

Pepco's Resource Advisor Overview

October 2014



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 the “Settings” link.
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, please click “Save Prefs” at the bottom of the screen to save your adjustments.

Dashboard / Home » Preferences

Preferences

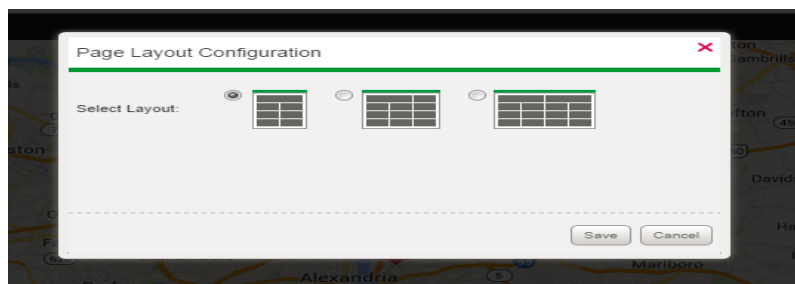
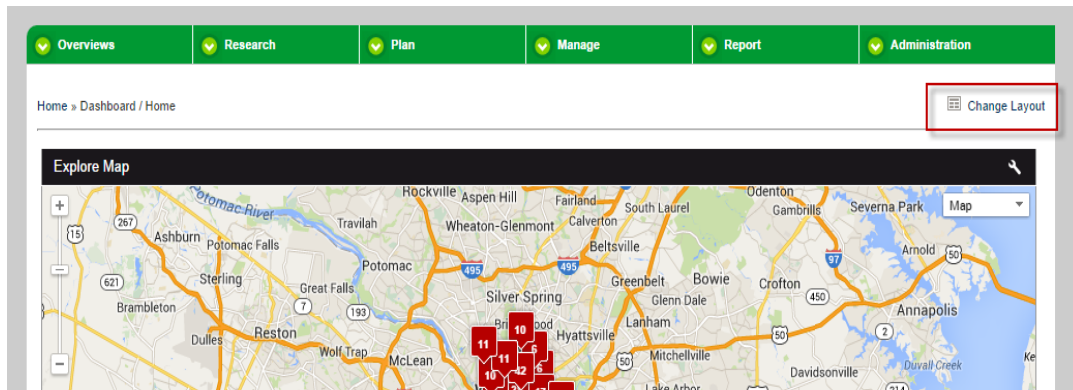
Account Details	Settings
CM(S): Rusty Varisco	Language: <input checked="" type="radio"/> English (US) <input type="radio"/> Deutsch (GER) <input type="radio"/> Français (FR) <input type="radio"/> Nederlands (NL/BE)
Users: 23	<input type="radio"/> English (UK) <input type="radio"/> Español (ES) <input type="radio"/> Italiano (IT) <input type="radio"/> Português (BR)
Your Sites: 183	<input type="radio"/> 简体中文 (CN) <input type="radio"/> Español (MX) <input type="radio"/> 日本語 (JP) <input type="radio"/> Português (PT)
Your Accounts: 0	<input type="radio"/> 繁體中文 (HK) <input type="radio"/> Français (CAN) <input type="radio"/> 한국어 (KR) <input type="radio"/> Русский (RU)
Default Currency: USD	
Default Gas Unit of Measure: MMBtu	
Default Power Unit of Measure: kWh	
Username: rvarisco1	
Password: [masked] Confirm Password: [masked]	
First Name: Rusty	
Middle Name: [empty]	
Last Name: Varisco	
Email: varisco@abc.com	
[Save Prefs] [Cancel]	

NAVIGATING THE HOMEPAGE

Now that you’ve changed your preferences the next sections will outline how to navigate Resource Advisor. When you log-in, you are taken to your very 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.

Changing the Layout:

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

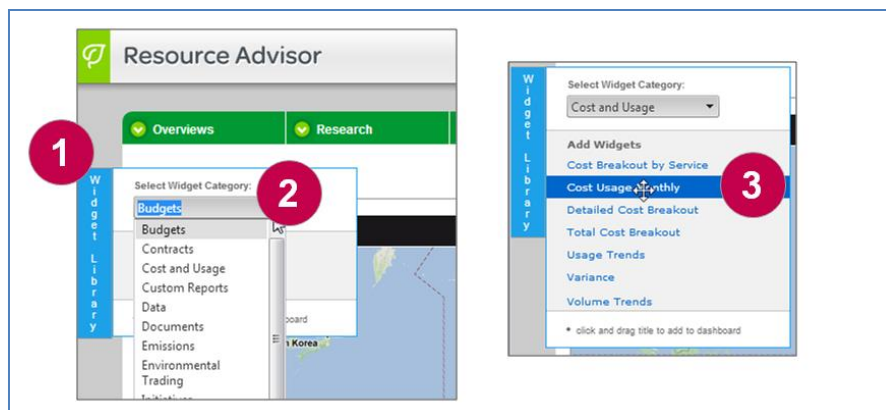


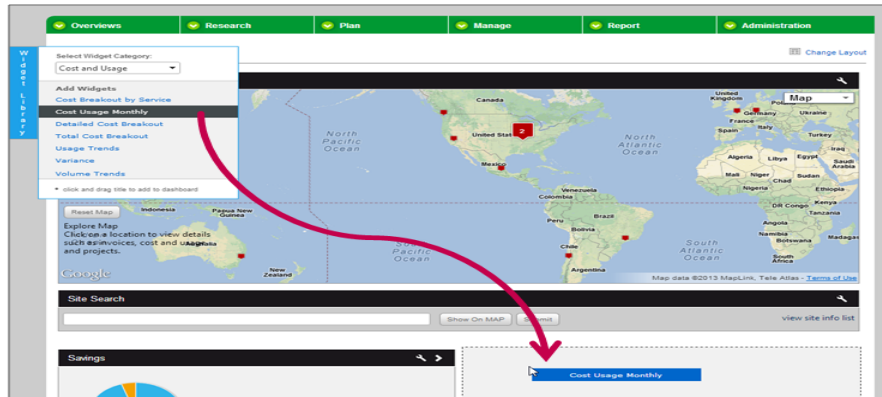
You can also rearrange your widgets by clicking and holding on the widget, dragging and dropping the widget where you want it on your homepage. Your screen will reset and your changes should be saved.

Adding widgets:

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

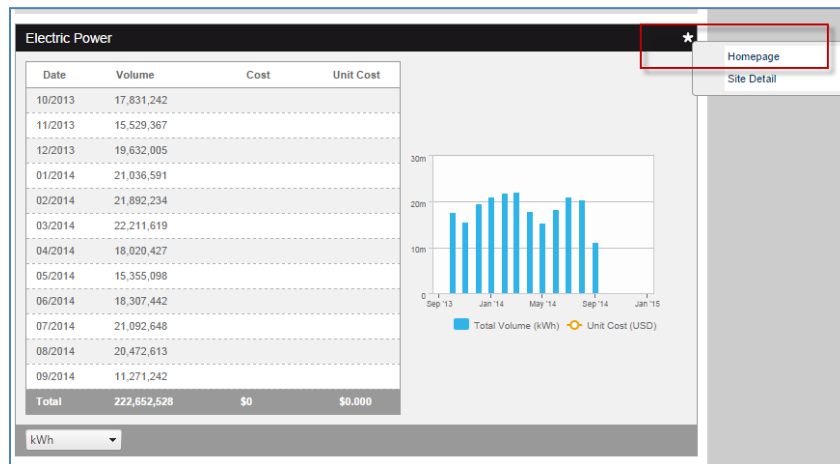
1. Click on the blue rectangle labeled "Widget Library"
2. Search the drop-down menu for the category of interest
3. Click on the title and hold as you drag it to your dashboard





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

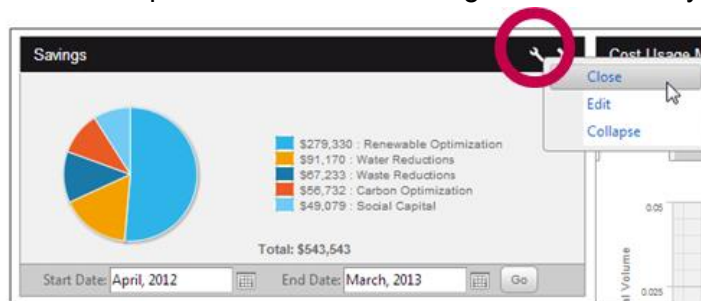
1. Once you've ran a report that you'd like to pin to your homepage in the top right-hand corner click on the asterisk. By clicking on the "Homepage" link it will take the graph/chart and associated data set and add it to your homepage.
2. You can do this anywhere there is an asterisk.



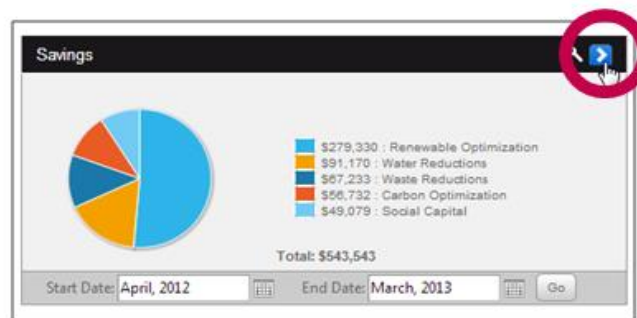
Managing Widgets:

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 additional details relevant to the widget and site by clicking on the arrow icon within the widget.

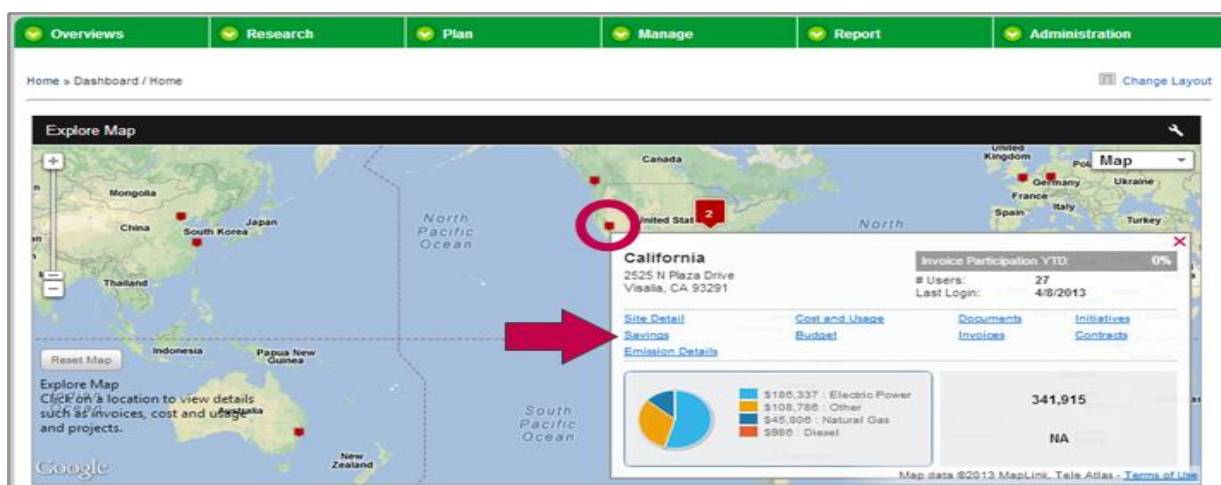


FINDING YOUR SITE

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

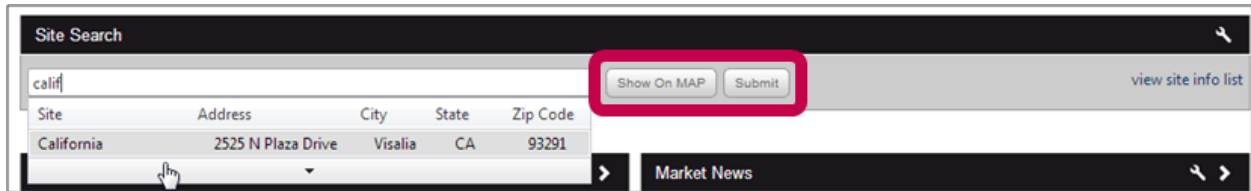
Option #1: Exploring the Map on the Homepage

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 some information about the site and some pre-filtered quick 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 below
3. Click “Show on MAP” to find your site’s dot on the map
4. Or, Click “Submit” to view the site detail page.



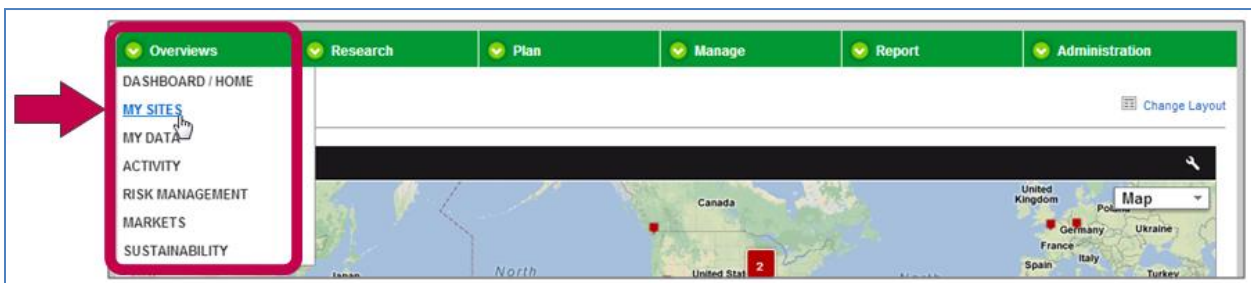
The screenshot shows the 'Site Search' widget. At the top, there is a search input field containing 'calif'. To the right of the input field are two buttons: 'Show On MAP' and 'Submit'. Below the input field is a table with the following data:

Site	Address	City	State	Zip Code
California	2525 N Plaza Drive	Visalia	CA	93291

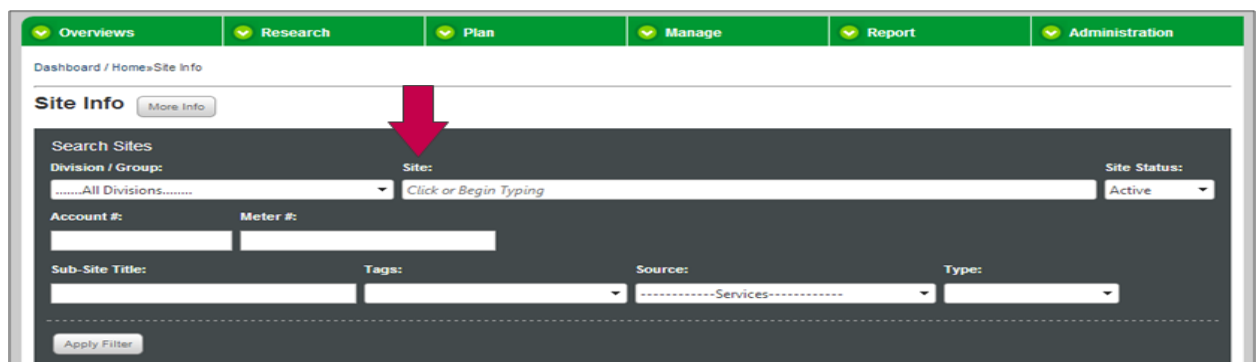
Below the table is a dropdown arrow. To the right of the table is a 'Market News' section with a search icon and a right arrow.

Option #3: My Sites Link

1. Hover over the “Overviews” tab in the navigation bar
2. Click on the “My Sites” link 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



The screenshot shows the 'Site Info' page. At the top, there is a navigation bar with tabs: 'Overviews', 'Research', 'Plan', 'Manage', 'Report', and 'Administration'. Below the navigation bar is the 'Site Info' section. The 'Site Info' section has a 'Search Sites' form with the following fields:

- Division / Group: All Divisions
- Site: Click or Begin Typing
- Site Status: Active
- Account #:
- Meter #:
- Sub-Site Title:
- Tags:
- Source: Services
- Type:

At the bottom of the form is an 'Apply Filter' button.

- Once the search results have been filtered click on your site name in the list to see the Site Detail page

Download PDF | Excel

Sites			
Site	Account / Meter	Sub-site Structure	
Site	Address	City	State
APAC Distribution	103 weidi road	tianjin	CHN
Asia Pacific Site 1	300 Huaihai 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 Gresillons	Asnieres	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 Cuahuatlapan	MEX
Sao Paulo Store	Avenida das Nacoes Unidas 18.605	Sao Paulo	SP
USA Manufacturing	18600 S. John Deere Road	Dubuque	IA

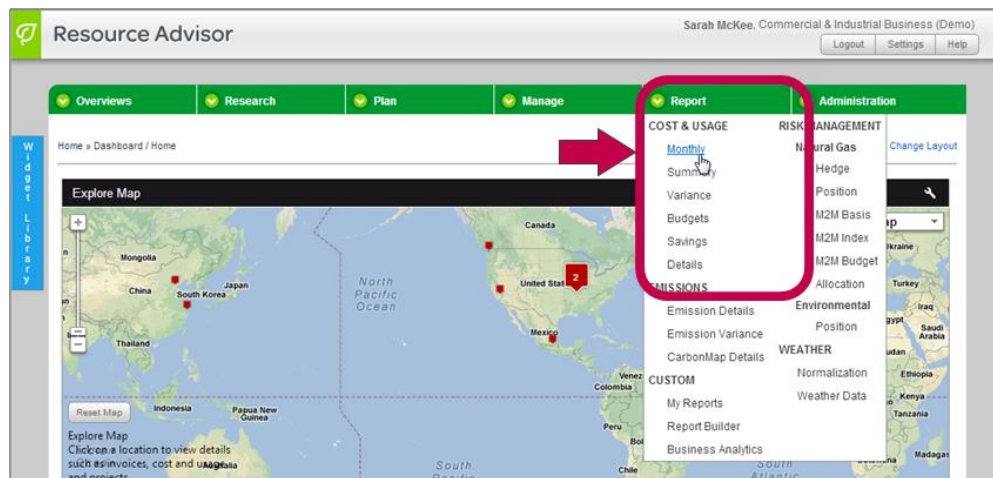
Page 1 of 1 | 1 | 12 Total Records View: 25 # of rows

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:

- Hover over the “Reports” tab in the navigation bar.
- Click on “Monthly” in the menu underneath the “Cost & Usage” heading



- By default, the Cost and Usage Monthly Report shows you:
 - Cost & Usage data and charts.
 - Aggregated data for all your sites if you manage more than one
 - Data over the last 12-months.
- By changing your filter data you can expand your time period and filter by desired site.

- 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.

Resource Advisor Sarah McKee, Commercial & Industrial Business (Demo)

Logout Settings Help

Overviews Research Plan Manage **Report** Administration

Dashboard / Home > Monthly Report

Cost and Usage: Monthly Report [More Info](#)

Last Month Summary

Division/Group	Site	Account #	Service	Start Date	End Date
DIESEL	02/2013				
Volume	1,863				
Cost	\$279,281				
Unit Cost	\$182,540				
NUMBER 2 FUEL OIL	02/2013				
Volume	126				
Cost	\$100				
Unit Cost	\$0,790				
NUMBER 5 FUEL OIL	02/2013				
Volume	2				
Cost	\$0				
Unit Cost	\$0,000				
ELECTRIC POWER	02/2013				
Volume	13,481,652				

Filter Data

Division/Group: Site: Site Status:

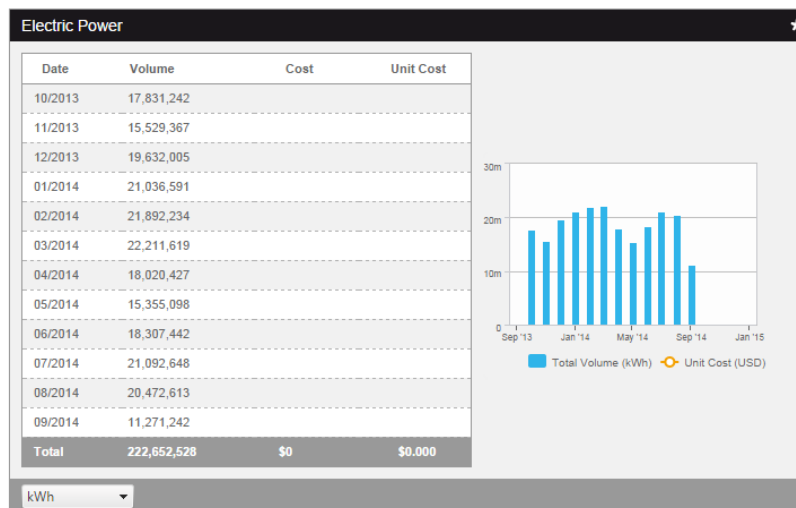
Account #: Service: Start Date: End Date:

[Apply Filter](#) [Show Options](#)

[Download PDF](#) [Excel](#)

Electric Power

Date	Volume	Cost	Unit Cost
04/2012	16,541,100	\$2,340,141	\$0,141
05/2012	21,096,400	\$2,901,040	\$0,141
06/2012	25,030,070	\$3,218,264	\$0,129



Summary Report:

- Hover over the "Reports" tab in the navigation bar.
- Click on "Summary" in the menu underneath the "Cost & Usage" heading

Resource Advisor Sarah McKee, Commercial & Industrial Business (Demo)

Logout Settings Help

Overviews Research Plan Manage **Report** Administration

Home > Dashboard / Home

Explore Map

Report

- COST & USAGE
 - Monthly
 - Summary**
 - Variance
 - Property
 - Details
- WEATHER
 - Normalization
 - Weather Data
- CUSTOM
 - My Reports
 - Report Builder
 - Business Analytics

[Change Layout](#)

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

Filter Data

Division/Group:All Divisions..... Site: Click or Begin Typing Site Status: Active

Country: All

[Apply Filter](#)

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

All

[Apply Filter](#)

Last 6 Months
 Last 12 Months
 FY 2001
 FY 2002
 FY 2003
 FY 2004
 FY 2005
 FY 2006
 FY 2007
 FY 2008
 FY 2009
 FY 2010
 FY 2011
 FY 2012
 FY 2013

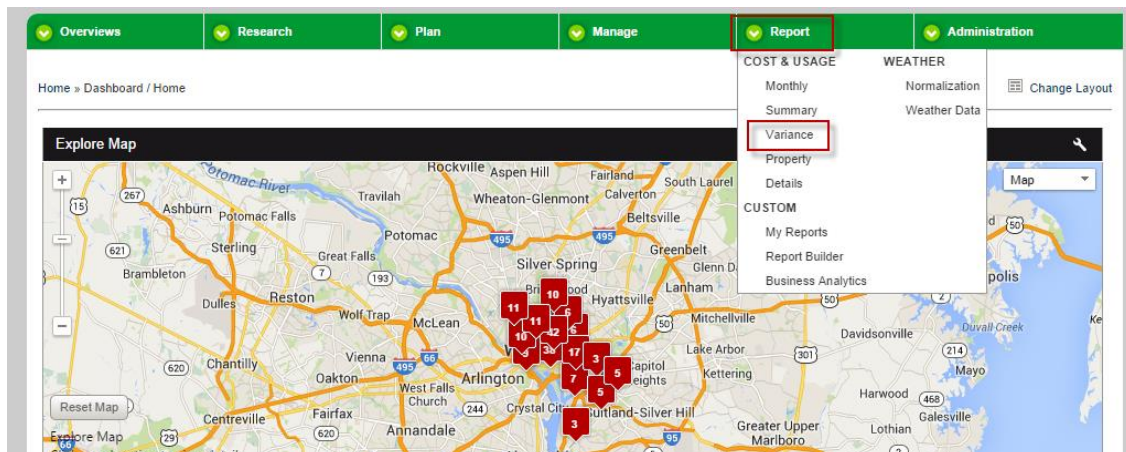
Display Last 6 Months

[Download PDF](#) | [Excel](#)

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 underneath the “Cost & Usage” heading



3. By default, the Variance Report shows you:
 - c. Usage data by site compared against itself.
 - d. Actual current year data compared to actual previous year's data.
 - e. Percentage year-over-year variance.
4. By changing your filter data you can expand your time period and filter by desired site.

Filter Data

Division/Group: Site: Site Status:

Service: View As: Data Type:

Compare >>

Report for month beginning

(Jan 2014 - Dec 2014) (Jan 2013 - Dec 2013)

Variance Report													
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	18,408,272	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.