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1 Building Operator User Guide

1.1 Before you start

Overview
This Service allows you to remotely operate and monitor building equipment like heating, ventilation and air conditioning as well as applications and meters for a fleet of connected sites.

- Multi-site overview
- View live and historical values at data point level
- Command data points
- Remotely access on-premise web applications within the connected building automation controls

Connect device
This Service is currently only compatible with the models of Siemens gateways made commercially available under the brand name Connect (the “Connect device family”). A description of the Connect devices is set forth below. Accordingly, to implement this Service, a Connect device must be purchased and installed on premise at a site specified by you in accordance with a separate agreement between your company and Siemens. You will be responsible for such installation of the Connect device at the site and any associated costs to perform such service in accordance with related documentation for the device.

Contractual documents
To be eligible to use this Service, it is required that your company signs a Master Order Form for usage of Digital Services with your local Siemens entity. This Master Order Form is tied into the Digital Service Agreement (DSA) together with this Product and Service Data Sheet (PSDS) which is the Specification Document for this Service and any further Exhibits to the foregoing. All the above-mentioned documents make up the contractual documents.

Prerequisites:
- Signed software-as-a-service (SaaS) contract
- Functional Connect X300 Gateway
- Chrome or Firefox browser
- Screen resolution 1920 × 1080 or higher
- Internet connection on premise

Learn more about Building Operator here.

Data Privacy in Building Operator
Building Operator considers the requirements of the GDPR (General Data Protection Regulation 2016/679/EU). We collect the data which is required to ensure the functionality of this Service (purpose limitation, data minimization, data retention/deletion). Users can at any time access their personal data we are processing in this Service. The personal data in relation with Building Operator will be deleted on request in any event. The user account itself will only be deleted if the Siemens ID is not used for authentication purposes for other by Siemens applications you have subscribed to.

For additional security, always log out from Building Operator. Closing your browser does not guarantee your account safety.

1.2 Getting Started Through MindSphere
To enable Building Operator in the MindSphere Launchpad, please contact your regional sales representative and provide the following information:
- Your tenant name
- Your tenant URL
- The email to grant administrator access to

Enabling Building Operator in the MindSphere Launchpad takes approximately 10 business days.

Please wait for the setup to complete. Once the setup is complete, select Building Operator from the Launchpad, and proceed with Building Operator Overview: Before you start.

1.3 Getting started
This document is intended for Administrators of the Building Operator application and reviews the initial log-in and configuration steps in Building Operator.

1.3.1 Signing up
To log in to the Building Operator application for the first time, complete the following steps:
2. Select Log In/Sign Up on the landing page.
3. Select the **Sign Up** tab and complete the fields to create a Siemens ID. Select **Sign Up** to confirm. Keep this tab in the browser open.

4. Check your inbox for an email from Siemens ID. Select **Confirm my account** in the email.
5. Navigate back to the initial tab and select **Continue**.

1.3.2 **Choosing a subscription type**

Once you've logged in to the Building Operator application for the first time, you need to select a subscription plan. For more details on each subscription plan, please see the *Product and Service Datasheet* (A6V11913114).

To select a subscription:
1. Select Start Now to start a Free Trial or Activate Now to activate the Standard subscription.

   ![Welcome Screen]

   Welcome
   Please choose your subscription

   **Free trial**
   Perfect to start with 6 month trial
   - 1 site
   - 500 Data points
   - 10 Remote web access connections
   - Data history
   - Upgradable

   ![Start now button]

   **Standard**
   Perfect to grow with flexible needs
   - 10,000 Sites
   - 500 Data points
   - 10 Remote web access connections
   - Data history
   - Add-ons to scale up
   - Renewable

   ![Activate now button]

2. If you click Start Now:
   - Enter the information in the Company and Address fields provided.
   - Select the checkbox below, then Continue to proceed.
   - In the Review section, review the information you just entered. Select Activate to activate your free trial.

![Free trial subscription details]

3. If you select Activate Now to activate a Standard subscription:
   - Enter your Entitlement ID in the field provided. Select Continue to proceed.
   - Enter the company information in the fields provided. Select Continue.
   - Select the products you want to activate. Select Continue.
   - Review the information and select Activate when ready.

![Activate now subscription details]
1.3.3 Upgrading and adding on to subscriptions
You can either upgrade an existing free-trial subscription in Building Operator, or add more data points to your current paid subscription.

A valid Entitlement ID for Standard subscription is required to upgrade the service.

Upgrading Subscriptions
To upgrade the subscription in the Building Operator application, complete the following steps:

1. Select the gear icon to access the settings.
2. Select the Subscriptions tab, then Upgrade.
3. When you select Upgrade, copy and paste your Entitlement ID in the field provided. The key will come from a Siemens LMS email. Select Next to proceed.
4. Review the site information in the Products screen and select Save to continue.

Adding data points to subscriptions
To add on data points to an existing subscription, complete the instructions below:

1. Select Settings.
2. Select the Subscriptions tab.
3. Ensure you have purchased add-ons to increase data points, and remote access to those data points.
4. Select Add-on.
5. Paste or enter the Entitlement ID. The key will come from a Siemens LMS email. Select Next.

6. Review the site information in the Products section and Select Save.

7. You will be redirected to an empty page with no registered sites. To add a site, see the Asset Manager User Guide (A6V12060067).

1.3.4 Adding sites
To add sites in Building Operator, please reference the Building Operator Engineering Guide in the Help tab.

1.3.5 Inviting users
To invite a new user to the Building Operator application, complete the following steps:
1. Select the gear icon in the top-right corner to access the settings.

2. Select the **Company** tab, then the user’s company name.

3. Next, select **Invite User**, beneath the Details header.

4. Fill in the **Name** and **Email** fields with the appropriate information, and select their role from one of the four radio buttons listed below:
   - **Monitor**: Read-only access to remotely monitor building automation applications.
   - **Operator**: Read and write access to remotely operate building automation applications.
   - **Engineer**: Read, write and engineering access to remotely operate building automation applications. Engineering access to remotely troubleshoot and service building automation applications via the web. Responsible for commissioning and servicing a fleet of sites.
   - **Administrator**: Full access to administrate the service.
5. Select **Send** to invite the user.

### 1.4 Operation and Monitoring

#### 1.4.1 Viewing sites and building data

*This section is intended for all users in Building Operator.*

In the Building Operator multisite overview page, complete the following steps to view Site and Device data points:

1. Find and select the site you wish to view in the **Site** list view.

2. Select the device you want operate.
3. Alternatively, you can search for specific data points by selecting the data points icon.

4. Select the data point you want to view in the device list results.

5. A new window will appear to the right of the list results. The default time period is Hour. You can select the other time-value buttons to manipulate the period shown in the graph. You can also select, hold, and drag on the graph itself to manually create a custom, more in-depth view (as illustrated below).

Building Operator uses Haystack tags, generated in Building Operator Discovery to identify, organize and map specific data. For more information regarding Haystack, please see the Haystack website. For a list of whitelisted tags in Building Operator, please see the Appendix in the Building Operator Engineering Guide (A6V11881627).
Saving Data Point History to CSV File

Once you have selected the time range of data you would like to view, you can export the data to a CSV file. This allows the use of collected data in a user's own analytics pipeline to analyze energy flows and consumption.

To save data point history to a CSV file on a local PC, complete the following instructions:

1. Select the data point with the information that you want to save.
2. In the upper right corner of the chart, click the Download icon.
3. After clicking the icon, the CSV file will automatically download to your browser’s download location.

Printing Data Point History

To print data point history to a PDF file on a local PC, complete the following instructions:

1. Select the data point with the information that you want to save.
2. In the upper right corner of the chart, click the Print icon.
3. After clicking the icon, the PDF file will automatically download to your browser’s download location and can be printed.

1.4.2 Remote web access
For more information on how to establish a remote web access connection using the Connect X300, see the Building Operator Engineering Guide.

1.5 User management
This section is intended for Administrator users in Building Operator.

1.5.1 Viewing and editing user profiles
To view users in the Building Operator application:
1. Select settings in the top-right corner of the browser window.
2. Select the Users tab.
3. A list of users displays. Select a user’s name to view their user profile details. These include:
   – Name
   – Email address
   – Memberships, or which companies they belong to
   – User role in that Company

To edit a user profile, complete the following steps:
1. Navigate to a user profile.
2. Select the User role in the Details section.
3. Select one of the four options from the dropdown list.
1.5.2 Removing memberships of user

This section is intended for Administrator users in Building Operator.

To remove the company membership of a user, complete the following instructions:

1. From the homepage, select site settings.
2. Select the Company tab.
3. Scroll to locate the individual user and Select on their name.
4. Select Remove, then Yes in the ensuing pop-up to confirm.

4. Once the change is applied, a confirmation message displays in the bottom-right corner of the screen.
5. You can also change the user’s role. To do so, find and select the appropriate permission role in the dropdown beneath their name.

### 1.5.3 User permissions

Please see the table below for user-based permissions:

<table>
<thead>
<tr>
<th>User permissions</th>
<th>Monitor</th>
<th>Operator</th>
<th>Engineer</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Service</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• View site list overview</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>• View device list</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• View data point list and data point history</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>• View About page</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>My Account Profile</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• View and edit my account profile</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>• Remove own profile from company in application</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Write Actions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Command a data point</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>• Release a BACnet command</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### User permissions

<table>
<thead>
<tr>
<th>User permissions</th>
<th>Monitor</th>
<th>Operator</th>
<th>Engineer</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote Web Access</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>● Connect / disconnect a tunnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Site Configuration</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>● Add / edit / delete a site</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Activate a gateway device</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Add / edit / delete remote web access end point</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Management</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>● View / invite / edit / remove a user (from membership)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>● View / add / edit a company</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subscriptions</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>● Add / view / upgrade / add-on / renew a subscription</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 1.5.4 Editing company information

To edit a Company in the Building Operator application, complete the following steps:

1. Select settings.
2. Select the Companies tab.
3. Find and select the company you want to edit, then select Edit beneath the Details header.
4. Edit the appropriate fields, except for the Company Name.

5. Select **Save** to confirm the changes.

### 1.6 Deleting user account

This section is intended for all users in Building Operator.

Users can delete their account by first leaving all memberships and then requesting deletion of the Siemens ID, which results in the deletion of their personal data. This is applicable to:

- Admin users who delete all memberships at the end of a trial or license period
- Monitor, Operator or Engineer users who had their last remaining memberships removed from Building Operator

1. Select **My account**.
2. Select **Leave for all memberships**.
3. Select **Delete**, in order to initiate the account deletion