

Resource Advisor Overview

CUSTOMIZING RESOURCE ADVISOR

Rocky Mountain 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 <u>PortfolioManagerSupport@</u> <u>se.com</u>.

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.

	PACIFICORP Pacific Power Comain View > Comain View >						r (PacifiCorp) V	Schneider	
D	ASHB	DARDS SUSTAINABILITY	EFFICIENCY	REPORTING	TOOLS	QUICKLINKS		Settings	HELP DESK
	7	Starter Dashboard						Logout	⊡1 i

- 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.

Settings		
Username: pacificorpuser	Change Password	
First Name:	Email:	
Pacificorp		
Middle Name:	Phone:	
Last Name:	Mobile:	
User		
	Fax:	
Diastra Language	Destand Company	
Display Language.	Preference Currency:	
English (US)	↓ 05D ↓	

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.



Manage Dashboard	×
Dashboard Name : *	
Select Layout:	
Save Ca	ncel

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

DASHB	OARDS	SUSTAINA
	Starter (Dashboard



- 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

SHBOARDS SUS	STAINABILITY	EFFICIENCY	REPORTING	TOOLS	QUICKLINKS
Cost And Usage			Custom		
Monthly			Report Builder		
Summary			My Reports		
Variance					
Property					
Details					
Weather Normalization	n				
Weather Data					

- 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

Dashboard / Hom	e / Monthly Report						
Cost and Us	sage: Monthl	y Report					More inf
Last Month Sum	imary	Filter Data					
ELECTRIC POWER	01/2022						
Volume	223,982,619	Division/Group:	s				Site Status
Cost	\$0	All Divisions		lick or Begin Typ	ping		Active *
Unit Cost	\$0.000	Data Streams'		Start Da	6 4	End Date:	
		Please Select		March	2021	February, 2022	
YTD Summary		Account #					
ELECTRIC POWER	01/2022 - 12/2022						•
Volume	223,982,619						_
Cost	\$0						
Unit Cost		Apply Filter	More Options				
Volume Trends							Download PDF Excel
Total Volume Per Mo	onth						
Electric Power	-		Page 1	of 1 <<1>> 1	Total sources		View: 10 • # of rows
PE	EPCO	Electric Down		_	_		
		Ciccalic Power					
2021	2022	Date	Volume	Cost	Unit Cost		
-	1	Mar 21	273,343,916	\$0	\$0.000		

5. The output will look like this below the Filter data box

etric Dourou	Page 1 o	n coə 1	Total sources	View: 10 • # of
Date	Volume	Cost	Unit Cost	1
Mar 21	273,343,916	\$0	\$0.000	
Apr 21	260,989,631	\$0	\$0.000	
May 21	226,563,230	\$0	\$0.000	400m
Jun 21	260,750,098	\$0	\$0.000	
Jul 21	301,498,727	\$0	\$0.000	traffit .
Aug 21	302,951,226	\$0	\$0.000	200m
Sep 21	361,873,405	\$0	\$0.000	
Oct 21	276,538,235	\$0	\$0.000	
Nov 21	173,995,885	\$0	\$0.000	Jan 21 Jul 21 Jan 22 Jul 22
Dec 21	200,820,732	\$0	\$0.000	Total Volume (kWh) 🔷 Unit Cost (USD
Jan 22	223,982,619	\$0	\$0.000	
Feb 22				
Total	2.863.308.704	\$0	\$0.000	(

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.

							(
Overviews	😌 Research	(Plan	😜 Manage		😧 Report	S Administration
ashboard / Home > Month	ly Report						
Cost and Usage	e: Monthly Re	port Mere	i linda				
Last Month Summa	iry	Filter Data	Si				
DIESEL	02/2013	Division/Gro	up:	Sile			Site Status:
Volume	1,663	All Divis	ions	 Click or Begin T 	yping		Active
Cost	\$270,281	Account #		Service:		Start Date:	End Date:
Unit Cost	\$162.540	All	•	All		 April, 2012 	March, 2013
NUMBER 2 FUEL OIL	02/2013						
Volume	126	Apply Filter	More Options				
Cost	\$100						_
Unit Cost	\$0.790						Download PDF Exce
NUMBER 5 FUEL OIL	02/2013	Electric Por	wer				
Volume	2	-			The Read	7	
Cost	50	Oute	vorumie	Cost	unit Cost	-	
Unit Cost	\$0.000	04/2012	10,041,100	52,340,141	\$0.141		
ELECTRIC POWER	02/2013	00/2012	21,090,400	52,901,040	20.141		
Mahama		VOLUTE	23,034,019	80,410,404	\$10.1478	324	1.4

Date	Volume	Cost	Unit Cost	
0/2013	17,831,242			
1/2013	15,529,367]
2/2013	19,632,005			30m
1/2014	21,036,591			
2/2014	21,892,234			20m
3/2014	22,211,619			1.1111.111
4/2014	18,020,427			10m
5/2014	15,355,098			
6/2014	18,307,442			0 Gep'13 Jan'14 May'14 Gep'14 Jan'
7/2014	21,092,648			Total Volume (kWh) 🔶 Unit Cast (USI
8/2014	20,472,613			
9/2014	11,271,242			
	222,652,528		\$0.000	

Variance Report

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

DASHBOARDS	SUSTAINABILITY	EFFICIENCY	REPORTING	TOOLS	QUICKLINKS
Cost And Us	age		Custom		
Monthly			Report Builder		
Summary					
Variance					
Property					
Details					
Weather Norm	alization				
Weather Data					

- 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*

Filter Data				
Division/Group:		Site:		Site Status:
All Divisions		Click or Begin Typing		Active •
Service:	View As:	Data Type:		
Electric Power	Percentage Variance	• All •		
Compare >> Actual	 2014 ▼ onth beginning Jan 	•	Actual 🔹 2013	-
(Jan 2014 - Dec 2014)			(Jan 2013 - Dec 2013)	
Apply Filter				

- 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.

Variance	Variance Report													
Client	Division	Site												
Client	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	
PEPCO														
Actual (Jan	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														