

Oracle Hospitality Enterprise Management

User Guide



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Preface

Purpose

This guide explains how to use Oracle Hospitality Enterprise Management features and functionality.

Audience

This document is intended for OPERA Cloud Central customers.

Customer Support

To contact Oracle Customer Support, access the Customer Support Portal at the following URL:

<https://iccp.custhelp.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at <http://docs.oracle.com/en/industries/hospitality/>.

Revision History

Table 1 Revision History

Date	Description of Change
September 2025	Initial Publication

1

Prerequisites for Enterprise Management

This chapter of the Enterprise Management User Guide lists the prerequisites for Enterprise Management menu.

Prerequisites for Getting Started

Subscriptions

OPERA Cloud Central Management Services

Prerequisites for Configuring Enterprise Templates

Tasks

- **Group:** Enterprise Template
- **Tasks:** Manage Enterprise Template

Prerequisites for Configuring Custom Templates

Tasks

- **Group:** Custom Template
- **Tasks:** Manage Custom Template

Prerequisites for Managing Template Items Approval Status

Tasks

- **Group:** Miscellaneous
- **Tasks:** Approve Configuration

Prerequisites for Data Import

Tasks

- **Group:** Miscellaneous
- **Tasks:** Manage Import

Prerequisites for Assigning Properties to Custom Templates

Tasks

- **Group:** Miscellaneous
- **Tasks:** Manage Properties

Prerequisites for Distributing Configuration

Tasks

- **Group:** Miscellaneous
- **Tasks:** Distribute Configuration

Prerequisites for Managing User Groups (Roles)

Roles

<ENTERPRISEID>-ADMIN

Tasks

- **Group:** Miscellaneous
- **Tasks:** Manage Groups

Prerequisites for Viewing Changes Log

Tasks

- **Group:** Miscellaneous
- **Tasks:** Changes Logs

Prerequisites for Viewing Distribution Logs

Tasks

- **Group:** Miscellaneous
- **Tasks:** Distribution Logs

Prerequisites for Enterprise Settings

User Group

<ENTERPRISEID>-ADMIN

Enterprise Management Tasks

- **Group:** Miscellaneous
- **Tasks:** Enterprise Settings

2

Getting Started

[Prerequisites for Getting Started](#)

Enterprise Management is available for the centralized management of OPERA Cloud configuration across all chains, brands and properties within a single enterprise. Using Enterprise Management you can create and update standardize configuration and then efficiently distribute configuration to properties across multiple locations, ensuring consistency and accuracy of the configuration. Enterprise Management can be used for the provisioning of new properties or for distributing configuration updates to existing properties on an on-going basis. OPERA Cloud Central and OPERA Cloud Loyalty OPERA Controls are also available to manage in templates and distribute to properties.

Enterprise Management uses templates in a two-level hierarchy to manage configuration across your enterprise.

- Enterprise Templates - Define standard configurations across all properties in a chain (for example, chain-wide standard configuration).
 - For each template created, a Manage Enterprise Template sub task is auto-created in the **Enterprise Template** task group; assign this task to user groups for user access to the template.
 - Global (chain-level) configuration, applying to all properties in a chain, is indicated with  and can only be configured in an Enterprise Template.
 - Any dependent configuration is fetched from the enterprise template.
 - Any seeded configuration types and configuration values required in OPERA Cloud are indicated, for example the various **Preference Groups** and the PM **Room Type**.
- Custom Templates - Linked to an enterprise template, custom templates define standard configuration for a subset of properties (for example, brand-specific or region-specific configuration).
 - For each template created, a **Manage Custom Template** sub task is auto-created in the **Custom Template** task group; assign this task to user groups for user access to the template.
 - Any dependent configuration is fetched from both the enterprise template and custom template.

For each template you create, start by selecting the various configuration types, then adding the configuration items (entries) for these options. The configuration types available for selection is dependent on the lowest version at your properties. For example, a configuration type added in 25.x will not be enabled for selection if some properties are currently operating 24.x. Configuration types with dependencies on other configuration types are indicated, for example - **Market Codes** is dependent on **Market Groups**.

Once configuration types are selected in a template, configuration can be entered; either directly in Enterprise Management or imported from a CSV template file. Configuration values have a **Pending** status initially, and must be approved by a user with the **Approve Configuration** task assigned. Configuration values can be rejected and configuration values

no longer required are updated to **Archive** status to prevent distribution to new properties. You can export the configuration values in a template to CSV files for import elsewhere. You also have the option to import all supported configuration from an OPERA Cloud property to an unconfigured enterprise template.

In order to distribute configuration to properties, a custom templates is linked one or more properties; resulting in the configuration from both the enterprise template and the custom template being distributed and upsert (update or insert) in OPERA Cloud. When the **Multi Property** OPERA Control is active, configuration is upsert to both the template (where applicable) and the properties.

When distributing configuration dependent on an OPERA Control (for example, Alerts Messages for the **Alerts** OPERA Control), distribution fails when the OPERA Control is inactive at the property. Distribution logs will indicate "<property> does not support <configuration type>".

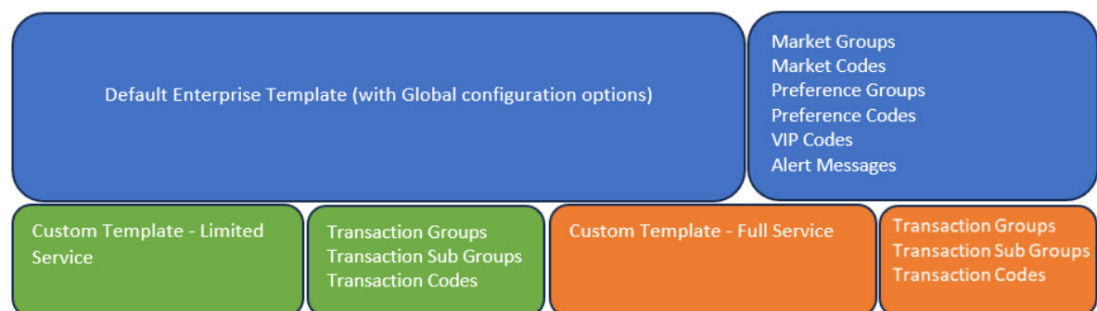
In OPERA Cloud Administration, a **Managed By** column is displayed in search results, indicating the origin of the configuration.

- If the configuration is added directly in OPERA Cloud, configuration entries are labeled as **"Property Managed"**.
- If the configuration was distributed from Enterprise Management, configuration entries are labeled as **"Enterprise Managed"**.
- If the configuration was distributed from Enterprise Management and overridden by the property, configuration entries are labeled as **"Property Overridden"** (Requires the **Override Enterprise Managed Configuration** task). Further updates from Enterprise Manager are declined.

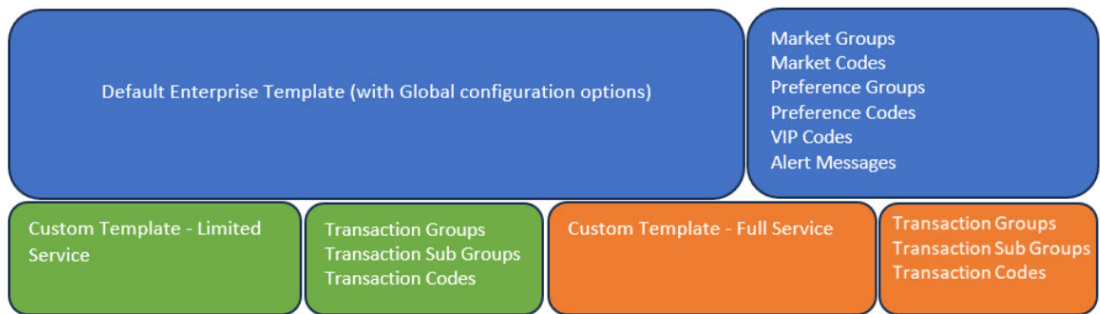
Note

All Enterprise Management configuration changes are tracked in the OPERA Cloud changes log with the user Enterprise-Manager.

Multiple Enterprise Templates = N - Single Chain for all properties



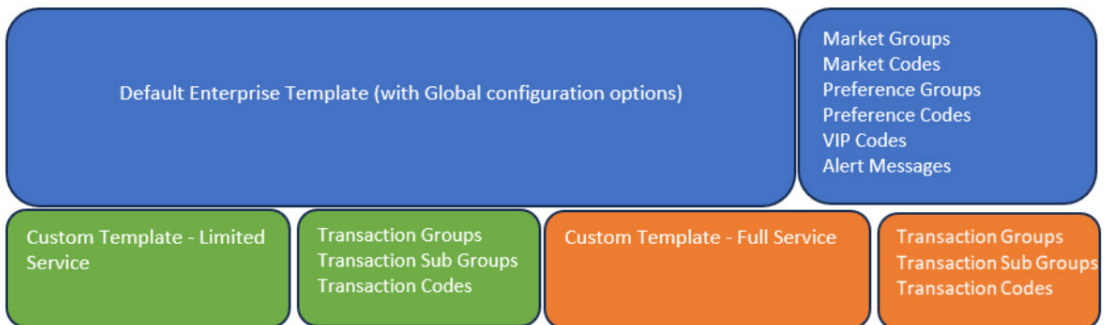
Chain 1	Property A	Custom Template - Limited Service
Chain 1	Property B	Custom Template - Limited Service
Chain 1	Property C	Custom Template - Full Service
Chain 1	Property D	Custom Template - Full Service
Chain 1	Property E	Custom Template - Limited Service
Chain 1	Property F	Custom Template - Full Service
Chain 1	Property G	Custom Template - Full Service

Multiple Enterprise Templates = N - Multiple Chains

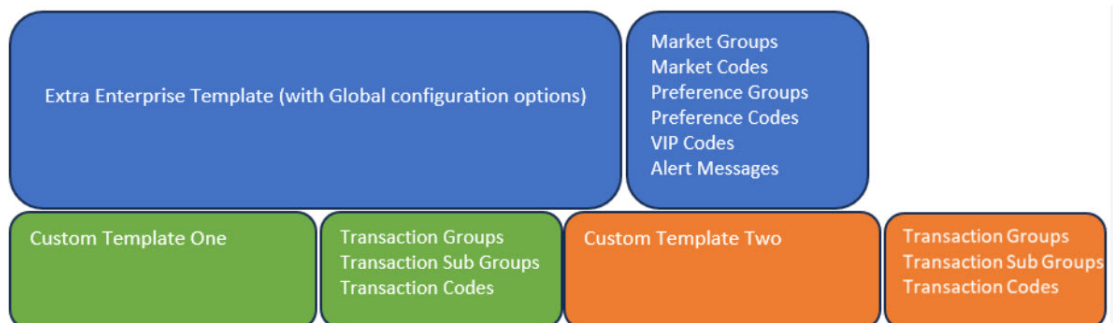
Chain 1	Property A	Custom Template - Limited Service
Chain 1	Property B	Custom Template - Limited Service
Chain 2	Property C	Custom Template - Full Service
Chain 2	Property D	Custom Template - Full Service
Chain 1	Property E	Custom Template - Limited Service
Chain 2	Property F	Custom Template - Full Service
Chain 2	Property G	Custom Template - Full Service

Multiple Enterprise Templates = Y - Multiple Chains

Requires all properties of a Chain Code to be associated to the same Enterprise Template



Chain 1	Property A	Custom Template - Limited Service
Chain 1	Property B	Custom Template - Limited Service
Chain 2	Property C	Custom Template - Full Service
Chain 2	Property D	Custom Template - Full Service
Chain 1	Property E	Custom Template - Limited Service
Chain 2	Property F	Custom Template - Full Service
Chain 2	Property G	Custom Template - Full Service



Chain 3	Property H	Custom Template One
Chain 3	Property I	Custom Template One
Chain 3	Property J	Custom Template Two
Chain 3	Property K	Custom Template One
Chain 3	Property L	Custom Template Two

Related Topics

- [Managing User Groups](#)

Seeded Configuration

The following configuration options and configuration entries are seeded on creation of an Enterprise Template

Table 2-1 Seeded Configuration

Configuration Option	Configuration Entries	Dependent Configuration
Genders	• M-Male • F-Female • U-Unknown	No
Preference Groups	• Dietary-Dietary Requirements • Floor-Floor Preference • Key Options-Room Key Options • Interests-Interests • Minibar Options-Minibar Options • Phone Options-Phone Options • Room Features-Room Features • Smoking-Smoking Preference • Specials-Special Requests • TV Options-TV Options • Unassigned-Unassigned • Video Options-Video Options	Yes
Reservation Colors	• Black • Blue • Cyan • Green • None • Red • White • Yellow	No
Room Types	PM-Posting Master	Yes

Template Configuration Options

BOOKING

Table 2-2 Booking

Configuration Option	OPERA Control	Notes
Alert Messages	Alerts	
Block Cancellation Reasons	Business Block	
Block Conversions	Business Block	
Block Destination Codes	Business Block	
Block Lost Reasons	Business Block	
Block Refused Reasons	Business Block	
Block Reservation Methods	Business Block	
Block Rankings	Block Ranking	
Block Rate Override Reasons	Allow Rate Editing with Rate Code	
Booking Types	Business Block Type	
Cancel Penalties (Rules)	Cancellation Handling	
Cancellation Reasons		
Catering Revenue Groups	Resource Management	
Catering Revenue Types	Resource Management	
Country Entry Points		
Deposit Rules	Deposit Handling	
Discount Reasons	Reservation Discount	
Guest Locators	Guest Locators	
Guest Messages	Messages	
Guest Status		
Guest Types		
Immigration Status		
Market Codes		
Marketing Cities		
Market Groups		
Menu Item Container	Event Resources	
Marketing Regions		
Origin Codes		
Property Move Reasons		
Purpose of Stay		
Reservation Colors		
Room Move Reasons		
Reservation Types		
Source Codes		
Source Groups		
Trace Texts	• (AR) Traces • (Block) Traces • Reservation Traces	
Turnaway Codes	Turnaway Functionality	

Table 2-2 (Cont.) Booking

Configuration Option	OPERA Control	Notes
Waitlist Codes	Waitlist	
Waitlist Priorities	Waitlist	

CLIENT RELATIONS**Table 2-3 Client Relations**

Configuration Option	OPERA Control	Notes
Address Formats		
Alternate Language Titles	Multi Language	Supports multi-byte Unicode characters for Code
Account Priorities	Sales Information	
Address Types		
Birth Countries		
Business Segments		
Company Types	IATA Company Type	
Competition Codes	Sales Information	
Countries		
Country Main Groups		
Communication Types		
Credit Ratings	Credit Rating	
Districts		
Distance Types		
Enrollment Groups	Enrollment	
Enrollment Codes	Enrollment	
Genders		
Global Action Codes	Property Action Code	
Inactive Reasons		
Industry Codes		
Identification Types		
Identification Countries		
Influence Codes	Sales Information	
Keyword Types	Keyword	
Languages	Multi Language	
Location Types	E-Certificate Redemption	
Mailing Action Codes		
Membership Claim Origins	 Membership Claims	
Membership Claim Types	 Membership Claims	
Membership Classes		

Table 2-3 (Cont.) Client Relations

Configuration Option	OPERA Control	Notes
Membership Status Codes	Loyalty	
Nationalities		
Payment Due Days	Payment Due Days	
Preference Groups		
Preferences		
Regions		
Restriction Reasons	Restriction/Flagged Reasons	
Sales Activity Results	Activity Results	
Sales Activity Types	Activities	
Sales Activity Trace Codes	Activities	
Sales Scope	Sales Information	
Sales Scope City	Sales Information	
States		
Tax Categories		
Tax Offices		
Titles		
Travel Agent Types	IATA Company Type	
VIP Levels	VIP	

ENTERPRISE**Table 2-4 Enterprise**

Configuration Option	OPERA Control
Airports	
Amenities	
Attraction Categories	
Attractions	
Departments	
Hotel Categories	
Job Titles	
Note Types	
Property Detail Categories	
Property Types	
Service Request Priorities	Service Requests
Service Requests	Service Requests
Transportation	
Track It Actions	Track It
Track It Locations	Track It

Table 2-4 (Cont.) Enterprise

Configuration Option	OPERA Control
Track It Types	Track It

FINANCIALS**Table 2-5 Financial**

Configuration Option	OPERA Control	Notes
Articles	Articles	
Adjustment Codes		
AR Restricted Reasons		
Daily Rate Code (Definition)	Daily Rates	
Day Types	Day Types	
Display Sets		
Folio Arrangement Codes	Folio Arrangements	
Foreign Currency Codes	Foreign Currency Codes	
Group Arrangement Codes	Foreign Currency Codes	
Package Codes (Definition)		
Package Groups		
Package Forecast Groups		
Payment Methods		
Promotion Groups	Promotions Module	
Rate Class		
Revenue Bucket Types		
Rate Categories	Daily Rates	
Stop Processing Reasons	Commission Handling	

Table 2-5 (Cont.) Financial

Configuration Option	OPERA Control	Notes
Standard Rate Codes (Definition)		
Tax Type	Tax Types	
Transaction Groups		
Transaction Sub Groups		
Transaction Codes		

Note

Does not support Revenue Posting by Room Type/Room Class OPERA Control

INVENTORY

Table 2-6 Inventory

Configuration Option	OPERA Control	Notes
Bed Types		
Building Groups	Building Management	
Buildings	Building Management	
Floors		
Function Space Types	Catering Events	
Housekeeping Attendants		
Housekeeping Section Codes		
Housekeeping Section Groups		
Housekeeping Tasks	Task Sheets Housekeeping Task Scheduling	
Housekeeping Task Supplies	Housekeeping Task Scheduling	
Out of Order Service Reasons	Out of Order Out of Service	
Room Class	Room Class	

Table 2-6 (Cont.) Inventory

Configuration Option	OPERA Control	Notes
Room Conditions	Room Condition	
Room Features		
Room Maintenance	Maintenance	
Room Pool Codes	Room Pool	
Room Types		

Signing In and Signing Out

Signing In

You are automatically signed in when launching Enterprise Management from the OPERA Cloud side menu.

1. **User Name:** Enter your user name.
2. **Password:** Enter your password.
3. **Remember Me** (optional): Select the check box to save your **User Name** for future login sessions.
4. Click **Sign In**.

Signing Out

1. Click your user initials icon in the top-right to display additional options.
2. Click **Sign Out**.

Changing Your Language

1. Click your user initials icon in the top-right to display additional options.
2. Click **Change Language**.
 - a. Select a language from the list.
 - b. Your session will reinitialize.

Session Expiration

You are automatically signed out when your session is idle for 15 minutes.

Using the Dashboard

The Dashboard displays sections for the Enterprise template(s) and Custom template(s). If you are assigned a specific template task and configuration tasks, you can access the **Manage** link for Enterprise Templates and Custom Templates.

The Dashboard also displays a **Quick Links** section, with access based on the tasks assigned to your user group.

- Manage Import Jobs - to import configuration to templates. See [Using Data Import](#) for more information.
- Manage Properties - to assign custom template to properties. See [Assigning Properties to Custom Templates](#) for more information.
- Manage Distribution Jobs - to display a list of distribution jobs and their status. See [Distributing Configuration](#) for more information.
- Manage (User) Groups - to manage user groups and tasks. See [Manage User Groups](#) for more information.
- Changes Logs - to view changes logs. See [Viewing Changes Logs](#) for more information.
- Distribution Logs - to view distribution logs. See [Viewing Distribution Logs](#) for more information.

3

Configuring Enterprise Templates

[Prerequisites for Configuring Enterprise Templates](#)

The DFLT_<ENTERPRISEID> enterprise template is seeded for the setup of global (chain-level) configuration. Typically, only one enterprise template is required to distribute global configuration to all chains and properties in your enterprise. Multiple enterprise templates can be configured, however activating this setting ([Configuring Enterprise Settings](#)) requires that all properties associated with one Chain Code must be associated to the same enterprise template. For each enterprise template created, a **Manage Enterprise Template** sub task is auto-created in the **Enterprise Template** task group; assign this task to user groups for user access to the template. See [Manage User Groups](#).

Related Topics

- [Using Data Import](#)
- [Managing Template Items Approval Status](#)

Adding Enterprise Templates

✓ Tip

Configuration items with no dependencies follow an alphabetical order and appear below other configuration items with dependencies within the Configuration Group. Configurations items with dependencies are listed at the bottom of the list, in order of dependencies within the Configuration Group. The **Requirement** column indicates a mandatory field in OPERA Cloud.

1. From the Side Menu, select **Manage Enterprise Template**.
2. Click **Create** and enter the following details:
 - a. **Code**: Enter a code for the enterprise template.
 - b. **Description**: Enter a description for the enterprise template.
 - c. Click **Expand All** to expand all **Configuration Groups**.
 - d. Select the **Configurations** tab to add configuration to the template.
 - i. Select configuration **Categories** and configuration **Types** to include in the enterprise template.
 - e. Select the **OPERA Controls** tab to setup OPERA Controls in the template.
 - i. Select a **Group**, then select **Functions** or **Parameters** to expand the list.
 - ii. Select the OPERA Controls to include in the enterprise template.
 - f. Click **Create**.

Editing Enterprise Templates

1. From the Side Menu, select **Manage Enterprise Template**.
2. Select the enterprise template code in the search result then click **Edit**

3. Select the **Configurations** tab to add configuration to the template.
 - a. Select configuration **Categories** and configuration **Types** to include in the enterprise template.
4. Select the **OPERA Controls** tab to setup OPERA Controls in the template.
 - a. Select a **Group**, then select **Functions** or **Parameters** to expand the list.
 - b. Select OPERA Controls to include in the enterprise template.
5. Click **Update**.

Deleting Enterprise Templates

Note

The DFLT_<ENTERPRISEID> template cannot be deleted.

1. From the Side Menu, select **Manage Enterprise Template**.
2. Select the enterprise template code in the search result then click **Edit**

3. Click **Delete Template**, then click **Delete** to confirm.

Managing Configuration Items in Enterprise Templates

All configuration **Categories** and configuration **Types** selected for the enterprise template are listed.

Tip

Use the **Manage Translations** link to enter localized descriptions for properties with the **Multi Language** OPERA Control active. Use the **Generate** action for AI translation. The **Languages** available are fetched from the template.

Adding Configuration Items to Enterprise Templates

1. From the Side Menu, select **Manage Enterprise Template**.
2. Select the enterprise template code link in the search result or click **Manage**

 - a. Select the **Configurations** tab.

- b. Select a configuration **Category**, then select a configuration **Type**, then click **Edit**  to edit the details.
- c. Click **New** and complete the configuration, then click **Confirm**.

Editing Configuration Items in Enterprise Templates

1. From the Side Menu, select **Manage Enterprise Template**.
2. Select the enterprise template code link in the search result or click **Manage** 
 - a. Select the **Configurations** tab.
 - b. Select a configuration **Category**, then select a configuration **Type**, then click **Edit**  to edit the details.
 - c. Select the Code, then click **Edit**  to edit the details.
 - d. Make the necessary changes.
 - e. Click **Save**.

Viewing Configuration Property Distribution List

To view a list of properties associated with a configuration item.

1. From the Side Menu select **Manage Enterprise Template**.
2. Select the enterprise template code link in the search result or click 
 - a. Select the **Configurations** tab.
 - b. Select a configuration **Category**, then select a configuration **Type**, then click **Edit**  icon to edit the details.
 - c. Select the Code, then click **View Logs** 

Downloading Configuration Items

To download a zip file containing configuration details for a configuration item.

1. From the Side Menu, select **Manage Enterprise Template**.
2. Select the enterprise template code link in the search result or click **Manage** 
 - a. Select the **Configuration** tab.
 - b. Select a configuration **Category**, then select a configuration **Type**, then click **Download** 
 - c. Select a destination folder, then click **Save**.

Deleting Configuration Items in Enterprise Templates

Configuration items pending approval can be deleted.

1. From the Side Menu, select **Manage Enterprise Template**.
2. Select the enterprise template code link in the search result or click **Manage**

 - a. Select the **Configuration** tab.
 - b. Select a configuration **Category**, then select a configuration **Type**, then click **Edit**

to edit the details.
 - c. Select the Code in the search result, then click **Delete**


Managing OPERA Controls in Enterprise Templates

1. From the Side Menu, select **Manage Enterprise Template**.
2. Select the enterprise template code link in the search result or click **Manage**

 - a. Select the **OPERA Controls** tab.
 - b. Select a **Group**, then select **Functions** or **Parameters** to expand the list.
 - c. Toggle the switch to activate or deactivate the OPERA Control.

4

Configuring Custom Templates

[Prerequisites for Configuring Custom Templates](#)

Custom templates are used for configuration that applies to a sub-set of properties. For example, custom templates could be configured for various brands within your chain, applying brand-specific configuration in addition to global configuration from the enterprise template. A **Manage Custom Templates** sub task is auto-created in the **Custom Template** task group for each custom template added; assign this task to user groups for user access to the template. See [Manage User Groups](#) for more information.

Related Topics

- [Using Data Import](#)
- [Assigning Properties to Custom Templates](#)
- [Managing Template Items Approval Status](#)

Adding Custom Templates



Tip

Configuration items with no dependencies follow an alphabetical order and appear below other configuration items with dependencies. Configurations items with dependencies are listed at the bottom of the list in order of dependencies within the configuration category.

1. From the Side Menu, select **Manage Custom Template**.
2. Click **Create** and enter the following details:
 - a. **Code**: Enter a code for the template.
 - b. **Description**: Enter a description for the custom template.
 - c. **Enterprise Templates**: Select an enterprise template from the list to link to the custom template.
 - d. Select the **Configurations** tab to add configuration to the template.
 - i. Select configuration **Categories** and **Types** to include in the custom template.
 - e. Select the **OPERA Controls** tab to setup OPERA Controls in the template.
 - i. Select a **Group**, then select **Functions** or **Parameters** to expand the list.
 - ii. Select OPERA Controls to include in the custom template.
 - f. Click **Create**.

Editing Custom Templates

Note

Existing Configuration Options cannot be deselected (removed) from template.

1. From the Side Menu, select **Manage Custom Template**.
2. Select the custom template code in the search result then click **Edit**

3. Select the **Configurations** tab to add configuration to the template.
 - a. Select additional configuration **Categories** and **Types** to include in the custom template.
4. Select the **OPERA Controls** tab to setup OPERA Controls in the template.
 - a. Select a **Group**, then select **Functions** or **Parameters** to expand the list.
 - b. Select the OPERA Controls to include in the custom template.
5. Click **Update**.

Deleting Custom Templates

Custom templates can be deleted when properties are not assigned and the configuration has not been distributed.

1. From the Side Menu, select **Manage Custom Template**.
2. Select the custom template code in the search result then click **Edit**

3. Click **Delete Template**, then click **Delete** to confirm.

Managing Configuration Items in Custom Templates

All configuration Categories and Types selected for the custom template are listed.

Tip

Use the **Manage Translations** link to enter localized descriptions for properties with the **Multi Language** OPERA Control active. The **Languages** available are fetched from the Enterprise and Custom templates.

Adding Configuration Items to Custom Template

1. From the Side Menu, select **Manage Custom Template**.
2. Select the custom template code link in the search result or click **Manage**


- a. Select the **Configuration** tab.
- b. Select a configuration **Category**, then select a configuration **Type**, then click **Edit**

- c. Click **New** and complete the configuration, then click **Confirm**.

Editing Configuration Items in Custom Template

1. From the Side Menu, select **Manage Custom Template**.
2. Select the custom template code link in the search result or click **Manage**

 - a. Select the **Configuration** tab.
 - b. Select a configuration **Category**, then select a configuration **Type**, then click **Edit**

 - c. Select the **Code**, then click **Edit**


to edit the details.
 - d. Make the necessary changes.
 - e. Click **Save**.

Viewing Configuration Property Distribution List

To view a list of properties associated with a configuration item.

1. From the Side Menu select **Manage Custom Template**.
2. Select the custom template code link in the search result or click

 - a. Select the **Configurations** tab.
 - b. Select a configuration **Category**, then select a configuration **Type**, then click **Edit**


icon to edit the details.
 - c. Select the Code, then click **View Logs**


Downloading Configuration Items

To download a zip file containing configuration details for a configuration item.

1. From the Side Menu, select **Manage Custom Template**.
2. Select the custom template code link in the search result or click **Manage**

 - a. Select the **Configuration** tab.
 - b. Select a configuration **Category**, then select a configuration **Type**, then click **Download**

 - c. Select a destination folder, then click **Save**.

Deleting Configuration Items in Custom Templates

Configuration items pending approval can be deleted.

1. From the Side Menu, select **Manage Custom Template**.
2. Select the custom template code link in the search result or click **Manage**

 - a. Select the **Configurations** tab.
 - b. Select a configuration Category, then select a configuration Type, then click **Edit**

 - c. Select the Code in the search result, then click **Delete**


Managing OPERA Controls in Custom Templates

1. From the Side Menu, select **Manage Custom Template**.
2. Select the custom template code link in the search result or click **Manage**

 - a. Select the **OPERA Controls** tab.
 - b. Select a **Group**, then select **Functions** or **Parameters** to expand the list.
 - c. Toggle the switch to activate or deactivate the OPERA Control.

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Managing Template Items Approval Status

[Prerequisites for Managing Template Items Approval Status](#)

Each configuration item (entry) added to an enterprise template or custom template (Pending status) must be approved (Approved status) before distributing to properties. You can also reject, archive or delete configuration entries not required.

Approving Configuration Items



Tip

Select **All** or **Pending** status.

1. From the Side Menu, select **Manage Enterprise Template** or **Manage Custom Template**.
2. Select the template code link in the search result or click **Manage**



- a. Select a Configuration Main Group, then select a Configuration Option and click **Edit**
 to edit the details.
- b. Click **Manage Pending Approvals**.
 - i. Select the item, then select **Approve** from the **Status** list.
 - ii. Repeat for each item requiring approval.
 - iii. Click **Confirm**.

Rejecting Configuration Items

Indicates a configuration item has been reviewed but is not approved for distribution.

1. From the Side Menu, select **Manage Enterprise Template** or **Manage Custom Template**.
2. Select the template code link in the search result or click **Manage**



- a. Select a Configuration Main Group, then select a Configuration Option and click **Edit**
 to edit the details.
- b. Click **Manage Pending Approvals**.
 - i. Select the item, then select **Rejected** from the **Status** list.
 - ii. Repeat for each item requiring approval.
 - iii. Click **Confirm**.

Deleting Configuration Items

You can delete configuration items in **Pending** status.



Tip

Select **Pending** status.

1. From the Side Menu, select **Manage Enterprise Template** or **Manage Custom Template**.
2. Select the template code link in the search result or click **Manage**



- a. Select a Configuration Main Group, then select a Configuration Option and click **Edit**



- b. Select the **Code** in the search result, then click **Delete**



Archiving Configuration Items

You can archive **Approved** or **Rejected** configuration items to prevent distribution to new properties.

1. From the Side Menu, select **Manage Enterprise Template** or **Manage Custom Template**.
2. Select the template code link in the search result or click **Manage**



- a. Select a Configuration Main Group, then select a Configuration Option and click **Edit**



- b. Select the **Code** in the search result, then click **Archive**



Unarchiving Configuration Items

You can unarchive configuration items and revert to **Pending** status for review.



Tip

Select **Archived** status.

1. From the Side Menu, select **Manage Enterprise Template** or **Manage Custom Template**.
2. Select the template code link in the search result or click **Manage**



- a. Select a Configuration Main Group, then select a Configuration Option and click **Edit**



- b. Select the **Code** in the search result, then click **Unarchive**



Using Data Import

Prerequisites for Data Import

Use data import to populate (seed) an Enterprise Template with all configuration from a property or import selected configuration details from CSV templates to Enterprise or Custom Templates.

Importing Configuration from OPERA Cloud

You can populate all configuration types to an unconfigured (blank) Enterprise Template from an OPERA Cloud property. The configuration is imported in **Pending** status.

Note

Does not include OPERA Controls.

 Tip

Remember to assign the enterprise template task to a user group assigned to your user.

1. From the Side menu, select **Manage Imports Jobs**.
2. Click **Create**.
3. Select **OPERA Cloud Import** and complete the following:
 - a. Select the **Enterprise Template** to import to.
 - b. Select the **OPERA Cloud Property** to import from.
 - c. **Job Description:** Enter a job description. Defaults to 'Import from <property> to <template>'.
 - d. Click **Create**.

Importing Configuration from CSV Templates

You can selectively import configuration to Enterprise or Custom Templates.

Start by downloading the CSV templates for each configuration type, then prepare the data using Microsoft Excel or similar solution.

Note

Row 2 in each CSV file indicates the data type, string lengths, date format and other important information; this row is ignored on import.

Downloading Templates

Each CSV data file must have a maximum file size of 2MB, and you can import multiple files for one template (uniquely name each file. For example, **Market_Codes01.csv** and **Market_Codes02.csv**).

1. From the Side menu, select **Manage Imports Jobs**.
2. Click **Download Template** to download the **ConfigurationCSVFiles.zip** file.
 - a. Navigate to the download folder then unzip the **ConfigurationCSVFiles.zip** file.
 - b. Open and prepare data for each of the configuration CSV files.

Creating Import Jobs

The enterprise template(s), custom templates and configuration options displayed are based on the tasks assigned to your role. See [Manage User Groups](#) for more information.



Tip

Click **Refresh** to refresh the results updated status of Job ID(s).

1. From the Side menu, select **Manage Imports Jobs**.
2. Click **Create**.
3. Select **CSV Import** and complete the following:
 - a. **Job Description**: Enter a job description.
 - b. **Select Template**: Select the template from the list (both Enterprise and Custom templates are listed).
 - c. **Configuration Type**: Select a configuration type from the list.
 - d. Click **Attach File** and select the CSV file to import or drag the CSV file onto the area.
 - i. Repeat for additional files to import.
 - e. Click **Create**.

Deleting Import Job

You can delete jobs when **Status** is New.

1. From the Side Menu select **Manage Import Jobs**.
2. Select the job in the search result, then click **Delete**

Viewing Import Job Logs

1. From the Side Menu select **Manage Import Jobs**.
2. Select the job in the search result, then click **View Logs**

- a. Click **Download**



to download logs for a configuration type.

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Assigning Properties to Custom Templates

[Prerequisites for Assigning Properties to Custom Templates](#)

Once custom templates are configured, you must associate a custom template with properties in order to distribute configuration. All properties provisioned for your enterprise are listed.

Note

Once configuration has been distributed to the property, the template assigned to a property cannot be changed.

Tip

Use the Unassigned/Assigned filter options to assist with searching for properties.

Assigning Properties to Custom Templates

1. From the Side menu, select **Manage Properties**.
2. Enter search criteria and select the **Unassigned** filter.
3. Select check boxes for properties in the search result, then click **Assign Template**.
 - a. Enter search criteria for the custom template.
 - b. Select a template in the search result, then click **Assign**.

Unassigning Properties from Custom Templates

The assigned template for a property can be removed if the configuration has not been distributed.

1. From the Side Menu, select **Manage Properties**.
2. Enter search criteria and select the **Assigned** filter.
 - a. Select the property, then click **Manage**



Related Topics

- [Distributing Configuration](#)

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Distributing Configuration

[Prerequisites for Distributing Configuration](#)

Approved configuration can be distributed once a custom template is associated to properties. See [Assigning Properties to Custom Templates](#) for more information.

Initiating Distribution

1. From the Side menu, select **Manage Custom Template**.
2. Select the custom template in the search result, then click **Manage**

3. Select **Distribute**.
 - a. **Exclude Previously Distributed:** Select check box to only include new records.
 - b. Search and select properties from the list.
 - c. Click **Distribute**.

Viewing Distribution Job Status

To display a list of all distribution jobs and their status.

1. From the Side menu, select **Manage Distribute Jobs**.
2. Enter search criteria and click **Search**.
3. Click **View Logs**

for any job in the search result to display detailed information. See [Viewing Distribution Logs](#) for more information.

Related Topics

- [Viewing Distribution Logs](#)

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Manage User Groups

[Prerequisites for Managing User Groups \(Roles\)](#)

A list of all enterprise-level groups created in OPERA Cloud Identity Management (OCIM) are displayed.

The following (read only) groups are seeded:

- <ENTERPRISEID>-ADMIN is assigned the **Manage Groups** and **Enterprise Settings** tasks in order for an administrator to assign tasks to custom user groups you configure.
- <ENTERPRISEID>-ENTDATAACCESS and <ENTERPRISEID>-ENTSENSITIVEDATAACCESS are used by Oracle support for support access.

Editing User Groups



Tip

Click **Refresh** to update the result.

You can manage groups by providing sub tasks and access to main tasks at Configuration group level.

1. From the Side menu, select **Manage Groups**.
2. Select the user group in the search result, then click **Edit**

 - a. Enter search criteria, then click **Search**.
 - b. Select a **Task Group**, then select tasks to assign or click the **Select All** checkbox to select all tasks in the task group.
 - c. Repeat steps for other task groups.
 - d. Click **Save**.

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Viewing Changes Logs

[Prerequisites for Viewing Changes Log](#)

The Changes Log provides a history of user activity. You can view the activities such as the creation or update of an enterprise template and custom template, adding or updating, and approving of configuration. The changes log is not purged.



Tip

Enter any text in the Search field for a wildcard search.

1. From the Side menu, select **Changes Logs**.
2. Enter search criteria and click **Search**.

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Viewing Distribution Logs

[Prerequisites for Viewing Distribution Logs](#)

The distribution logs display the status of configuration distributed for a specific template.

✓ **Tip**

Enter any text in the Search field for a wildcard search.

1. From the Side menu, select **Distribution Logs**.
2. Enter search criteria and click **Search**.

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Configuring Enterprise Settings

[Prerequisites for Enterprise Settings](#)

If different global configuration is required across your enterprise, enable the option to configure multiple enterprise templates. Activating this option requires that all properties of one Chain Code are associated to the same Enterprise Template.

Enabling Multiple Enterprise Templates

Note

This option cannot be reverted once activated.

1. From the Side menu, select **Enterprise Settings**.
2. Select the **Enable the Creation of Multiple Enterprise Templates** checkbox.
3. Click **Save**.