



# SIGMA TRAINING

We offer a number of predefined and bespoke training packages to help you get the most out of Sigma software. Whether you are new to the system and want to start with the basics, or a super user who wants to put into practice a new system feature, we have a course to suit you.

All our training courses are delivered by our expert Software Training team, and can be held in the comfort of your own office or at our onsite facility in Milton Keynes.

A typical training day runs from 9am to 3.30pm, allowing for a half-an-hour lunch.

The following is a list of our predefined courses, please speak to your Account Manager for more information about which sessions will provide the best training for your use of the system.

## General

Course Code	Subject	Description	Approx Length
G1	Introduction to Sigma	<ul style="list-style-type: none"><li>Logging in and out</li><li>Set preferences</li><li>Navigate Sigma</li><li>Overview of available activities</li><li>Understanding the tree selector</li><li>Help available</li></ul>	45 minutes
G2	Searching	Understanding some of the search methods, including: <ul style="list-style-type: none"><li>Tree selector</li><li>Item finder</li><li>Multi-list selector</li></ul>	30 minutes
G3	Advanced searching	Understanding the advanced searching methods, including: <ul style="list-style-type: none"><li>Global search</li><li>Store searches</li><li>Custom searches</li><li>Advanced item finder searches</li></ul>	30 minutes
G4	Creating and amending stored searches	<ul style="list-style-type: none"><li>Creating a stored search</li><li>Understanding the icons, including amending and deleting</li><li>Amending stored search in the custom search</li></ul>	30 minutes
G5	Estate management	<ul style="list-style-type: none"><li>View supply points, sites, accounts, meters</li><li>Create supply points, sites, accounts, meters</li><li>Edit data</li><li>Remove data</li><li>Use the set up wizard</li></ul>	2 hours

Course Code	Subject	Description	Approx Length
		<ul style="list-style-type: none"> <li>View and extract data such as lists of sites, meters and accounts</li> <li>Amend data in bulk e.g. adding addresses, meter numbers and channel ID</li> <li>Change contracts and account numbers individually and in bulk</li> </ul>	
G6	Adding information in bulk	<ul style="list-style-type: none"> <li>Add sites, meters, accounts etc in bulk using a CSV file format</li> </ul>	30 minutes
G7	Overview activities	<p>View the overview screens, including:</p> <ul style="list-style-type: none"> <li>Events overview</li> <li>Performance overview</li> <li>Period summary overview</li> <li>Site overview</li> </ul>	30 minutes
G8	Energy Viewer	<ul style="list-style-type: none"> <li>Viewing the components of Energy Viewer</li> <li>Setting up users</li> </ul>	30 minutes

## Administration

Course Code	Subject	Description	Approx Length
A1	Administration	<ul style="list-style-type: none"> <li>Admin dashboard</li> <li>Create new users and roles</li> <li>Restrict access to particular sites</li> <li>Reset passwords</li> </ul>	45 minutes
A2	Admin data management	<ul style="list-style-type: none"> <li>Amend items in drop down menus</li> <li>Add items to drop down menus</li> </ul>	15 minutes

## Billing

Course Code	Subject	Description	Approx Length
B1	Manual bill entry	<ul style="list-style-type: none"> <li>Introduction and searching</li> <li>Overview</li> <li>View bills</li> <li>Enter manual bills</li> <li>View EDI bills</li> <li>View the account history screen</li> <li>Customise the screen</li> </ul>	2 hours
B2	Bulk bill entry	<ul style="list-style-type: none"> <li>Set-up Sigma for bulk billing</li> <li>Load EDI files in batches</li> <li>Understand the validation</li> <li>Check the batch and load bills into Sigma</li> <li>View and delete EDI bills</li> <li>Remove a batch</li> </ul>	2.5 hours
B3	Bill view	<ul style="list-style-type: none"> <li>Search and view Sigma bills. This is for those who only view bills but do not enter them.</li> </ul>	30 minutes

Course Code	Subject	Description	Approx Length
B4	Bill validation	<ul style="list-style-type: none"> <li>Add validation for manual and/or bulk bills</li> <li>Amend and remove validators</li> </ul>	30 minutes
B5	Advanced bill validation	<ul style="list-style-type: none"> <li>Add property keys to link into validators</li> <li>Add advanced bill validators</li> </ul>	30 minutes
B6	Template editor	<ul style="list-style-type: none"> <li>Understand the layout</li> <li>Create, amend and delete bill templates</li> </ul>	30 minutes
B7	Managing billing queries	<ul style="list-style-type: none"> <li>Create, update and close a query</li> <li>Print and search</li> <li>Report on queries</li> <li>Add new categories</li> </ul>	45 minutes
B8	Accounts Link	<ul style="list-style-type: none"> <li>Understand what Accounts Link is for. To link to your existing finance system to add payment bills.</li> <li>Choose the bills for export</li> <li>Run a summary report and export bills</li> <li>View previous exports</li> </ul>	1 hour
B9	Importing historic bills	<ul style="list-style-type: none"> <li>Create the CSV file</li> <li>Import the file</li> </ul>	1 hour

## Metering

Course Code	Subject	Description	Approx Length
M1	Meter readings	<ul style="list-style-type: none"> <li>Input, export and delete individual readings</li> <li>Import and export readings in bulk</li> <li>Energy Viewer</li> </ul>	1 hour
M2	Half hourly data	<ul style="list-style-type: none"> <li>Set-up meters</li> <li>Import half hourly data</li> <li>Schedule imports or half hourly data</li> <li>View gaps in data</li> <li>Common reports for data</li> <li>Browse metering data</li> <li>Export meter readings</li> </ul>	2 hours
M3	Browsing	<ul style="list-style-type: none"> <li>Browse graphs of metering data</li> </ul>	30 minutes
M4	Data monitoring	<ul style="list-style-type: none"> <li>Setting up strategies including data gaps, overdue data and unexpected data</li> <li>Setting up profiles including fixed and dynamic profiles</li> <li>Using the data monitoring activity to work through notifications</li> </ul>	2 hours

## Reporting

Course Code	Subject	Description	Approx Length
R1	Basic reporting	<ul style="list-style-type: none"> <li>Run reports</li> <li>View reports</li> <li>Common reports</li> </ul>	1.5 hours
R2	Associated data	<ul style="list-style-type: none"> <li>Understand associated data, i.e. floor area, population</li> <li>Set-up associated data</li> <li>Common reports using associated data</li> <li>Use the associated data wizard</li> </ul>	45 minutes
R3	Degree days	<ul style="list-style-type: none"> <li>Import degree days</li> <li>Set-up degree days</li> <li>Common reports using degree days</li> </ul>	1 hour
R4	Cost definitions	<ul style="list-style-type: none"> <li>Understand cost definitions i.e. day rate, day and night rate</li> <li>Set-up cost definitions</li> <li>Common reports using cost definitions</li> </ul>	30 minutes
R5	Monitoring points	<ul style="list-style-type: none"> <li>Understand monitoring points i.e. grouping items together to allow certain reports to run</li> <li>Set-up monitoring points</li> <li>Use the wizard to set-up</li> <li>Edit and delete</li> <li>Common reports and using monitoring points</li> </ul>	1 hour
R6	Scheduling	<ul style="list-style-type: none"> <li>Schedule reports to run at a later date or to reoccur at defined intervals</li> </ul>	30 minutes
R7	Property keys	<ul style="list-style-type: none"> <li>Understand property keys. They are used to store any user specific information such as PPU rates, VAT codes and financial information.</li> <li>Set-up individual property keys in bulk</li> <li>Validate bills using property keys</li> <li>Search using property keys</li> </ul>	30 minutes
R8	Budgeting	<ul style="list-style-type: none"> <li>Create a budget group</li> <li>Create a budget</li> <li>Manage the budget</li> </ul>	1 hour
R9	Monitoring and targeting	<ul style="list-style-type: none"> <li>Monitor data</li> <li>Set targets</li> <li>Common monitoring and targeting reports</li> </ul>	1 hour
R10	Regression	<ul style="list-style-type: none"> <li>Use the period comparison report</li> <li>Create a correlation</li> <li>View the regression, CuSUM and control charts</li> </ul>	1 hour

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## Sigma Energy Intelligence

Course Code	Subject	Description	Approx Length
E1	Creating a report	<ul style="list-style-type: none"><li>• Overview of Energy Intelligence</li><li>• Create a report</li><li>• Copy and amend default reports</li></ul>	3 hours
E2	Creating a dashboard	<ul style="list-style-type: none"><li>• Add existing or newly created reports to a dashboard</li></ul>	30 minutes
E3	Creating a KPI report and dashboard	<ul style="list-style-type: none"><li>• Create a KPI report</li><li>• Create a KPI dashboard</li></ul>	30 minutes
E4	Creating a storyboard	<ul style="list-style-type: none"><li>• Creating a storyboard using existing and newly created reports</li></ul>	30 minutes

## Sigma Tenant Billing

Course Code	Subject	Description	Approx Length
T1	Introduction and billing	<ul style="list-style-type: none"><li>• Logging into Sigma</li><li>• Searching methods</li><li>• Understanding the tenant billing components</li><li>• Pre-checks and reports</li><li>• Initiating the bill run</li><li>• Checking, approving and issuing bills</li><li>• Printing and savings bills</li><li>• Creating a file for accounts</li></ul>	1 day
T2	Change of tenancy and maintenance	<ul style="list-style-type: none"><li>• Change of tenancy</li><li>• Moving tenants in and out</li><li>• Charging options</li><li>• Viewing historical data</li><li>• Maintenance</li><li>• Reporting</li></ul>	1 day

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## 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 30 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.***