



NEW USER TRAINING

The **Sigma New User** training programme is designed to get your workforce up and running with Sigma software. Each delegate will be taken through the key features of Sigma's end-to-end processes to ensure they get the most out of the software. The training will help new users gain a good understanding of working with available data, setting up and maintaining various data streams, creating reporting to suit your business needs and more. This course runs over three days (6 x 3-hour sessions) and is suitable for up to two people.

Delivered by our expert Customer Success team, this training programme can be held in the comfort of your own office, at our onsite facility in Milton Keynes, or online via Microsoft Teams or Zoom.

Who is this training for?

This course has been designed for new users to Sigma. Whether Sigma is new to your organisation, and you require user training as part of your organisation's onboarding to the system, or you are already using Sigma and you would like new staff trained to use the functionality. For enhanced learning, the training takes place using your own database, however a demonstration training environment is available if required.

What do users need to complete the course?

- This course is designed to teach a new Sigma user to perform the end-to-end process, there is no pre-requisite to have previously used Sigma or another energy management solution
- A knowledge of the Energy Industry would be advantageous but not essential
- Access to a computer or laptop with Wi-Fi is essential
- For remote training, access to Microsoft Teams or Zoom is essential

What does the course cover?

This three-day course is designed to introduce the many features within Sigma and to help the user:

- Understand the data and use the search options
- Set up Sigma to input data, such as Invoices and Metering data
- Input manual and electronic Invoices
- Manually input half hourly metering data, and set up automatic schedules
- Monitor metering data for gaps, including unexpected data and other streams
- Maintain data, for example Sites, Accounts and Meters
- Add and maintain additional data such as the Floor Area
- Add commodities for GHG Reporting such as Waste, Travel and others
- Run and export Reports based on billing and/or metering data
- Create bespoke versions of Reports

The course can be structured to suit your schedule and be delivered in the following ways:

- On site, over three consecutive days (2 sessions per day) or on 3 separate days for example, one day per month for three months
- Through online sessions (via Microsoft Teams or Zoom). Each session is 3 hours, and we recommend 1 or 2 sessions per week for 3/6 weeks
- A combination of the above

What are the learning outcomes?

During this course delegates will learn how to:

- Input and manage energy Cost and Consumption
- Monitor and Target energy usage
- Use Sigma's reporting functionality to enable exporting and scheduling
- Build interactive energy dashboards to help users understanding of energy data

On completion of the course, delegates will:

- Have comprehensive knowledge of all Sigma functionality
- Be able to validate Half Hourly (HH) data and Utility Billing files
- Know how to use the reporting capability for all Data Streams

What is the 3 Day Course Structure (6 x 3-hour sessions)?

Session 1 - Understanding Sigma

Session 2 - Billing

Session 3 - Metering

Session 4 - Managing Queries, Validation, Creating/ Maintaining Items and Monitoring HH Data

Session 5 - Creating / maintaining other Items and Admin

Session 6 - Reporting

Session 1 - Understanding Sigma

The Basics

- Access Sigma
- Understand how to navigate around the database
- Overview of available Activities
- Learn the various search options
- View the data including Sites, Supply Points, Meters and Accounts
- Create spreadsheets containing various Items such as Site details, Accounts and Meters
- Understand how to log out securely

Validation

- Understand and maintain existing Billing Validation

Schedule Management

- View existing Schedules

Energy Viewer

- Access and understand the Energy Viewer

Session 2 - Billing

Manual Billing

- Understand the Billing process
- Enter example Gas, Electricity and Water Bills
 - Create Queries for failed Bills
- Navigate to and view Bills
- Delete Bills

Electronic Billing (EDI Files)

- Set up and maintain EDI Suppliers
- Import and manage EDI files
 - Create Queries for failed bills
- Create and export Payment Files (optional)
- View the EDI Billing History
- Automate the import of EDI files (optional)

Session 3 - Metering

Manual Meter Readings

- Enter Meter Readings directly into Sigma
- Enter Meter Readings via the [Energy Viewer](#) portal
- Add documents and/or photos to a Meter (or Account etc)

Half Hourly data

- Check Meters and Channels are set up correctly for HH Data
- Import Half Hourly Data files
 - Spot check imported data for anomalies
- View HH data at Site level
- Automate HH Data importing (optional)
 - Checking the schedules for HH Data

Exporting Metering Data

- Export data for individual Meters
- Export data for multiple Meters

Session 4 - Managing Queries, Validation, Creating/Maintaining Items and Monitoring HH Data

Managing Queries

- View all existing Queries
- Work through and resolve previously created Queries

Validation

- Set up / amending Validation

Creating and Maintaining Items

- Create Sites, Supply Points, Meters and Accounts
- Create Suppliers and Contracts
- Create Markers (Property Keys) individually and in bulk
- Maintain Sites, Supply Points, Meters and Accounts
- Change Account numbers and/or Suppliers
- Create Suppliers and Contracts

Monitoring HH Data

- Create and maintain Strategies to monitor HH Data for gaps, overdue and unexpected data
 - Process and action Notifications created by the Strategies
- Create and maintain Strategies to check consumption profiles
 - Process and action Notifications created by the Strategies

Session 5 - Creating / maintaining other Items and Admin

Creating Commodities

- Create commodities such as Waste, Travel etc
 - Create standard or custom Emission Factors for the above
 - Enter consumption data for the above

Creating Items such as Floor Area, Assets etc

- Create Floor Area etc for individual Sites
 - Update Floor Area etc data
- Create Floor Area etc for multiple Sites
- Create Floor Area etc using a CSV file
 - Update Floor Area etc in bulk

Creating Other Items

- Add Asset types such as Solar Generation and EV Charging data
- Add Meter Relationships to show parent/child relationships

Admin

- Understand and create Users
- Understand and create Roles
- Create Users and Roles for the Energy Viewer

Session 6 - Reporting

Reporting

- Understand the EI Reporting configuration
- Understand and view the Report Folders
- Run Reports on Billed, Metered and Combined Data
- Run Reports on Emissions
- Export, share and broadcast Reports

Editing Reports

- Copy and edit Energy Intelligence Reports
 - Add and remove columns, logos and charts and save the updated Report
 - Rename and adjust columns
 - Add and remove filtering
 - Save Reports

If you have any questions or would like to discuss your training options further, please contact our Customer Success Trainer, Kim Gower, on kgower@teamenergy.com or speak to your Key Account Manager.

Why choose TEAM?

We are a leading supplier of carbon and energy management solutions committed to driving the efficiency and sustainability of energy consumption and environmental awareness.

We have been designing and building energy measuring and monitoring solutions for more than 35 years. Developed alongside industry professionals, our scalable cloud-based solutions are equipped to meet your organisation's energy management needs.



Certified with the ISO 27001 Information Security framework, you can rely on us to ensure the safety and security of your information assets.

Founded in 1985, we work with organisations across all sectors including private and public, education, government and utilities.

Our vision is to help each of our customers to build a successful and optimised energy management service.