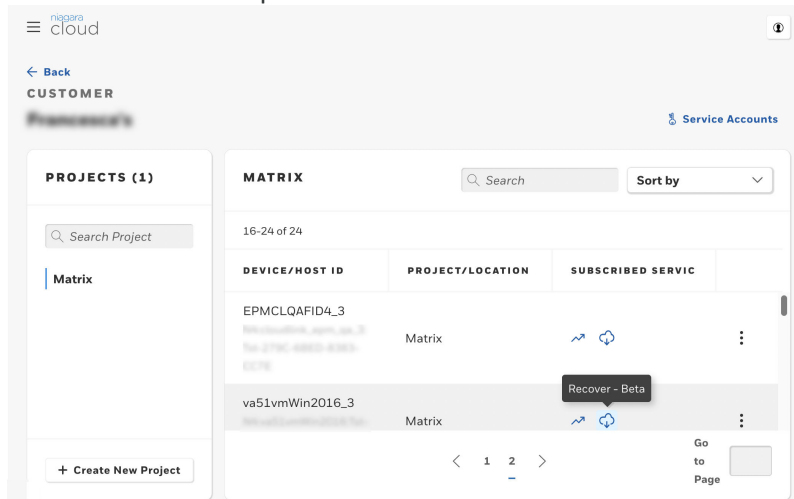
2. Select a project and search for a device.
The device row displays in the **CUSTOMER** view.
3. Click the Recover icon (⟳).
The **SAVED BACKUPS** view opens.
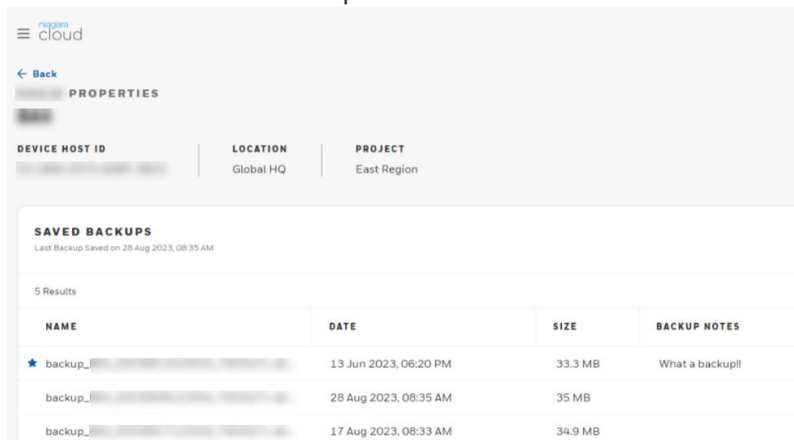
The star to the left of the backup file name indicates that this backup is the preferred backup to retain when making space to store a new backup.

Backup file names can be long.

4. To view the whole file name, hover your cursor over the ellipses to the right of the name.
If a backup note is longer than two lines, a More link provides access to the complete note.
5. To view the whole note, click **More**.

The **Notes** window opens.

Notes ✕

Configured by M. Smith and it was taken
before configuring Niagara Data Service
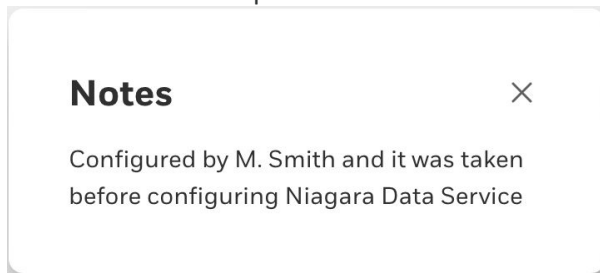
Parent topic: [Niagara Cloud Suite](#)

Niagara Remote enables you to securely access the built-in web interface on your Niagara stations directly from the Niagara Cloud Management Portal without using a VPN. You can connect to multiple stations at once and switch between them if needed.

Without Niagara Remote, if a device is installed on a remote network, the only way for you to access the web interface is by exposing the device's web interface on a publicly accessible web address, or over a separate VPN solution, which is complex, expensive to administer, and complicates access.

- **Connecting remotely to the station**
  Niagara Remote allows you to securely access the web interface of a Niagara device from where and when you need to connect. Here are the steps to follow.

Niagara Remote allows you to securely access the web interface of a Niagara device from where and when you need to connect. Here are the steps to follow.

- You have installed all required CloudLink modules on the station to be registered.

- The station to which you want to connect remotely is registered with Niagara Cloud Suite.

- The station has a Niagara license with an active subscription for the Niagara Remote product.

- You have the Niagara Remote or Admin role. You were able to multi-select Niagara Remote role and, for example, User role.

1. Log in to Niagara Cloud Management Portal and select the desired device.
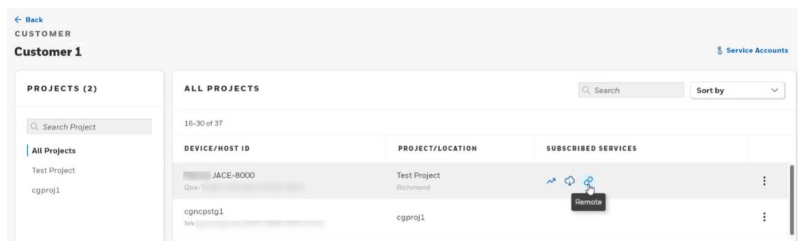
The device, which has the Niagara Remote subscription, displays the **Remote** link.
2. Click on the **Remote** link.

The web login window for the station opens.
3. To log on remotely to the station, enter username and password.
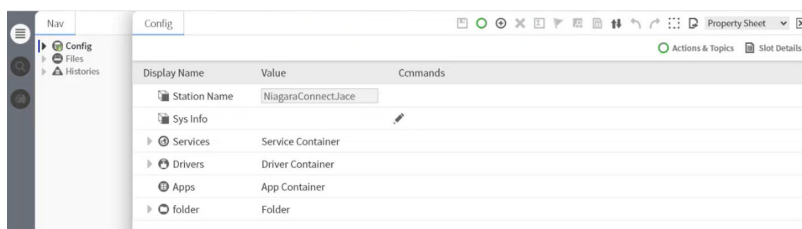
You have accessed the station via browser. From here you can see all web views just like you would when connecting to the station directly.

Note: Notice: In the URL, notice the device UUID (Universally Unique Identifier). This URL will always be the same for this particular device.
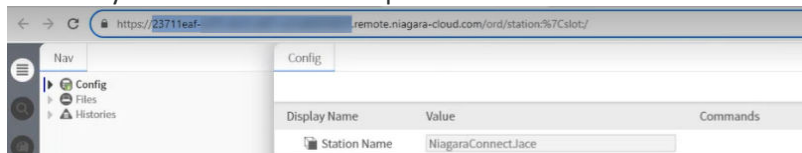
- You can share the URL with another user who is permitted through Niagara Cloud to remotely connect to this device.

- Another practical aspect is that you can bookmark the URL and later use it to connect to the station without first logging in directly to the Niagara Cloud Management Portal. First, you are directed to the Niagara Community login from where you are asked to enter your credentials. This will prompt a multi-factor authentication (MFA) request. From there, you will be redirected back to the station login.

Parent topic: Niagara Remote

This chapter documents the views available to customer users.

- **Saved Reports view**
  This view lists the reports that have been saved and are available to customer users.
- **Report view**
  This view provides a chart of up to 10 data items stored in the Niagara Cloud.
- **Saved Backups view for customers**
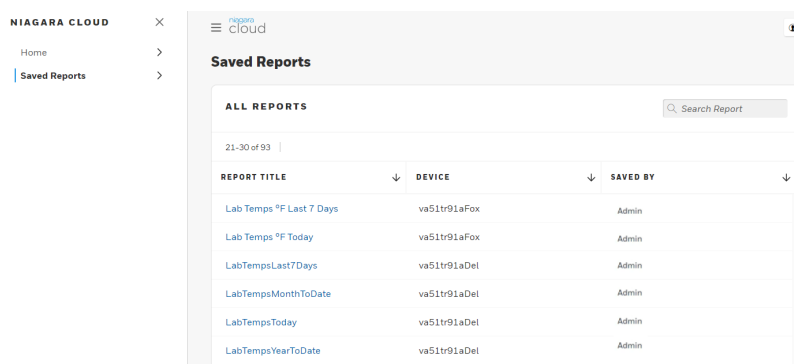 This view provides access to all saved backup files.

This view lists the reports that have been saved and are available to customer users.

Figure 1. Saved Reports view

To view this report, sign in to the Niagara Cloud, click the menu button (≡) and select **Saved Reports**.

Column	Description
Report Title	Identifies the report.
Station	Selects the station whose data are plotted on the report.
By	Reports the name of the SI who created the report.

Parent topic: Reference

This view provides a chart of up to 10 data items stored in the Niagara Cloud.

Each line on the chart represents a data item collected from a point in the device.
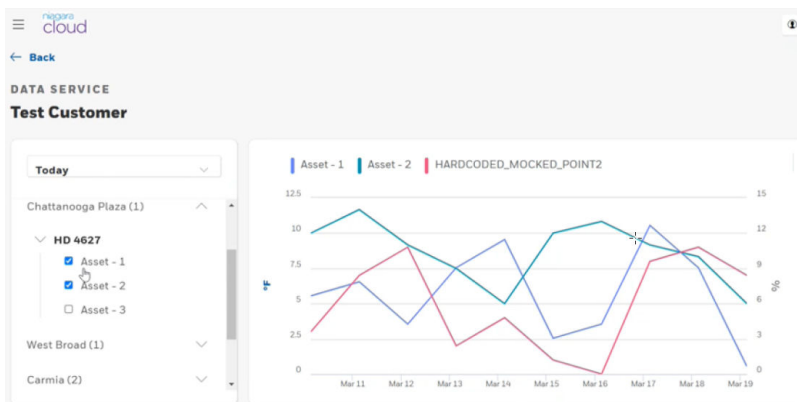
To view a report, sign in to the Niagara Cloud, click the menu button (☰), click the Data Service link for your location and select the report.

Passing the cursor over a time instance causes the tooltip to display the point's value at that time. When you select multiple points, the tooltip displays the values for all the points at the selected time.

Parent topic: Reference

This view provides access to all saved backup files.

Figure 1. Saved Backups view

Number	Description
1	Customer name.
2	Device name, which includes the device's host ID, location and related project.
3	Backup information.

To access this view, log in to https://www.niagara-cloud.com, select a customer, select a project and search for a device.

Table 1. Backup file columns

Column name	Description
NAME	Shows the beginning of the backup file's name. To view a tooltip with the full name, pass your cursor over the name. The blue star identifies the preferred backup file.
DATE	Indicates when (date and time) the backup was made based on the UTC timezone.
SIZE	Indicates the size of the file in megabytes.
BACKUP NOTES	Provides up to 1024 characters of additional information. If the note is long, Niagara Recover shows the first two lines and a **More** link. Click this link to view the entire note.

Parent topic: Reference

The following glossary entries relate specifically to the topics that are included as part of this document.

To find more glossary terms and definitions refer to glossaries in other individual documents.

Alphabetical listing

- **customer organization**
- **SI admin**

A company that buys the Niagara Framework from an original equipment manufacturer or distributor. This is the organization that hires a systems integrator to set up Niagara Cloud Suite services for their system.
Parent topic: Glossary
Systems integrator administrator: a person associated with an original equipment manufacturer or distributor who installs and manages the Niagara Framework at a customer organization's site. This person is authorized to perform Niagara Cloud Suite functions.
Parent topic: Glossary