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.

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

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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.

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

**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 underneath the “Cost & Usage” heading.

3. By default, the Cost and Usage Monthly Report shows you:
   b. Aggregated data for all your sites if you manage more than one.
   c. Data over 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.

Summary Report:

1. Hover over the “Reports” tab in the navigation bar.
2. Click on “Summary” in the menu underneath the “Cost & Usage” heading
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.

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 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.

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.