Opower Configuration Tool User Guide

F51834-08
April 2026

Opower Configuration Tool User Guide,

F51834-08

Contents

6 Defining Global Styling and Configurations

7 Best Practices and Configuration Considerations

8 Contact Your Delivery Team

1

Oracle Utilities Opower Configuration Tool User Guide

The Opower Configuration Tool is an intuitive tool for configuring Oracle Utilities Opower web products, including configuration of feature behavior, messages, branding, and additional configurations. This allows for direct configuration and modification of the web portal features that support your Utility site. Opower Configuration Tool supports configuration for the following products:

- Digital Self Service - Transactions: Configurations available in the Opower Configuration Tool are covered in this User Guide. For more information on configuring Digital Self Service - Transactions, see the Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide.

Quick Links

- Accessing the Opower Configuration Tool
- Configuring Pages and Including Widgets
- Configuring Widgets
- Publishing Configurations
- Defining Global Styling and Configurations
- Best Practices and Configuration Considerations

2

Accessing the Opower Configuration Tool

You can access the Opower Configuration Tool at https://configuration.opower.com/ and log in using the credentials provided to you by Oracle Utilities. After logging in to the Opower Configuration Tool, the system displays the **Home** page, which provides a navigation panel you can use to access the configuration tools, and high-level steps to configure and publish modifications to your web portal. You can use each of the following Opower Configuration Tool categories to complete the tasks to configure your products:

- **Pages**: The pages of your environment create the structure of your Digital Self Service - Transactions web portal and determine where widgets are included. For more information, see Configuring Pages and Including Widgets
- **Widgets**: Widgets are components of Digital Self Service - Transactions that provide the features and functionality that customers interact with on the web portal. For more information on configuring widgets, including feature behavior and message properties, see Configuring Widgets.
- **Publish**: When configurations are complete and ready for testing, the workspace that acts as a container of those changes can be saved as a version and then promoted through the various environments available to you. The final production environment applies and publishes those configurations to the user base of your web portal. For more information, see Publishing Configurations.
- **Settings**: Settings within the Opower Configuration Tool include configuration of product versions and various global configurations for your products. For more information, see Defining Global Styling and Configurations.

> **Note**
>
> For best practices on using Opower Configuration Tool to complete your product configuration, see Best Practices and Configuration Considerations.

3 Configuring Pages and Including Widgets

Building and configuring your customer web portal requires the configuration of pages and widgets. Pages act as the containers where widgets are made available to customers, and the widgets provide the features and data analysis.

The pages of the web portal are delivered with a default set of widgets and configurations. This default configuration provides a fully functioning web portal. You can update the initial configuration to add, hide, or remove widgets from the pages.

> **Warning**
>
> Be aware that if you deploy Digital Self Service - Transactions as embedded widgets rather than the Digital Self Service - Transactions standalone portal, page configuration is not required. All configuration for embedded deployments is handled through Configuring Widgets and Defining Global Styling and Configurations.

Including Widgets in Pages

Widgets provide the main content on pages. By default, each page comes with a set of widgets that match the tasks and themes of the page. For example, the Energy Use Overview page includes widgets that provide customers with various insights and ways to view their energy use, along with widgets that are used to make required customer account selections.

You can add widgets to pages or remove existing widgets. Use the steps below to modify the widgets on a page.

To add a Widget to a Page

The steps provided below can be repeated to add all applicable widgets to a page.

1. From the **Pages** area, select an existing page. The widgets for the page are displayed.
2. Click the **Add Widget** button. The Add Widget dialog box appears.
3. Determine the default configurations for the widget:
   - To add a widget that inherits defaults from the main widget library, click **Select a widget from the Core library** and click **Next**. The Choose Widget page is displayed.
   - To add a widget that inherits configurations from your own library, click **Copy a widget from My Library** and click **Next**. The Choose Widget page is displayed.
4. Select the desired widget, and click **Next**. The Define ID page is displayed
5. Specify a unique **Widget ID** and click **Done**. Widget IDs can only contain certain characters and cannot include spaces. This ID determines how widget configurations are shared across the web portal, and is required when embedding and linking widgets.

   If a widget is intended to share the same configuration across multiple pages of the web portal, ensure that you use the same widget ID that is used on other pages. All configuration updates for the widget with this widget ID remain in sync. If a widget is intended to have a page specific definition, use a widget ID that is unique to the page.

6. Within the page where the widget has been added, select **Page Configurations**. The page configurations are displayed.
7. From the Widgets area, select **Add New**. A new row is added to the Widgets area.
8. Select the new row that was added, and define the following:
   - **Name**: Enter the widget ID specified when adding a widget to the page.
   - **Enabled**: Select **Yes** to include the widget in the page.
   - **Segments**: Enter any customer segments that are required to control access to the widget. If all customers are allowed to view the widget, leave this field blank. If segmentation is defined for a widget, the same segmentation must be defined for any applicable menu and portal routing elements. Every widget has an applicable portal routing element, but not every widget has an applicable menu element as many menu elements link to pages that contain multiple widgets. For more information on segmentation, see Portal Segmentation.
9. Select **Save Changes** to save your page configurations and fully add the widget to the page.

4

Configuring Widgets

Widgets modularize functionality and content to provide a responsive layout and configuration capabilities for your web portal. Widget configuration is composed of two areas:

- Configuring Widget Behavior: Widget behavior includes various concepts that impact the user experience for a widget. This can include simple behavior such as showing or hiding certain parts of a widget to more complex behavior such as whether customers have the option to select the bill considered for their bill comparison.
- Configuring Widget Messages: Widget messages are the text elements that appear in a widget. This includes the headings, labels, insight message, long form text, and all other text elements displayed to customers that are interacting with a widget.

> **Note**
>
> For best practices on using Opower Configuration Tool to complete your product configuration, see Best Practices and Configuration Considerations.

Configuring Widget Best Practices

Consider the following best practices and examples when configuring widgets.

Using Shared or Page Specific Widgets

A widget can be used in multiple locations of your web portal. When including a widget in multiple locations, consider whether the widget should share its configuration definition, or have a page specific definition.

A widget that is shared in multiple pages means that all configuration changes to the widget are reflected on all pages it is included on. Shared widgets reduce the number of changes that are required, as configurations are automatically applied to all applicable uses of the widget. The widget ID determines if a widget is shared or page-specific. Widget definitions with the same ID are shared, and widgets with a unique ID are page specific. For more information on defining the widget ID when adding widgets to a page, see Configuring Pages and Including Widgets.

A widget that is specific to a page means that configuration changes to the widget are only reflected on that page. Page-specific widgets allow for unique configuration of a widget to meet a page's requirements. A technique to reduce the maintenance burden of a page-specific widget is to perform as much shared configuration on the widget as is possible, and this widget can be included on the page. Then, the widget ID can be modified to define the widget as page-specific, and then the page specific configurations can be completed.

To Modify the Widget ID

1. From the **Pages** area, select an existing page. The widgets included on the page are displayed.

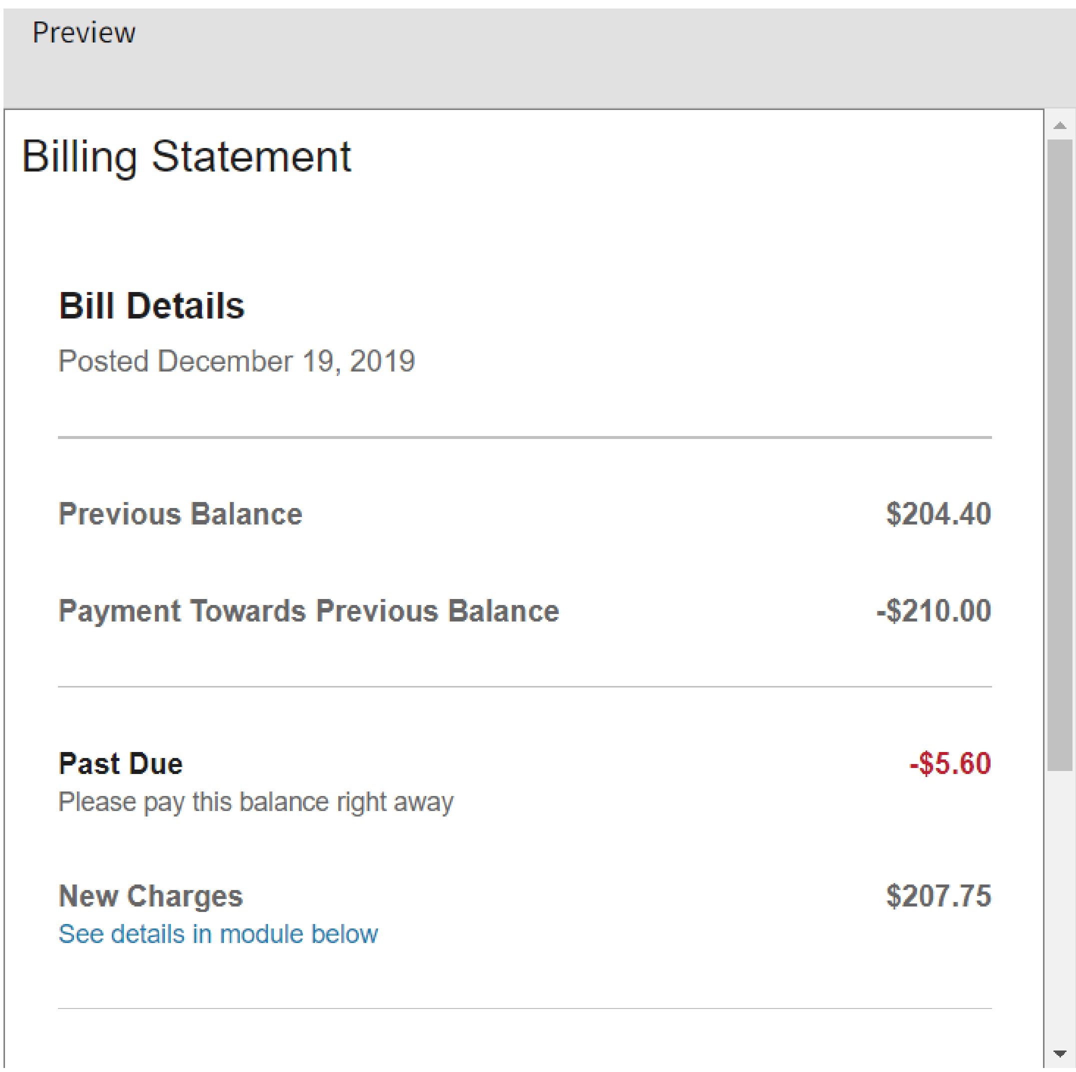
2. For the applicable widget, from the **Actions** drop-down list, select **Edit Widget ID**. The Change Widget ID page is displayed.
3. Within the Widget ID field, modify the ID as required. Validation is performed when defining widget IDs to ensure the widget IDs only contain supported characters and do not include spaces in the ID. This ID determines how widget configurations are shared across the web portal, and is required when embedding and linking widgets.

   If a widget is intended to share the same configuration across multiple pages of the web portal, ensure that you use the same widget ID that is used on other pages. All configuration updates for the widget with this widget ID remain in sync. If a widget is intended to have a page-specific definition, use a widget ID that is unique to the page.
4. Click **Confirm** to save your changes. If you modified a widget to use a unique widget ID, you can now modify the widget functionality and messages as required for the page.

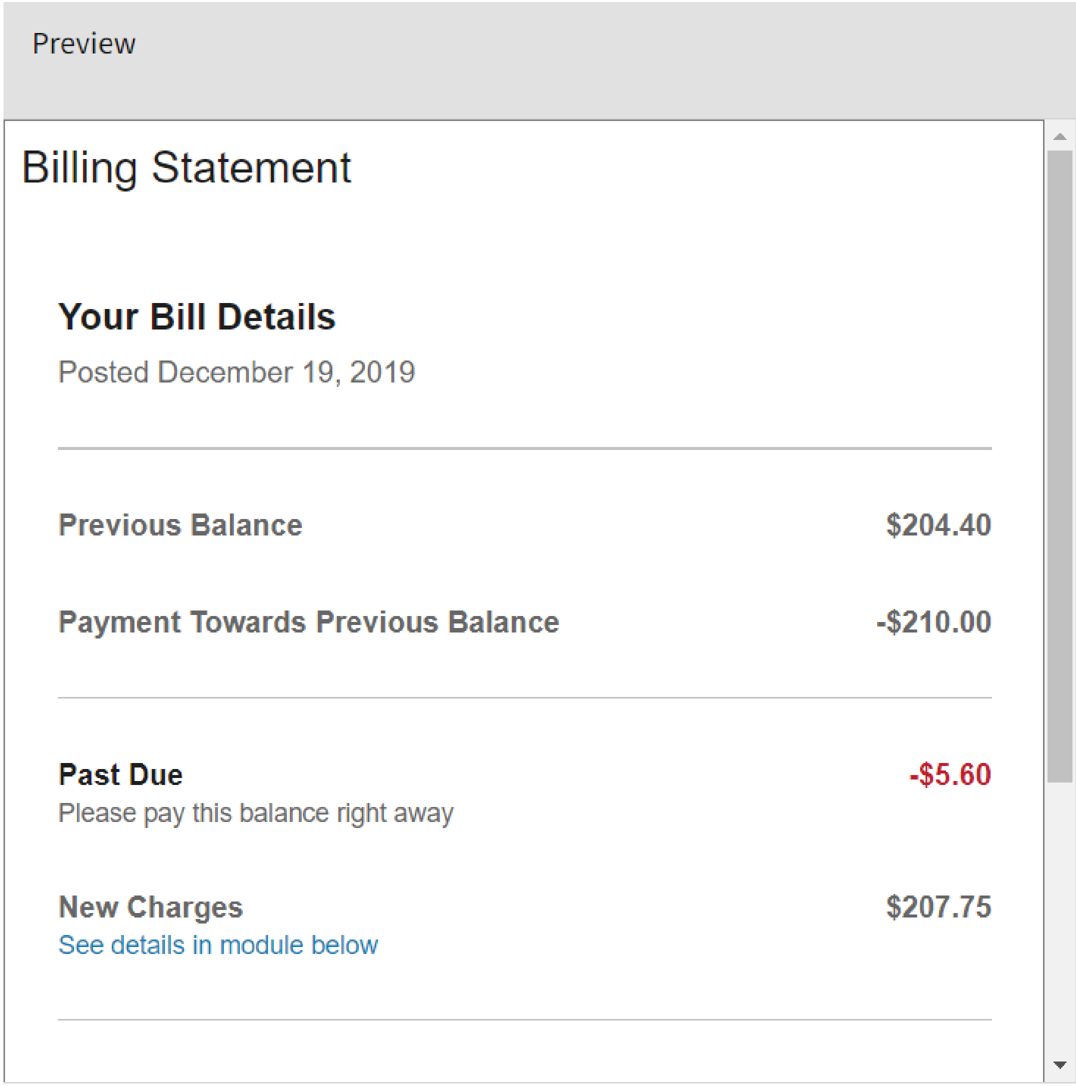
Example Widget Configuration

The following steps provide a direct example of performing widget configuration tasks, along with using the preview to review the configuration changes.

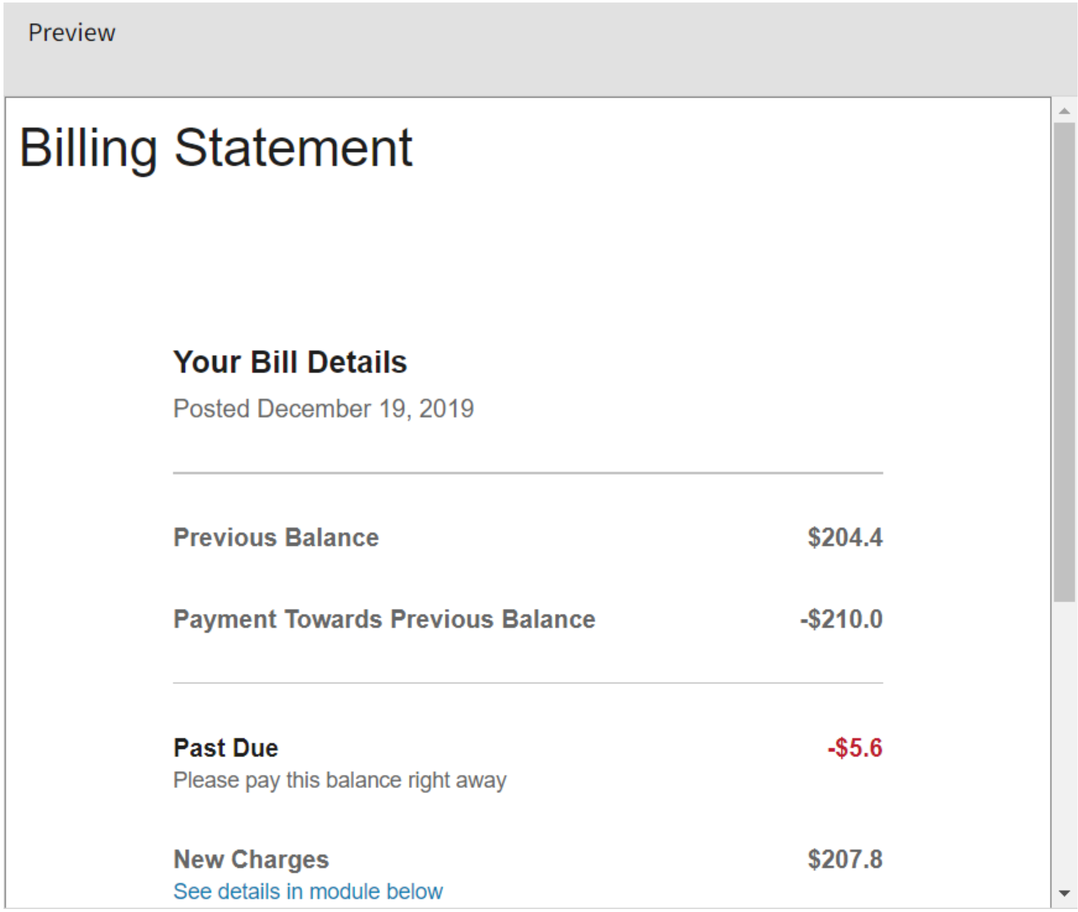
1. From the Opower Configuration Tool, click **Widgets**, and then click **Bill Summary**. The configuration options for the Bill Summary widget are displayed, along with the initial preview which is shown below.



2. From the **Text (en-US)** options, within the **Messages** tab, update the **Bill Details Section Title** to say **Your Bill Details**, and then click **Save Changes**. The widget preview is updated as shown below with the Your Bill Details title.



3. From the **Functionality** options, within the **Preferences** tab, modify **Currency Decimals Places** as **1**, and then select **Save Changes**. The the widget preview is updated with the new currency formatting as shown below.



Configuring Widget Behavior

Widget behavior includes various concepts that impact the user experience for a widget. This can include simple behavior such as showing or hiding certain parts of a widget to more complex behavior such as whether customers have the option to select the bill considered for their bill comparison.

You can configure widget behavior from the **Functionality** options for a widget. Each widget can include zero or more tabs of functionality options, which are general categorizations of the functionality options. While these categories are specific to each widget, they often include:

- Visual or general preference settings enable you to configure the display properties of the objects on the widget, such as colors, fonts, and tooltips, and so on.
- Rules settings provide functionality configurations to hide or display content, or change how certain things function.
- Link settings enable you to configure experiences or interlinking between widgets.

> **Note**
>
> While most widgets have some functionality configurations, it is possible for a widget to not have functionality configurations. If no configurations are available, the Functionality area displays a message that there are no applicable configurations.

Understanding Configuration Options

The Opower Configuration Tool can be used to understand the functionality configuration options available for widgets. The simplest first step is to navigate to the options for a widget and review the option titles, help text, and widget preview.

Be aware that not all configuration changes will impact the widget preview. Modifying particular functionality may not impact the customer state used for the preview or it may impact another screen or area of the widget not available on the preview. In this scenario, user acceptance testing may be required to confirm configuration changes. For information on publishing changes to an environment for testing purposes, see Publishing Configurations.

In addition to reviewing configuration option names, help text provides additional insight and explanation for configuration options.

> **Note**
>
> The steps below provide general steps to review configuration options. For an example scenario of widget configuration, see Configuring Widgets.

To Review Functionality Configuration Options

1. From the Opower Configuration Tool, select **Widgets**, select the widget to configure, and then select **Functionality**. The functionality options for the widget are displayed.
2. Select a tab to review the available configuration options. The titles along with the widget preview provide insights into each configuration option.
3. Hover over the information icon for a configuration option to display the help text for that option. This information gives important details about the configuration such as when the option is applicable, the behavior of each available option, and the resulting user experience.
4. To preview how a configuration change impacts a widget, update a configuration value and select **Save Changes**. The widget preview updates to reflect the change.

Configuring Widget Messages

Widget messages are the text elements for a widget. This can include the headings, labels, insight message, long form text, and all other text elements displayed to customers that are interacting with a widget. Error messages are also available for configuration through a widget's message options.

While completing widget message configuration, be aware of Syntax Standards for Messages.

Understanding Messages

The Opower Configuration Tool can be used to understand the messages available for widgets. The simplest first step is to navigate to the options for a widget and review the message titles, help text, and widget preview.

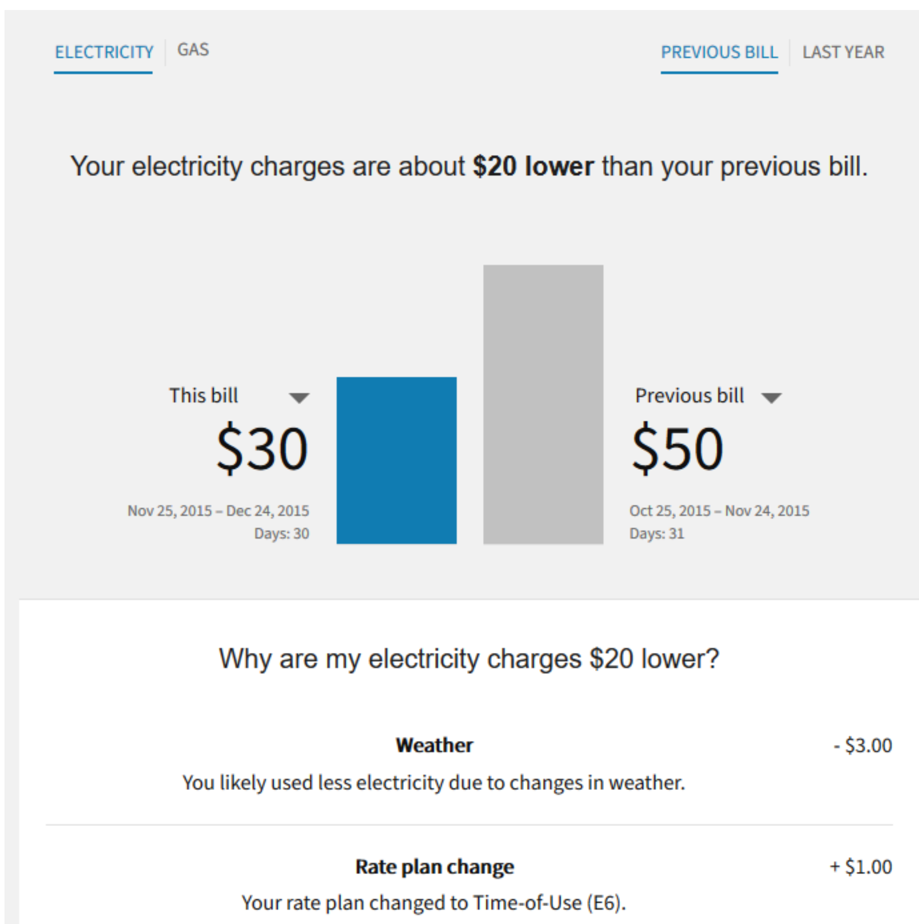
Be aware that not all configuration changes will impact the widget preview. Modifying particular functionality may not impact the customer state used for the preview or it may impact another screen or area of the widget not available on the preview. In this scenario, user acceptance testing may be required to confirm configuration changes. For information on publishing changes to an environment for testing purposes, see Publishing Configurations.

In addition to a simple review of a message name, help text provides additional insight and explanation for messages.

Note: The steps below provide general steps to review message options. For an example scenario of widget configuration, see Configuring Widgets.

To Review Messages

1. From the Opower Configuration Tool, select **Widgets**, select the widget to configure, and then select **Text [locale]**, where `[locale]` is the language locale to configure. The message options for that locale and widget are displayed. For more information on message locales, see Localizing Messages below.
2. Select a tab to review the available messages. The titles along with the widget preview provide insights into each message .
3. Hover over the information icon for a message to display the help text for that option. This information gives important details about the configuration such as where the message is located, special considerations for the message such as code inclusion, and the resulting user experience.
4. To preview how a message change impacts a widget, update a configuration value and select **Save Changes**. The widget preview updates to reflect the change. An example of a Bill Comparison preview is shown below.



Localizing Messages

If your web portal supports multiple locales, each widget includes a copy of the message configurations for each applicable locale. These locale specific messages can then be customized to meet the customer demands and expectations for that locale.

To Define Widget Messages for a Locale

1. From within the Opower Configuration Tool, ensure that the locale is enabled for your web portal. For information on this process, see Locales.
2. Select **Widgets**, select the widget to configure, and then select **Text [locale]**, where `[locale]` is the language locale to configure. The message options for that locale and widget are displayed. For example, select **Text es-US** to localize messages for the United States Spanish locale.
3. Modify each widget message as required in the applicable language for the locale. These messages are displayed for the widget for customers that have their web portal preferences or web browser defined to display content for that locale.

Syntax Standards for Messages

You can use a combination of text and code to update messages that are displayed on the web portal for the feature.

5
Publishing Configurations

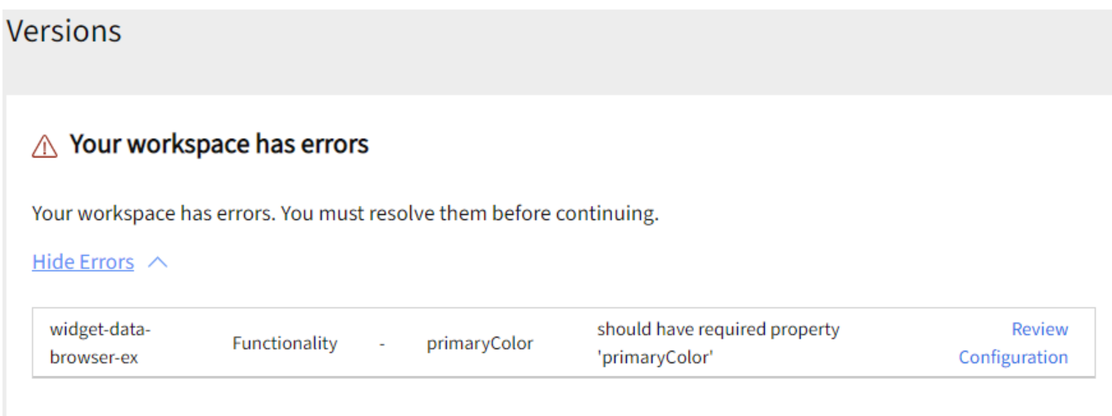
The Opower Configuration Tool enables you to publish configuration changes. All configuration changes, including widget, page, and global configurations are maintained as part of a workspace. When configurations are complete and ready for testing, the workspace can be saved as a version and then promoted through the various environments available to you. The final production environment applies and deploys those configurations to the user base of your web portal.

Versions

The Versions page provides detailed information on the full version history of your web portal, as well important current workspace information.

Reviewing and Resolving Errors

The Opower Configuration Tool highlights any errors in the current workspace, which stores configurations in development prior to saving the configuration changes as a packaged version. You can select **View Errors** to display all errors that must be resolved prior to publishing the workspace as a version. For each error a **Review Configuration** link redirects you to the component that has the error. This simplifies the task of locating and resolving errors to proceed with workspace publication.



Reviewing Workspaces

The current workspace is always highlighted to give quick access to the changes that are being considered in the current workspace. The following actions are available for the current workspace:

- **View Changes**: All of the changes included in a workspace can be reviewed. These changes provide a comparison of the previous value for a given configuration along with the new value in the current workspace. This offers a full history of all changes that are included in a workspace.
- **Revert Changes**: All of the changes in a workspace can be reverted, which clears all updates for the current workspace. This option is not available if a workspace does not

have any changes. For more information on reverting a workspace, see Reverting a Workspace.

- **Publish Workspace**: All of the changes in a workspace can be published, which saves all configurations implemented in the current workspace. A version of the workspace is created in the history. This option is not available if errors that must be fixed are detected in a workspace. A published workspace can then be promoted as a version through the various environments.

> **Note**
>
> Warnings are displayed if the current workspace uses an out-of-date product version. The product version can be updated to ensure that the workspace is using up-to-date product configurations.

To Publish a Workspace as a Version

1. From the Opower Configuration Tool, select **Publish**. The Versions page is displayed by default.
2. Within the Current workspace area, select **Publish Workspace**. The Publish a New Version page is displayed.
3. Details about the active version and the current workspace are displayed.
   - If the current workspace includes widget modifications, a Select Changes page lists each modification along with a checkbox for selection. By default, all widget modifications are selected to be included in the workspace publication. Widget modifications can be cleared and excluded from being saved with the workspace publication. Any modifications that are cleared are added to a new workspace after completing the publication action. Select **Next** after reviewing widget modifications to progress to the Review Changes page.
   - If there are no widget changes, all workspace changes, such as global changes, are mandatory to include in a workspace publication. Continue to the next step to confirm those changes in the Review Changes page.
4. In the **Review Changes** page, review and confirm all changes, and select **Next** to continue with the publication. The Name and Description page is displayed.
5. Provide a descriptive name for the workspace, along with a description of the changes made with the workspace. This information is helpful when reviewing the history. Select **Publish Version** to complete the publication of the workspace as a version.

Version History

The full history of versions is available for review, which provides important information about how changes have been created and promoted throughout the system. Expanding a version displays the description, which can provide additional details about the purpose for the given version. Depending on the status of a version, you can perform actions such as:

> **Note**
>
> A search field is provided to search through and filter versions within the history. The search field considers all version information such as the description, product version, and so on.

- **Preview**: All versions can be previewed to review all modifications made for a given version.
- **Promote to Environment**: All versions except for the version currently in production can be promoted to the next tier of deployment. For example, if a version is currently on the stage environment, it can be promoted to the production environment to make the changes available on the web portal. For more information on promoting and publishing a version, see Promoting and Deploying a Version.
- **Set as Current Workspace**: All versions can be set as the current workspace. This action changes the active workspace to the selected version. A confirmation message is displayed that clarifies this action. For more information on reverting to a version, see Reverting a Workspace.

Comparing Versions

The Opower Configuration Tool allows you to compare two published versions, which can be helpful to determine the changes that were made between the two versions. From the **Compare Versions** page, you can select the versions to compare. From the first drop-down list you select the older version and then the second drop-down list provides newer published versions to select from. After you have selected a version in each drop-down list, a full list of changes is provided for review.

Environments

The Environments page lists the tiers available in your system, along with information on the current status of each environment, such as:

- The version currently deployed to each environment.
- The Opower Configuration Tool product version that is part of that deployment
- When the last update was made to the environment.

A full history of updates for an environment is also available.

Promoting and Deploying a Version

To deploy a version to your production environment, you must promote the version through each environment, resulting in the final promotion to production. Each environment, aside from production, provides an option to promote to the next environment in the line of succession. Promoting to an environment implements the changes specified in a version, and allows for required testing on lower environments before making the changes live in production. When testing is complete, you can make the changes available to customers by promoting to the production environment.

1. From the Opower Configuration Tool, select **Publish**, and then select **Environments**. The Environments page is displayed.
2. From the environment area of the environment you are promoting from, select the **Actions** option, and then click **Promote to [Environment]**. A Promote Version to [Environment] page is displayed.
3. The first page provides information on the version available on the environment you are promoting to, and the new version selected to promote to the environment. Review all changes that would occur due to the promotion and then select **Next** to continue.

4. Provide a description of the promotion event, which can include details such as why the promotion was performed and what updates the new version includes. Select **Promote to [Environment]** to complete the promotion action.
   - If you promoted to production, publishing a version is considered complete.
   - If you promoted to an intermediary environment, the new configurations are now available on that environment and should be tested. After all tests and processes are complete, repeat these steps to promote to the next environment. Publishing is complete after you have promoted the version to production.

Reverting a Workspace

All of the configurations in a workspace can be reverted, which clears all updates for the current workspace, and reverts to the configurations of a previously saved version. This option is helpful if there are errors or other concerns with the configurations in the current workspace, and starting from the configurations of a historical version provides a better place to restart configuration.

1. From the Opower Configuration Tool, select **Publish**, and then select **Versions**. The Versions page is displayed.
2. Select from the following revert options:
   - To revert to the most recently saved version, within the **Current workspace** area, select **Revert Changes**. A confirmation message is displayed, click **Continue** to revert to the most recently saved version.
   - To revert to a version other than the most recent version, within the version history select the **Actions** option for the version to revert to, and then click **Set as current workspace**. A confirmation message is displayed. Click **Continue** to revert the current workspace to the selected version.

Rolling Back a Version

Promoting a version to an environment applies all configurations for that version to that environment. Rolling back the version for an environment updates the environment to use the configurations of a previous version. Rolling back to a previous version can also be thought of as promoting a previous version to that environment. This task is applicable if promoting a version causes errors or unforeseen behavior.

1. From the Opower Configuration Tool, select **Publish**, and then select **Environments**. The Environments page is displayed.
2. For a given environment, from the **History** area, select **Show** to display the version history for that environment.
3. Within the version history list select the **Actions** option for the version to roll back to, and then select **Roll back to this version**. A Promote Version to [Environment] page is displayed.
4. The first page provides information on the current version available on the environment, and the version selected to roll back to. Review all changes that would occur due to the roll back and then select **Next** to continue.
5. Provide a description of the roll back event, which can include details such as why the roll back was performed and why the roll back version is preferable. Select **Promote to [Environment]** to complete the roll back action.

6

Defining Global Styling and Configurations

The Settings options within the Opower Configuration Tool allow you to configure the product versions and various global configurations. Global configurations allow you to modify the default page and widget configurations to reflect a uniform brand identity and user experience. The Settings configurations that are available include:

- Software Version defines the current version of the product you are configuring with the Opower Configuration Tool, and supports the upgrade process to newer versions.
- Global Configs defines utility information and branding guidelines, web portal configuration, and other various configuration requirements to support your Digital Self Service - Transactions web portal.
- Brand Styling includes the web portal elements, color, text, buttons, and link global settings that you can configure to comply with the client's branding guidelines.
- Labels include the configuration settings for global labels such as currency, fuel types, and units of measure.
- Locales include the regional locales for message text that are enabled for a utility.

Note: For best practices on using Opower Configuration Tool to complete your product configuration, see Best Practices and Configuration Considerations.

Software Version

You can review the Software Version to view the current version of the product you are configuring with the Opower Configuration Tool. This includes a full version history which provides the creation date and summary for each version. If newer versions are available, you can update to a particular version.

To upgrade the software version

1. From the Opower Configuration Tool select the **Settings** option, and select **Software Version**. The Product Versions page is displayed, which lists product version upgrade history.
2. If a newer product version is available, select the **Upgrade to [productVersion]** option, where [productVersion] is the new product version to upgrade to. A confirmation message is displayed.
3. Select **Continue** to process the version upgrade.

Global Configs

The Global Configs are a set of required configurations for Digital Self Service - Transactions that define utility information and branding guidelines, web portal configuration, and other configuration requirements to support your Digital Self Service - Transactions web portal.

> **Note**
>
> If the required value for a configuration is unclear, hover over the information icon for the configuration to review applicable information about the configuration, including valid values.

You can access global configurations using the steps below:

1. From the Opower Configuration Tool, select the **Settings** option, and then select **Global Configs**. The global configuration options include:
   - URL Icons
   - Language
   - Utility Details
   - Portal Segmentation
   - Portal Routing
   - Session Configuration
   - Analytics
   - Side Bar
   - Footer
   - Menu
   - Chat

URL Icons

URL Icons define browser icons used for the web portal, which can be provided as embedded base64 images. Review the help text to learn more about each icon configuration.

Language

Language defines the languages to enable. You also set the default language to use on your labels, messages, headers, and body text. For additional configurations related to the languages supported for your product, see Locales.

Utility Details

Utility Details define utility-specific content such as address and contact information, logos, and customer support information. Review and update all configurations to reflect your utility requirements.

Portal Segmentation

Segmentation provides the ability to define which features and content within Digital Self Service - Transactions are accessible to certain groups, or segments of customers. For example, the Home Energy Analysis can be defined as only accessible by residential customers.

To support segmentation within Digital Self Service - Transactions, a segment group must be created. Each group defines the service agreement types that are applicable for the segment group. For example, a segment for all residential customers can include a single service agreement type that defines all residential customers. An additional segment group can be created for all electricity customers by including separate service agreement types for residential electricity customer and commercial electricity customers. The segment groups and their service agreement groupings must reflect how your system groups customers into service agreements.

Creating Segment Groups

A segment group is defined by providing a descriptive name that explains the group of customers in the segment, and a comma-separated list of applicable SA Types. The SA Type value corresponds to the SA Type values defined in Customer Care and Billing, which define the service agreement type. For example, an SA Type for residential electricity customers might be E-RES.

To create a segment group

1. From the Opower Configuration Tool, select the **Settings** option, select **Global Configs**, and then expand **Portal Segmentation**.
2. Select **Add New** to add another row for a new segment group. A new segment group is created with a default name applied for the segment group.
3. Select the edit icon to modify the default name for the segment group. Type a descriptive name to make the name more understandable and meaningful, such as Electricity Customers.
4. Select the segment group row to expand the definition. Within the **Segment Group** field, enter the list of applicable SA Types, separating each SA Type with a comma. For example, an Electricity Customers group might include an SA Type definition of E-RES, E-COM to include residential and commercial electricity customers.

Applying Segmentation

After segment groups are created, they can be applied as required to various configurations within Digital Self Service - Transactions. Any Digital Self Service - Transactions elements that apply segmentation are accessible only for the customers included in those segments. Segments can be applied to:

- Widget display on a page, see Configuring Pages and Including Widgets. If segmentation is defined for a widget on a page, that same segmentation must be defined on any applicable menu and portal routing elements. Every widget has an applicable portal routing element, but not every widget has an applicable menu element as many menu elements link to pages that contain multiple widgets. Applicable menu and portal routing elements for a page and widget can be determined by navigating through the Digital Self Service - Transactions web portal.
- Menu navigation items, see Menu.
- Portal routing to areas of theDigital Self Service - Transactions web portal, see Portal Routing.

Portal Routing

Routing supports the linking and redirection requirements of your web portal. Each page of your web portal must have a valid location to route customers to when they interact with menus and links that redirect to that page.

The pages of the web portal are provided with a default routing configuration which supports a fully functioning web portal. While modifications are not required, routing configuration is available to modify the configuration based on requirements, such as defining customer access of pages using **Grant To** and **Segmentation** options.

Each routing item must define the following:

- **Experience**: The experience name is an internal identifier that allows other elements within the web portal to identify and link to the page. When another element, such as a link within a widget, redirects to a page the experience name is used to locate the page and properly redirect to the location. This value can be left blank if the page is not directly linked to from other elements of your web portal.
- **Page**: The page name is an internal identifier for the page. This name is also used to define and configure a page within the web portal as described at Configuring Pages and Including Widgets.
- **Path**: The path defines the relative path within Digital Self Service - Transactions for the routing item. If this page is linked from the main menu navigation, this path must match the path for the menu item, as described in Menu.
- **Grant To**: This option defines the type of customer that can view the routing location. This can allow a routing location to be displayed or hidden based on whether a customer has logged in to Digital Self Service - Transactions or if they are payment eligible.
- **Segments**: Segments define the type of customer that can view the routing item based on their customer segment. Leaving this field blank makes the routing item available for all customer segments. Including segments limits the item to only the customer segments that are included. For more information on configuring segments, see Portal Segmentation.

Session Configuration

The Session Configuration options provide configuration of authentication sessions for Digital Self Service - Transactions. Use the Authentication Mode option to define if authentication uses the Oauth or SAML standard. For more information on configuring single sign-on with Digital Self Service - Transactions, refer to the Oracle Utilities Opower Digital Self Service - Transactions Authentication Configuration Guide.

In addition to the main authentication mode, you can configure user session details such as session lifetime. Review the help text on each option to learn more about the configurations they support.

Analytics

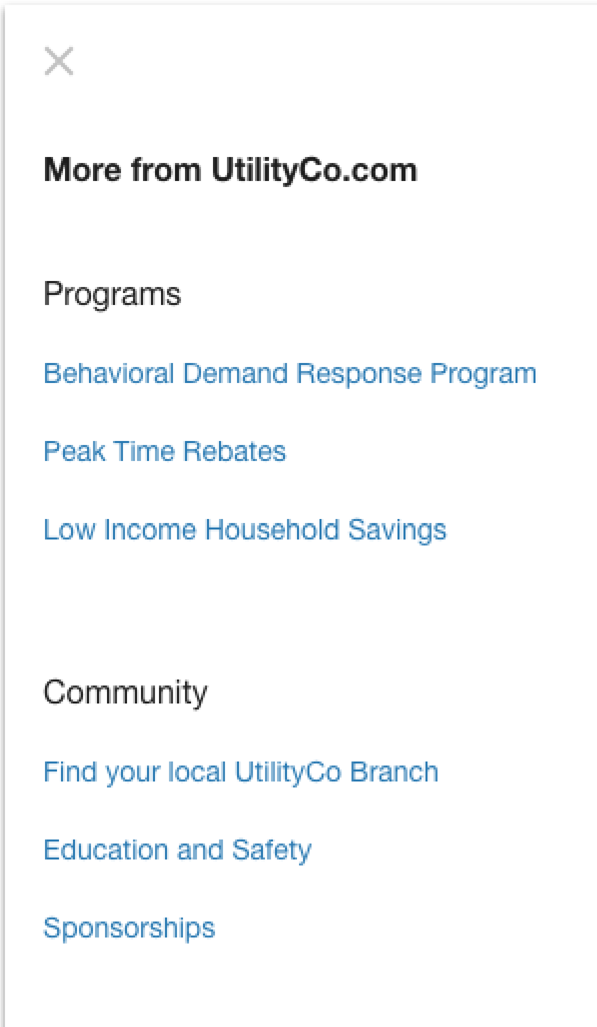
Digital Self Service - Transactions supports integration with Google Analytics to analyze web traffic. You must provide Oracle Utilities with the following Google Analytics information to support this integration:

- **Enabled**: Select **Yes** to enable integration with Google Analytics.
- **Tracking ID**: Provide your Google Analytics tracking ID value to link to your Google Analytics account.

Review the additional configurations, including reviewing the help text for each configuration, to learn about each option. You can also refer to the third-party documentation for Google Analytics to learn more about available configurations, such as anonymizing IP addresses.

Side Bar

The side bar, or secondary menu, is displayed when users click the menu button (three horizontal lines). This area can provide links to areas within Digital Self Service - Transactions as well as to external resources. The following image shows a standard example of the website navigation items within the side bar.



When enabling the side bar, you can create sections that include one or more links. Each link must include the link text as well as the path to the link location. This path can be relative for links within the Digital Self Service - Transactions web portal. If the item links to an external resource, you must include the full path for the resource. While multiple sections and links within those sections can be created, be aware that the size of the side bar is limited. Limiting the number of sections and links ensures that the links display well in the side bar and do not overwhelm customers reviewing the list of links.

If the side bar is disabled, clicking on the Digital Self Service - Transactions menu does not display a side bar.

Footer

The Footer defines the content displayed near the bottom of the Digital Self Service - Transactions web portal. The following footer configurations are supported:

- **Enabled**: Defines whether to show or hide all footer content.
- **Show Legal**: Defines whether to show or hide the legal section of the footer. This section can display various legal text related to the web portal. The content that is displayed in the legal footer is defined in the Messages options (as part of Labels) with the **Footer Copyright** configuration property.
- **Show Contacts**: Defines whether to show or hide the contacts section of the footer. This section can display utility contact information such as customer service contact information. The content that is displayed in the contacts section of the footer is defined in the Messages options (as part of Labels) with the various **Footer** configuration properties, such as **Footer Heading**, **Footer Contact Weekdays**, and so on.
- **Socials**: Defines whether social networks are displayed in the footer. If this content is displayed, you can select the social networks to display along with the applicable links to the utility-specific social network pages.

Menu

The main navigation menus displayed across the top of the screen allow customers to access the main content categories for the site. The Menu configuration options allow configuration of the main menu drop-downs, as well as each link within those drop-downs.

The top-level items within Menu configuration define the main menu navigation items. Within each item, items can be added to include the second level of links displayed within the drop-down. For example, you might create a main item for Billing and Payment. Within this item you can created additional billing and payment items, such as View Bill, Financial History, and Manage Billing.

> **Note**
>
> Digital Self Service - Transactions supports a maximum of two menu levels. This means the main navigation menu can display a drop-down of links related to that category. Additional levels within this drop-down are not supported.

For each menu item you must define the following:

- **Name**: Defines the internal name of the menu item.
- **Enabled**: Defines if the item is displayed. If an item is disabled it is not displayed in the menu navigation. Additionally, if a disabled item has nested items, those items are also hidden.
- **Path**: Defines the path within Digital Self Service - Transactions for the menu item. This path can be relative for links within the Digital Self Service - Transactions web portal. Be aware that this path must also be defined in the routing configuration, as described in Portal Routing.

  If the item links to an external resource, the full path for the resource must be included. External resources are not included in routing configuration.

Be aware that the path is not used for items that have items nested underneath. For example, a main item of Billing and Payment has additional items underneath that provide various menu items within a Billing and Payment menu. The main Billing and Payment item does not use a path because it contains items within its menu that link to billing and payment resources. The main Billing and Payment item is not an active link and thus the path is not used.

- **Grant To**: Defines the type of customer that can view the menu item. This enables you to display or hide a menu option based on whether a customer has logged in to Digital Self Service - Transactions or if they are payment eligible.
- **Segments**: Defines the type of customer that can view the menu item based on their customer segment. Leaving this field blank makes the menu item available for all customer segments. Including segments limits the item to only the customer segments that are included. For more information on configuring segments, see Portal Segmentation.

Chat

Chat services can be integrated with Digital Self Service - Transactions to enable customers and utilities to communicate in real-time in a chat channel. This feature helps utilities meet their customer's expectations, and can help increase customer satisfaction and revenue.

Note: Chat services are third-party services that require a separate service agreement and contracting with a third-party chat vendor prior to integration with Digital Self Service - Transactions.

The Opower Configuration Tool provides configuration for chat services that are dependent on the chat vendor selected. Review the help text provided with each chat configuration option along with your chat vendor documentation to determine proper configuration of your chat service with Digital Self Service - Transactions.

Brand Styling

The **Brand Styling** global configurations allow you to modify the colors, texts, buttons, and links of pages and widgets to comply with and reflect branding guidelines.

Locales

Locales defines the languages to enable and defines the default language to use on your labels, messages, headers, and body text. Enabling a language allows for configuration of the text elements in the applicable language, which can then be displayed to customers who select that language in their account preferences. Setting the default language determines which language is displayed to customers who have not identified their preferred language.

To configure locales

1. From the Opower Configuration Tool select **Settings**, and then select **Locales**. The Locales configuration options are displayed.
2. Enable or disable a locale by selecting or clearing the checkbox for the applicable locale, and then click **Save**. Labels options are created or removed based on your selections. For example, if you enable es-US a new Labels (es-US) option is displayed within the Settings options. While not directly viewable from this page, message properties for each enabled locale are also made available for each widget.

3. Any enabled locale can be defined as the default. From the list of enabled locales, select the **Default** radio button.
4. Click **Save** to save all changes to locales.

Be aware that enabling new locales can require additional configuration of the messages for each locale. As mentioned in the steps above, enabling a new locale also creates new locale options within settings, as well as new locale options for each widget.

Labels

The **Labels** settings allow you to configure the global currency code, web portal messages, fuel types, measurement units, date formats, and time formats for a given locale. Labels are available for each enabled locale. To enable additional locales, refer to Locales.

Currency

The currency code defines how currency values are displayed for a given locale, ensuring that the proper currency symbol and formatting are used. A locale uses a default currency code that is commonly applicable to a locale. You can provide a different currency code for a locale if required.

Messages

Messages are text elements displayed throughout the Digital Self Service - Transactions web portal. The elements defined here are commonly more applicable to the web portal itself rather than feature-specific elements. This includes elements such as website navigation, page titles, footers, and side bar content.

The default messages can be reviewed and modified to reflect the requirements of your web portal. For additional information on a particular message, review the help text provided with the message.

Fuel Type

Fuel Type defines the wording used for the fuel types applicable to your program. Fuel type terminology is used in locations such as fuel type toggles and other locations where the applicable fuel type is highlighted.

Unit of Measure

Units of Measure define the wording used for the units of measure applicable to your program, such as energy units, and temperature units. Unit of measure terminology is used in locations such as graphs, data insights, and other locations where a unit of measure is displayed.

Dates

Dates defines how various date elements are formatted. Messages that display date and time content support specific date and time formatting syntax. For the Labels options that are applied across all features, the date syntax uses the standards described at https://momentjs.com/docs/#/displaying/format/.

Time

Time defines how various time elements are formatted. Messages that display date and time content support specific date and time formatting syntax. For the Labels options that are applied across all features, the time syntax uses the standards described at https://momentjs.com/docs/#/displaying/format/.

Reviewing Label Modifications

Direct previews are not available when modifying labels. You can review label changes by publishing your workspace to an environment, as described in Publishing Configurations.

A process of modifying labels and republishing to an environment for review can be used until labels reflect the preferred configuration. It can be helpful to complete label configurations separately from widget and page configurations. This technique ensures that the changes that are seen in the environment are due to label changes and not related to other widget or page changes made elsewhere in the Opower Configuration Tool.

7

Best Practices and Configuration Considerations

When configuring your products with the Opower Configuration Tool, there are certain techniques, best practices, and other considerations that can simplify and improve the configuration experience. Be aware of the following:

- **File Assets**: Configuring your products can include various file asset requirements such as image files, logos, and fonts. The Opower Configuration Tool provides configuration of certain assets. To ensure the file assets meet product requirements and are stored in the proper location, contact your Oracle Utilities Delivery Team as described in Contact Your Delivery Team.
- **Message Configuration**: Messages can support a combination of content types such as text, HTML, and code, depending on the message property. For more information on message configuration, see Syntax Standards for Messages.
- **Restoring Defaults**: Configurations that have been modified from the default value provide a restore to default option. This allows for an easy way to restore the default behavior. The default value that is restored is shown before completing the restore action. If you are unsure whether you want to restore the default value or keep the current value, it is recommended to note down the current value in some way so that it is easier to reapply later if the default value does not meet requirements. The restore action can only restore to the default value, it does not keep a full history of changes.
- **Link Configuration**: Widgets use links to redirect users to other widgets and web portal locations. The default link definitions for widgets can be used in most scenarios. For embedded deployments or other link configuration tasks, contact your Oracle Utilities Delivery Team as described in Contacting Your Delivery Team.
- **Resolving Errors**: Configuration errors can be introduced which prevent publishing a workspace. You can view and resolve all errors for a workspace, as described in Publishing Configurations.

Using Search to Locate Applicable Content

Opower Configuration Tool provides search functionality to make finding and navigating configurations easier. Each page contains a search field at the top of the screen and searches the option names. Next to the search box, the total number of matching options is displayed. If the properties are within tabs or accordion menus, there are count indicators to help find the areas where the search matches are located.

Some examples of common searches and their results include:

- Search widget message and functionality configurations for applicable content. For example, you can search a widget for all message and functionality configurations that include the keyword disclaimer to review disclaimer related configurations.
- Search global and branding configurations for applicable content. For example, you can search brand styling for the keyword color to review all color configurations.
- Search pages for applicable widgets. For example, you can search a page for the keyword bill to review all billing-related widgets.

8 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.