Oracle Utilities Opower Platform

Configuration Guide

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Contents

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 is focused on the global configuration options that apply to all products on the platform. It should be completed along with all other product-specific configuration guides provided to you by your [Delivery Team](#).

> **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

The Oracle Utilities Opower platform refers to components that apply to multiple Oracle Utilities Opower products. For example, such components include global branding elements, energy efficiency details related to a utility territory, applicable rate codes, and so on.

Disclaimer

Your utility might not have all of the products or features described in this document. Contact your Delivery Team if you have any questions.

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.

Basic Utility Inputs

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 Options	Input Value
Customer-Facing Utility Name	**Required**
Utility Address Provide the utility address, city, state, and postal or ZIP code.	**Required**
Utility Customer Service Contact Information Provide the phone number and email address customers can use to contact customer service representatives.	**Required** Phone: Email:
"From" Name on Email Communications The name that appears in the "From" line in all email communications can be altered. **Default**: By default, the utility's name is used in the "From" line. For example, "UtilityCo."	**Optional** Choose one of the following: Use the default option. Use the following "From" name:

Configuration Options	Input Value
"From" Address The "From" email address that will appear as the sender for the email communication. **Default**: The utility must provide a "From" email address.	**Required** Indicate the desired "From" address.
"Reply To" Address (not depicted) The email address that will be populated when a customer replies to the communication. **Default**: The utility email address specified for the "From" is reused as the Reply To address.	**Optional** Choose one of the following: Use the default. Work with your Delivery Team to specify a different address.

Utility Branding Inputs

The configuration options listed in the table below apply to the utility's branding. They are used to configure the appearance of Oracle Utilities Opower products to match the utility's branding guidelines. 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.

> **Note**: Oracle Utilities requires multiple branding files from the utility, such as the utility logo and the utility branding guidelines. Provide all files listed in this table as an email attachment to your Service Delivery Manager along with the completed version of this form. See "Next Steps" on page 11 for more information.

Configuration Option	Input Value
Utility Logo The RGB and CMYK versions of the utility logo as .ai files.	**Required** File name of RGB utility logo:

Configuration Option	Input Value
Example: UtilityCo_Logo_RGB.ai	File name of CMYK utility logo:
Utility Branding Guidelines The branding guidelines are used to help designers from Oracle Utilities develop creative elements throughout the program life cycle. Indicate the PDF file name of the utility branding guidelines or visual style guide. **Example**: UtilityCo_Branding_ Guidelines.pdf	**Required**
Utility Color Palette To ensure that Oracle Utilities uses the correct colors for the utility's brand, indicate the PDF file names of the RGB and CMYK color palettes. **Example**: UtilityCo_ColorPalette_ RGB.pdf	**Required** RGB color palette: CMYK color palette:
Sample Bill Indicate the PDF file name of a sample customer-facing energy bill. Oracle Utilities uses the sample bill to help ensure that our products align with the utility's branding. **Example**: UtilityCo_Sample_Bill.pdf	**Required**
Account Number Format An example of how the customer	**Required**

Configuration Option	Input Value
account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed). **Example**: 12-34XX-XXX	

Energy Saving Tips Inputs

The configuration options listed in the table below are used to help create content in energy saving tips that appear in Oracle Utilities Opower products. 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.

> **Note**: Oracle Utilities requires multiple files from the utility related to energy efficiency and customer energy use. Provide all files listed in this table as an email attachment to your Service Delivery Manager along with the completed version of this form. See "Next Steps" on page 11 for more information.

Configuration Options	Input Value
Fuel Types Indicate the customer fuel types that will be included in the Oracle Utilities program. Dual fuel refers to customers that receive both gas and electric service.	**Required** Electric-Only: Gas-Only: Dual fuel:
Fuel Units Indicate the units of measure for each supported fuel type. **Example**:	**Required** Electric Units: Gas Units:

Configuration Options	Input Value
Electric Units: kWh Gas Units: therms	
Service Territory ZIP Codes Provide the file name of a document or spreadsheet that contains a full list of all ZIP codes in the utility's service territory. Tab-delimited .txt or Excel files are preferred. **Example**: UtilityCo_Service_ ZipCodes.xlsx	**Required**
Average Annual Electric Consumption Provide the average annual electric consumption for residential customers in kWh. **Example**: 11841 kWh	**Required**
Average Annual Gas Consumption Provide the average annual gas consumption for residential customers in therms. **Example**: 355 therms	**Required**
Average Residential Electric Rates Divide the average annual electric bill for residential customers in USD ($) by the average annual electric consumption in kWh. Provide your response in $/kWh. **Example**: .1114/kWh	**Required**

Configuration Options	Input Value
Average Residential Gas Rates Divide the average annual gas bill for residential customers in USD ($) by the average annual gas consumptions in therms. Provide your response in $/therm. **Example**: .4326/therm	**Required**
Rate Codes Provide the file name of a PDF document that lists all utility rate codes. Rate codes are abbreviations for the rate plan associated with the account. The utility rate codes include, but are not be limited to: residential, commercial, low-income, time-of-use, and medical or disability rates. See [Rates Data Transfer](#) for details. **Example**: UtilityCo_RateCodes.pdf	**Required**

Home Energy Report Inputs

The configuration items listed in the table below are specific to the Home Energy Report (HER) or Email Home Energy Report (eHER) products, and are required only if you are configuring those products. 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
Program Name The program name appears on print Oracle Utilities Opower Home	**Required**

Configuration Option	Input Value
Energy Reports and on the Oracle Utilities Opower Web Portal. By default, the program name is Home Energy Report.	
"Neighbors" and "Similar Homes" Terminology "Neighbors" and "Similar Homes" terminology can be replaced in the Home Energy Report experiences. **Default**: - **Home Energy Reports v2**: By default, "Neighbors" terminology is used. - **Home Energy Reports v3:** By default, "Similar Homes" terminology is used.	**Optional** Choose one of the following: Use the default option. Use the alternative terminology: - **Home Energy Report v2**: Use "Similar Homes" terminology. - **Home Energy Report v3**: Use "Neighbors" terminology.
Legal Language Up to 250 characters of legal, disclaimer, or business-related language can be added to the footers of Home Energy Reports and Oracle Utilities Opower Email Home Energy Reports. This language can also be added to the Energy Efficiency Web Portal - Classic. **Default**: By default, no legal language is included.	**Optional** Choose one of the following: Use the default option. Add the following legal language to Home Energy Reports, Email Home Energy Reports, and the Energy Efficiency Web Portal - Classic (up to 250 characters):

Magic Link Inputs

Magic links enable utilities to use pre-authenticated links in their email and paper communications so that customers can access a feature without having to enter a username and password. Anyone with access to the link can select it to view the requested information without any additional authentication.

Magic Links are currently available for use in [Oracle Utilities Opower Affordability Proactive Alerts](#).

The configuration items listed in the table below are specific to the use of Magic Links in your customer communications, and are required only if you are using features that include these links. 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
Link Placement Placement of a Magic Link button or URL within a communication varies by feature.	**Required** Work with your Delivery Team to confirm the location of the link in your communications.
URL for Magic Link Placement of a Magic Link button or URL within a communication varies by feature.	**Required** Use this URL:
Link Duration - Paper Communications Specify the duration that the link is valid. **Default:** By default, links sent in paper communications are valid for 45 days.	**Required** Choose one of the following: Use the default option. Specify the number of days:
Link Duration - Email Communications Specify the duration that the link is valid. **Default:** By default, links sent in email communications are valid for 14 days.	**Required** Choose one of the following: Use the default option. Specify the number of days:

Configuration Option	Input Value
Scope of Access Agreement Because Magic Links provide pre-authenticated access to customer data, you must work with your Delivery Team to ensure that you have a complete understanding of the information that will be provided to the user when they use the Magic Link. The default scope of access varies by feature.	**Required** Work with your Delivery Team to confirm the scope of access for your link.

FAQs

This section provides answers to frequently-asked questions (FAQs) about configuring the Oracle Utilities Opower platform.

What third-party data is used?

Oracle Utilities loads all available parcel, demographic, and weather data for the utility's service territory, which is acquired from well-known providers. The percent of third-party data coverage may vary by service territory. Through analysis of program results across service territories of varying levels of third-party data coverage, Oracle Utilities has determined that the percent of third-party data coverage does not affect program results.

Is recycled paper used for envelopes and reports?

Oracle Utilities uses un-coated recycled envelopes. Such envelopes are easily recycled and Oracle Utilities is able to get a high quality sheet for our product, while avoiding the use of harmful chemicals in the de-inking process. Sometimes the format requirements of our inserts do not allow for recycled paper, but it is used whenever possible.

Why is "neighbors" used instead of "similar homes"?

The word "neighbors" is more likely to generate an emotional response, since it implies to more specific groups of peers as opposed to an anonymous group of people. By using the term "neighbors," Oracle Utilities can ensure that the comparison is relevant and familiar.

Next Steps

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

1. Complete any other product-specific configuration guides provided to you by your Service Delivery Manager. (Your Service Delivery Manager is the lead member of your [Delivery Team](#).)
2. Submit all configuration guides and required documents to your Service Delivery Manager as an email attachment. Be sure to include the following:
   - The inputs for the *Oracle Utilities Opower Platform Configuration Guide* (see [Design and Configuration](#))
   - Up-to-date HTML, CSS, and JavaScript files for your utility website (if applicable to your situation–your Delivery Team will help you decide)
   - Any applicable utility branding guidelines
3. Update the Version table of this guide with your name, the date, and a descriptive comment.

> **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

Name	Date	Comment