Resource Advisor Overview

CUSTOMIZING RESOURCE ADVISOR

Pacific Power partners with Schneider Electric to provide Resource Advisor to customers. Resource Advisor provides robust energy information about your property(ies) and can be customized and configured to your preferences. You can set up your own navigation experience with easy-to-add widgets and download useful reports in PDF and Excel formats.

If you need assistance with Resource Advisor, please reach out for support to PortfolioManagerSupport@se.com.

Settings and User Management

Before exploring the functionality of Resource Advisor, it is important to show you how to manage your settings and preferences.

1. Once logged in, navigate to the top right-hand corner of the screen and click on your username then the "Settings" link.
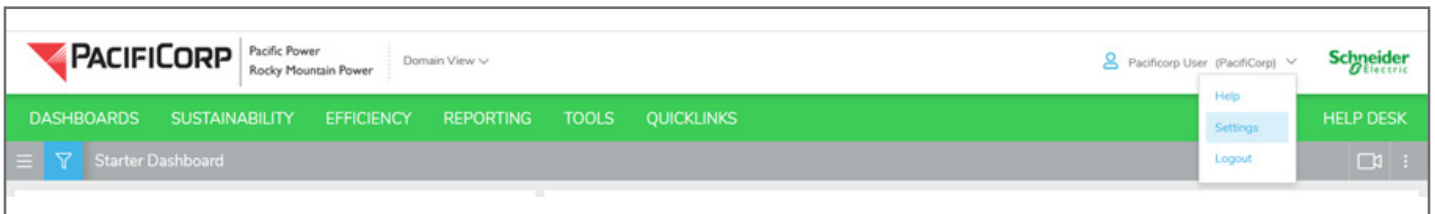
2. The next screen is your **Preferences** page where you can do the following:

    a. Change your language.

    b. Change and save your password.

    c. Manage the email associated with your Resource Advisor account.

3. After you've made changes to any of the above, select **Save** at the bottom of the screen to save your adjustments.

Navigating the Homepage or Dashboard

Now that you've changed your preferences, the next sections will outline how to navigate Resource Advisor. When you login, you are taken to your own homepage or dashboard. Your dashboard is customizable and only viewable by you. Below are some tips and tricks to navigate and customize your Homepage.
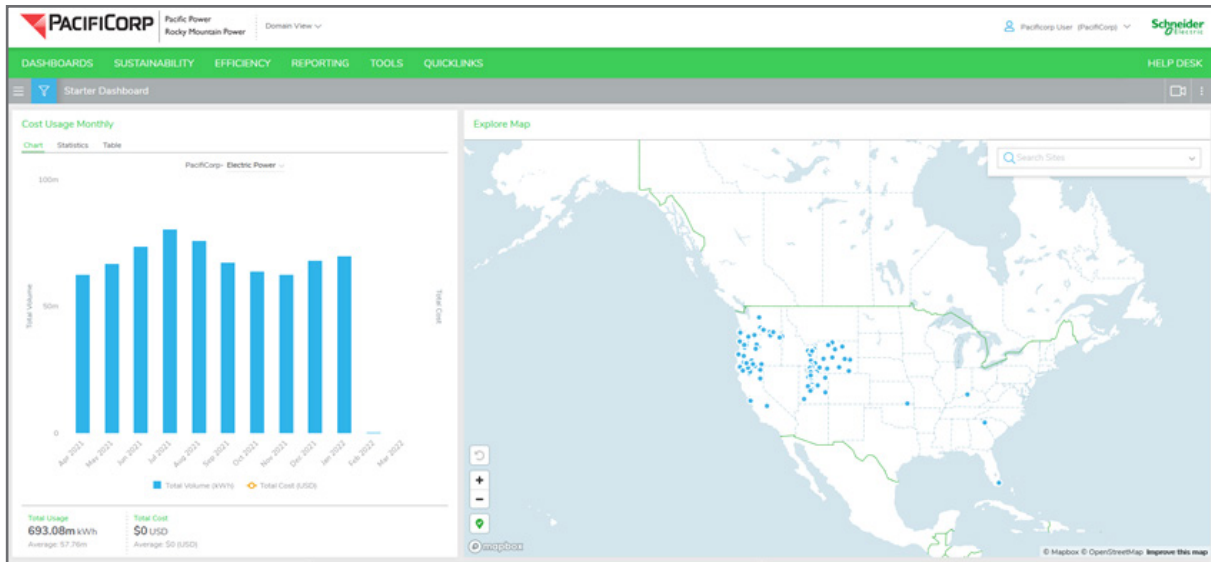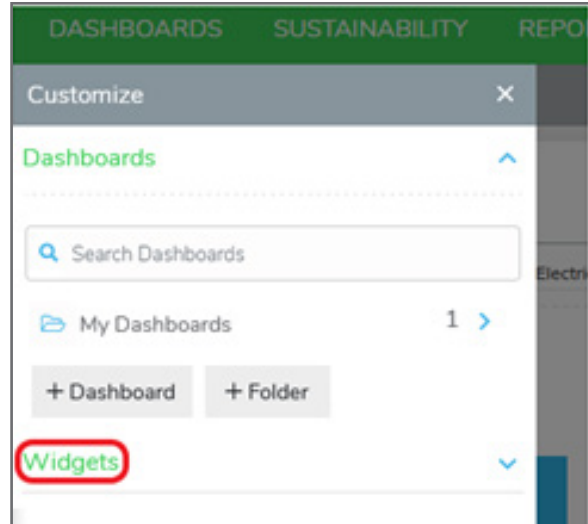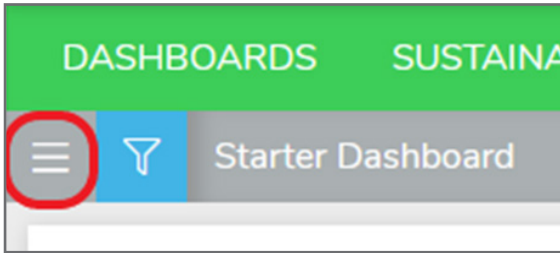

Arranging Widgets

You can rearrange your widgets by clicking and holding on the top bar of a widget, dragging and dropping the widget where you want it on your homepage. You can also resize them by grabbing a corner and dragging to a new dimension. Your screen will reset and your changes should be saved.
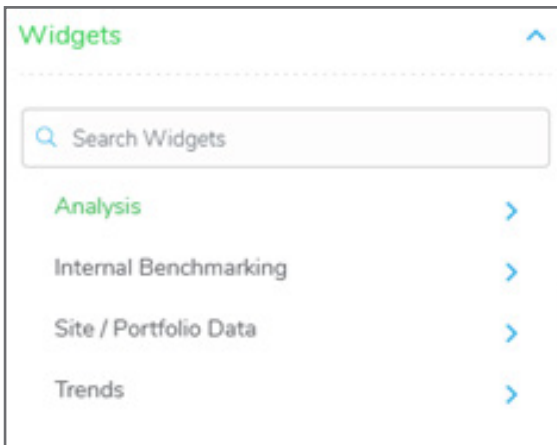
Adding Widgets

You can add widgets to your Dashboard.

1. Click on the the three line "hamburger" icon on the top left of the Dashboard page
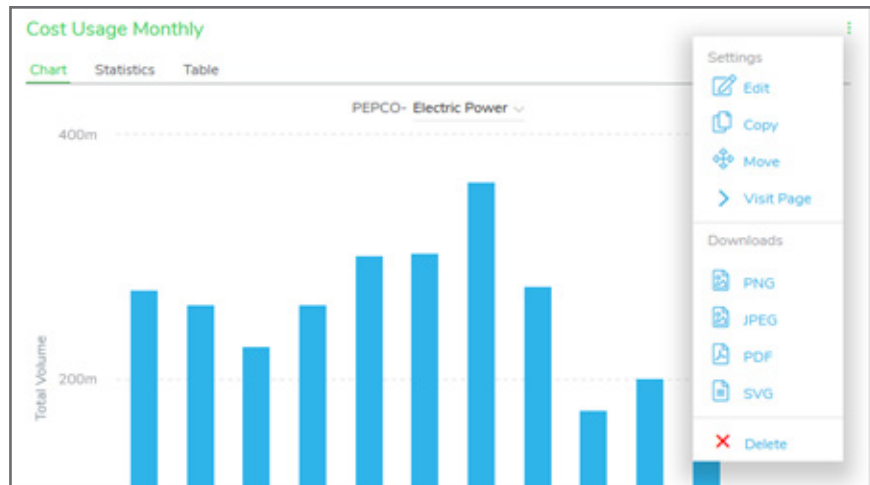
2. Click the widgets category from the Flyout Menu

3. Then choose a widget category

4. And then "Add to Dashboard"

Managing Widgets

You can manage your widgets by clicking on the three dots icon after hovering in the widget's top right-hand corner.


1. Select "Delete" to remove or delete the widget from your dashboard.

2. Select "Edit" to further customize the type of data you wish to see

3. Select "Copy" to create a copy of the widget

4. Select "Visit Page" to go to the associated page (where available)

5. Select a file type under "Download" for an image of the Widget

Finding Your Energy Use Data

Resource Advisor has a variety of reports that allow you to see your data in different ways. The following pages illustrate how to navigate through some of the reports available to you.
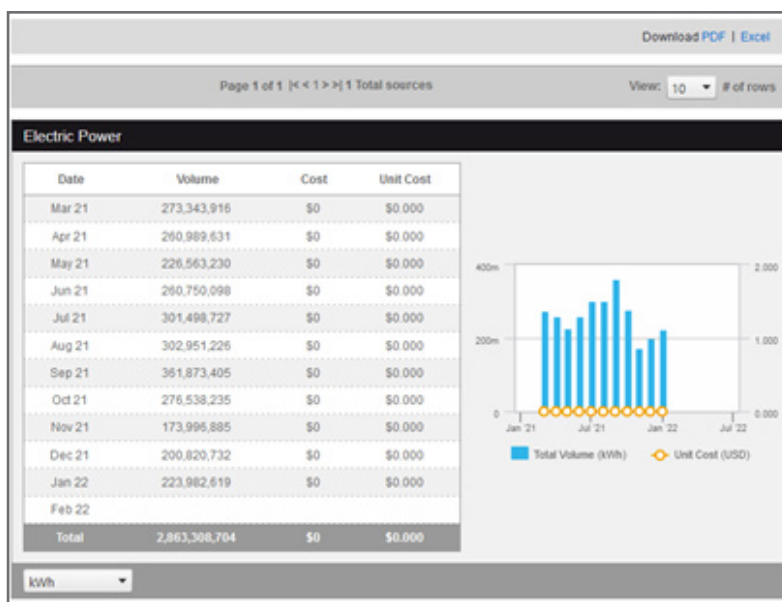
Monthly Report

1. Hover over the **Reports** tab in the navigation bar.

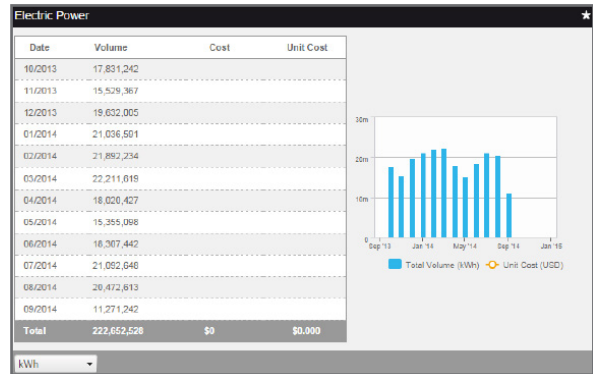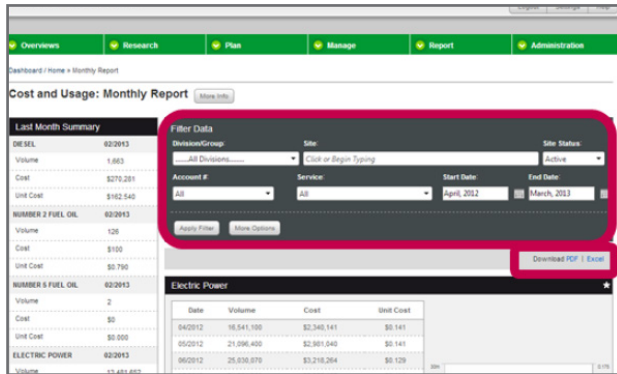2. Click on **Monthly** in the menu below the **Cost & Usage** heading
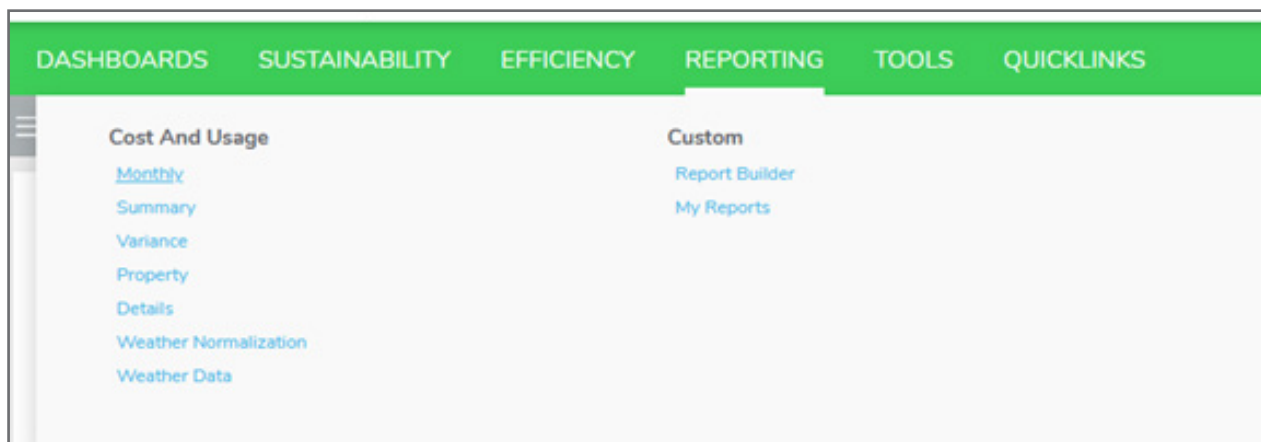
3. By default, the Cost and Usage Monthly Report shows you:

   a. Cost and Usage data and charts.

   b. Aggregated data for all your sites, if you manage more than one.

   c. Data for the last 12 months.

4. By changing your filter data you can expand your time period and filter by desired site.

   a. In the dark grey box, select the site you'd like to see in the "Site" box (this will show all your available sites when you click it)

   b. Choose your Start Date and End Dates

   c. Press "Apply Filter" to update the report
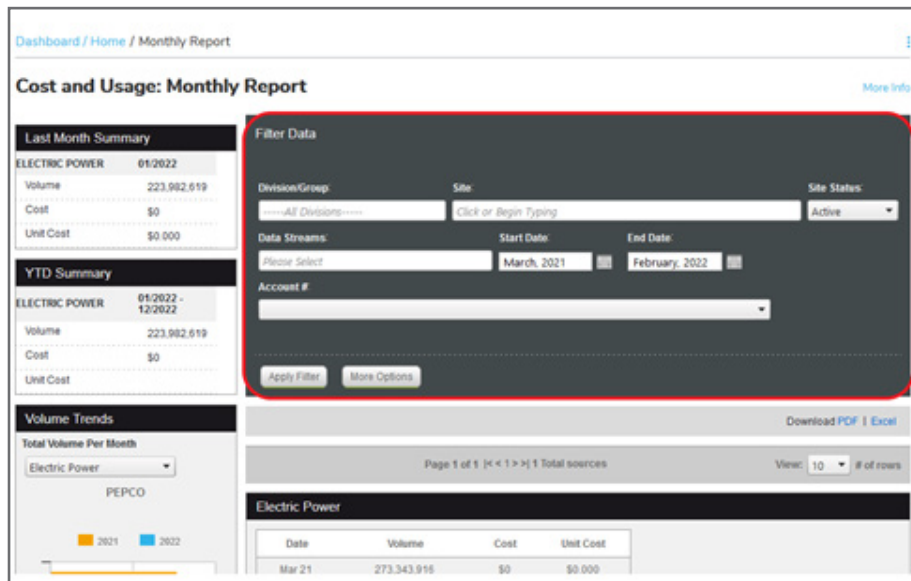
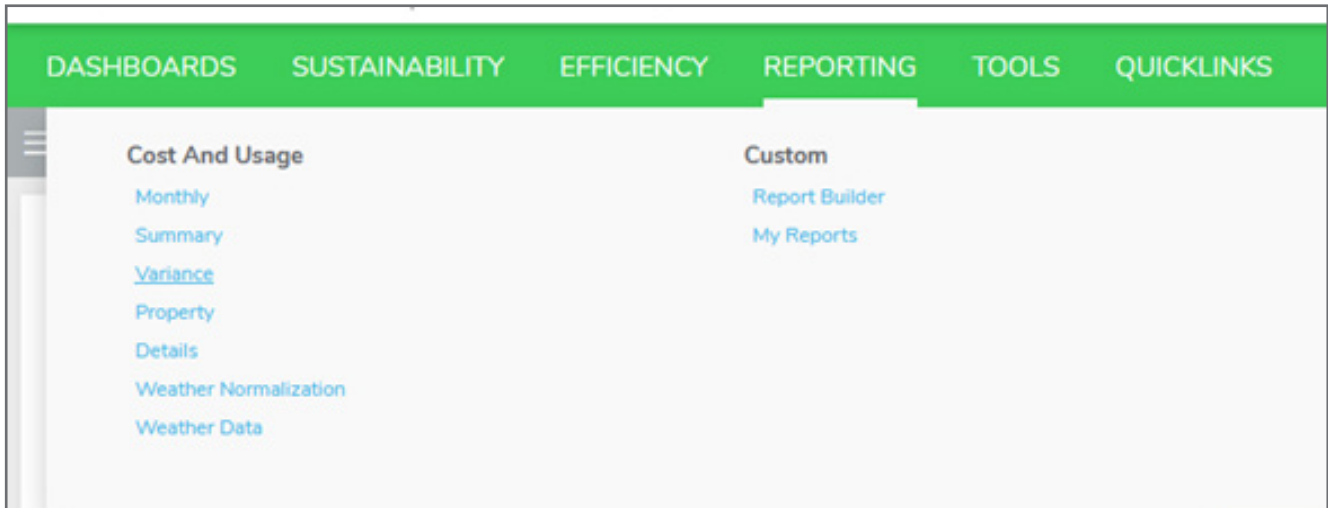5. The output will look like this below the Filter data box

6. Once you get to the data you want, you have the ability to download your report to PDF or Excel by clicking the links in the top right-hand corner of the report.

Variance Report

1. Hover over the **Reports** tab in the navigation bar.

2. Click on **Variance** in the menu below the **Cost & Usage** heading.

3. By default, the Variance Report shows you:

   a. Usage data by site compared against itself.

   b. Current year data compared to previous year's data.

   c. Percentage year-over-year variance.

4. By changing your filter data you can expand your time period and filter by desired site. *Make sure to press "Apply Filter" when you've made your selection*

5. The default report shows you all the sites in your footprint. Get to a site specific variance by either filtering in the filter box, or by clicking on the **Site** tab in the above graphic.

6. Once you get to the data you want, you have the ability to download your report to PDF or Excel by clicking the links in the top right-hand corner of the report.