

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@ems.schneider-electric.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 **Settings**.
2. The next screen is your **Preferences** page where you can do the following:
 - a. Change your language.
 - b. Manage your units of measure.
 - c. Change and save your password.
 - d. Manage the email associated with your Resource Advisor account.
3. After you've made changes to any of the above, select **Save Prefs** at the bottom of the screen to save your adjustments.

The screenshot shows the 'Preferences' page in the Resource Advisor application. The page has a navigation bar at the top with tabs for Overview, Research, Plan, Manage, Report, and Administration. The main content area is titled 'Dashboard / Home > Preferences' and contains two columns. The left column, 'Account Details', lists CMSID (Rusty Varisco), Users (23), Your Sites (183), and Your Accounts (0). The right column, 'Settings', includes a Language selection menu with 14 options, three dropdown menus for Default Currency (USD), Default Gas Unit of Measure (MMBtu), and Default Power Unit of Measure (kWh), and a form for user information. The user information form includes fields for Username (rvarisco1), Password, Confirm Password, First Name (Rusty), Middle Name, Last Name (Varisco), and Email (rvarisco@abc.com). At the bottom of the form are 'Save Prefs' and 'Cancel' buttons.



Let's turn the answers on.

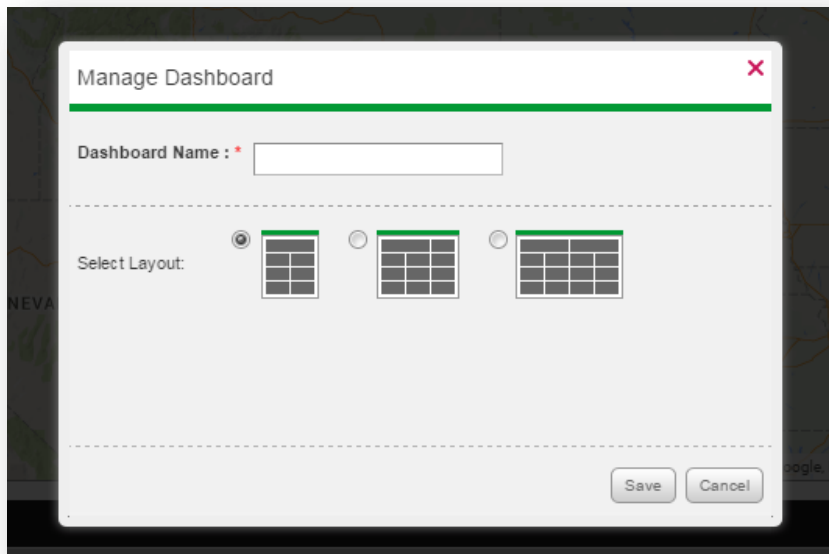
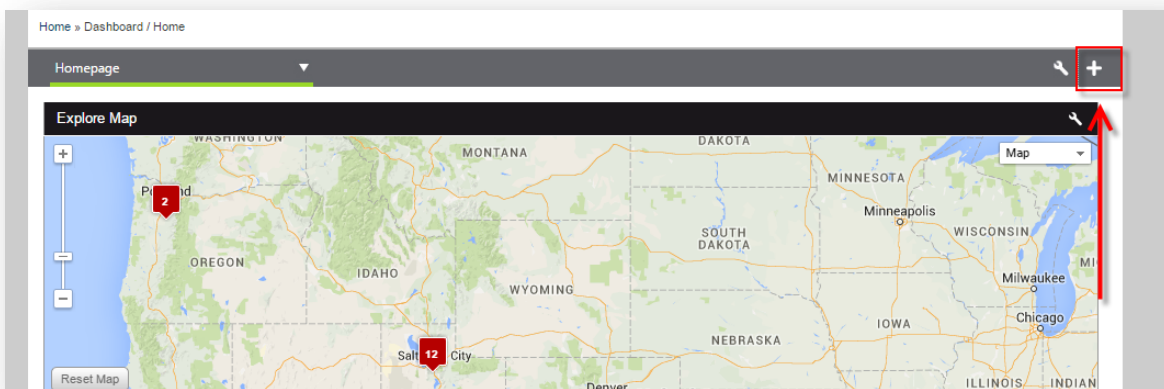
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Navigating the Homepage or Dashboard

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.

Changing the Layout

In the top right-hand corner there is a link to name and change your dashboard layout.



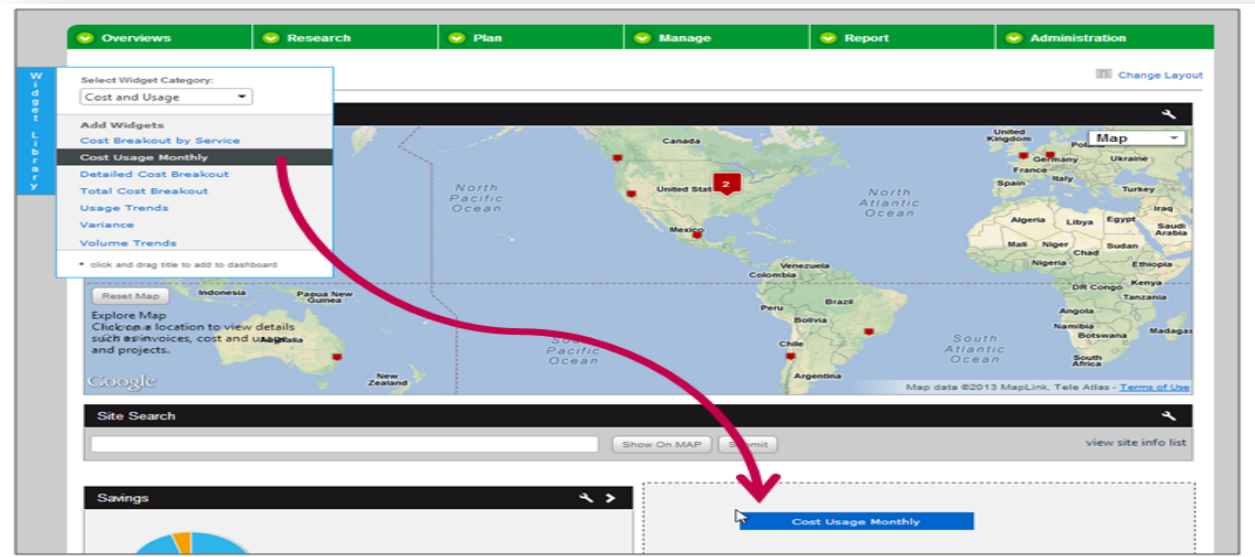
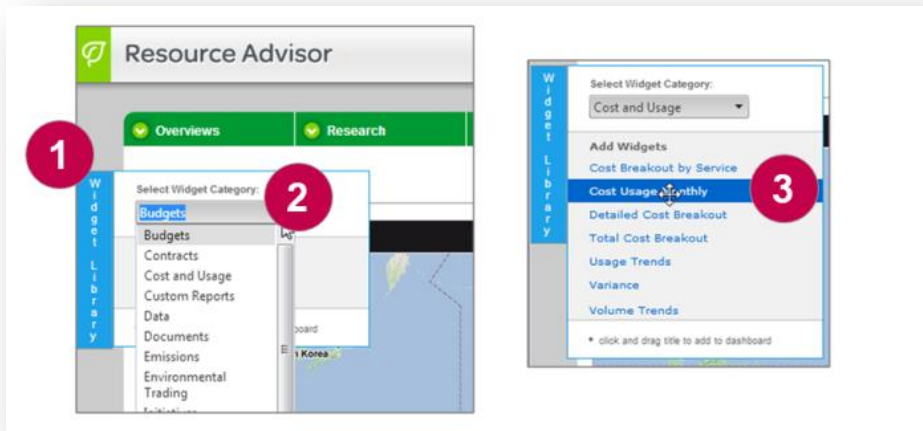
Let's turn the answers on.

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Adding Widgets

You can add widgets in two ways. The first is to drag and drop from the Widget Library.

1. Click on the blue rectangle labeled **Widget Library**.
2. Search the drop-down menu for the category of interest.
3. Click on the title and hold as you drag it to your dashboard.

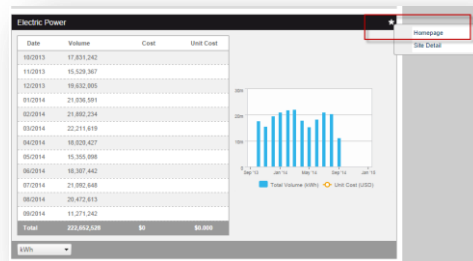


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The other way to post widgets to your homepage is from the reports themselves.

1. Once you've run a report that you'd like to pin to your homepage, go to the top right-hand corner and click on the **asterisk**. By selecting **Homepage** it will take the graph/chart and associated data set and add it to your homepage.
2. You can do this anywhere there is an asterisk.

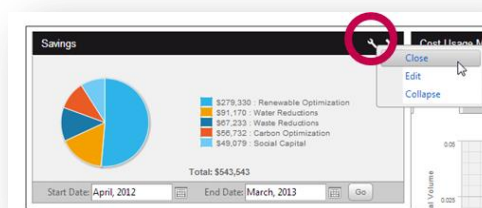


You can rearrange your widgets by clicking and holding on the widget, then dragging and dropping the widget where you want it on your homepage. Your screen will reset and save your changes.

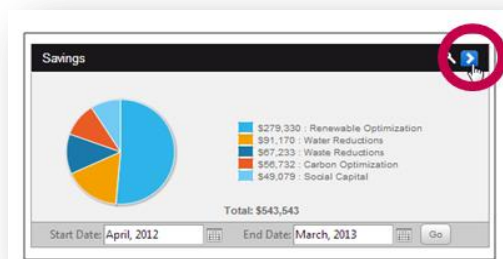
Managing Widgets

You can manage your widgets by clicking on the **wrench icon** in the top right-hand corner.

1. Select **Close** 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 **Collapse** to minimize the widget and show only the title bar



You can see details relevant to the widget and site by clicking on the **arrow icon** within the widget.



Let's turn the answers on.

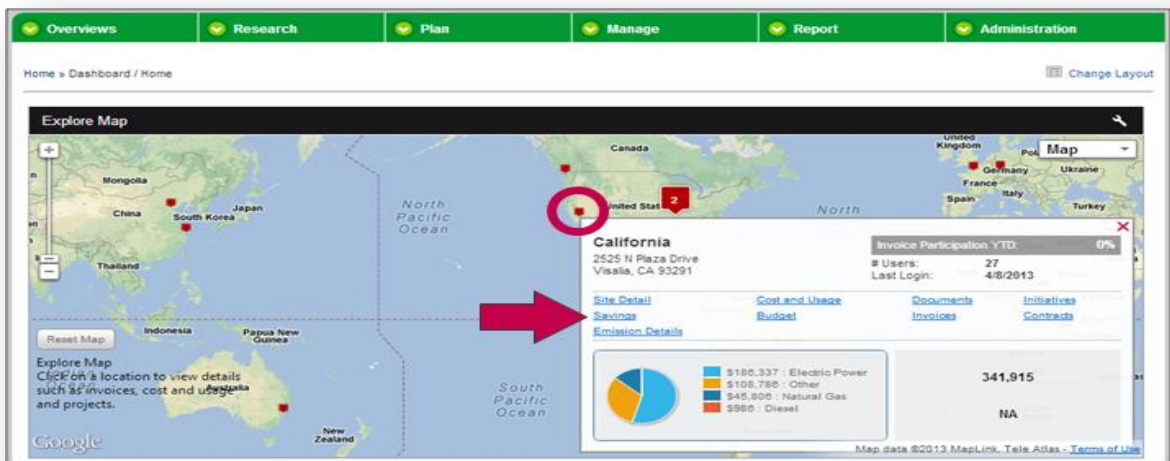
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Finding Your Site

There are many ways to find your site in Resource Advisor. In this section we'll list the options.

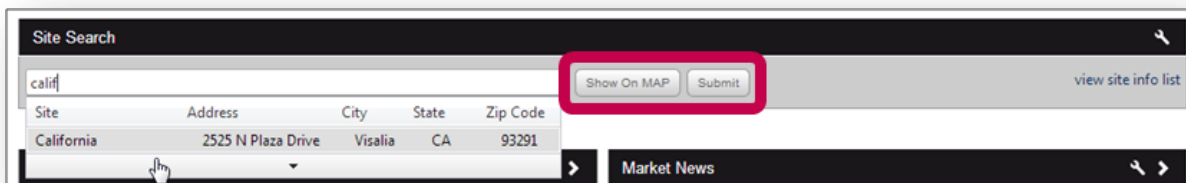
Option 1: Exploring the Map on the Homepage

1. On your homepage, find the physical location of your site on the map.
 - a. Click on the **Red Marker**
 - i. Note: A marker with a number will zoom in to show you several sites.
2. Next a site snapshot will appear with information about the site and some pre-filtered links.
 - a. Clicking on these links will allow you to see more details relevant to your site.



Option 2: Site Search Widget

1. Under the map on your dashboard, find the **Site Search** widget.
 - a. If you do not have the "Site Search" widget, please see the "Widget Customization" section later in this document.
2. Type the name of your site in the **Site Search** box and select it from the drop-down box.
3. Click **Show on MAP** to find your site's dot on the map.
4. Or, click **Submit** to view the site detail page.

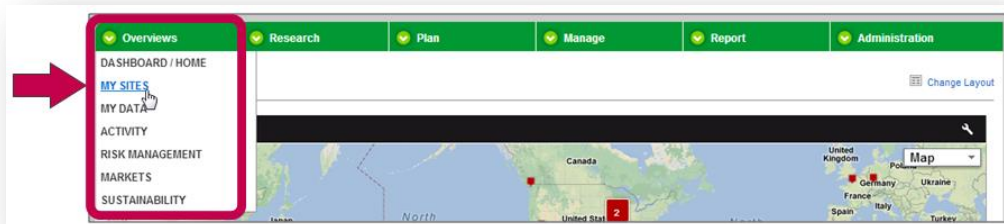


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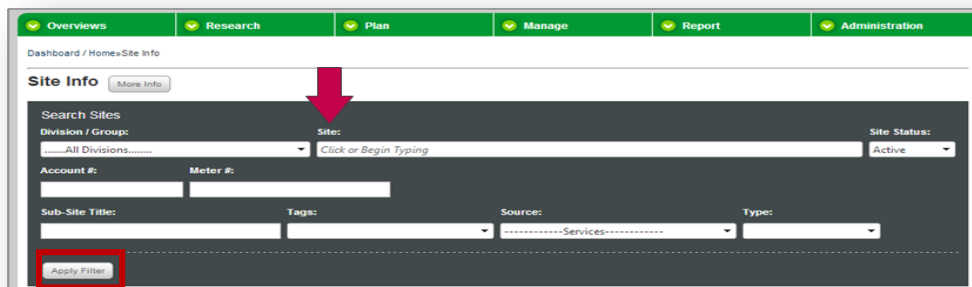
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Option 3: My Sites Link

1. Hover over the **Overviews** tab in the navigation bar.
2. Click on **My Sites** in the menu.



3. Once on the **Site Info** page, use the search criteria at the top of the page to narrow your search results.
 - a. Search for a particular site by typing in the name of the site.
4. Click **Apply Filter** to see the search results.



5. Once the search results have filtered, select site name from the list to see the Site Detail page.

Site	Account / Meter	Sub-site Structure	Address	City	State
APAC Distribution			103 weidi road	Itanjin	CHN
Asia Pacific Site 1			300 Huahai Zong Road	Shanghai	CHN
Australia Operations Center 1			14a Rodborough Road	Frenchs Forest	NSW
California			2525 N Plaza Drive	Visalia	CA
Chile Data Center			Avda. Santa Clara 684, Ciudad Empresarial	Santiago	Chile
Corporate Headquarters			One Market Place	Moline	IL
International Logistics Center			250 Avenue des Gressions	Asnières	FRA
Keating, Victoria			2144 Keating Cross Road	Victoria	BC
Mannheim Store			Straße 70	Mannheim	GER
SA Distribution Center			Carr. Mex. Tex. Km. 31.1	Santiago Cuahutlapan	MEX
Sao Paulo Store			Avenida das Nações Unidas 18.605	Sao Paulo	SP
USA Manufacturing			18600 S. John Deere Road	Dubuque	IA

Page 1 of 1 | 12 Total Records View: 25 # of rows



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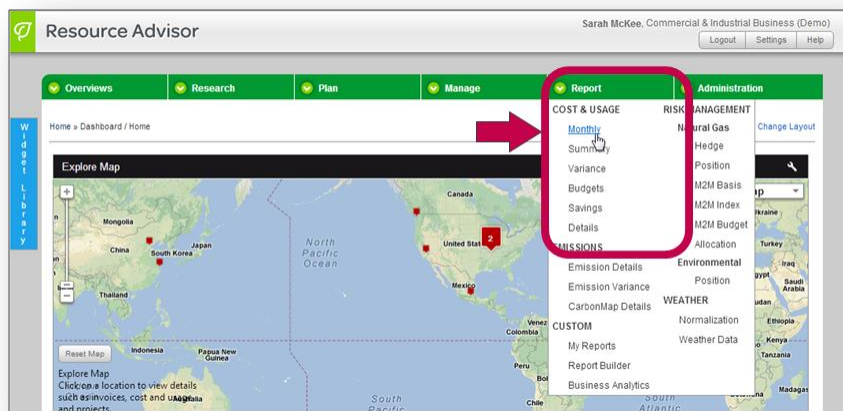
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Finding Your Energy Use Data

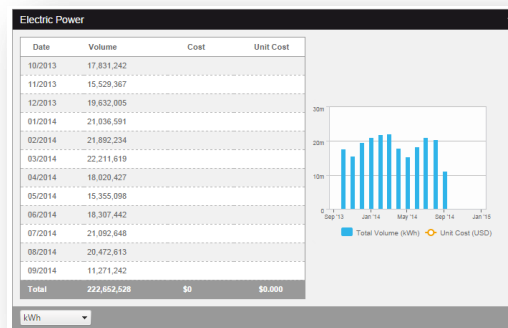
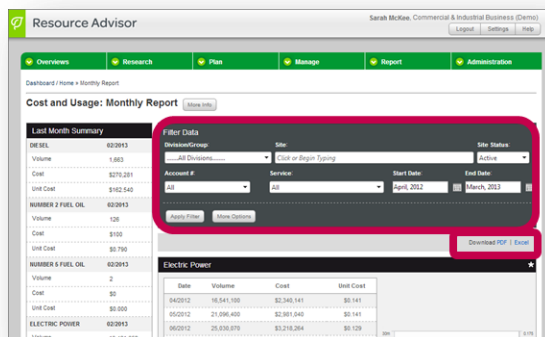
Resource Advisor has a variety of reports that allow you to see your data in different ways. The following pages illustrate how to navigate through some of the reports available to you.

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.
5. 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.

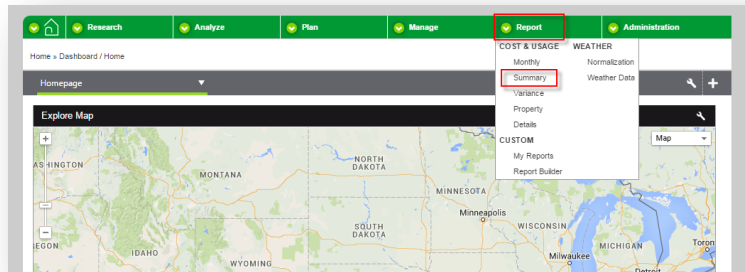


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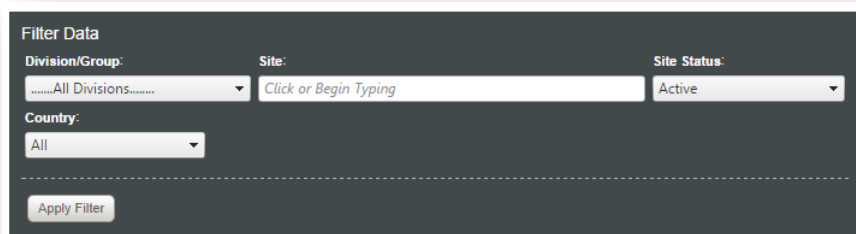
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Summary Report

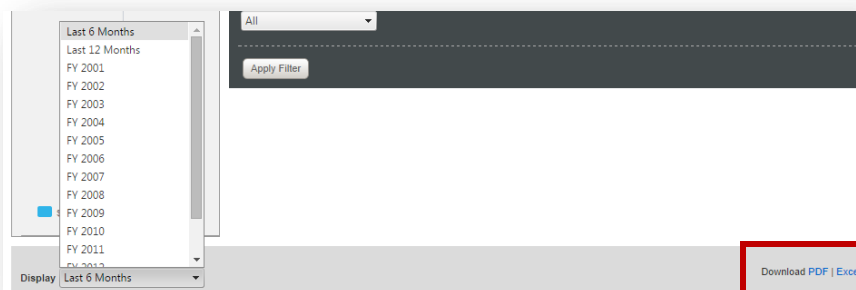
1. Hover over the **Reports** tab in the navigation bar.
2. Click on **Summary** in the menu below the **Cost & Usage** heading.



3. By default, the Summary Report shows you:
 - a. Usage data by site.
 - b. Data for the last 6 months.
4. Filter the data by desired site.



5. On the display click the drop down box to change the date range.



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 bottom right-hand corner of the report.

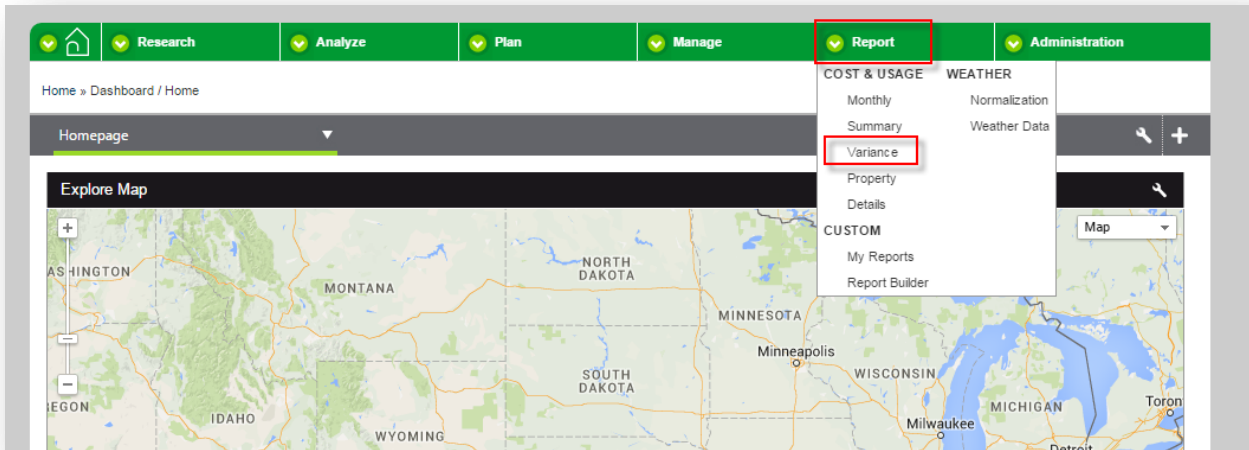


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Variance Report

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.
 - 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.

A screenshot of the 'Filter Data' form in the Resource Advisor interface. The form is dark gray with white text and dropdown menus. It includes the following fields:

- Division/Group:** A dropdown menu with the text '.....All Divisions.....'.
- Site:** A text input field with the placeholder 'Click or Begin Typing'.
- Site Status:** A dropdown menu with the value 'Active'.
- Service:** A dropdown menu with the value 'Electric Power'.
- View As:** A dropdown menu with the value 'Percentage Variance'.
- Data Type:** A dropdown menu with the value 'All'.
- Compare >>** Two sets of dropdown menus. The first set has 'Actual' and '2014'. The second set has 'Actual' and '2013'.
- Report for:** A dropdown menu with the value '12' and a text input field with the value 'month beginning' and another dropdown menu with the value 'Jan'.
- Below the 'Report for' field, there are two text labels: '(Jan 2014 - Dec 2014)' and '(Jan 2013 - Dec 2013)'.
- Apply Filter:** A button at the bottom left of the form.



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Variance Report													
Client	Division	Site											
Client	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
PEPCO													
Actual (Jan 2014 - Dec 2014)													
Volume	21,036,591	21,892,234	22,211,619	18,020,427	15,355,098	18,307,442	21,092,648	20,472,613	11,271,242				169,659,914
Total Cost													
Unit Cost													
Actual (Jan 2013 - Dec 2013)													
Volume	19,262,130	19,452,469	20,066,934	17,610,880	15,298,191	18,409,272	21,336,351	21,843,533	21,986,916	17,831,242	15,529,367	19,632,005	228,259,290
Total Cost													
Unit Cost													
Variance													
Volume	9.21%	12.54%	10.69%	2.33%	0.37%	(0.55%)	(1.14%)	(6.28%)	(48.74%)				(3.20%)
Total Cost													
Unit Cost													

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.



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