



# Resource Advisor Platform

Market leading enterprise-level platform to manage your energy and sustainability portfolio



# A Modular Approach for Expansion

## EcoStruxure™ Resource Advisor



Platform: Reporting & Dashboards



Analytics & Data Visualization



Utility Data Management



Procurement Management



Interval Data Management



Emissions Management



Sustainability Reporting



Goals & Project Planning



Survey Module

PROCUREMENT

EFFICIENCY

SUSTAINABILITY

## EcoStruxure™ Resource Advisor



Life Is On

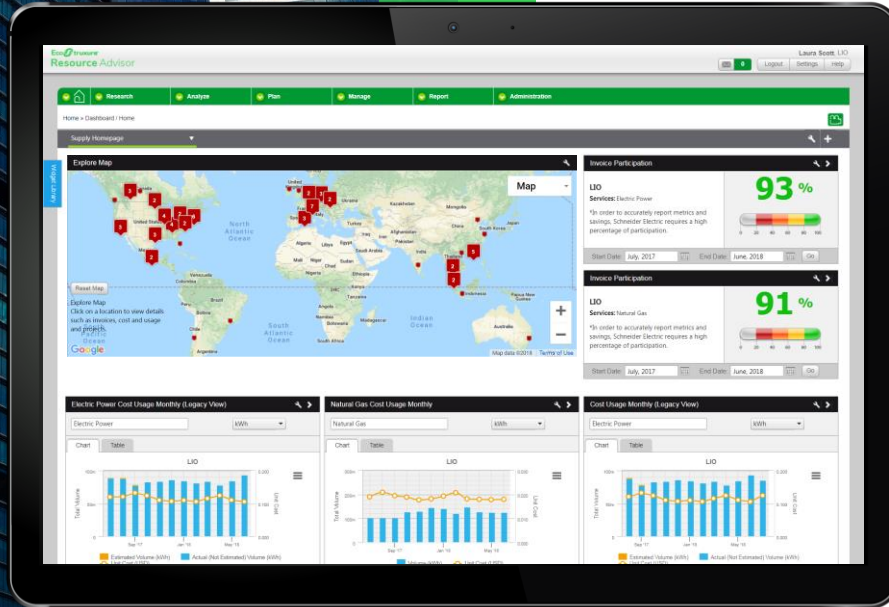
Schneider  
Electric

## QUICKFACT

Resource Advisor is deployed across more than **400,000** sites globally, supporting more than **48,000+** users globally

# Platform: Dashboards & Reporting

Single source of truth for all energy and sustainability data



## GLOBAL SOFTWARE SOLUTION

Access anytime, anywhere, in 18 languages with built in unit and currency conversion libraries



## FLEXIBLE DATA COLLECTION

Streamline data capture of any source with reminders and bulk entry tools, fully automate using APIs



## ROBUST REPORTING

View information using quick standard views or build your own with scheduling and distribution



## CONFIGURABLE

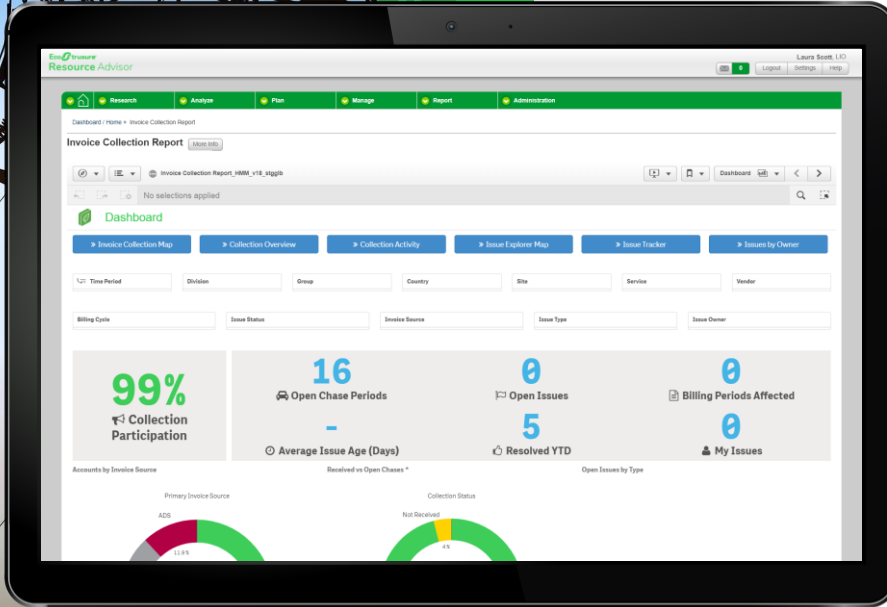
Configure dashboards with our widget library to create a custom experience for different stakeholders

## QUICKFACT

Schneider Electric processed more than **8 million** invoices last year, finding over **\$200 million** in invoice errors.

# Utility Data Management

## Manage and track all utility invoices centrally



### GLOBAL DATA OPERATIONS

Access to 250+ data professionals located in 9 offices around the globe



### INVOICE COLLECTION

Track the status of invoice collection efforts, benchmark performance of sites to drive improvement



### REPORTING & ANALYSIS

Detailed, line item view of utility invoices allowing you to understand what's driving costs



### INVOICE VALIDATION

Track invoices that failed validation tests, see summary information about potential issues and savings recovered



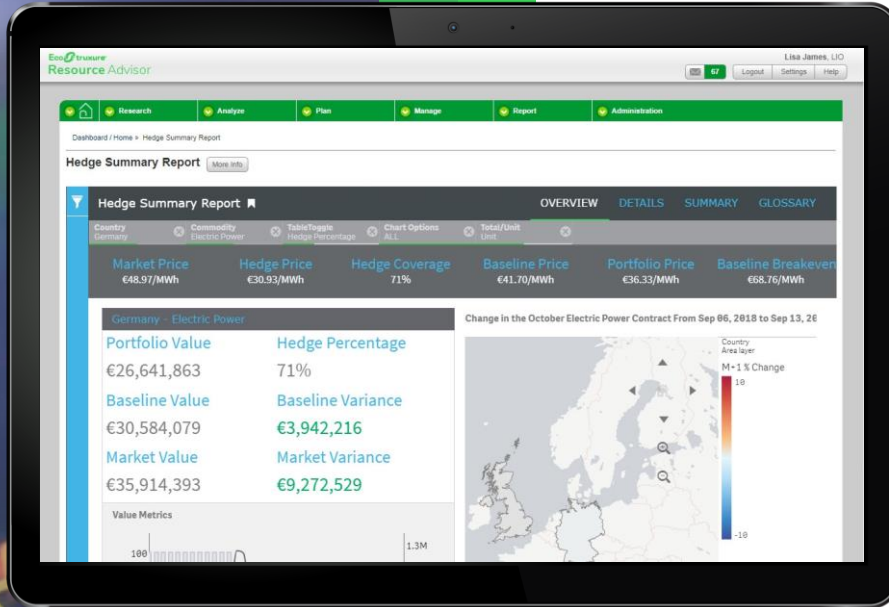
## QUICKFACT

Over €30B of energy spend is managed through Resource Advisor. Our sourcing teams undertake around 6,000 RFPs each year on behalf of clients.



# Procurement Management

Visibility into all aspects of your procurement strategy and program



## RISK MANAGEMENT

Centrally access reports detailing the current position and performance of your risk management strategy



## MARKET INTELLIGENCE

Make informed decisions with access to market intelligence reports from energy and sustainability experts



## STRATEGIC SOURCING

Engage with services teams and track status of initiatives such as RFPs



## BUDGETS

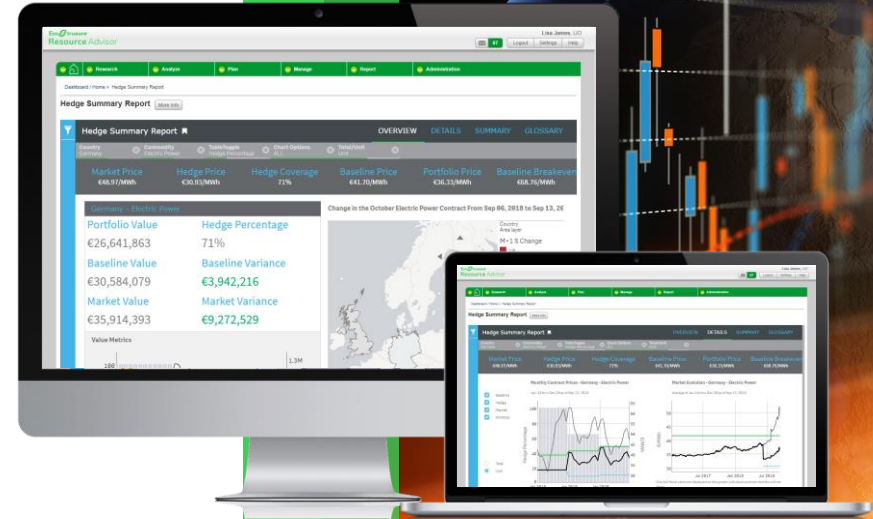
Track performance relative to budget at any level in your organization, access detailed views of your budget

# Commodity Risk Report

Guard against volatility with a digitized and intuitive experience

- **Visualize risk.** Intuitive and easily-manipulated reports
- **Flexibility.** Visualize and filter data, scroll through data sets and export outputs as required to a variety of applications
- **Single view.** Risk Management reporting delivered directly through the Resource Advisor platform
- **Real-time.** Receive updates in near real-time to manage risk and volatility to your portfolio.
- **Universal reference.** Develop and streamline universally-defined terms for price, volume and value across portfolio.

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Resource Advisor



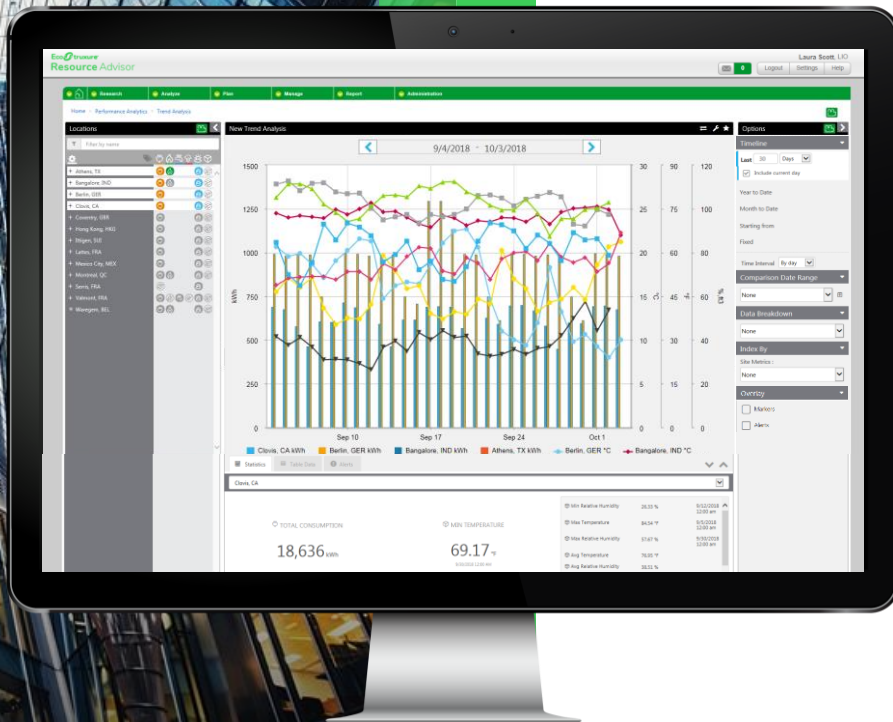
## QUICKFACT

Resource Advisor is connected to over **5,000** weather stations worldwide, enabling us to quickly link your sites directly to the closest station.



# Interval Data Management

Connect your sites together for complete visibility of consumption



## BENCHMARK AND COMPARE

Benchmark site performance across your portfolio and compare historical trends



## IDENTIFY OPPORTUNITIES

Identify facility, equipment and behavioral inefficiencies, understand initiative performance



## PROACTIVE MANAGEMENT

Configure alerting rules to notify you when there are potential issues



## INTERVAL VARIANCE

Pair utility invoices with interval meters to identify any irregularities between metered and billed consumption

# Utility Cost Allocation

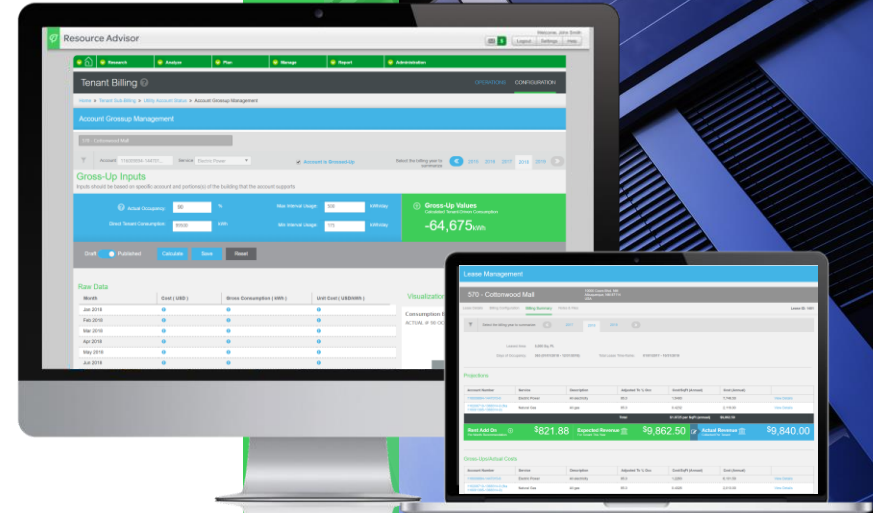
Bill Intelligently. Bill Correctly. Manage Fairly. Operate Efficiently.

- **Configure the Basics:** Utility accounts, tenants, leases and sub-meters
- **Customize your Buildings:** Define buildings, floors and spaces to match your portfolio
- **Invoice Efficiently:** Generate invoices to send directly to tenants or export to an accounting system for distribution

## Tailored Solutions

- **Understand Gross Costs:** Visualize gross utility costs in aggregate or by commodity for single sites or across portfolio.
- **Report Direct & CAM charges:** Report on direct charges to tenants, and operational or CAM charges rolled into budgets.
- **Yearly Utility Cost Projections:** Project into the coming year the cost per square foot of both the direct and operational
- **Energy & cost gross-up analysis:** Ensure accurate and equitable utility billing that properly accounts for occupancy
- **Handle Lease Complexity:** Reflect lease structures that vary over time and between tenants, calculate lease-by-lease
- **Manage Change:** Properly track changes over time for building reconfigurations and more.

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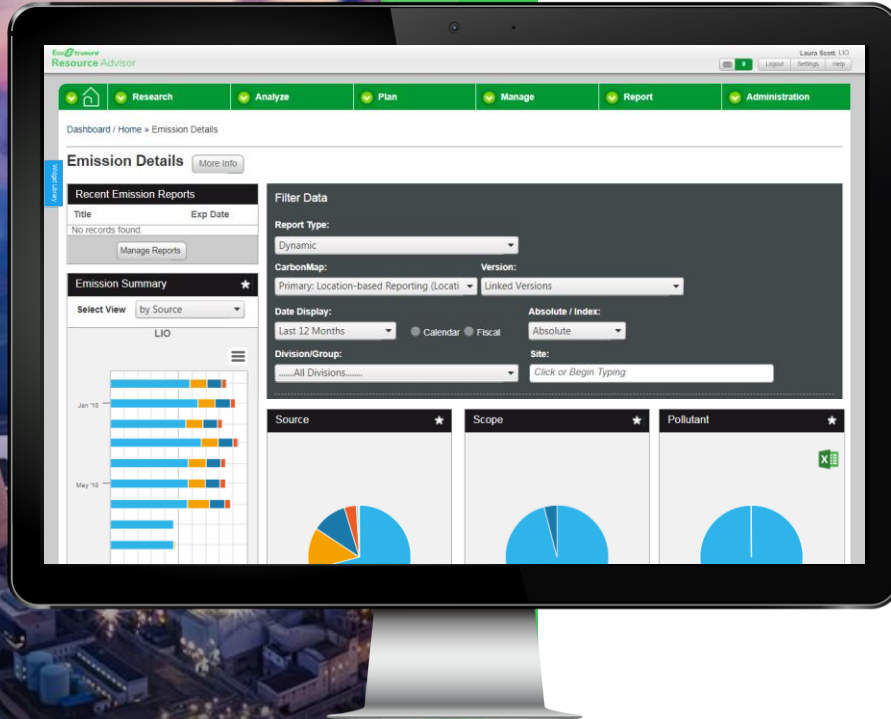


## QUICKFACT

Resource Advisor manages carbon emissions from over **2,500** different sources on behalf of clients.

# Emissions Management

Automate emissions data management and reporting



## SCOPE 1, 2 AND 3 EMISSIONS

Access over 200 GHG protocols through emissions factor library managed by ESS experts



## SUSTAINABILITY SUPPORT

Sustainability experts on hand to help align with your reporting practices



## UPDATED PERFORMANCE

Linked to your data management program, emissions data will update as new data is available



## AUDITABLE MANAGEMENT

Fully tracked process, with audit trail providing complete transparency and access to raw data

## QUICKFACT

A Resource Advisor client manages over **1,200** different data streams in Resource Advisor to support its annual report that follows the GRI standards

# Sustainability Reporting

## Manage sustainability reporting programs end-to-end



## EXTERNAL REPORTING

Streamline the process for capturing and reporting quantitative and qualitative data



## ENERGY STAR

Seamless integration with Portfolio Manager, push data for reporting and track resulting scores within platform



## GRESB

Manage all data required for GRESB and push data directly to framework



## ENVIRONMENTAL TRADING

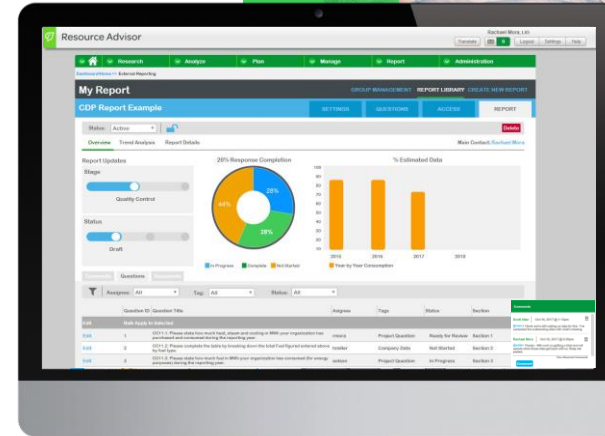
Setup and manage performance of emissions trading programs, including financial impact



# External Reporting Feature

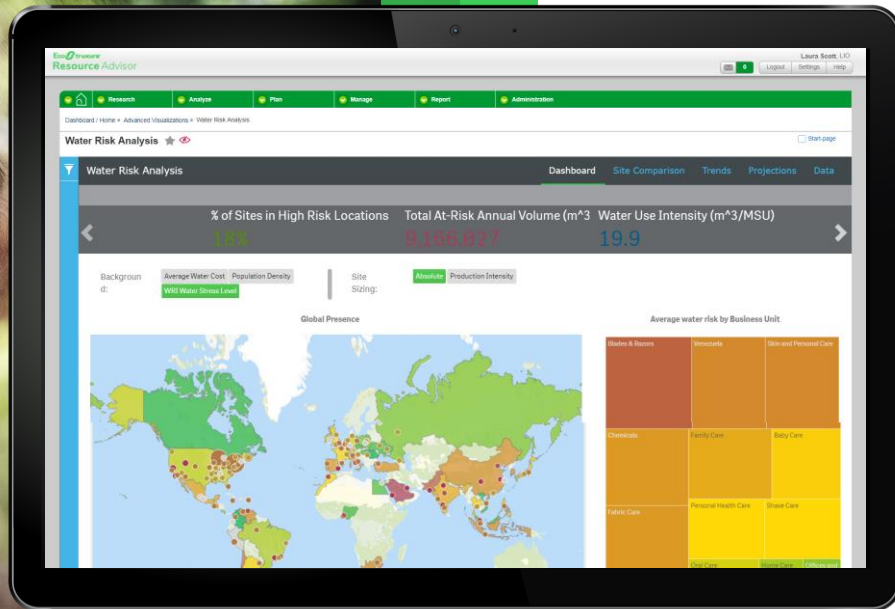
From organizing data to collaborating on responses, fully manage the reporting process

- **Save time.** Access a library of reporting templates for multiple frameworks such as CDP, GRESB and GRI.
- **Reference.** Retrieve key documents and previous reports.
- **Engage.** Streamline capture of qualitative information from different stakeholders.
- **Control Access.** Apply permissions to individual questions.
- **Reduce Redundancy.** Map data to multiple frameworks that require similar information.
- **Collaborate.** Through comments, tasks and chat.
- **Manage Progress.** Visualize key metrics and monitor activity through a response dashboard.



# Analytics & Data Visualization

Unleash the potential of your data



## INTUITIVE ANALYTICS

Self-serve visualization tools support benchmarking, KPI trending and other analysis across your data streams



## SHARE INSIGHTS

Monitor results as data updates and easily share these views to support engagement



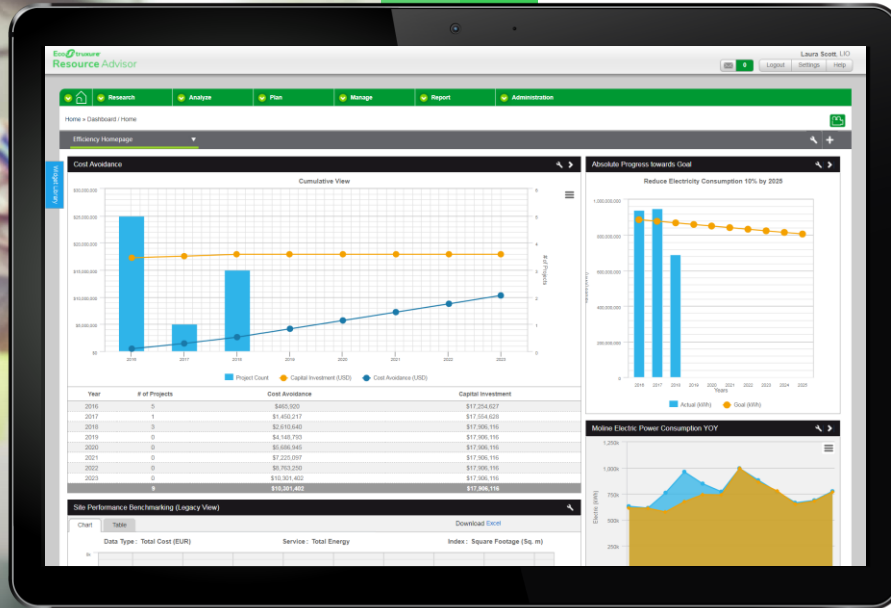
## ADVANCED VISUALIZATION

Team up with our experts using our embedded analytics capability to open up even more opportunities



# Goals & Project Planning

Articulate, share and visualize goals and projects



## CENTRALIZE PROJECTS

Create a single source of information across your portfolio including project status, activities and documentation



## TRACK PERFORMANCE

Manage corporate goals through goal creation, link qualitative/quantitative corporate, division or site level goals



## PAVE WAY TO SUCCESS

Create forecasts for goal performance and assemble scenarios to evaluate "what if", set priorities

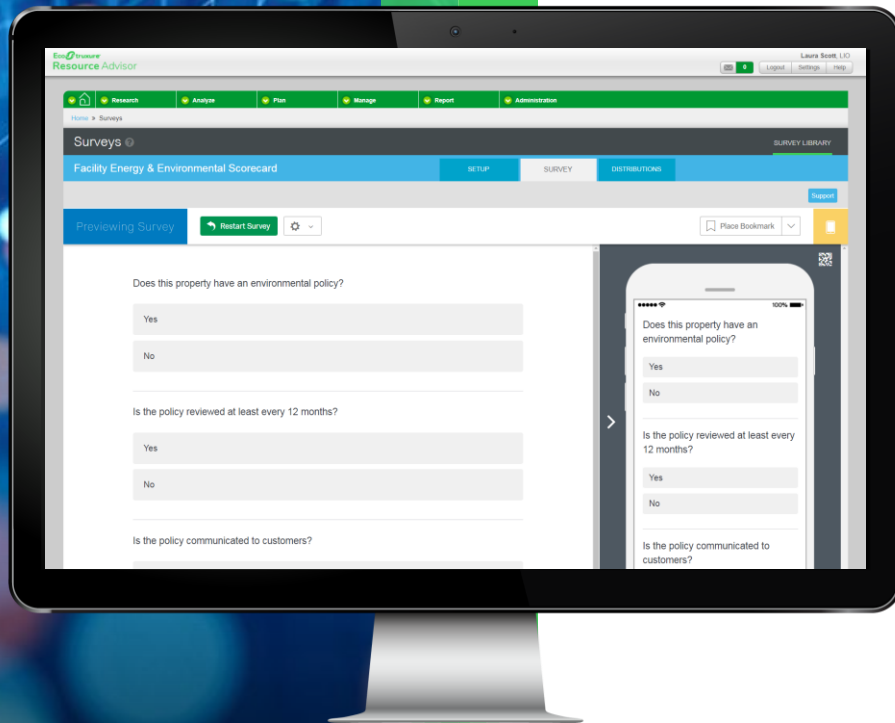


## ADAPT & COMMUNICATE

Share dashboards and publish results, modify goals or projects mid-cycle as needed

# Survey Module

Capture qualitative and quantitative data across your portfolio



## DISTRIBUTE SURVEYS

Create and administer surveys using multiple question types to support data collection and reporting



## INCREASE ENGAGEMENT

Flexible distribution workflow enables targeted survey distribution across different audiences



## ANALYZE RESPONSES

Dive into analytics to view, analyze, and aggregate survey responses and trends



## ACTIONABLE METRICS

Audit multiple audiences like supply chain or building management to improve efficiency and energy efforts



60k+

USERS ACROSS  
140+ COUNTRIES



250k+

SITES MANAGED  
GLOBALLY



128.3M

METRIC TONS OF  
CO<sub>2</sub> MANAGED



70k+

MEGAWATTS  
MANAGED GLOBALLY



70k

TARIFFS



4bn

DATA POINTS

