

Oracle Utilities Opower Email Home Energy Report v3 Cloud Service

Configuration Guide

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Getting Started

This guide is used during the Oracle Utilities Opower launch process to provide product design information, collect utility configuration preferences for the products being launched, and track the finalization of these preferences. The preferences are then used to set up your Oracle Utilities Opower products and platform. This guide focuses on configuration preferences for Email Home Energy Report v3.

Note: Once submitted to Oracle Utilities, all utility inputs recorded in the configuration guides are final and cannot be modified. Ensure that all configuration inputs are accurate before submitting them.

Product Overview

Email Home Energy Reports v3 are communications sent through the email channel to engage utility customers about their home energy use. The reports provide a new, modernized experience with bold colors, a varied layout, and data-driven insights targeted to specific customer attributes. It includes new and enhanced features such as the Efficiency Zone normative comparison, Energy Use Benchmark performance summary, and energy disaggregation-based insights and tips about the customer's major energy end-use categories, such as heating, cooling, and appliances.

The goals of the product are to give customers actionable insights about their energy and motivate them to lower their usage.

Disclaimers

Your utility might not have all the products or features described in this document. [Contact your Delivery Team](#) if you have questions.

Report Types

Email Home Energy Reports v3 implement several report types with different layouts and modules that vary throughout the year to provide customers with a dynamic experience. The report types are designed to construct a story for the customer to follow as they learn about their energy use. Some report modules are common to all report types, while others only appear in a specific report type. The available report types include:

- [Progress Report](#)
- [Promotion Report](#)

- [Welcome Report](#)
- [Limited Income Report](#)
- [Seasonal Report](#)
- [Time of Use Report](#)
- [Annual Report](#)
- [Solar Report](#)
- [Electric Vehicle Report](#)

Progress Report

The Progress Report uses insights and various energy saving tips to motivate customers to maintain or improve their energy efficiency. The design of the report leverages behavioral science techniques such as normative comparison, curiosity, and anchoring to help customers stay engaged with their report experience over time. The Energy Use Benchmark, neighbor comparison, context-aware tips, and marketing module promotion features are designed to help the customer save energy.

Sarah,
Here's your Home
Energy Report



Your energy use at a glance

Mar 5 - Apr 4, 2020



You likely used more this period due to changes in your home or energy use habits.

Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. Go to the individual module page for more details on the user experience.

The Progress Report includes the following modules:

- [Subject Line \(Not Depicted\)](#)
- [Header](#)
- [Energy Benchmark](#)
- [Three-bar Neighbor Comparison](#) or [Efficiency Zone](#)
- [Progress Report Tips](#)
- [Mini Home Energy Analysis](#)
- [Customer Feedback](#)
- [Footer](#)

Promotion Report

The Promotion Report offers customers personalized insights about specific end-uses in their home in order to motivate them to take advantage of a utility-offered promotion. This report type leverages Oracle Utilities Opower disaggregation capabilities to facilitate customer adoption of more efficient devices, appliances, and deep home retrofits.

Sarah,

You could be saving more on water heating, cooling and lighting.



Where you spent the most on energy

Jun 1, 2020 – May 30, 2021

Water Heating

21% of your total use last year

\$396 spent last year

You were selected to receive this report because you may be using more than the regional average for this energy use category. Numbers are approximate and calculated with your energy usage.

A new water heater could help you save



\$400 UtilityCo Rebate

If your water heater is over 10 years old, now's a good time to upgrade to an ENERGY STAR® heat pump water heater. According to the U.S. Department of Energy, you can save over 50% on water heating costs—for a family of 3, that adds up to \$2,610 in energy savings over its lifetime!

Though there's a little money you can make on the extra cost

Claim your rebate

The report experience is determined by the promotion type selected by the utility. Oracle Utilities Opower works with the utility to select the promotion they wish to run based on available disaggregation insights. Possible report states include:

Customer's Top End Use Category: The utility selects the end use category to focus on for the main insight and promotion at the top of the email. In this case, the selected end use is the customer's largest end use.

Utility Preferred Category: The utility selects the end use category to focus on for the main insight and promotion at the top of the email. This is not the customer's largest end use.

Heating and Cooling Combined - Top Use: Heating and cooling categories are combined and are the focus of the main insight and promotion at the top of the email. These end uses are the customer's largest end uses for last year.

Heating and Cooling Combined - Utility Preferred: Heating and cooling categories are combined and are the focus of the main insight and promotion. These end uses are not the customer's largest end uses for the last year.

Promotion Report Modules

The Promotion Report type is built with a predefined mix of dynamic and static modules carefully crafted to tell customers a personalized story about their energy use, and to promote specific offerings and tips for them to act upon. Go to the individual module page for more details about the user experience.

The Promotion Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Disaggregation Main Insight](#)

[Promotion Report Tips](#)

[Promotion Module](#)

[Customer Feedback](#)

[Marketing Module](#)

[Footer](#)

Welcome Report

The Welcome Report introduces new and legacy Email Home Energy Report recipients to the v3 experience. The Welcome Report structure builds off [Progress Report](#) and includes an additional Welcome module at the top of the report that varies slightly depending on whether the customer is a new or legacy customer.

New customers: Customers that *have never received* an Email Home Energy Report before are considered new customers. A welcome module that introduces them to report experience and insights is included at the top of their Welcome Report.

Legacy customers: Customers *that have received* an earlier version of the Home Energy Report are considered legacy customers. A welcome module at the top of the Welcome Report acknowledges how the report has changed to include energy use at a glance, the Efficiency Zone module, and improved tips and insights. The new items are numbered, and corresponding numbers that highlight the new modules and insights appear in the email in the upper-right corner of the modules.

New Customer

Legacy Customer

UtilityCo

Account #*****789

UtilityCo

Account #*****7890

Sarah,
Here's your new
Home Energy Report.

Sarah,
Here's your new
Home Energy Report.

Why are you receiving this?

These reports can help you save energy, which can lower your bill and help us deliver cleaner, more reliable energy to everyone. Here's what to expect:

- 1 Energy use insights**
You can learn about your energy use, and get helpful context to determine how you're doing.
- 2 Personalized ways to save**
You'll get helpful tips and personalized expert advice chosen specifically for your home.
- 3 Timely, tailored advice**
You'll also get seasonal advice and special savings opportunities in future reports.

What's new in your report

- 1 Energy use at a glance**
A quick summary to let you know how you're doing.
- 2 The Efficiency Zone**
This new graph shows a different view of your energy use, and how you stack up.
- 3 Better tips and insights**
Your reports are now more tailored to your home, making it easier to manage your energy use.

Your energy use at a glance

Mar 5 - Apr 4, 2021



Use this report to learn about your energy use and how you can save more.

Your energy use at a glance

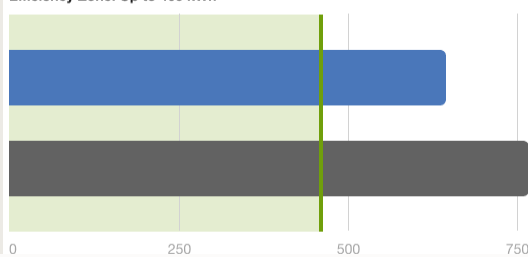
Mar 5 - Apr 4, 2021



Use this report to learn about your energy use and how you can save more.

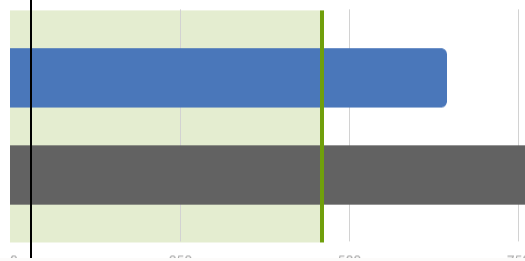
How you compare to others

Efficiency Zone: Up to 460 kWh



How you compare to others

Efficiency Zone: Up to 460 kWh



Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. Go to the individual module page for more details on the user experience.

The Welcome Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Welcome](#)

[Energy Benchmark](#)

[Efficiency Zone](#) or [Neighbor Comparison](#)

[Welcome Report Tips](#)

[Mini Home Energy Analysis](#)

[Customer Feedback](#)

[Footer](#)

Limited Income Report

The Limited Income Report educates limited income customers about ways to be more energy efficient and presents opportunities for them to reduce their immediate and future bills. While the overall goal is to encourage energy efficiency, the report includes features that acknowledge the unique circumstances and needs of limited income customers. There are two types of reports:

- Limited Income Welcome Report
- Limited Income Progress Report

Limited Income Welcome Report

The Limited Income Welcome Report is the first report a new or legacy limited income customer receives as part of their Home Energy Report v3 program experience. The report varies slightly depending on whether the customer is a new or legacy customer.

Legacy customers: Customers that have received earlier versions reports in the past are considered legacy customers. The Welcome Report acknowledges how the report experience has changed.

New customers: Customers that have never received a Home Energy Report are considered new customers. The Welcome Report introduces new customers to their report insights.

UtilityCo

Account #*****789

UtilityCo

Account #*****7890

Sarah,
Here's your new
Home Energy Report.

Sarah,
Here's your new
Home Energy Report.

Why are you receiving this?

These reports are designed to help you save energy and money, so your energy bill can be one less thing to worry about. Here's what to expect:

- 1 Energy use insights**
You can learn about your energy use, and get helpful context to determine how you're doing.
- 2 Personalized ways to save**
You'll get helpful tips and personalized expert advice chosen specifically for your home.
- 3 Savings and assistance programs**
You'll learn about energy efficiency programs that can help you save, as well as assistance programs you may qualify for.

Your energy use at a glance

Mar 5 - Apr 4, 2021



Use this report to learn about your energy use and how you can save more.

How you compare to others

Efficiency Zone: Up to 460 kWh



What's new in your report

- 1 Energy use at a glance**
A quick summary to let you know how you're doing.
- 2 The Efficiency Zone**
This new graph shows a different view of your energy use, and how you stack up.
- 3 Better tips and insights**
Your report now gives a closer look at your home's energy use, so you know where you have the biggest potential to save.

Your energy use at a glance

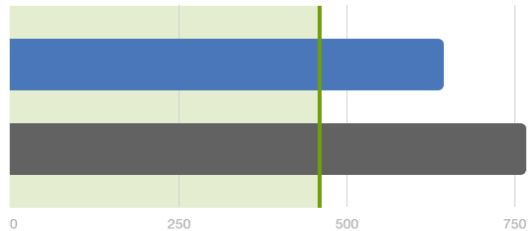
Mar 5 - Apr 4, 2021



Use this report to learn about your energy use and how you can save more.

How you compare to others

Efficiency Zone: Up to 460 kWh



- You:** 644 kWh
- Similar homes:** 766 kWh

The **Efficiency Zone** represents the 20% of similar homes in your comparison group that used the least energy this period. To create this group, we use your home profile to look for 100 single-family homes in your area with a similar **heating source** and **square footage**.

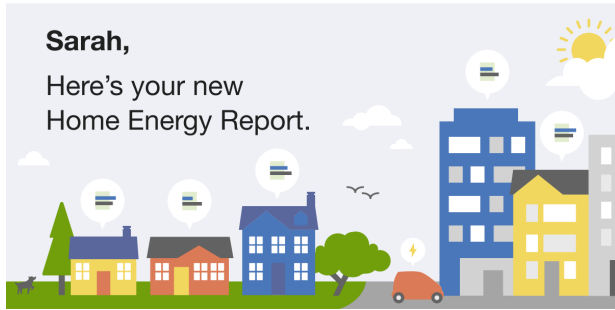
Need to update your home profile?
[Go to the Home Energy Survey.](#)

Note: New customers does not include customers who move from one audience segment to another.

See the [individual report modules](#) for more information about how the experience varies by module.

Limited Income Progress Report

The Limited Income Progress Report is focused on general energy efficiency and money saving goals for limited income customers.



Sarah,
Here's your new
Home Energy Report.

Your energy use at a glance

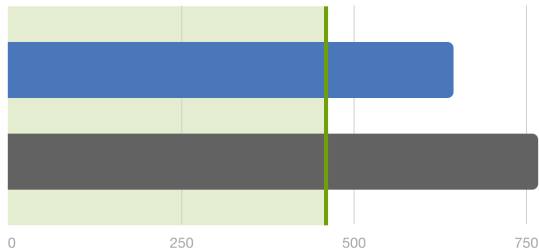
Mar 5 - Apr 4, 2021



Use this report to learn about your energy use and how you can save more.

How you compare to others

Efficiency Zone: Up to 460 kWh



- You:** 644 kWh
- Similar homes:** 766 kWh

The **Efficiency Zone** represents the 20% of similar homes in your comparison group that used the least energy this period. To create this group, we use your home profile to look for 100 single-family homes in your area with a similar **heating source** and **square footage**.

Need to update your home profile?
[Go to the Home Energy Survey.](#)

Your energy use was outside of the Efficiency Zone by

40%

You used less energy than similar homes



See the [individual report modules](#) for more information about how the experience varies by module.

Limited Income Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules designed to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. Go to the individual module page for more details on the user experience.

Limited Income Welcome Report Modules

The modules included in the Limited Income Welcome Report vary depending on whether the customer is a new or legacy customer.

The Limited Income Welcome Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Welcome](#)

[Energy Use Benchmark](#)

[Efficiency Zone](#) or [Neighbor Comparison](#)

[What Uses Most](#)

[Paired Tips](#)

[Mini Home Energy Analysis](#)

[Footer](#)

Limited Income Progress Report Modules

The Limited Income Progress Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Energy Benchmark](#)

[Efficiency Zone](#) or [Neighbor Comparison](#)

[What Uses Most](#)

[Paired Tip](#)

[Mini Home Energy Analysis](#)

[Marketing Module \(Not Depicted\)](#)

[Footer](#)

Seasonal Report

The Seasonal Report is designed to motivate customers to reduce their energy use in time leading up to the extreme weather seasons of summer and winter. The summer version of the Seasonal Report focuses on cooling use since cooling has the largest impact on the summer utility bills. The winter version of the Seasonal Report focuses on heating since heating has the largest impact on the winter bills. The reports are sent before the start of the season to help the customer prepare and plan for the season ahead. The report provides specific tips and actions customers can take to lower their heating or cooling use, and a recommended thermostat adjustment that is unique to the seasonal report.

Summer Seasonal

Winter Seasonal

UtilityCo

Account #*****71

UtilityCo

Account #*****7830

Warmth in the air?
Time to prepare!



Colder weather is on
the way!



Cooling has a big impact on summer
energy bills

20%

of your total energy use went towards **cooling*** last
summer

*Can include window units, central AC, and fans

Heating has a big impact on winter
energy bills

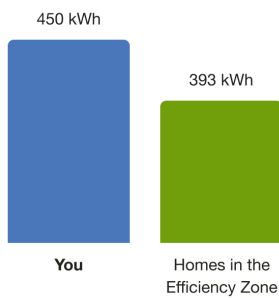
20%

of your total energy use went toward **heating*** last
winter

*Includes things like furnaces, boilers, baseboard heaters, and space heaters

LAST SUMMER

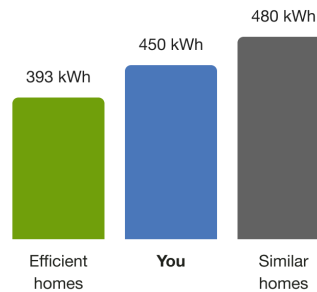
You used **more** on cooling than homes in the
Efficiency Zone*



*Homes in the Efficiency Zone are the 20% of similar homes that used the least
amount of energy from Jun 6 - Aug 30, 2020.

LAST WINTER

You used **more** on heating than efficient
homes*



*Similar homes are in the same area as yours and about the same size and home
type. Efficient homes are the 20% of similar homes that used the least amount of
energy. The graph shows usage Dec 6, 2020 - Feb 28, 2021.

THIS SUMMER

When you're out for a few hours, turn up your
thermostat for easy energy savings



THIS WINTER

When you're heading to bed, turn down your
thermostat for easy energy savings



See the [individual report modules](#) for more information about how the experience varies by module.

Seasonal Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules that have been carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. See the individual module pages for more details on the user experience.

The Seasonal Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Seasonal Breakout](#)

[Seasonal Normative Comparison](#)

[Thermostat Adjustment](#)

[Seasonal Report Tips](#)

[Seasonal Home Energy Analysis](#)

[Customer Feedback](#)

[Footer](#)

Time of Use Report

The Time of Use Report provides customers on a time of use energy plan with a email report experience that is focused on overall energy savings and rate education. The Time of Use Report experience includes the following report types:

Time of Use Welcome Report: The Time of Use Welcome Report is the first report a customer on a time of use plan receives. It welcomes the customer to the program and tells them what they can expect from their reports.

Time of Use Progress Report: The Time of Use Progress Report is focused on general energy efficiency and money saving goals for customers on time of use plans.

Time of Use Welcome Report

Time of Use Progress Report

UtilityCo

Account #*****789K

UtilityCo

Account #*****7890

Sarah,
Here's your new
Home Energy Report.



Sarah,
Here's your Home
Energy Report.



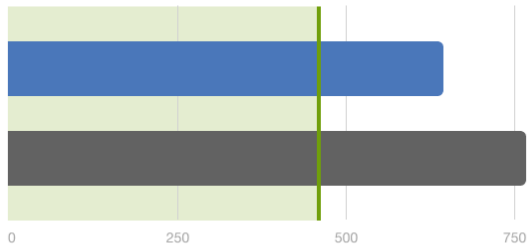
Why are you receiving this?

These reports provide insights about your energy use, so you can save more on your bill and make the most of your Time-of-Use (TOU) plan. Here's what to expect:

- 1 Energy use insights**
You can learn about your energy use, and get helpful context to determine how you're doing.
- 2 Personalized ways to save**
You'll get tips specifically for your home, so you can save more energy all the time, and especially during peak hours.
- 3 Timely, tailored advice**
You'll also get seasonal advice and special savings opportunities in future reports.

How you compare to others

Efficiency Zone: Up to 460 kWh



- You: 644 kWh
- Similar homes: 766 kWh

The **Efficiency Zone** represents the 20% of similar homes in your comparison group that used the least energy this period. To create this group, we look for 100 single-family homes in your area with a similar **heating source** and **square footage**.

Need to update your home profile?
[Go to the Home Energy Survey.](#)

Your energy use was outside of the Efficiency Zone by:

Your energy use at a glance

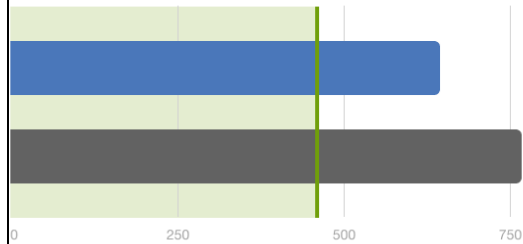
Mar 25 - Apr 24, 2021



Use this report to learn about your energy use and how you can save more.

How you compare to others

Efficiency Zone: Up to 460 kWh



- You: 644 kWh
- Similar homes: 766 kWh

The **Efficiency Zone** represents the 20% of similar homes in your comparison group that used the least energy this period. To create this group, we look for 100 single-family homes in your area with a similar **heating source** and **square footage**.

Need to update your home profile?
[Go to the Home Energy Survey.](#)

Your energy use was outside of the Efficiency Zone by:

40%

You used less energy than similar homes.

See the [individual report modules](#) for more information about how the experience varies by module.

Time of Use Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules that have been carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. See the individual module pages for more details on the user experience.

Time of Use Welcome Report

The Time of Use Welcome Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Welcome](#)

[Efficiency Zone](#) or [Neighbor Comparison](#)

[Time of Use 101](#)

[Time of Use Tip Modules](#)

[Mini Home Energy Analysis](#)

[Customer Feedback](#)

[Footer](#)

Time of Use Progress Report

The Time of Use Progress Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Energy Use Benchmark](#)

[Efficiency Zone](#) or [Neighbor Comparison](#)

[Time of Use 101](#)

[Time of Use Tip Modules](#)

[Mini Home Energy Analysis](#)

[Footer](#)

Annual Report

The Annual Report educates the customer about their energy use in the previous calendar year, and advises them on the most impactful actions that they can take to save energy and money in the new year. It also includes a community message that reminds the customer that their efforts contribute to a massive collective impact.



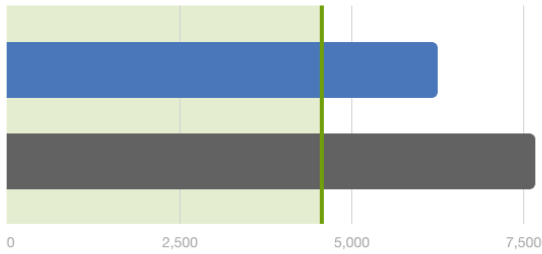
Your 2021 energy use at a glance

Jan 5 - Dec 4, 2021



Nice work! Let's get you saving even more this year.

How your use compares to others over the last 12 months



- You:** 6,242 units
- Similar homes:** 7,659 units
- Efficiency Zone:** Up to 4,601 units

A unit is a combined measurement of electricity (kWh) and gas (therms) use.
The **Efficiency Zone** represents the 20% of similar homes in your comparison group that used the least energy this period. To create the comparison group, we use your home profile to look for 100 single-family homes in your area with a similar **heating source** and **square footage**.

Need to update your home profile?
[Go to the Home Energy Survey.](#)

Your energy use was outside of the Efficiency Zone by

36%

You used less energy than similar homes

See the [individual report modules](#) for more information about how the experience varies by module.

Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. Go to the individual module page for more details on the user experience.

The Annual Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Energy Benchmark](#)

[Efficiency Zone](#) or [Three-Bar Neighbor Comparison](#)

[Annual Secondary Insight](#)

[Annual Report Tips](#)

[Marketing Module](#)

[Footer](#)

Solar Report

The Solar Report provides a personalized report experience that is focused on improving energy savings behaviors and customer satisfaction for solar customers. The report takes into account the impact of solar on the customer's energy use and acknowledges how their solar use contributes to the public good.

There are two types of solar reports:

Solar Welcome Report: The welcome report is the first report a customer on a solar plan receives. It introduces the customer to their solar-only neighbor comparison and tells them what they can expect from subsequent reports.

Solar Progress Report: The progress report is focused on general energy efficiency and money saving goals for solar customers.

Solar Welcome Report

Solar Progress Report

UtilityCo

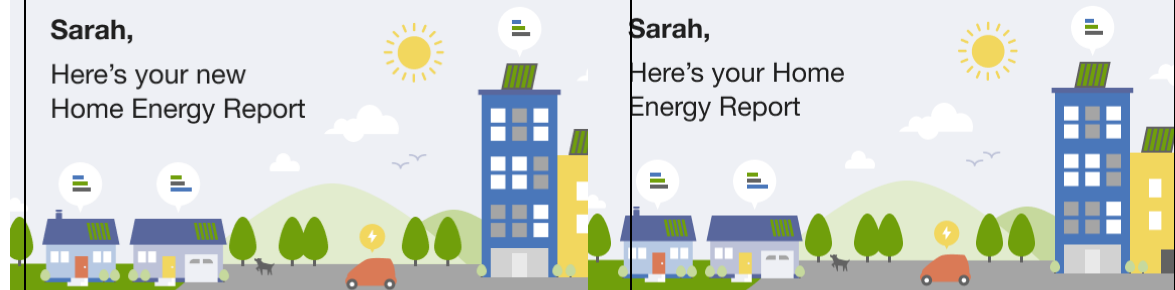
Account #*****789

UtilityCo

Account #*****7890

Sarah,
Here's your new
Home Energy Report

Sarah,
Here's your Home
Energy Report



Why are you receiving this report?

These reports can help you save energy, which can lower your bill and help us deliver cleaner, more reliable energy to everyone. Here's what to expect:

- 1 Energy use insights**
You can learn about your net energy, and get helpful context for how you're doing compared to other solar households.
- 2 Personalized ways to save**
You'll get helpful tips and personalized expert advice chosen specifically for your home.
- 3 Timely, tailored advice**
You'll also get seasonal advice and special savings opportunities in future reports.

Your net energy at a glance

Mar 20 - Apr 19, 2022



Use this report to learn about your net energy and how you can save even more.

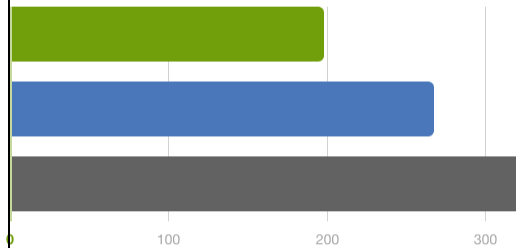
Your net energy at a glance

Mar 20 - Apr 19, 2022



Use this report to learn about your net energy and how you can save even more.

How your net energy compares to other homes with solar



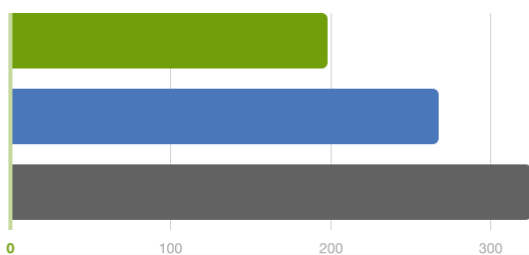
- Efficient homes with solar: 198 kWh**
- You: 268 kWh**
- Similar homes with solar: 326 kWh**

Net energy is the difference between the amount of energy your solar panels produce and the amount of energy you use. Efficient homes with solar are the 20% of homes in your comparison group with the lowest net energy.

To create your comparison group, we use [your home profile](#) to look for **100 single-family homes with solar** in your area with a similar heating source and square footage.

A Kilowatt-hour (kWh) is the standard unit used to measure electricity use.

How your net energy compares to other homes with solar



Your net energy was **higher** than efficient homes by

35%



Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. Go to the individual module page for more details on the user experience.

Solar Welcome Report

The Solar Welcome Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Welcome](#)

[Energy Benchmark](#)

[Three-Bar Neighbor Comparison](#)

[Solar Report Tips](#)

[Customer Feedback](#)

[Footer](#)

Solar Progress Report

The Solar Progress Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Energy Benchmark](#)

[Three-Bar Neighbor Comparison](#)

[Solar Report Tips](#)

[Customer Feedback](#)

[Footer](#)

Electric Vehicle Report

The Electric Vehicle Report provides electric vehicle customers with a report experience that takes into account the unique priorities of electric vehicle customers, and the impact that electric vehicle charging has on their energy use. The report includes insights and explanations that are specific to the electric vehicle customer experience, and encourages customers to further enhance their report by completing the Home Energy Survey.

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Energy Efficiency
Scale	No limitations.

Customer Requirements

Category	Description
Billing Frequency	Monthly, bi-monthly, or quarterly.
Data Delivery Frequency	Daily, monthly, bi-monthly, or quarterly. See module-specific requirements.
Data Requirements	<ul style="list-style-type: none">■ Hourly AMI data and insights.■ Electric vehicle confirmation. Contact your Delivery Team for more information.
Data History	See module-specific requirements.
Data Coverage	See module-specific requirements.
Supported Fuels	Electric-only and dual fuel.

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Limitations

- **Electric Vehicle Disaggregation Data:** There are additional data requirements to show advanced insights such as Electric Vehicle disaggregation. Contact your Delivery Team

for more information.

- **Efficiency Zone:** The [Efficiency Zone](#) is not available for this report type.

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User Experience

This section describes the Electric Vehicle Report. The report is built with a predefined mix of dynamic and static modules carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals.

This image is an example of the Electric Vehicle Report user experience for an electric-only fuel customer. Go to the individual module page for more details about the user experience.

Sarah,
Here's your Home
Energy Report



How you compare to others

Aug 9 - Sep 8, 2023

Efficient homes

596 kWh

Similar homes

1,067 kWh

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Report Modules

Email Home Energy Report v3 is built with predefined mix of dynamic and static modules carefully crafted to tell customers a personalized story about their energy use. It provides new experiences and insights that vary over time, depending on specific customer attributes and utility goals. Go to the individual module page for more details on the user experience.

The Electric Vehicle Report includes the following modules:

[Subject Line \(Not Depicted\)](#)

[Header](#)

[Three-Bar Neighbor Comparison](#)

[What Uses Most](#)

[Paired Tips](#)

[Marketing Modules](#)

[Footer](#)

Design and Configuration

The Oracle Utilities Opower platform allows for product configurations and customizations to meet the needs of each utility. A *configuration* is a simple change that can be made with no coding required. There are required configurations and optional configurations. A *customization* is a change that requires more in-depth technical work, design, or coding to alter the appearance or behavior of the product, or to create something new within the product.

This guide only provides a summary of configuration options. Customization options may be available for your program at cost as an Oracle Utilities Opower professional service offering. Ask your Delivery Team how customization options could enhance your program.

Note: If an element is not listed as a configuration, you should assume that it cannot be configured and would require a customization. Contact your Delivery Team if you have questions about this process or would like to make a customization request.

Annual Secondary Insight

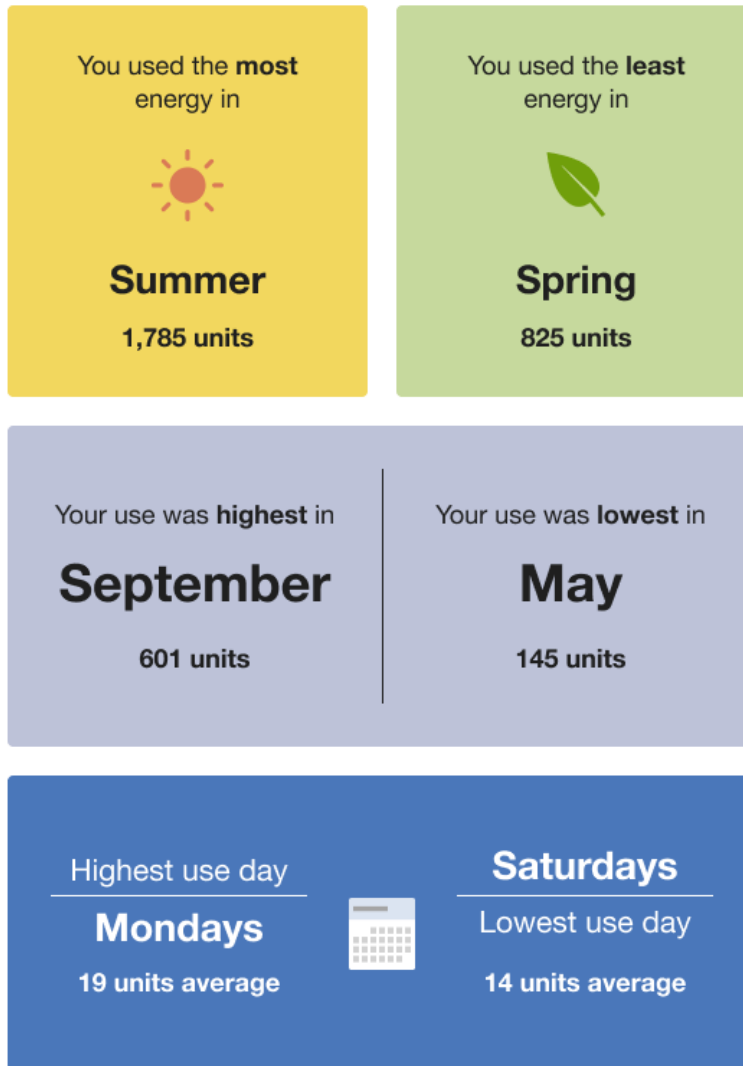
The Annual Secondary Insight provides customers with an overview of their energy use trends throughout the year. It includes a summary of their highest and lowest time periods by season, month, and day of the week. The goal of this module is to provide the customer with easily accessible insights about their annual use.

Appears in: [Annual Report](#)

Design

This image shows an example of the module for an electric customer that receives an Annual Report with 12 months of data.

How you used energy across the year



Configuration Options

Configuration Option	Input Value
<p>Header</p> <p>The heading draws the customer's attention to module as</p>	<p>Optional</p> <p>Select one of the</p>

<p>an a overview of their energy use trends throughout the year.</p> <p>Default: How you used [energy/gas] across the year</p>	<p>following:</p> <ul style="list-style-type: none"> ■ Use the default text. ■ Contact your Delivery Team about altering the text.
---	--

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

No AMI Data

Daily meter reads are required to include the day-of-the-week insight. If a customer does not have AMI, the day-of-the-week insight is omitted.

Incomplete Seasonal Data

If a customer has incomplete seasonal data, the highest or lowest use season is estimated.

Incomplete Monthly Data

If a customer has incomplete data for a high or low month, the highest or lowest use month is estimated.

Incomplete Monthly and Seasonal Data

If a customer has incomplete data for a high or low month and the high or low season, the insights for at least two of the insight cards are estimated.

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Customer Feedback

The Customer Feedback module is an optional module that can be included to solicit feedback about the Email Home Energy Report. It asks the customer how useful they found the report, and provides the utility with a way to gather feedback that can be used to improve the report experience. The module questions vary by [report type](#).

Appears in: [Progress Report](#), [Promotion Report](#), [Seasonal Report](#), [Time of Use Report](#), [Solar Report](#)

Design

This image shows an example of the module that could appear in the [Progress Report](#), [Seasonal Report](#), [Time of Use Report](#), and [Solar Report](#).



This image shows an example of the module in the [Promotion Report](#).

Is this promotion relevant to you?

Yes

No

Note: The User Feedback module should be used no more than once a quarter in the Promotion Report. It should not be used with the [Mini Home Energy Analysis](#) module to prevent competing calls to action.

Configuration Options

Configuration Option	Input Value
<p>Prompt</p> <p>Utilities may configure the prompt to reinforce the report promotion. For example, "Is this heat pump water promotion relevant to you?"</p> <p>Default:</p> <p>Progress report: "How useful was this email?"</p> <p>Promotion module: "Is this promotion relevant to you?"</p>	<p>Optional</p> <ul style="list-style-type: none">■ Use the default header.■ Contact your Delivery Team about using the specific promotion configuration.

User Experience Variations

There are no supported user experience variations.

Disaggregation Main Insight

The Disaggregation Main Insight module uses personalized information about an end use in the customer's home to motivated them to take advantage of a utility promotion. The goal of this module is to help customers understand their use in a specific end-use category where they are using more than the regional average so that they may feel motivated to uptake the promotion and subsequently reduce their energy use in that end-use category. The module can be used to promote the customer's largest end use category, or the utility may select a preferred end use category to reinforce the report promotion. Oracle Utilities Opower works closely with the utility to create marketing modules that enhance the report experience.

Appears in: [Promotion Report](#)

Design

This image shows an example of the Disaggregation Main Insight module.

Where you spent the most on energy

Jun 1, 2020 – May 30, 2021

Water Heating

21% of your total use last year

\$396 spent last year

You were selected to receive this report because you may be using more than the regional average for this energy use category. Numbers are approximate and calculated with your energy usage.

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
<p>Disclaimer</p> <p>The disclaimer explains to the customer why the customer is receiving the report.</p> <p>Default:</p> <p>"You were selected to receive this report because you may be using more than the regional average for this energy use category. Numbers are approximate."</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none">■ Use the default.■ Contact your Delivery Team about altering the text.

User Experience Variations

The user experience varies for customers depending on their energy use, service types, available data, costs, locale, and if the utility elects to promote an end use that is not the customer's largest end use category.

Utility Preferred End Use

If the utility decides to promote an end use that is not the customer's largest end use category, the header introduces the category more generically as a place to save without saying where it ranks in their overall use.

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Energy Use Benchmark

The Energy Use Benchmark module provides a dynamic and personalized, at-a-glance interpretation of the customer's energy use. The Benchmark has three sections that indicate overall customer status as it relates to their energy use:

- Fair
- Good
- Great

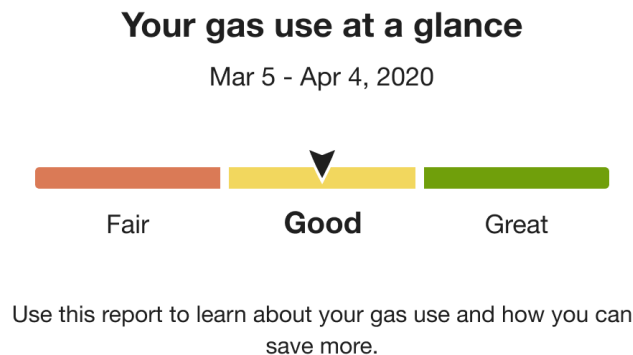
The customer's status on that gauge is determined by their performance relative to both comparison points in the [neighbor comparison](#).

Note: The Energy Use Benchmark module must be used in context with the [Efficiency Zone](#) or the [Neighbor Comparison](#).

Appears in: [Progress Report](#), [Welcome Report](#), [Limited Income Report](#), [Annual Report](#), [Time of Use Report](#), [Solar Report](#)

Design

This image shows an example of the Energy Use Benchmark module.



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
<p>Benchmark Header</p> <p>The heading notifies the customer that the benchmark gives them an at-a-glance view of their energy use. It also includes the customer's fuel type.</p> <p>Default: "Your <fuel type variation> use at a glance."</p>	<p>Optional</p> <p>Contact your Delivery Team about configuring the benchmark header.</p>
<p>Color Labels</p> <p>The benchmark has three potential states, and each</p>	<p>Optional</p> <p>Choose one of the</p>

Configuration Option	Input Value
<p>corresponds to a color. The labels (Fair, Good, and Great) are configurable. However, the default labels and colors are strongly recommended.</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Orange: Fair. Customer is using more than Similar Homes. ■ Yellow: Good. Customer is using more than Efficiency Zone /Efficient Neighbors threshold, but less than Similar Homes. ■ Green: Great. Customer is using less than the Efficiency Zone/Efficient Neighbors threshold. 	<p>following:</p> <ul style="list-style-type: none"> ■ Use the default labels. ■ Contact your Delivery Team about configuring the color labels.
<p>Benchmark Copy</p> <p>The copy below the gauge tells the customer how they can leverage the report or recognizes a change in state.</p> <p>Default:</p> <p>The copy defaults vary by fuel type and the customer’s energy use. Discuss the default language with your Service Delivery Manager.</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default labels. ■ Contact your Delivery Team about configuring the benchmark copy.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Benchmark State

The copy below the gauge changes depending on the customer's current state and any differences since their last report. Possible states include:

- **Good state:** Explains how to use the report.
- **Low to higher use state:** Helps the customer consider what may have changed.

- **High to lower use state:** Congratulates the customer for lowering their use compared to neighbors.
- **Great state:** Congratulates the customer for being efficient
- **Fair state:** Explains how to use the report
- **Fuel Type** The customer's fuel type is displayed in the header and benchmark copy, "Your <fuel variation> use at a glance."
 - **Dual fuel:** The benchmark header uses the term 'energy.'
 - **Electric-only:** The benchmark header uses the term 'electricity' and the benchmark copy uses the term 'energy.'
 - **Gas-only:** The benchmark header uses the term 'gas.'

Welcome Report - Legacy Customers, Limited Income Report - Legacy Customers

A dog-ear corresponding to the "energy use at a glance" bullet of the [Welcome](#) module appears in the upper right corner of the Energy Use Benchmark module.

Note: Dog-ear numbers do not appear in the [Solar Report](#).

Annual Report

The Benchmark module in [Annual Report](#) collates the customer's energy usage data from all available bill periods over the previous calendar year to provide an at-a-glance rating of their usage. The Energy Use Benchmark module for the Annual Report includes the following variations:

- **Heading:** The heading identifies the year being reported. For example, "Your 2021 energy use at a glance."
- **Benchmark copy:** The text below the benchmark has an annual focus that introduces the customer to the goals of the report by acknowledging past and future actions. For example, "Thanks for tracking your energy use with us. Let's get you saving this year!"

Solar Report

The Benchmark module in the [Solar Report](#) includes unique copy and logic for net negative energy states experienced by solar customers. There are four energy states:

- **Fair:** Net energy was positive and more than similar homes.
- **Good:** Net energy was positive and less than similar homes, net energy was negative and more than similar homes, or net energy was negative and more than efficient homes, but less than similar homes.
- **Great:** Net energy was positive or negative and an efficient home.
- **State Change (Higher Use to Lower Use):** Benchmark state has changed from Fair to Good or Good to Great since the last report.

Home Energy Analysis

The Home Energy Analysis modules prompt the customer to answer simple questions about their home attributes and energy habits to improve their report experience. The type of module the customer receives varies by report type:

Mini Home Energy Analysis: The Mini Home Energy Analysis prompts the customer to answer simple questions about their home attributes and energy habits from within the report. See the [Mini Home Energy Analysis](#) for more information.

Seasonal Home Energy Analysis: The Seasonal Home Energy Analysis encourages customers to complete the Home Energy Analysis in order to improve their report experience, and includes a call to action button that redirects the customer to the Home Energy Analysis in [Digital Self Service - Energy Management](#) where they can complete the full survey. See the [Seasonal Home Energy Analysis](#) for more information.

Mini Home Energy Analysis

The Mini Home Energy Analysis module prompts the customer to answer simple questions about their home attributes and energy habits from within the Email Home Energy Report v3. The module creates an additional opportunity for customers to provide information that can be used to improve their report experience regardless of whether they complete the full Home Energy Analysis in [Digital Self Service - Energy Management](#).

Appears in: [Progress Report](#), [Welcome Report](#), [Limited Income Report](#), [Time of Use Report](#)

Design

This image shows an example of the Mini Home Energy Analysis module.

Help us improve your report

Do you own your home?

Answer questions like this to help make your tips and insights more relevant.

Yes	No
------------	-----------

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Mini Home Energy Analysis Header Default: Help us improve your report	Optional <ul style="list-style-type: none">■ Use the default header.■ Contact your Delivery Team about creating an alternative header.

User Experience Variations

There are no supported user experience variations.

Seasonal Home Energy Analysis

The Seasonal Home Energy Analysis module encourages customers to complete the Home Energy Survey in order to improve their report experience specific to the seasonal report. The module creates an additional opportunity for customers to provide information that can be used to improve their report experience regardless of whether they complete the full Home Energy Analysis in [Digital Self Service - Energy Management](#).

Appears in: [Seasonal Report](#)

Design

This image shows an example of the Seasonal Home Energy Analysis module.

Get personalized winter tips and insights

Tell us more about your home

Take the 5-minute Home Energy Survey so we can deliver tips and insights customized to how you use energy in your home.

[Take the survey](#)

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Seasonal Home Energy Analysis Header Default: Help us improve your report	Optional <ul style="list-style-type: none">■ Use the default header.■ Contact your Delivery Team about creating an alternative header.

User Experience Variations

There are no supported user experience variations.

Home Profile

The Home Profile highlights the customer's progress and reminds them of the impact of completing the survey on their report insights. The module includes a list of known and unknown home attributes, a percent complete wheel which displays how much of the customer's [Home Energy Analysis](#) that is complete, and a link to the [Home Energy Analysis](#).

Appears in: [Progress Report](#), [Welcome Report](#)

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Energy Efficiency Cloud Service
Scale	Not applicable.

Customer Requirements

Category	Description
Billing Frequency	Monthly, bi-monthly, or quarterly.
Data Delivery Frequency	Monthly, bi-monthly, or quarterly.
Data Requirements	Not applicable.
Data History	A minimum of one historical bill.
Data Coverage	Not applicable.
Supported Fuels	Electric-only, gas-only, dual fuel.

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Limitations

- **Progress and Welcome Report only:** This module may only be used in the [Welcome](#) and [Progress](#) reports.
- **Welcome Report:** This module may be used as a replacement for the [Home Energy Analysis](#) in the [Welcome Report](#).

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User Experience

This section describes the user experience of a customer who has not yet completed their [Home Energy Analysis](#), followed by how the user experience may vary.

Complete your Home Energy Survey



Home Energy Survey completion

You're so close to getting personalized tips for energy savings and more accurate neighbor comparisons!

- ✓ Home type: Unit in multi-family building
- ✓ Home size: 1400 sq. ft.
- ? Heating
- ? More home details

Finish the survey

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User Experience Variations

The user experience of the feature may vary for customers and utilities depending on their service types (gas, electricity, dual fuel, and so on), available data, costs, locale, and other factors. For more information, see Introduction Modules description in the [Oracle Utilities Opower Energy Efficiency Cloud Service Overview](#) and go to the User Experience Variations section.

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
<p>Online Energy Assessment Name</p> <p>The utility may select an alternative name for the Home Energy Analysis.</p> <p>Default: By default, Home Energy Survey is used.</p>	<p>Optional</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about selecting a different name.
<p>Header</p> <p>The header varies by state. The utility may select alternative headers for each state.</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Not started: Start your Home Energy Survey ■ Incomplete: Complete your Home Energy Survey ■ Recently completed: Congrats to completing your Home Energy Analysis survey ■ Completed: Start your Home Energy Survey 	<p>Required</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about selecting different headers.
<p>Explainer text</p> <p>The explainer text may be configured for each state.</p> <p>Default: "</p> <ul style="list-style-type: none"> ■ Not attempted: You're so close to getting personalized tips for energy savings and more accurate neighbor comparisons! ■ Incomplete: For personalized tips on energy savings and more accurate neighbor comparisons, 	<p>Required</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about configuring the explainer text for each state.

Configuration Option	Input Value
<p>complete this quick survey.</p> <ul style="list-style-type: none"> ■ Recently completed: Personalized tips and accurate neighbor comparisons are now at your fingertips. ■ Completed: Update your Home Energy Survey to get better tips and more accurate neighbor comparisons. 	
<p>Call to Action Button Text</p> <p>The QR codes call to action may be configured by state.</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Not attempted: Start the survey ■ Incomplete: Finish the survey ■ Recently completed: View your survey ■ Completed: Update the survey 	<p>Required</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about configuring the call to action button text.
<p>Call to Action URL</p> <p>The utility may configure the URL by state</p> <p>Default: utility.co/homesurvey</p>	<p>Required</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about configuring the QR code by state.

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Marketing Modules

Marketing modules encourage customers to take advantage of utility-specific or Oracle Utilities-specific products or programs. The modules are selected from a library of content that has been tested to optimize conversions and satisfaction. Small edits can be made to the text and visuals. For example, the modules can be customized to promote utility-specific programs (such as a home audit), products or features, processes, rebates, calls to action (URL, phone number, or both), and more.

Appears in: [Promotion Report](#), [Progress Report](#), [Limited Income Report](#), [Annual Report](#), [Electric Vehicle Report](#)

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Energy EfficiencyCloud Service
Scale	Not applicable.

Customer Requirements

Category	Description
Billing Frequency	Monthly, bi-monthly, or quarterly.
Data Delivery Frequency	Not applicable.
Data Requirements	<ul style="list-style-type: none"> ■ Appliance detection and disaggregation with Digital Self Service - Energy Management - Home Energy Analysis heating and cooling disaggregation. ■ Simple disaggregation with Digital Self Service - Energy Management - Home Energy Analysis completion.
Data History	<ul style="list-style-type: none"> ■ Appliance detection & disaggregation: A single bill from the last bill period or previous to last bill period is required. ■ Heating and cooling: Six bills are required non-AMI customers. 60 days of AMI reads are required for AMI customers .
Data Coverage	Not applicable.

Category	Description
Supported Fuels	Electric-only, gas-only, dual fuel.

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Limitations

- **Image and text placement:** There are limitations on where images and text may be placed in the module depending on module type.

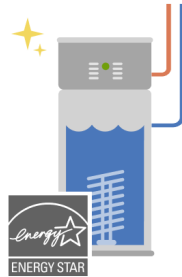
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User Experience

Flexible Marketing Modules

The following image is an example of a flexible marketing module with a disaggregation breakdown focus .

A new water heater could help you save



\$400 UtilityCo Rebate

If your water heater is over 10 years old, now's a good time to upgrade to an ENERGY STAR® heat pump water heater. According to the U.S. Department of Energy, you can save over 50% on water heating costs—for a family of 3, that adds up to \$2,610 in energy savings over its lifetime!

Though they're a little pricey, you can make up the extra cost in as little as 3 years, plus save another \$400 with a limited-time UtilityCo rebate.

[Claim your rebate](#)

The following image is an example of a marketing module with an electric vehicle focus.

Install solar to power your electric vehicle



You may have noticed your electric bills have increased since getting an electric vehicle (EV). To cut down on these costs, consider installing solar panels to power both your EV and your home!

Save Now

Limited Income Marketing Module

The following image is an example of a limited income-specific weatherization marketing module included in the [Limited Income Report](#).

See if you qualify for free weatherization upgrades




Looking to make your home more comfortable without driving up the bill? With the Weatherization Assistance Program (WAP), you could get free weatherization improvements to help you save more energy and money all year round.

See if you qualify

Community Marketing Module

The following image is an example of a Community Marketing Message module included in the [Annual Report](#).

Making a difference together—you and your community



By taking steps to reduce energy consumption, you and other Home Energy Report recipients saved more than 35 million units of energy over the last 12 months. That's equivalent to the CO₂ emissions of 2.7 million gallons of gasoline!

[Learn more](#)

Configuration Options

The content within marketing messages is customizable in coordination with Oracle Utilities Opower. Depending on the purpose of the module, you may be required to provide additional inputs. Talk to your Service Delivery Manager about selecting marketing modules that support the report experience.

Neighbor Comparisons

Normative Comparison modules compare a customer against themselves (for example, their past energy usage) or their neighbors. These modules are designed to motivate customers to understand the underlying causes of the differences in each comparison and subsequently reduce energy. Types of normative comparisons include:

- **Three-bar Neighbor Comparison:** The Three-bar Neighbor Comparison is designed to motivate customers to save energy based on how they see themselves in relation to their neighbors. It compares the customer (“You”) to two groups: “Efficient Homes” and

“Similar Homes.” The results are displayed in a horizontal bar graph.

- **Efficiency Zone:** The Efficiency Zone is composed of a bar graph depicting the use of the customer and similar homes relative to a green efficiency zone, paired with the key insights or takeaways for the customer. If the customer's bar is at the green vertical threshold line or to the left of it, within the light green box, they are considered "in the efficiency zone." The Efficiency Zone threshold represents the average use of the 20th percentile of similar homes during that bill period and will change with each report.

Note: Utilities have the option of including either the Efficiency Zone or the Three-bar Neighbor Comparison module in their report experience. It is recommended that utilities with a savings-focus include a Three-bar Neighbor Comparison in their report experience.

The design of the modules varies by the customer's report type and program design. Go to the individual module page to learn about the details of each module experience.

Three-Bar Neighbor Comparison

The Three-Bar Neighbor Comparison is designed to motivate customers to save energy based on how they see themselves in relation to their neighbors. It compares the customer (“You”) to two groups: “Efficient Homes” and “Similar Homes.” The results are displayed in a horizontal bar graph. A brief message indicates how the customer compares to efficient homes in the area. An informational section below the bar graph explains that "Efficient Homes" represent the 20% of similar homes in the customer's comparison group that used the last amount of energy in the billing period and provides information about how the graph works. An insight statement located below the Three-Bar Neighbor Comparison indicates whether the customer falls in one of three states:

- Great
- Good
- Using more than average

The neighbor comparison in Digital Self Service - Energy Management mirrors the customer's report experience. For example, a customer that receives the Efficiency Zone in their report will also see an Efficiency Zone in Digital Self Service - Energy Management. For more information about the web version of the neighbor comparison, see [Digital Self Service Energy Management Neighbor Comparison](#).

Appears in: [Progress Report](#), [Welcome Report](#), [Limited Income Report](#), [Annual Report](#), [Time of Use Report](#), [Solar Report](#), [Electric Vehicle Report](#)

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Energy Efficiency Cloud Service
Scale	Maximum of 300,000 a week.

Customer Requirements

Category	Description
Billing Frequency	Monthly, bi-monthly, quarterly.
Data Delivery Frequency	Monthly and bi-monthly.
Data Requirements	Billing data and third-party data.
Data History	A minimum of one historical bill.
Data Coverage	No specific requirements.
Supported Fuels	Electric, gas, and dual fuel.

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Limitations

- **Report Type:** The behavior of this module varies by report type. See the [User Experience](#) for more information.

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User Experience

This section describes the user experience for the Three-bar Neighbor Comparison Module. The module varies by report type, service type, and other factors. See the [User Experience Variations](#) for additional information about each Three-bar Neighbor Comparison type.

Progress Three-bar Neighbor Comparison Graph

This image is an example of the Three-bar Neighbor Comparison module included in the [Progress Report](#), [Welcome Report](#), [Limited Income Report](#), [Annual Report](#), [Electric Vehicle Report](#), and [Time of Use Report](#).

How you compare to others



- **Efficient homes:** 600 kWh
- **You:** 700 kWh
- **Similar homes:** 800 kWh

Efficient homes represent the 20% of similar homes in your comparison group that used the least energy this period. To create this group, we look for 100 single-family homes in your area with a similar **heating source** and **square footage**.

Need to update your home profile?
[Take the Home Energy Survey.](#)

Your energy use was **higher** than efficient homes by

17%

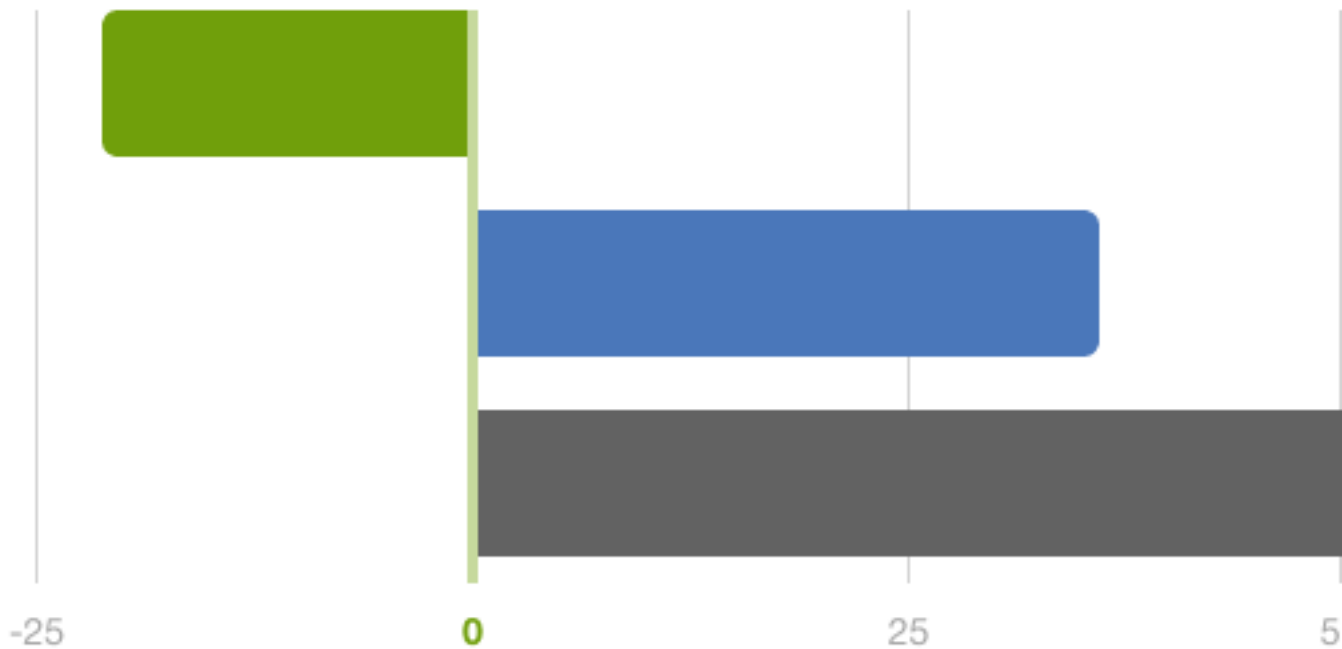
You used less energy than similar homes.



Solar Three-bar Neighbor Comparison

This image is an example of the Three-bar Neighbor Comparison module included in the [Solar Report](#).

How your net energy compares to other homes with solar



- **Efficient homes with solar: -21 units**
- **You: 36 units**
- **Similar homes with solar: 53 units**

Net energy is the difference between the amount of electricity your solar panels produce and amount of gas and electricity you use. Efficient homes with solar are the 20% of homes in your comparison group with the lowest net energy.

To create your comparison group, we use [your home profile](#) to look for **100 single-family homes with solar** in your area with a similar heating source and square footage.

A unit is a combined measurement of electricity (kWh) and gas (therms) use.

Electric Vehicle Three-Bar Neighbor Comparison

This image is an example of the Three-bar Neighbor Comparison module included in the [Electric Vehicle Report](#).

How you compare to others

Aug 9 - Sep 8, 2023

Efficient homes

596 kWh

Similar homes

1,067 kWh

You

700 kWh

916 kWh

- Home energy use (excluding EV)
- EV charging at home

Your comparison group includes 100 single-family homes (with and without electric vehicles) in your area that have a similar **heating source** and **square footage**. Efficient homes are the 20% of similar homes that used the least amount of energy this period.

Need to update your home profile?

[Take the Home Energy Survey.](#)

58% higher, was

higher than efficient homes by

User Experience Variations

The user experience of the feature may vary for customers and utilities depending on their service types (gas, electricity, dual fuel, and so on), available data, costs, locale, and other factors. For more information, see Neighbor Comparisons description in the [Oracle Utilities Opower Energy Efficiency Cloud Service Overview](#) and go to the User Experience Variations section.

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
<p>Similar Homes Terminology</p> <p>Default: "Similar Homes" terminology is the default, but it can be replaced with "Neighbors" terminology.</p>	<p>Optional</p> <p>Indicate the desired terminology in the Oracle Utilities Opower Platform Configuration Guide.</p>
<p>Explainer Text</p> <p>The text encouraging the customer to modify their Home Energy Analysis / Home Energy Survey is configurable.</p> <p>Default:</p> <ul style="list-style-type: none">■ Progress Three-Bar Neighbor Comparison: Home Energy Survey.■ Solar Three-bar Neighbor Comparison: Your Home Profile■ Electric Vehicle Three-Bar Neighbor Comparison: Home Energy Survey.	<p>Optional</p> <p>Select one of the following:</p> <ul style="list-style-type: none">■ Use the default text.■ Contact your Delivery Team about altering the text.

Efficiency Zone

The Efficiency Zone module is designed to motivate customers to save energy based on how they see themselves in relation to similar homes. It reframes the Efficient Homes concept from the Neighbor Comparison to improve customer satisfaction without heavily compromising energy efficiency. The module is comprised of a bar graph that compares customer and similar homes usage against an Efficiency Zone, and insights that place the

customer's usage in context. Usage below or up to the threshold is considered in the "efficiency zone." The Efficiency Zone threshold is the average use of the most efficient 20% of similar homes during that bill period and might change with each report.

Note: Utilities have the option to replace the Efficiency Zone module with the [Neighbor Comparison](#) module.

The normative comparison in Digital Self Service - Energy Management mirrors the customer's report experience. For example, a customer that receives the Efficiency Zone in their report will also see an Efficiency Zone in Digital Self Service - Energy Management. For more information about the web version of the Efficiency Zone, see [Digital Self Service Energy Management Efficiency Zone](#).

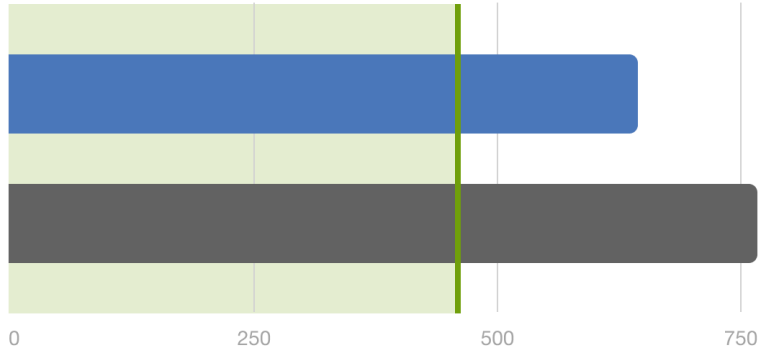
Appears in: [Progress Report](#), [Welcome Report](#), [Limited Income Report](#), [Annual Report](#), [Time of Use Report](#)

Design

This image shows an example of the Efficiency Zone module.

How you compare to others

Efficiency Zone: Up to 460 kWh



You: 644 kWh

Similar homes: 766 kWh

The **Efficiency Zone** represents the 20% of similar homes in your comparison group that used the least energy this period. To create this group, we look for 100 single-family homes in your area with a similar **heating source** and **square footage**.

Need to update your home profile?

[Go to the Home Energy Survey.](#)

Your energy use was outside of the Efficiency Zone by

40%

You used less energy than similar homes.



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
<p>Efficiency Zone Color</p> <p>Changing the Efficiency Zone color is supported but strongly discouraged. The Efficiency Zone color must match the Great color in the benchmark and insight colors.</p> <p>Default: A green tinted rectangle</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default color. ■ Change the Efficiency Zone color to light gray.
<p>You Bar Color</p> <p>Colors in the graph can match the utility’s color palette. The You bar color must contrast the other colors to meet Accessibility guidelines.</p> <p>Default: The colors in the example represent the default colors.</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default color. ■ Contact your Delivery Team about configuring this label.
<p>Similar Homes Label</p> <p>The bar graph label can be changed. However, Oracle Utilities strongly recommends using the default label.</p> <p>Default: Similar Homes</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default label. ■ Provide alternate label:

Configuration Option	Input Value
<p>Similar Homes Bar Color</p> <p>Colors in the graph can match the utility’s color palette.</p> <p>Default: The colors in the example represent the default colors.</p>	<p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default color. ■ Provide alternate color.
<p>Explainer Text</p> <p>The text encouraging the customer to modify their Home Energy Analysis/Home Energy Survey is configurable.</p> <p>Default: Go to the Home Energy Survey.</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default text. ■ Contact your Delivery Team about altering the text.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Fuel Type

Gas-only and dual fuel customers see a variation in the units of energy displayed in the Efficiency Zone module. The electricity unit “kWh” is replaced by “therms” for gas-only customers and “units” for dual fuel customers. Moreover, there is a variation in the wording of the insight statement. The word "electricity" is replaced by "natural gas" for gas-only customers, and "energy" for dual fuel customers.

Explainer Text

The explainer text varies depending on the available customer data.

- **Full Data:** If the customer has square footage, heating source, home type, and fuel type data the text changes as follows: "To create this group, we look for 100 single-family homes in your area with a similar heating source and square footage."

- **Home Size Data:** If the customer has square footage, home type, and fuel type data, the text changes as follows: "To create this group, we look for 100 single-family homes in your area with a similar square footage."
- **Minimum Data:** If the customer has only home type and fuel type, the text changes as follows: "To create this group, we look for 100 single-family homes in your area that we can compare you with."

Substituting the Neighbor Comparison for the Efficiency Zone

Utilities have the option of including a version of the Neighbor Comparison in their report instead of the Efficiency Zone module. See the [Neighbor Comparison](#) to learn about the module limitations and requirements, and configuration options. A Neighbor Comparison will also replace the Efficiency Zone in Digital Self Service - Energy Management. See [Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview](#) for more information. Substituting the Neighbor Comparison for the Efficiency Zone module does not impact the [Benchmark](#) module.

Welcome Report - Legacy Customer, Limited Income Welcome Report - Legacy Customer

The upper right corner of the module includes a number that corresponds to the Efficiency Zone highlight in the [Welcome](#) module.

Annual Report

The Efficiency Zone for the Annual report includes the following variations:

- **Heading:** The heading is, "How your use compares to others over the last [XX] months."
- **Hero insight:** The hero insight graph shows usage for the previous 12 months (or portion thereof) instead of the usual one or two month summary.

Personal Tracker

The Personal Tracker is an optional module that provides customers with up to one year's comparison of their current year's usage to the previous year. It offers a range of data scenarios, displaying usage information across as few as three bills or as many as two full years of bills. The module includes an evaluative statement that assesses the customer's performance, a bar chart for visualization, seasonal helpers, and insights into why their energy use may have increased, decreased, or remained the same. The goal of the module is to provide customers with important insights into their energy use in order to help them make informed decisions about their consumption and improve their overall efficiency.

Appears in: [Progress Report](#)

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Oracle Utilities Opower Energy Efficiency Cloud Service
Scale	Not applicable.

Customer Requirements

Category	Description
Billing Frequency	Monthly, bi-monthly, or quarterly.
Data Delivery Frequency	Monthly, bi-monthly, or quarterly.
Data Requirements	Not applicable.
Data History	A minimum of one historical bill.
Data Coverage	Not applicable.
Supported Fuels	Progress Reports: Electric-only, gas-only, dual fuel.

Limitations

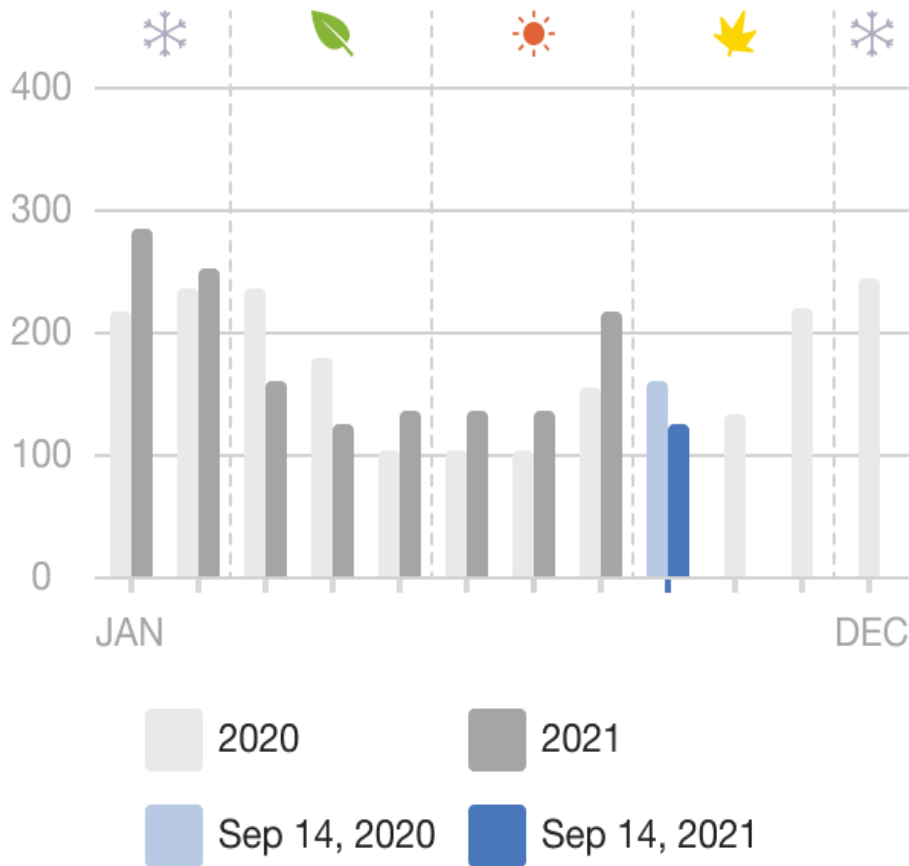
- The module can only be used in the [Progress Report](#).

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User Experience

This section describes the user experience of an electric-only customer, followed by how the user experience may vary.

Your energy use compared to last year



What could have caused your energy use to decrease?

Factors like lower appliance use or fewer household guests may have

Header: The header informs the customer that the module is a comparison of their current energy use to the previous year.

Bar chart: The bar chart displays the customer's bills over time and provides a comparison to previous energy use if enough data is available. The chart can accommodate different reporting periods. By default it will compare the customer's energy usage month over month going as far back as the beginning of the previous year. It also supports customers that have bimonthly or quarterly bill periods.

- **Unit of measurement:** The unit of measurement varies by fuel type: kWh, Therms, and units.
- **Legend:** The legend differentiates which bars on the chart are from the current and previous year, and which bars are from the current bill and the same billing period from the previous year.
- **Seasonal Icons:** Icons located above the chart place indicate the season in which the bill occurred.

Insight: The insight located directly below the chart legend informs the customer if their energy use has increased or decreased since the previous bill period..

Secondary Insight: The secondary insight of the Personal Tracker module provides explanations for why their energy use may have increased or decreased compared to the previous billing period, particularly in relation to changes in temperature. The module uses weather insights calculations to determines whether the average temperature was higher or lower between the current and comparison billing periods. Based on this calculation, Personal Tracker provides suggestions as to why the customer's energy use increased or decreased.

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User Experience Variations

The user experience of the feature may vary for customers and utilities depending on their service types (gas, electricity, dual fuel, and so on), available data, costs, locale, and other factors.

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Header	Required

Configuration Option	Input Value
<p>The header varies by fuel type and available data. The utility may select alternative headers.</p> <p>Default: Your energy use compared to last year</p>	<ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about selecting different headers.
<p>Bar Chart Colors</p> <p>The bar chart colors maybe altered</p> <p>Default: By default, the chart colors match the utility branding.</p>	<p>Required</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about changing the chart colors.
<p>Primary Insight</p> <p>The primary insight varies by fuel and report type.</p>	<p>Required</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about configuring the primary insight.
<p>Secondary Insight</p> <p>The primary insight varies by weather data and report type.</p>	<p>Required</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about configuring the secondary insight.

Promotion Module

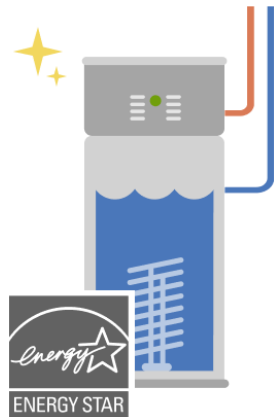
The Promotion module enables the utility to promote a program of their choice that is related to the available disaggregation categories: heating, cooling, water heating, appliances, lighting, and fridge. The module is designed to help the customer understand the cost and benefits of taking advantage of the program. Oracle Utilities Opower works directly with the utility to design the promotion module on the front of the report to be specific to the report promotion.

Appears in: [Promotion Report](#)

Design

This image shows an example of the module promoting a hot water heater.

A new water heater could help you save



\$400 UtilityCo Rebate

If your water heater is over 10 years old, now's a good time to upgrade to an ENERGY STAR® heat pump water heater. According to the U.S. Department of Energy, you can save over 50% on water heating costs—for a family of 3, that adds up to \$2,610 in energy savings over its lifetime!

Though they're a little pricey, you can make up the extra cost in as little as 3 years, plus save another \$400 with a limited-time UtilityCo rebate.

Claim your rebate

Configuration Options

Oracle Utilities Opower works directly with the utility to design the promotion module on the front of the report to be specific to the report promotion. The module elements are configurable. Talk to your Service Delivery Manager about configuring the module.

User Experience Variations

The user experience varies for customers depending on their energy use, service types, available data, costs, locale, and if the utility elects to promote an end use that is not the customer's largest end use category.

Heating and Cooling Combined

The heating and cooling combined messaging may include a feel-good or community type messaging focused on personal benefits of acting as a behavioral science lever. For example, the promotion may talk about how installing a smart thermostat is a great way to manage heating and cooling use without giving up comfort, and how to set thermostat schedules from a smart phone. It may also include messaging about the dollar savings a customer can realize, and how their thermostat energy savings can equate to an impact on greenhouse emissions.

Seasonal Breakout

The Seasonal Breakout module informs the customer what percentage of their energy use the previous summer or winter went toward cooling or heating. The purpose of this module is to highlight the how large a customer's heating or cooling costs can get and prepare them for the seasonal insights and tips presented later in the report.

Appears in: [Seasonal Breakout](#)

Design

This image shows an example of the module for a customer that receives the summer Seasonal Report.

Cooling has a big impact on summer energy bills

20%

of your total energy use went towards **cooling*** last summer

*Can include window units, central AC, and fans

Configuration Options

There are no supported configuration options for this module.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Winter Seasonal Report

The winter seasonal report focuses on the impact that heating had on the customer's previous winter energy bills. The explainer text below the insight notes that the calculation considers furnaces, boilers, baseboard heaters, and space heaters.

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Seasonal Normative Comparison

The Seasonal Normative Comparison module compares the customer's cooling or heating energy use from the previous season compared to other homes. This comparison motivates them to reduce cooling energy use during the upcoming extreme weather season.

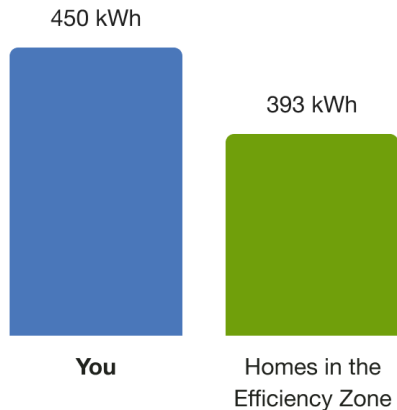
Appears in: [Seasonal Report](#)

Design

This section describes the summer Seasonal Normative Comparison experience for a customer whose program includes an Efficiency Zone.

LAST SUMMER

You used **more** on cooling than homes in the Efficiency Zone*



*Homes in the Efficiency Zone are the 20% of similar homes that used the least amount of energy from Jun 6 - Aug 30, 2020.

Configuration Options

There are no supported configuration options for this module.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Winter Seasonal Variation

The winter version of the Seasonal Neighbor Comparison compares the customers heating energy use from the previous winter to other homes in order to motivate them to reduce heating energy use during the upcoming winter. It varies from the summer version of the report in the following ways:

- **Normative Message Label:** The label identifies the comparison season. For example, "Last Winter."
- **Insight:** A state-dependent insight focused on heating use summarizes the information in the bar chart. For example, "You used more on heating than homes in the Efficiency Zone."

Normative Comparison Type

The type of normative comparison used in this module is consistent with the comparison graph used in the customer's Progress Report. For example, customers who receive a two-bar Neighbor Comparison as part of their Progress Report receive a two-bar Seasonal Neighbor Comparison. "Efficient homes" is used for Neighbor Comparison recipients in the insight, graph label, and explainer areas for each data state.

Insight Variations

The module insight varies depending on the graph state. The following table provides an example of how the module changes for a customer whose program includes an Efficiency Zone.

Graph State	Insight	Explainer
Less than efficient homes	You used less on [cooling/heating] than homes in the Efficiency Zone	Homes in the Efficiency Zone are the 20% of similar homes that used the least amount of energy from [Date - Range].
More than efficient homes	You used more on [cooling/heating] than homes in the Efficiency Zone	
Same as efficient homes	Nice work! You used about the same amount of energy on [cooling/heating] as homes in the Efficiency Zone	

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Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Explainer This text defines the season date range. Default: Based on utility branding guidelines	Optional Choose one of the following: <ul style="list-style-type: none">■ Use the default.■ Contact your Delivery Team about alternative text.

Subject Line, Header, and Footer

The subject line and header are used to engage the customer and brand the communication. The footer provides customers with links to manage preferences and unsubscribe from the email channel. It also contains the utility address, necessary legal text, and optional app download and social media links. The user experience varies by report type.

Appears in: All [report types](#).

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Energy Efficiency
Scale	Not applicable.

Customer Requirements

Category	Description
Billing Frequency	Not applicable.
Data Delivery Frequency	Not applicable.
Data Requirements	Not applicable
Data History	Data History: For the Promotion Report Header, a minimum of six bills is required for non-AMI customers, and a minimum of 60 days of AMI reads is required for AMI customers.
Data Coverage	Not applicable.

Category	Description
Supported Fuels	Not applicable.

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User Experience

This section describes the user experiences for the various report types.

Subject Line

The subject line is designed by Oracle Utilities to engage customers. All subject lines include a customer's name, as our research has shown that including the customer's name results in a higher open rate.

Progress Report: Utilities have the choice of using a standard default subject line each time "[first name, last name] Your Home Energy Report is here" or choosing a dynamic subject lines that vary based on customer state.

Promotional Report: The subject line varies by disaggregation category. For example, it may show the customer's name and ask how much they are spending on a disaggregation category such as heating, cooling, or appliances.

Welcome Report: "[first name], check out your new Home Energy Report"

Limited Income Report: The subject line varies by report type.

- **Limited Income Welcome Report:** "[first name], check out your new Home Energy Report"
- **Limited Income Progress Report:** Utilities have the choice of using a standard default subject line each time "[first name, last name] Your Home Energy Report is here" or choosing dynamic subject lines that vary based on customer state.

Seasonal Report: The default subject line is designed to shift the customer's focus to seasonal energy efficiency. "Hi [first name, last name], see how much energy you used last [winter/summer]"

Annual Report: The default subject line is designed to shift the customer's focus to their energy use over the last calendar year. "[first name, last name], here's your [YYYY] Energy Lookback"

Time of Use Report: The default subject lines are designed to acknowledge the time of use plan experience. The subject line varies by report type.

- **Time of Use Welcome Report:** "[first name], check out the new Home Energy Report"
- **Time of Use Progress Report:** "[first name, last name] Your Home Energy Report is here"

Solar Report: The Solar Report includes a static subject line that emphasizes that the customer is part of a solar report experience. The subject line varies by report type.

- **Solar Welcome Report:** "Hi [first name] your Home Energy Report for solar households is here"
- **Solar Progress Report:** "Hi [first name], your Home Energy Report is here"

Electric Vehicle Report: Utilities have the choice of using a standard default subject line each time "[first name, last name] Your Home Energy Report is here."

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Header

The report headers are distinct and appear at the top of each communication. The header of the Promotion Report header highlights three end-uses in the customer's home where their use is the highest or they may benefit from making behavioral changes and taking advantage of a utility-offered promotion. The rest of the reports provide colorful introductions to the report.

Appears in: All [report types](#).

Progress Report

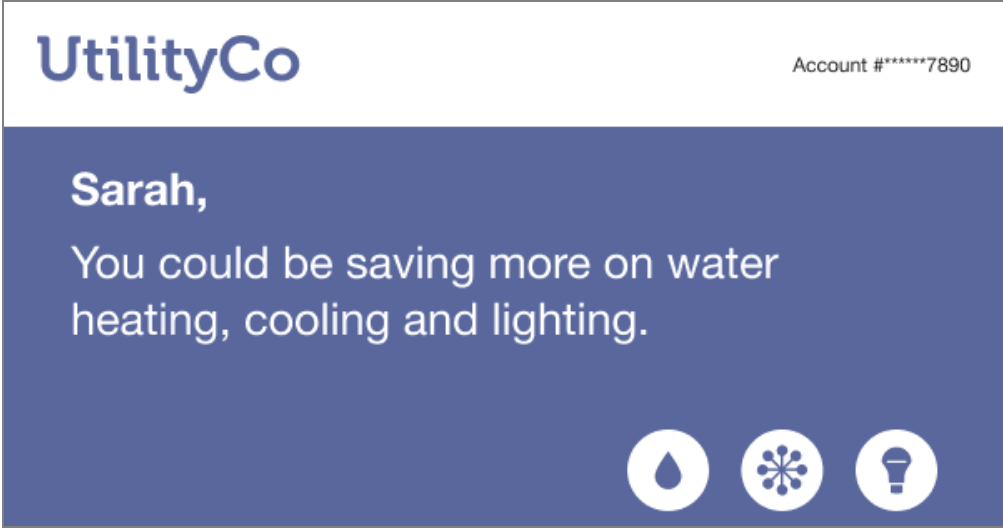
This image is an example of the header for the [Progress Report](#), [Limited Income Progress Report](#), and [Time of Use Progress Report](#).

Sarah,
Here's your Home
Energy Report



Promotion Report

This image is an example of the [Promotion Report](#) header.



Welcome Report

This image is an example of the [Welcome Report](#), [Limited Income Welcome Report](#), and [Time of Use Welcome Report](#) header.



Seasonal Report

These images are examples of the [Seasonal Report](#) headers.

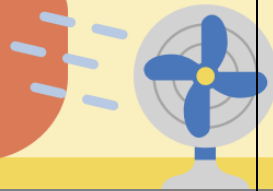
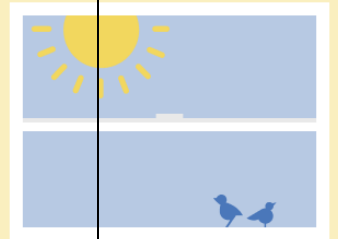
Winter
Seasonal
Report

Summer Seasonal Report

UtilityCo

Account #*****7890

Warmth in the air?
Time to prepare!



Annual Report

This image is an example of the [Annual Report](#) header.

Energy Lookback

A review of your 2021 energy use
and how to save more this year



Solar Report

This image is an example of the [Solar Report](#) header.

Sarah,
Here's your Home
Energy Report



Electric Vehicle Report

This image is an example of the [Electric Vehicle Report](#) header for an existing customer.

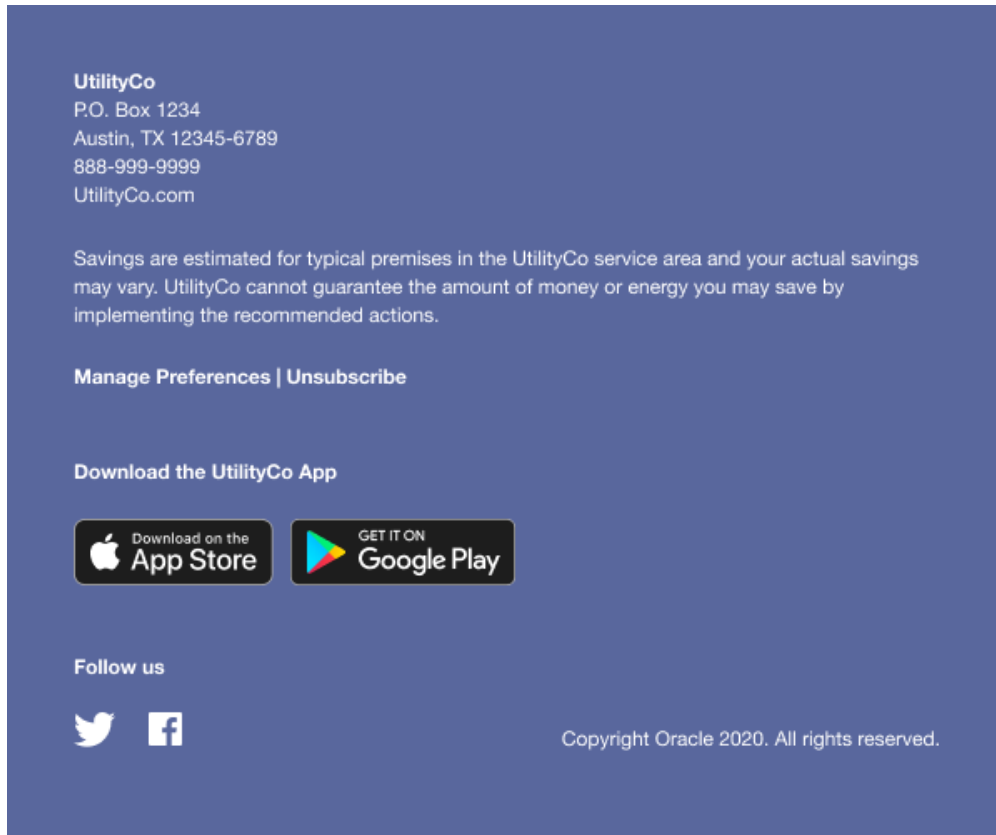
Sarah,
Here's your Home
Energy Report



Footer

The footer is included at the bottom of every report and includes components that provide more context about the report, such as the utility's contact information and legal disclaimers.

This image is an example of the Footer module.



User Experience Variations

The user experience of the feature may vary for customers and utilities depending on their service types (gas, electricity, dual fuel, and so on), available data, costs, locale, and other factors. For more information, see Introduction Modules description in the [Oracle Utilities Opower Energy Efficiency Cloud Service Overview](#) and go to the User Experience Variations section.

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Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
<p>Utility Logo</p> <p>The RGB version of the utility logo as an .ai file. Oracle Utilities Opower will configure the logos</p>	<p>Required</p> <p>Provide the utility logo in the Oracle Utilities Opower Platform</p>

Configuration Option	Input Value
<p>appropriately for the communication.</p> <p>Example: UtilityCo_Logo_RGB.ai</p>	<p>Configuration Guide.</p>
<p>Email Subject Line (Not Depicted)</p> <p>Clients can choose between a static (default) or dynamic subject line in the Progress Report. The promotional report uses a disaggregation-based subject line.</p> <p>Default:</p> <p>Progress Report: "[first name, last name] Your Home Energy Report is here"</p> <p>Promotional Report: The subject line varies by disaggregation category. Contact your Delivery Team about subject line options.</p> <p>Welcome Report: "[first name], check out your new Home Energy Report"</p> <p>Limited Income Report: The subject line varies by report type:</p> <ul style="list-style-type: none"> ■ Limited Income Welcome Report:"[first name], check out your new Home Energy Report" ■ Limited Income Progress Report: "[first name, last name] Your Home Energy Report is here" <p>Seasonal Report: "Hi [first name, last name], see how much energy you used last [winter/summer]".</p> <p>Time of Use Report: The subject line varies by report type:</p> <ul style="list-style-type: none"> ■ Time of Use Welcome Report: "[first name], check out the new Home Energy 	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about using a dynamic subject line.

Configuration Option	Input Value
<p>Report" alerts the customer to a new report experience.</p> <ul style="list-style-type: none"> ■ Time of Use Progress Report: "[first name, last name] Your Home Energy Report is here." <p>Annual Report: "[first name, last name], here's your [YYYY] Energy Lookback"</p> <p>Solar Report: The subject line varies by report type:</p> <ul style="list-style-type: none"> ■ Solar Welcome Report: "Hi [first name] your Home Energy Report for solar households is here" ■ Solar Progress Report: "Hi [first name], your Home Energy Report is here" <p>Electric Vehicle Report: Utilities have the choice of using a standard default subject line each time "[first name, last name] Your Home Energy Report is here"</p>	
<p>Preference Prompt</p> <p>A link to the Energy Efficiency Web Portal page or utility preferences page where a customer can edit their report preferences.</p> <p>Default: Manage Preferences</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default prompt. ■ Contact your Delivery Team about an alternative prompt.
<p>Preference URL</p> <p>Default: UtilityCo.com/preferences</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default URL. ■ Contact your Delivery Team about an alternative URL.

Configuration Option	Input Value
<p>Unsubscribe Prompt</p> <p>A link to a page where customers can unsubscribe from Email Home Energy Reports v3</p> <p>Default: Unsubscribe</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default prompt. ■ Contact your Delivery Team about an alternative prompt.
<p>Unsubscribe URL</p> <p>Default: UtilityCo.com/unsubscribe</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default URL. ■ Contact your Delivery Team about an alternative URL.

Thermostat Adjustment

The Thermostat Adjustment module provides customers with a recommended thermostat adjustment for the season. It also includes an additional recommendation to purchase a smart thermostat in order to automate seasonally appropriate savings on heating or cooling.

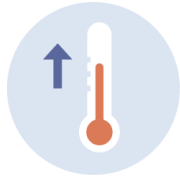
Appears in: [Seasonal Report](#)

Design

This image shows an example of the Thermostat Adjustment experience for a customer that receives the summer Seasonal Report.

THIS SUMMER

When you're out for a few hours, turn up your thermostat for easy energy savings



Try raising settings by

5-8°F

Recommended by the Department of Energy

Make it easier: Installing a smart thermostat lets you switch between home and away temperature settings using your smartphone. If you're away at regular times during the week, you can set your thermostat to adjust automatically based on your schedule.

Configuration Options

Configuration Option	Input Value
<p>Source</p> <p>The recommended adjustment tells the customer how they should modify their thermostat as recommended by a source.</p> <p>Default: The Department of Energy.</p>	<p>Optional</p> <p>Select one of the following:</p> <ul style="list-style-type: none">■ Use the default text.■ Contact your Delivery Team about altering the text.
<p>Details</p> <p>The details encourage the customer to make saving energy easier by purchasing a smart thermostat so that they can automate their thermostat adjustment.</p> <p>Default: "Make it easier: Installing a smart</p>	<p>Optional</p> <p>Select one of the following:</p> <ul style="list-style-type: none">■ Use the default text.■ Contact your Delivery Team about altering the text.

Configuration Option	Input Value
thermostat lets you switch between home and away temperature settings using your smartphone. If you're away at regular times during the week, you can set your thermostat to adjust automatically based on your schedule."	

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Winter Seasonal Report Thermostat Adjustment

The winter version of the Seasonal Report encourages customers to adjust their thermostat setting to alignment with U.S. Department of Energy recommendations for the winter season. The winter version varies from the summer version in several ways:

Module label: The label identifies the season applicable to the thermostat adjustment. For example, "This Winter."

Header: The header encourages customers to adjust their thermostat when they go to bed to save energy.

Image: An illustration is paired with large number call out of degrees to lower the thermostat.

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Time of Use 101

The Time of Use 101 module educates customers about when electricity is most expensive based on their time of use rate plan. The module provides customers with information such as:

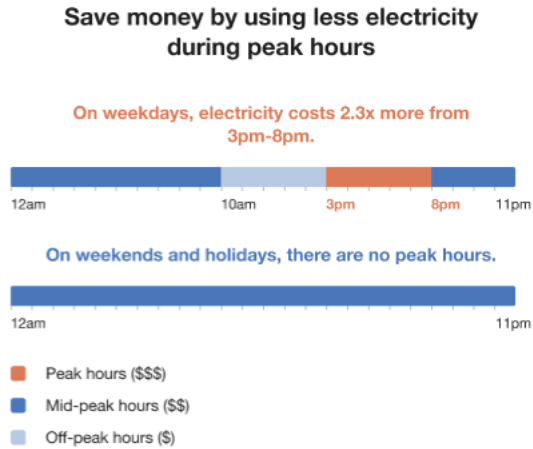
- Whether electricity prices differ on weekdays and weekends
- How much more expensive peak prices are than off-peak prices
- The hours during which electricity is most expensive
- A visual time line that displays off-peak, partial-peak, and peak hours

The module serves the dual purpose of educating customers about their specific rate plan at the specific time the report is generated and providing educational information about why saving during peak is especially important. It includes a heading, weekday graph, weekend graph, explainer, call-to-action, and seasonal details where applicable.

Appears in: [Time of Use Report](#)

Design

This image shows an example of the Time of Use 101 module for a customer with a single weekday peak, no weekend peak hours, and a seasonal variation.



Why does it matter when I use electricity?

Peak hours are when energy demand is highest in our region. Using less electricity during peak hours will save you more on your bill, and helps us deliver cleaner energy to the whole community.

This Time-of-Use schedule lasts May 1-Sep 30. [View the full details of your rate plan.](#)

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
<p>Heading</p> <p>The heading tells the customer that they can save money by using less energy during peak hours.</p> <p>Default: "Save money by using less electricity during [peak hours]"</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none">■ Use the default labels.■ Contact your Delivery Team about configuring the heading.

Configuration Option	Input Value
<p>Call to action</p> <p>The call to action invites the customer to view their full plan details and provides a link to the utility's rate plan page.</p> <p>Default: "View your full details of your rate plan."</p>	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default labels. ■ Contact your Delivery Team about configuring the call to action
<p>Call to action URL</p> <p>The call to action invites the customer to view their full plan details and provides a link to the utility's rate plan page.</p> <p>Default: The URL links to the utility's rate plan page.</p>	<p>Required</p> <p>Contact your Delivery Team to discuss URL options.</p>

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Timeline subheading

The timeline subheading text varies based on the customer's rate plan and the type of days displayed in the sliding scale. The following table shows examples of the insight statement variations for different rate plans and day scenarios.

Peak Type	Peak Period	Timeline subheading
Single Peak	Daily	Every day, electricity costs X from [X am/pm] - [X am/pm].
	Week day	On weekdays, electricity costs X from [X am/pm] - [X am/pm].
	Weekend	On weekends, electricity costs X from [X am/pm] - [X am/pm].

Double Peak	Daily	Every day, electricity costs X from [X am/pm] - [X am/pm] and [X am/pm] - [X am/pm].
	Week day	On weekdays, electricity costs X from [X am/pm] - [X am/pm] and [X am/pm] - [X am/pm].
	Weekend	On weekends, electricity costs X from [X am/pm] - [X am/pm] and [X am/pm] - [X am/pm].
No Peak	Weekend - Same All Day	On weekends, there are no peak hours.
	Weekend - Multiple Off-Peak Rates	

Tip Modules

Tip modules present actionable energy savings tips for customers to follow. Tip module designs vary by report type as well as available customer and utility data.

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Energy EfficiencyCloud Service
Scale	There is no limit on the number of customers per utility.

Customer Requirements

Category	Description
Billing Frequency	Not applicable
Data Delivery Frequency	Not applicable
Data Requirements	AMI data, Appliance Detection and Disaggregation data.
Data History	Not applicable
Data Coverage	Not applicable
Supported Fuels	Electric-only, gas-only, and dual fuel.

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Limitations

User Experience

This section describes the user experience for tips in the different report types.

Progress Report Tips

Appears in: [Progress Report](#)

The [Progress Report](#) includes one or up to three tip modules that highlight personalized aspects of the tip experience.

This image is an example of the progress report tip design.

Top recommended tip for you

This low-cost tip was personalized to help you save.



Install efficient showerheads

Showering accounts for about 40% of your home's hot water use, but you can cut costs without sacrificing comfort. Energy-efficient showerheads can reduce hot water use without compromising water pressure.

Save up to \$13 per year

Get more savings tips

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Promotion Report Tips

Appears in: [Promotion Report](#)

The [Promotion Report](#) tips use disaggregation data and/or [Home Energy Analysis](#) data to provide customers with low or no-cost alternative actions to the promotion. They include two actions that relate to the customer's top end uses or the promotion use case.

This image is an example of a promotion report tip.

More ways you can save right now

Cooling

19% of your total use last year

Use fans instead of AC

Because fans are targeted to a specific area, they can be more cost effective than cooling your entire home. To save electricity, raise the thermostat setting by 4°F and use fans to keep cool.

Save up to \$28 per year

Lighting

10% of your total use last year

Spotlight your work spaces

Overhead bulbs often provide more light than you need. Using a kitchen counter light while preparing dinner—or a small lamp when reading a book—brings better light to the task at hand and saves energy.

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Seasonal Report Tips

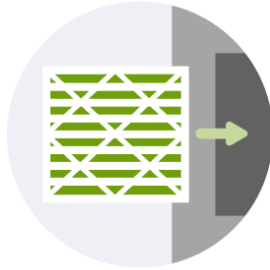
Appears in: [Seasonal Report](#)

The Seasonal Report tips provide customers with two seasonally relevant tips to help them lower their summer or winter energy use. The first tip is dedicated to saving on cooling or heating and the second helps them save on another end use. The module also points customers to more tips on the web.

This image is an example of tips included in the summer version of the Seasonal Report.

More ways to save this summer

These low-cost tips were chosen for you based on how you use energy in your home.



Schedule maintenance for your central AC

If your AC system isn't properly maintained, it will cost more to run and require more frequent repairs. Schedule an inspection each spring to ensure your cooling system is running safely and efficiently before summer.

Save up to \$90 per year



Select efficient home office equipment

If you have a home office, choosing an efficient printer, copier or scanner could cut its energy use by 30%. Choose ENERGY STAR® models and use low-power modes to reduce your bills.

Save up to \$60 per year

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Welcome Report Tips

Appears in: [Welcome Report](#)

The [Welcome Report](#) includes up to three tip modules that highlight personalized aspects of the tip experience.

This image is an example of the [Welcome Report](#) tips design.

Top recommended tips for you

Based on your smart meter, your energy use was highest in heating, refrigerator, and clothes drying.



Run ceiling fans in reverse during the winter to circulate warm air

Warm air rises and collects near ceilings. In the winter, you can run your ceiling fan in reverse on a low setting to circulate warm air more evenly. Then lower your thermostat to save on heating costs.

Save up to \$13 per year



Make sure your refrigerator door seal is tight

If the seal on your refrigerator or freezer door isn't doing its job, your appliance could be leaking some of the cooled air it produces. To fix the problem, replace your leaky seal with a new one.

Save up to \$13 per year

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Annual Report Tips

Appears in: [Annual Report](#).

The Annual Report includes tips that are designed to help customers take stock of their energy use from the past year, and to share new insights about their energy use in order to inspire customers to take action to save energy.

Top tip: The first tip promotes an energy assessment program or includes a tip from the utility tip library. Possible energy assessment program promotions include:

- In-person energy audit
- Utility's virtual audit program
- Oracle UtilitiesOpower's Home Energy Analysis

Second tip: The second tip includes an easy tip that the customer can act on right away to save energy.

This image is an example of the Annual Report tips design for customers that receive a utility virtual home energy assessment program tip and a generated tip in their report.

Prepare for a year of energy savings

Start the new year off right—try these tips



Schedule a virtual home energy assessment

You could save up to 30% on your energy bill by making upgrades identified in a home energy assessment. [Sign up for a no-cost virtual home energy assessment](#) today so we can help you start saving right away.

Save up to \$280 per year



Use a moisture sensor on your dryer to avoid over-drying

Hang drying is the most energy-efficient and low-cost way to dry clothes. If you do need to use a dryer, make sure to run

Save up to \$30 per year

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Time of Use Report Tips

Appears in: [Time of Use Reports](#)

The [Time of Use Progress Report](#) includes three rotating tip modules that highlight personalized aspects of the tip experience that can help customers on time of use plans save energy and money. Possible tip modules include:

- **Disaggregation Tip Module:** Provides the customer with one or two AMI context tips focused on general energy efficiency.
- **Large Appliance Tip Module:** Highlights four large appliances that typically consume a lot of electricity when run, and provides a link to where customers can learn more about saving energy.
- **Two Tip Module:** Provides the customer with a peak-savings tip and an anytime-savings tip.

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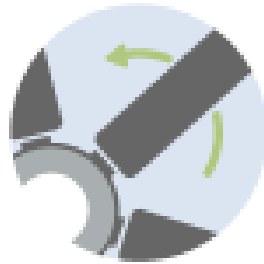
Disaggregation Tip Module

The disaggregation tip includes one or two AMI context tips focused on general energy efficiency. The tips shown are determined by the customer's top energy use category.

This image is an example a disaggregation tip module containing two tips:

Top recommended tips for you

Based on your smart meter, your energy use was highest in heating and clothes drying.



Run ceiling fans in reverse during the winter to circulate warm air

Warm air rises and collects near ceilings. In the winter, you can run your ceiling fan in reverse on a low setting to circulate warm air more evenly. Then lower your thermostat to save on heating costs.

Save up to \$13 per year



Use a moisture sensor on your dryer to avoid over-drying

Hang drying is the most energy-efficient and low-cost way to dry clothes. If you do need to use a clothes dryer, make sure to run only full loads and remove lint from the filter after each cycle.

Save up to \$4 per year

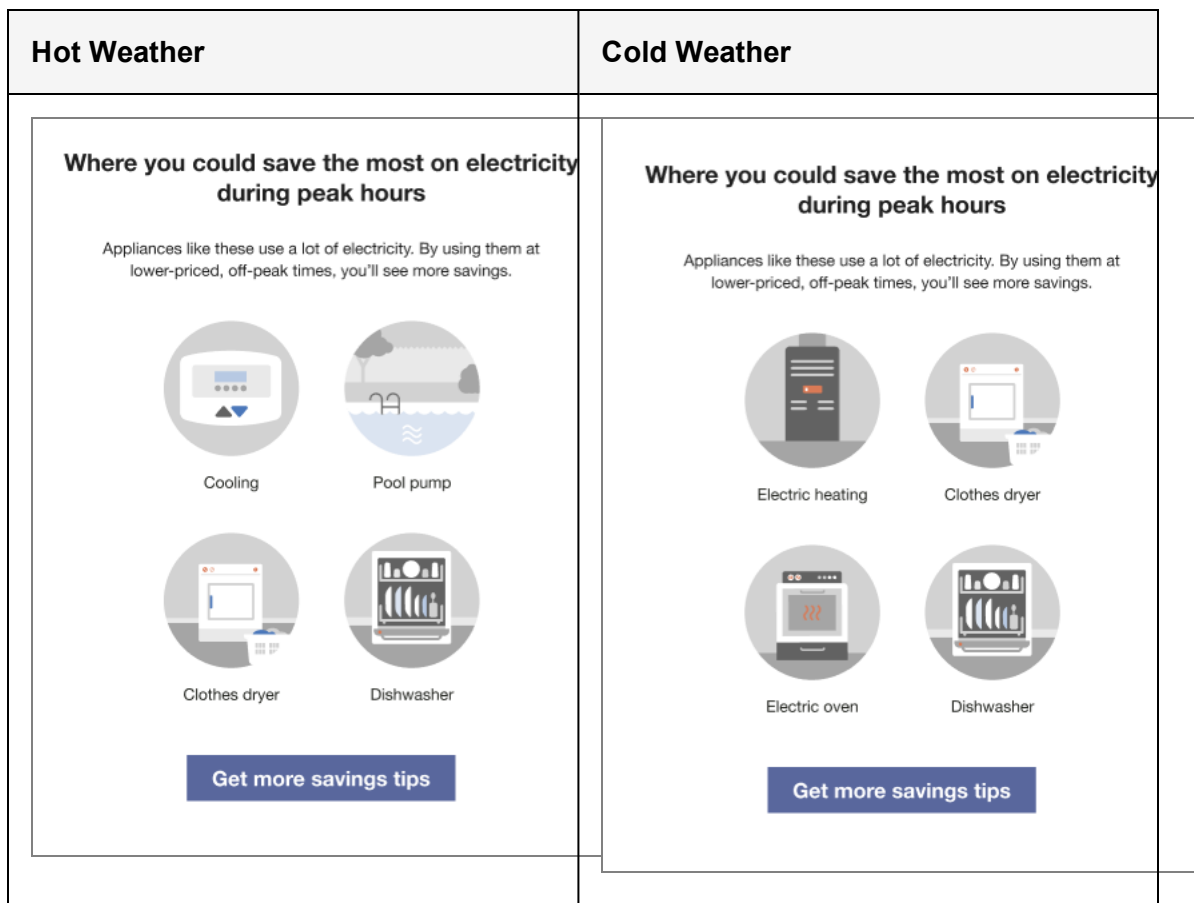
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Large Appliance Tip Module

The Large Appliance tip highlights four large appliances that typically consume a lot of electricity when run, and provides a link to where customers can learn more about saving energy. The module is designed to help educate customers on TOU rate plans about the types of appliances that they should try to avoid during peak hours when electricity is highest in demand. The module has two, season-specific states:

- **Hot Weather:** The hot weather state includes the spring and summer seasons.
- **Cold Weather:** The cold weather state includes the fall and winter seasons.

These images are examples of the Large Appliance Tip design for hot and cold weather.



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Two Tip Module

The two tip provides the customer with a peak-savings tip and an anytime-savings tip. The peak tip is identified as such so that the customer knows when to act on that tip. The general energy-efficiency tip leverages tip targeting to provide the customer with the most relevant tip

from any end use category. The module includes a tip cost label that shows the general level of financial effort involved in following a tip to help the customer focus on their rate plan as a signal for if and when to act on a tip.

This image is an example of the two tip module.


Tips for peak hours and beyond



Use a power strip and turn it off during peak hours

Many devices draw power even when turned off. Use a power strip to turn off several electronics at once, including your TV, game console, and computer. Smart power strips can make it even easier to switch them all off.

This tip is low cost



Open your shades on winter days for natural light and warmth

Take advantage of winter sunlight. By opening blinds during the day to use natural light and capture free heat, you'll be able to lower the temperature on your thermostat and save on heating costs.

This tip is free

[Get more savings tips](#)

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Limited Income Report Tips

Appears in: [Limited Income Report](#)

The Limited Income Report includes one or up to three tip modules that highlight personalized aspects of the tip experience.

This image is an example of the Progress Report tips design.

Top recommended tip for you

This low-cost tip was personalized to help you save.



Install efficient showerheads

Showering accounts for about 40% of your home's hot water use, but you can cut costs without sacrificing comfort. Energy-efficient showerheads can reduce hot water use without compromising water pressure.

Save up to \$13 per year

Get more savings tips

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Paired Tips

Appears in: [Limited Income Report](#), [Electric Vehicle Report](#)

The Paired Tips module use disaggregation data and/or [Home Energy Analysis](#) data to provide customers with a tip related to the energy use highlighted in the [What Uses Most](#) module.

Note: Paired tips must be combined with the [What Uses Most](#) module.

This image is an example of an air leak tip selected to pair with a top energy use highlighted in the [What Uses Most](#) module.

Top heating tip to help you save



Seal air leaks

In most homes, if you add up the air leaks, it is similar to leaving a window open. Sealing air leaks can save you up to 20% on your heating and cooling costs. Weatherstrip windows and doors and seal cracks with caulk.

Save up to \$35 per year

Find more ways to save

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Solar Report Tips

Appears in: [Solar Report](#)

The [Solar Report](#) includes one or up to three tip modules that highlight personalized aspects of the tip experience. Recipients of the Solar Report are eligible to receive solar tips in addition to the standard tips used in other report types.

This image is an example of the Solar Report tips design for a module that includes three tips.

Top recommended tip for you

This tip was personalized based on your Home Energy Survey.



Run ceiling fans in reverse during the winter to circulate warm air

Warm air rises and collects near ceilings. In the winter, you can run your ceiling fan in reverse on a low setting to circulate warm air more evenly. Then lower your thermostat to save on heating costs.

Save up to \$13 per year



Trim trees that shade your solar panels

Tree branches casting shade over your solar panels can significantly reduce the amount of electricity your panels produce. It isn't necessary to cut down entire trees, but it is a good idea to trim branches.



Use solar outdoor lights

Save energy by replacing outdoor lights with solar lights. They don't need electricity and can provide light almost anywhere, like along an outdoor path.

Save up to \$45 per light per year

Get more savings tips

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User Experience Variations

The user experience of the feature may vary for customers and utilities depending on their service types (gas, electricity, dual fuel, and so on), available data, costs, locale, and other factors. For more information, see Introduction Modules description in the Energy Efficiency Cloud Services Overview Guide and go to the User Experience Variations section.

Limited Income Report Tips

AMI and Appliance Detection and Disaggregation

If the utility has AMI and appliance detection and disaggregation data, the tip is related to the customer's highest disaggregated end use energy category. For example, if the customer spends the most energy on heating, the tip will be focused on heating.

Completed Home Energy Analysis

If the customer completed their Home Energy Analysis in the past and there is existing survey data, the tip copy indicates that the tips are personalized based on the results of the customer's survey.

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Progress Report Tips

AMI and Appliance Detection and Disaggregation

If the utility has AMI and appliance detection and disaggregation data, the tip is related to the customer's highest disaggregated end use energy category. For example, if the customer spends the most energy on heating, the tip will be focused on heating.

Completed Home Energy Analysis

If the customer completed their Home Energy Analysis in the past and there is existing survey data, the tip copy indicates that the tips are personalized based on the results of the customer's survey.

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Promotion Report Tips

Utility selects one end use

Tips are displayed for the top two end uses (excluding the promotion end use).

Utility selects heating and cooling combined

Tips provide free and low-cost ways to save for heating and cooling as an alternative to the promotion on the front, which is likely a larger investment.

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Seasonal Report Tips

Contexts

Context helps the customer understand why specific tips have been selected for them. All contexts are shown randomly, with the exception of the "recent Home Energy Analysis completion context" which is always shown if a customer has completed Home Energy Analysis since their last report was generated. The context statement that appears for a customer varies as follows:

- AMI customers who have completed Home Energy Analysis can receive any context.
- AMI customers who have not completed Home Energy Analysis can receive the AMI context or the cost category/no information context.
- Non-AMI customers who have completed Home Energy Analysis can receive both Home Energy Analysis contexts and the cost category/no information context.
- Non-AMI customers who have not completed Home Energy Analysis can only receive the cost category/no information context.

Winter Experience Variation

The tips module for the winter Seasonal Report provides customers with two seasonally relevant tips to help them lower their winter energy use. The first tip helps them save on heating and the second tip helps them save on another targeted end use. The module also points customers to more tips on the web, ideally to a winter tip guide when available, so that they can learn more.

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Welcome Report Tips

AMI and Appliance Detection and Disaggregation

If the utility has AMI and appliance detection and disaggregation data, the tip is related to the customer's highest disaggregated end use energy category. For example, if the customer spends the most energy on heating, the tip will be focused on heating.

Completed Home Energy Analysis

If the customer completed their Home Energy Analysis in the past and there is existing survey data, the tip copy indicates that the tips are personalized based on the results of the customer's survey.

Welcome Report - Legacy Customer, Limited Income Report - Legacy Customer

The upper right corner of the module includes a number that corresponds to the "Better tips and insights" highlight in the [Welcome](#) module.

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Annual Report Tips

In-home Utility Home Energy Analysis

If the utility elects to run an in-home Home Energy Analysis program, the top tip encourages the customer to schedule their in-home home energy analysis appointment.

Oracle Utilities Opower Home Energy Analysis

If the utility elects to use the Oracle Utilities Opower Home Energy Analysis, the top tip encourages the customer to complete their [Home Energy Analysis](#) to improve their tip experience.

Two Tip Library Tips

If the utility elects to omit an in-home home energy analysis program tip from the report, both tips are pulled from the utility's tip library.

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Time of Use Report Tips

There are no supported user experience variations.

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Paired Tips

There are no supported user experience variations.

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Solar Report Tips

AMI and Appliance Detection and Disaggregation

Solar customers are not eligible for AMI tip context.

Completed Home Energy Analysis

If the customer completed their Home Energy Analysis in the past and there is existing survey data, the tip copy indicates that the tips are personalized based on the results of the customer's survey.

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Annual Report Tips

In-home Utility Home Energy Analysis

If the utility elects to run an in-home Home Energy Analysis program, the top tip encourages the customer to schedule their in-home home energy analysis appointment.

Oracle Utilities Opower Home Energy Analysis

If the utility elects to use the Oracle Utilities Opower Home Energy Analysis, the top tip encourages the customer to complete their [Home Energy Analysis](#) to improve their tip experience.

Two Tip Library Tips

If the utility elects to omit and home energy analysis program tip from the report, both tips are pulled from the utility's tip library.

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Configuration Options

The content within the progress report tip is customizable in coordination with Oracle UtilitiesOpower. Depending on the purpose of the module, Oracle UtilitiesOpower may require additional inputs from you. [Contact your Delivery Team](#) about selecting tips that support the report experience.

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Welcome

The Welcome module introduces new and existing customers to the Email Home Energy Report v3 experience. The report is designed to meet the needs of new and legacy customers:

Legacy customers: Customers that have received earlier versions of the reports in the past are considered legacy customers. The welcome module for legacy customers acknowledges how the report has changed.

New customers: Customers that have never received an Email Home Energy Report v3 are considered new customers. The welcome module introduces new customers to the report insights.

Appears in: [Welcome Report](#), [Limited Income Report](#), [Time of Use Report](#), [Solar Report](#)

Design

This image shows an example of the Welcome module for a new customer in the [Welcome Report](#).

Why are you receiving this?

These reports can help you save energy, which can lower your bill and help us deliver cleaner, more reliable energy to everyone. Here's what to expect:

- 1 Energy use insights**
You can learn about your energy use, and get helpful context to determine how you're doing.
- 2 Personalized ways to save**
You'll get helpful tips and personalized expert advice chosen specifically for your home.
- 3 Timely, tailored advice**
You'll also get seasonal advice and special savings opportunities in future reports.

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Heading Default: <ul style="list-style-type: none">■ New Customer: "Why are you receiving this?"■ Legacy Customers: "What's new in your report?"■ Solar Customers: "Why are you receiving this?"	Optional Choose one of the following: <ul style="list-style-type: none">■ Use the default.■ Contact your Delivery Team about altering the heading.
Introduction Text	Optional

Configuration Option	Input Value
<p>The introduction text only appears in welcome modules sent to new customers.</p> <p>Welcome Report Default - New Customers: "These reports can help you save energy, which can lower your bill and help us deliver cleaner, more reliable energy to everyone. Here's what to expect:"</p> <p>Limited Income Welcome Report Default - New Customers: "These reports are designed to help you save energy and money, so your energy bill can be one less thing to worry about. Here's what to expect:"</p> <p>Time of Use Welcome Report Default - New Customers: "These reports provide insights about your energy use, so you can save more on your bill and make the most of your Time-of-Use (TOU) plan. Here's what to expect:"</p> <p>Solar Report Default: "These reports can help you save energy, which can lower your bill and help us deliver cleaner, more reliable energy to everyone. Here's what to expect:"</p>	<p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the text.
<p>Welcome Report Highlights Subheadings and Text - New Customers</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Energy use insights You can learn about your energy use and get helpful context to determine how you're doing. ■ Personalized ways to save You'll get helpful tips and personalized expert advice chosen specifically for your home. ■ Timely, tailored advice You'll also get seasonal advice and special savings opportunities in future reports. 	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the subheadings and text.
<p>Welcome Report Highlights Subheading and Text - Legacy Customers Only</p>	<p>Optional</p> <p>Choose one of the</p>

Configuration Option	Input Value
<p>Default:</p> <ul style="list-style-type: none"> ■ Energy use at a glance A quick summary to let you know how you're doing. ■ The Efficiency Zone This new graph shows a different view of your energy use, and how you stack up. ■ Better tips and insights Your reports are now more tailored to your home, making it easier to manage your energy use. 	<p>following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the text.
<p>Limited Income Welcome Report Highlights Subheadings and Text- New Customers</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Energy use insights You can learn about your energy use and get helpful context to determine how you're doing. ■ Personalized ways to save You'll get helpful tips and personalized expert advice chosen specifically for your home. ■ Savings and assistance programs You'll learn about energy efficiency programs that can help you save, as well as assistance programs you may qualify for. 	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the text.
<p>Limited Income Welcome Report Highlights Subheading and Text- Legacy Customers Only</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Energy use at a glance A quick summary to let you know how you're doing. ■ The Efficiency Zone This new graph shows a different view of your energy use, and how you stack up. ■ Better tips and insights 	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the

Configuration Option	Input Value
<p>Your report now gives a closer look at your home’s energy use, so you know where you have the biggest potential to save.</p>	<p>text.</p>
<p>Time of Use Report Highlights Subheading and Text- Legacy Customers Only</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Energy use at a glance A quick summary to let you know how you're doing. ■ The Efficiency Zone This new graph shows a different view of your energy use, and how you stack up. ■ Better tips and insights Your report now more tailored to your home, and will include ways to save during peak hours. 	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the text.
<p>Time of Use Report Highlights Subheadings and Text- New Customers</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Energy use insights You can learn about your energy use and get helpful context to determine how you’re doing. ■ Personalized ways to save You'll get helpful tips and personalized expert advice chosen specifically for your home. ■ Savings and assistance programs You’ll also get seasonal advice and special savings opportunities in future reports. 	<p>Optional</p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the text.
<p>Solar Report Highlights Subheadings and Text- All Customers</p> <p>Default:</p> <ul style="list-style-type: none"> ■ Energy use insights 	<p>Optional</p> <p>Choose one of the following:</p>

Configuration Option	Input Value
<p>You can learn about your net energy, and get helpful context for how you're doing compared to other solar households.</p> <ul style="list-style-type: none"> ■ Personalized ways to save You'll get helpful tips and personalized expert advice chosen specifically for your home. ■ Timely, tailored advice You'll also get seasonal advice and special savings opportunities in future reports. 	<ul style="list-style-type: none"> ■ Use the default. ■ Contact your Delivery Team about altering the text.

User Experience Variations

The user experience varies for customers depending on whether they are new or legacy customers, the type of report they receive, and the normative comparison type included in their email.

Welcome Report - Legacy Customers

The Welcome module in the Welcome Report varies for legacy customers in the following ways:

- **Heading:** The heading draws the customer's attention to what has changed in their report.
- **Introduction text:** Not applicable.
- **Welcome highlights:** The welcome highlights list how the report changes improve their report experience to help them save energy and lower their bills. The number next to each highlight corresponds to the related module:
 1. **Energy use at a glance:** This highlight refers to the [Efficiency Use Benchmark](#).
 2. **The Efficiency Zone:** This highlight refers to the [Efficiency Zone](#).
 3. **Better tips and insights:** This highlight refers to the [tip modules](#).

Limited Income Welcome Report - New Customers

The module language acknowledges aspects of the report experience that are beneficial to limited-income customers, while primarily focusing on energy efficiency and introducing the report.

The module varies for new limited income customers in the following ways:

- **Introduction text:** The introduction text frames the report as a tool to educate and reduce stress about the customer's energy bills.

- **Welcome highlights:** The welcome highlights list how the report changes improve their report experience to help them save energy and lower their bills:
 1. **Energy use insights:** This highlight refers to the [Energy Use Benchmark](#).
 2. **Personalized ways to save:** This highlight refers to the [Efficiency Zone](#) or [Neighbor Comparison](#).
 3. **Savings and assistance programs:** This highlight refers to the [tips module](#) with special focus on savings and assistance programs for limited income customers.

Limited Income Welcome Report - Legacy Customers

The module varies for legacy limited income customers in the following way:

- **Introduction text:** Not applicable.
- **Welcome highlights:** The welcome highlights list how the report changes improve their report experience to help them save energy and lower their bills.
 1. **Energy use insights:** This highlight refers to the [Energy Use Benchmark](#).
 2. **Personalized ways to save:** This highlight refers to the [Efficiency Zone](#) or [Neighbor Comparison](#).
 3. **Better tips and insights:** This highlight refers to the [tips modules](#) with special focus on potential savings.

Time of Use Welcome Report - Legacy Customer

This module varies for legacy customers on a time of use plan in the following ways:

- **Introduction text:** Not applicable.
- **Welcome highlights:** The Time of Use Report welcome highlights for legacy customers include:
 1. **Energy use insights:** This highlight refers to the [Energy Use Benchmark](#).
 2. **Personalized ways to save:** This highlight refers to the [Efficiency Zone](#) or [Neighbor Comparison](#).
 3. **Better tips and insights:** This highlight refers to the [Time of Use 101](#) module.

Time of Use Welcome Report - New Customer

This module varies for new customers on a time of use plan in the following ways:

- **Introduction text:** The introduction text explains that the purpose of the report is to help them save energy, which can lower their bill.
- **Welcome highlights:** The Time of Use Report welcome highlights for new customers include:

1. **Energy use insights:** This highlight refers to the [Energy Use Benchmark](#).
2. **Personalized ways to save:** This highlight refers to the [Efficiency Zone](#) or [Neighbor Comparison](#).
3. **Timely, tailored advice:** This highlight refers to the [Time of Use 101](#) module.

Solar Report - All Customers

All solar customers, regardless of new customer or legacy customer type, receive the same Welcome module in their first report. The module varies for solar customers in several ways:

- **Introduction text:** The introduction text explains that the purpose of the report is to help them save energy, which can lower their bill.
- **Welcome highlights:** The Time of Use Report welcome highlights for new customers include:
 1. **Energy use insights:** This highlight refers to the [Energy Use Benchmark](#).
 2. **Personalized ways to save:** This highlight refers to the [Neighbor Comparison](#).
 3. **Timely, tailored advice:** This highlight refers to the [solar tips](#).

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What Uses Most

The What Uses Most module educates customers about the top five energy uses in their home for the report period. One of the customer's top five energy uses is highlighted at the top of the module. The highlighted usage category heading varies depending on the highlighted category and module state (highest energy use, second highest energy use, most above regional average). It is immediately followed by the [Paired Tip](#) module, which provides a related energy-saving tip.

Note: While this module was designed for the limited-income customer experience, it can be used for other audience segments as well. [Contact your Delivery Team](#) to discuss module options.

Appears in: [Limited Income Report](#), [Electric Vehicle Report](#)

Requirements

Utility Requirements

Category	Description
Required Cloud Service	Energy EfficiencyCloud Service
Scale	Not applicable.

Customer Requirements

Category	Description
Billing Frequency	Monthly, bi-monthly, or quarterly
Data Delivery Frequency	Not applicable.
Data Requirements	<ul style="list-style-type: none"> ■ Minimum: Weather data and at least six historical bills. ■ Appliance Detection and Disaggregation: Appliance detection and disaggregation, heating and cooling disaggregation and/or simple disaggregation with Home Energy Analysis completion. ■ AMI Requirements: There are additional AMI data requirements to show advanced insights such as an appliance-level breakdown. Generally speaking, this requires about a years' worth of AMI data at hourly or sub-hourly resolutions.
Data History	A minimum of six bills is required for Non-AMI customers. A minimum of 60 days of AMI reads for AMI customers.
Data Coverage	Not applicable.
Supported Fuels	Electric-only, gas-only, dual fuel

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Limitations

Report Type: This module is available for the [Limited Income Report](#), and [Electric Vehicle Report](#) by default, but may be included in other report experiences. Contact your [Delivery Team](#) for more information.

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User Experience

This section describes the user experience for the What Uses Most module. The module varies by usage factors. See the [User Experience Variations](#) for additional information.





This image is an example of the module for a customer with water heating as the highest energy use in the billing period.

Heating was your highest energy use this period

Water Heating

33% of your total energy use

Your other energy uses

	EV Charging	24%
	Laundry	17%
	Dishwasher	9%
	Oven	6%

All the other energy uses, including electronics and lighting,

User Experience Variations

The user experience of the feature may vary for customers and utilities depending on their service types (gas, electricity, dual fuel, and so on), available data, costs, locale, and other factors. For more information, see Introduction Modules description in the [Oracle Utilities Opower Energy Efficiency Cloud Service Overview](#) and go to the User Experience Variations section.

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Configuration Options

There are no supported configuration options for this module.

Delivery

Oracle Utilities coordinates with a third-party email platform to send Email Home Energy Reports. This platform provides Oracle Utilities with information on send, bounces, opens, opt-outs, unsubscribes, and click-throughs. Oracle Utilities does not track the web behavior of a customer after they have clicked on a link in the Email Home Energy Report.

For programs that include both email and paper reports, [Email Home Energy Reports are usually generated during the same week as the corresponding paper [Home Energy Reports are generated.

Content is delivered directly in the email message with no attachments. This makes it more convenient for customers to quickly view the information, and it makes the emails less likely to be blocked by spam filters.

Delivery Cadence

Oracle Utilities supports the following delivery frequencies for Email Home Energy Report programs: monthly, bi-monthly, and quarterly. Because the reports are generated from data from the latest utility bill for each customer, the delivery cadence will depend on each customer's billing dates and the program design specified in your statement of work.

Delivery Options

For programs that include both email and paper reports, Email Home Energy Reports are usually generated during the same week as the corresponding Home Energy Reports. Email Home Energy Reports are typically sent on Friday afternoons so that customers will have time to review the reports over the weekend. However, delivery may be configured for days other than Friday. Ask your Service Delivery Manager which delivery options are best suited to your program.

Next Steps

After completing all required inputs in this guide, complete the following next steps.

1. Complete any other product-specific configuration guides provided to you by your Service Delivery Manager.
2. Submit all configuration guides and required documents to your Service Delivery Manager as an email attachment. Be sure to include the following:
 - The *Oracle Utilities Opower Platform Configuration Guide*
 - Utility branding guidelines
3. Update the Version table of this guide with your name, the date, and a descriptive comment. See "Version" on page 124.

Note: Once submitted to Oracle Utilities, all utility inputs recorded in the configuration guides are final and cannot be modified. Ensure that all configuration inputs are accurate before submitting them.

Version

The table below is used to track the version of this document. Comments in the table indicate the latest state of the document. For example, the utility could comment "Sent draft to Oracle Utilities" or "Final Sign-off" when the completed version of this document is returned to the Service Delivery Manager for product configuration. Fill out the next row in the table with your name, today's date, and a comment.

Name	Date	Comment

Contacting Your Delivery Team

Your Oracle Utilities Delivery Team is the group responsible for setting up, configuring, launching, or expanding your Oracle Utilities Opower program. Contact your Delivery Team if you have any questions about your program products and implementation.

To contact your Delivery Team:

1. Log in to Inside Opower (<https://inside.opower.com>). This is your portal for questions and information related to your program.
2. Go to the **Community** tab to see who is on your Delivery Team.
3. Contact any of the team members using the information provided.

If you need to report an issue or get technical support, contact [My Oracle Support](#).