Oracle Utilities Opower Inside Opower

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Contents

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Welcome to the Inside Opower User Guide. Use the information in this guide to understand how to use the features and functionality of Inside Opower.

Quick Links

Getting Started

Inside Opower is a tool that lets you manage your Oracle Utilities Opower program and provides you with insight into the performance of your program. You can use Inside Opower to do the following:

- Check on the success of your programs through data analytics
- Add and edit content in tips that appear in Oracle Utilities Opower products
- Schedule peak events
- Preview upcoming features
- Request access for new users
- Send feedback
- Contact Your Inside Opower Team
- View insights about your customers and the number of outbound communications they receive through easy-to-analyze downloadable reports

Requirements and Limitations

The following requirements and limitations apply to Inside Opower.

- **Browser Requirements**: The customer must use a supported web or mobile browser. Oracle Utilities Web products adhere to the Oracle Software Web Browser Support Policy.
- **Report Availability**: The reports that are available in Inside Opower, and the data that the reports and dashboards contain, depend on the Oracle Utilities Opower programs in which the utility is enrolled. There are no additional requirements for Inside Opower beyond the requirements of each program. For example, if a utility and customer meet the

requirements to see tips in the Oracle Utilities Opower Energy Efficiency Web Portal - Classic, the utility is also eligible to receive reports about tip actions in Inside Opower.

- **Feature Availability**: Some Inside Opower features may not be applicable or available to your utility because they are part of a paid add-on service. Contact Your Inside Opower Team
- **Tip Manager Language Support**: The Tip Manager is a feature that provides tip content in the language agreed upon between Oracle Utilities and the utility. The Tip Manager interface for editing tip content is only available in English.

Logging into Inside Opower

When you open Inside Opower, if you are not logged into the tool, you will see fields to type your **Email** and **Password**. From here, you can also click the **Forgot Your Password** link to recover your password and select the interface language from the **Language** drop-down list.

Navigating Inside Opower

After you sign into Inside Opower, you are automatically taken to the Home page. From the Home page, you can navigate to any part of Inside Opower. Use the left navigation bar to switch between **Programs**, **Data**, **Peak Events**, **Community**, and **Resources**. The Home page describes the most recent activity for Inside Opower, which includes:

- Notifications when new reports are ready
- Changes such as new widgets or modules
- Highlights from the Oracle Utilities Opower blog
- Upcoming energy community events

In addition, the Home page may have links to the Customer Service Tool and the Client Support Portal. For customers who have purchased the Opower Analytics Visualization (OAV) tool, links to OAV and the OAV admin console are included on the Home page.

Managing Your Inside Opower Account

You can manage your Inside Opower account by opening the **Settings** page. On the Settings page, you can change your password, update your name, change the language of the user interface, and manage your notification subscription preferences.

Managing Tips

You can manage the energy efficiency tips for your program by using the Tip Manager. Tip Manager is a configuration tool that lets you edit custom content that appears in the tips of your Oracle Utilities Opower web products and outbound communications. Editable content includes program-specific energy efficiency information such as rebates, tax incentives, recycling information, and other offers.

Searching for Tips

One of the first steps in managing tips for your program is to search for and find the tip you want to review or update. To search for tips:

1. Click the **Programs** tab.

2. Click **Client** to open the tip library.
3. Type the name of the tip in the **Title, name** field or select a filter from the **All tips** drop-down. The list of tips will be automatically filtered based on your selection. If there are multiple locales available in a Tip Library, use the drop-down list next to the library name to select the locale you need before searching.
4. Select a tip to view its details.

Viewing Excluded Tips

When you open the tip library, you can view tips that are excluded from your locale or utility. Click **View excluded tips** above the list of tips. If you see a tip on the excluded list that you want to include in the library, Contact Your Delivery Team.

Editing and Submitting Tips

1. Open the tip you want to edit from the list of tips in the Tips Library.
2. When the tip opens, on the left side of the page, you will see a preview of the tip that corresponds with the channel selected on the right side of the page. The layout and design of the tip changes based on the selected channel.
3. **Note**: When you open a tip, you can navigate to the previous or the next tip by using the **Previous Tip** and **Next Tip** buttons at the bottom of the page. You can also change your filters using the **All tips** drop-down menu also located at the bottom of the page.
4. Click the pencil icon above the list of channels to edit the tip. A list of editable fields will display into two sections: **These fields are shared by other channels** and **These fields are unique to** [the selected channel]. Depending on the selected channel, the field options will change under **These fields are unique to**. For example, if you switch from the Web channel to the Print channel, you may see fewer field options.
5. Click the field you want to edit and make the desired changes. The tip preview automatically updates as you make changes so you can see the changes immediately.
6. When you finish making edits, click **Save**.
7. Return to the Tips library and click **Submit to review**.
8. Type what was changed for each tip and click **Send**.

The delivery team will review your tips, schedule the updates, and notify you if there are any comments or suggestions on your updates.

Adding a Custom Program Promotion

You can add custom program promotions to tips. For example, you can add information about a utility rebate available to customers who purchase a new energy efficient appliance.

Email and Print Channels

1. Open the tip you want to edit from the list of tips in the tip library.
2. Click the pencil icon to edit the tip.
3. Under **These fields are unique to**, do one or both of the following to add a custom program promotion**:**
   - Select the Email channel and click **Email Program Promotion**.
   - Select the Print channel and click **Print Program promotion**.

4. Click the toggle button to turn on the promotion.
Note: When you turn on the promotion, the promotion text will replace the Savings text. The Savings text is information that tells customers how much money they could save by doing a tip.
5. Add your text and click **Save** when you are satisfied with your changes.
6. Return to the Tips library and click **Submit to review**.
7. Type the date you want the updates to appear and click **Send**.

Web Channel

1. Open the tip you want to edit from the list of tips in the tip library.
2. Click the pencil icon to edit the tip.
3. Under **These fields are unique to**, you can add program promotion text to one of the following fields. The promotion text will appear on the right side of the tip.
    - Rebate Text
    - Recycling Text
    - Tax Incentives Text
    - Offers and Incentives Text
4. Click **Save** when you are satisfied with your changes.
5. Return to the Tips library and click **Submit to review**.
6. Type the date you want the updates to appear and click **Send**.

Reviewing the Tip Library

The Tip Library allows you to review default tip information displayed in outbound communications and view any edits and updates to these tips. You can quickly find tips using a simple keyword search or filters. See Managing Tips for additional information.

Tips listed in the Tip Library are being edited, reviewed by your utility, reviewed by a Service Delivery Manager, or have been submitted to the Delivery Team for implementation. If a field on a tip has been edited, you will see a black flag next to the **Program Promotion** column. If you hover your cursor over the flag, the number of new edited fields and the name of those fields display.

Custom Content and Program Promotion

If a tip has custom content or includes a program promotion, you will see a green check mark in the **Custom Content** and **Program Promotion** columns. If you hover your cursor over one of the check marks, the fields that include custom content or program promotion text will appear.

Exporting Tips

Use the following steps to export tips if you want to review or print them in a document format:

1. Click the **Export** icon near the top of the Tips library landing page.
2. Select one of two options: **Export tips to CSV** or **Export tips to a print-friendly PDF**.
3. - If you select **Export tips to CSV**, you can click **CSV-Child Data Only** or **CSV-All Text** to automatically download the file.

- If you select **Export tips to a print-friendly PDF**, a **Print View** page opens and you can print all tips or select filters from the **Tips** drop-down and **Fields** drop-down. After you make your selection open your internet browser menu and click **Print**.

Tip Manager FAQs

Can I edit tip information that is not related to a program?

Yes. The only tip content that cannot be edited is savings text, which informs customers they can "Save up to $X per year". When a tip is opened in the edit view, the Tip Manager indicates the editable content.

Can I change a tip after I've submitted it to Oracle Utilities?

You cannot edit tips while Oracle Utilities is processing your changes. Be sure that you only submit your final changes. If additional updates are required, Contact Your Delivery Team .

Can I use the Tip Manager to target tips to specific customers or groups of customers?

No. The Tip Manager is used only to edit the content of tips. Oracle Utilities then targets the tips to customers using other internal targeting tools.

Can I edit tips for all Oracle Utilities Opower products?

At this time, you can edit tips that appear in print Home Energy Reports, Email Home Energy Reports, Weekly Energy Updates, Energy Efficiency Web Portal, and Digital Self Service - Energy Management, both in embeddable widgets or the standalone web portal.

How can I access the Tip Manager?

You can open the Tip Manager from https://tips.opower.com.

How do I request access for a new user or remove a user?

Contact Your Delivery Team to add or remove users.

Can I add or remove tips from the library?

Only your Service Delivery Manager can add or remove tips from the library. Contact Your Delivery Team for more information.

Can I add or remove custom content from a tip?

Yes. See Managing Tips for more information.

Using Data Dashboards

Data dashboards display visual representations called widgets. Widgets contain aggregate Oracle Utilities Opower program and customer data, usually in the form of a graph or table.

This allows for quick consumption of high-level data. You can access Data Dashboards by clicking the **Data** tab. The following is a list of available data dashboards:

- **Dashboard**: Provides data on energy efficiency programs and other miscellaneous customer details.
- **Peak Events Savings**: Provides data on peak time energy savings and demand reduction.
- **Email Engagement**: Provides data on customer engagement with Oracle Utilities Opower email communications.
- **Communications Dispatched**: Provides the number of each type of communication dispatched each month.
- **Web**: Provides data on customer digital engagement.

For more information about dashboards, see the Inside Opower Product Overview.

Rearranging Widgets on a Dashboard

You can change how widgets are arranged by opening a dashboard from the **Data** tab and selecting and clicking the widget you want to move. While you still have the widget selected, drag it to the desired location on the dashboard.

Interacting with Widgets

Each widget will have a graphical chart like a line or bar graph, a table, or a map.

- **Line and Bar Graph Widgets**: For line graphs, you can click any of the dots to review specific information about it. For example, if you click one of the dots on the Behavioral Load Shaping Open Rate widget, it tells you the month, year, and the open rate percentage for that month. The same is true for bar graphs. For example, if you click one of the bars on the Weekly AMI Comms Dispatched bar graph, you will see the month, year, and the number of AMI communications dispatched for that month.
- **Table Widgets**: You can sort data on a table widget by the column name. You can also change the number of visible rows from five up to a maximum of 25 rows. Tables with several rows include pagination arrows to move between pages of rows.
- **Map Widgets**: You can hover your cursor over the region your utility serves and get specific information about that region. Use the plus (+) and minus (-) icons to zoom the map in or out.

Slider Tool

Use the slider tool at the bottom of a line or bar graph widget to change the window of time you want to view. For example, a graph may give data for a span of two years. You can use the slider tool to only capture one month, a few months, or any other specific window of time.

Downloading Data

You have the options to **Grab chart image** or **Download Data** for each graphical widget on a dashboard. You have the option to **Download Data** for any table and map widgets.

- If you click **Grab chart image**, you will be prompted to save a PNG file on your computer.
- If you click **Download data**, you will be prompted to save an XLSX file to your computer.

Accessing Reports

Inside Opower contains various reports on customer data (such as lists of customers in a given energy efficiency wave) and customer engagement (such as how often customers interact with the products in your Oracle Utilities Opower program). You can access reports in Inside Opower from the **Data** tab under **Reports**.

Finding and Sorting Reports

- You can search for a report by typing the title in the **Name** field and selecting a specific date range by using the **From** and **To** fields. As you type the name of the report, the table auto-refreshes and displays reports based on your search criteria.
- You can sort all reports by **Name**, **Date Generated**, or **File Size** by clicking any one of those columns from the Reports table.
- To clear previous search criteria, click **Clear**.

For more information about each available report, see the Inside Opower Product Overview.

Downloading Reports

To download a report, you can either click the download icon from the **Actions** column or click the name of the report. Alternatively, you can use the link icon to copy a link to the report and send it to another person. The report is inside of a ZIP file, so you will need to unzip the file to access the report. You can open the report using Notepad or Microsoft Excel.

Scheduling Peak Events

The Peak Events page is where you can schedule new peak events and review the history of scheduled peak events. See Peak Events for more information. Scheduling options vary by Peak Management product type.

Scheduling Behavioral Demand Response Peak Events

The Peak Events page is where you can schedule new peak events and review the history of scheduled Behavioral Demand Response peak events. See Peak Events for more information.

Peak Event Days and Times

When you schedule a peak event, you have the option to select a peak event for today or tomorrow, and you can schedule peak events simultaneously by selecting today and tomorrow. You must schedule an event before the start time. You can schedule peak events for any day between 8 AM and 5 PM local time, but on weekends, you must schedule them by 9 AM.

User Segments

Segments of customers can receive pre-event communications. For example, if a single region requires calling a peak event and it is configured as Zone A, you can select **Zone A** from the available user segments to only send communications to those customers.

Note: These segments must be configured before the start of the summer season. Contact Your Delivery Team for assistance.

Scheduling a Peak Event

To schedule a peak event:

1. Click the **Peak Events** tab and click **Schedule a New Event**.
2. Under **Days**, select **Today** or **Tomorrow**, or both options.
3. Under **Peak time interval** select a **Start** and **End** time.
   Note: You must schedule an event before the start time. For example, if you want to schedule an event that starts at 1 PM, you cannot schedule it at 1:45 PM. Contact Your Delivery Team if you have questions.
4. Under **User segments**, you must select one or more of the available zones.
5. Click **Create Event** to finish scheduling the event.
6. Click **Send Communications** to deliver communications.
   Note: Communications will be delivered immediately; therefore, you cannot cancel an event after clicking **Send Communications**.

Notify List

You can manage who receives communications about peak events from the Notify List page.

- **To add an email**: Type the email address in the **Add email to notify list** field and click **Add**.
- **To delete an email**: Click the trash can icon next to the email address.

History

The History page displays, if applicable, a list of past peak events. On the **History Events** table, you can see the date of the peak events, the peak time interval, and to which user segments the peak event was applicable. In addition, you can schedule new peak events by clicking **Schedule New Event**.

Scheduling Peak Time Rebate Peak Events

The Peak Events page is where you can schedule new peak events and review the history of scheduled Peak Time Rebates peak events. See Peak Events for more information.

Peak Event Days and Times

When you schedule a peak event, you have the option to select a peak event for today or tomorrow, and you can schedule peak events simultaneously by selecting today and tomorrow. You must schedule an event before the start time. You can schedule peak events for any day between 8 AM and 5 PM local time, but on weekends, you must schedule them by 9 AM.

Scheduling a Peak Event

To schedule a peak event:

1. Click the **Peak Events** tab and click **Schedule a New Event**.
2. Under **Days**, select **Today** or **Tomorrow**, or both options.
3. Under **Peak time interval** select a **Start** and **End** time.

Note: You must schedule an event before the start time. For example, if you want to schedule an event that starts at 1 PM, you cannot schedule it at 1:45 PM. Contact Your Delivery Team if you have questions.

4. Under **User segments**, you must select one or more of the available zones.
5. Click **Create Event** to finish scheduling the event.
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   Note: Communications will be delivered immediately; therefore, you cannot cancel an event after clicking **Send Communications**.

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History

The History page displays, if applicable, a list of past peak events. On the **History Events** table, you can see the date of the peak events, the peak time interval, and to which user segments the peak event was applicable. In addition, you can schedule new peak events by clicking **Schedule New Event**.

Using Resources

You can access product documents, release notes, and FAQs from the **Resources** tab.

- If you want to view any Inside Opower product documentation, click the **Product Docs** tab to open the Inside Opower Oracle Help Center page.
- When you click the **Release Notes** tab, the Inside Opower release readiness page opens so you can read about the latest updates to the tool.
- The **FAQs** tab opens a list of common questions and answers about Inside Opower.

Requesting Access for New Users

Oracle Utilities manages Inside Opower users and can grant access to additional users within the organization. If there is a user at the utility who needs access to Inside Opower, the Service Delivery Manager responsible for that program can grant access to that user. Contact Your Delivery Team for more information.

Sending Feedback

Oracle Utilities Opower is constantly releasing new features for Inside Opower. We value our user's opinions, so to help build a tool that suits your needs, we welcome your feedback.

To submit feedback on the Inside Opower tool:

1. Open the **Data** tab and click **Send Feedback**.
2. Type your feedback in the text box and click **Send**.

Contact Your Delivery Team

Your Oracle 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. Sign 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.