



# 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 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
- Input manual and half hourly metering data
- Monitor metering data for gaps, including unexpected data and other streams
- Maintain data, for example in Sites, Accounts, 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:

- Over three consecutive working days or on separated days (for example, one day per week)
- Through online sessions (via Microsoft Teams or Zoom). Each session is three hours and would cover 6 x three-hour sessions
- A combination of the above
- The course must be completed within a 12-week period

---

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

## Three-day course structure

Day One
<b>The Basics</b> <ul style="list-style-type: none"><li>■ Securely access the system</li><li>■ Introduction to the database</li><li>■ Navigate around the Activities</li><li>■ Learn the search options</li></ul>
<b>Understanding your data</b> <ul style="list-style-type: none"><li>■ View the data including Sites, Supply Points, Meters and Accounts</li><li>■ Navigate Activities</li><li>■ Create spreadsheets containing various Items such as Site details, Accounts and Meters</li></ul>
<b>EDI Billing (Electronic Bills)</b> <ul style="list-style-type: none"><li>■ Set up and maintain Suppliers</li><li>■ Import and manage EDI files</li><li>■ Automate the import of EDI files</li><li>■ Create Queries for failed bills</li><li>■ Create and export Payment Files (optional extra)</li></ul>
<b>Setting up Validation</b> <ul style="list-style-type: none"><li>■ Understand and maintain Validation for Manual and EDI Bills</li><li>■ Set up additional Validation</li></ul>
<b>Managing Queries</b> <ul style="list-style-type: none"><li>■ Work through previously created Queries</li><li>■ Run reports for Open and Closed Queries</li></ul>

---

## Entering Manual Bills

- Enter Gas, Electricity and Water Bills (other Commodities can also be added)
- View and delete bills

## Day Two

### Importing Half Hourly data

- Check Meters and Channels are set up correctly for HH Data
- Import HH Data files
- Automate HH Data importing
- Spot check imported data for anomalies
- View HH data at Site level

### Entering Manual Meter Readings

- Enter Readings directly into Sigma
- Enter Readings into Sigma via the Energy Viewer portal

### Exporting Metering Data

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

### Running reports in Energy Intelligence

- Understand EI configuration options
- Understand Report Folders
- Run Reports on billed and/or metered data
- Run Reports on Emissions
- Export, share and broadcast Reports
- Copy, edit and save Reports

### Creating and maintaining the Items in the database

- Create and maintain Sites, Supply Points, Meters and Accounts
- Create and maintain Suppliers and Contracts
- Add documents and/or photos against points including Meters and Accounts
- Create and add Asset types to capture data including Solar Generation and EV Charging data
- Add Meter Relationships to show parent/child relationships
- Add Property Keys (markers) to assist in Reporting

---

## Day Three

### Monitoring HH Data for Gaps and Overview data

- Create and maintain Strategies using the Data Monitoring Activity
- View Notifications for gaps, overdue and unexpected data
- Process and action Notifications
- Create and maintain Strategies to check consumption profiles

### Adding additional Commodities such as Waste and Travel

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

### Adding additional data such as Floor Area and Population

- Add additional data to individual Sites
- Add additional data to multiple Sites
- Add additional data using a CSV file
- Update individual data
- Update data in bulk

### Editing reports in Energy Intelligence

- Run Reports recap
- 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](mailto: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.***