



# 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 Customer Success team, and can be held in the comfort of your own office, at our onsite facility in Milton Keynes, or online via Microsoft Teams or Zoom.

## Onsite Training Voucher

One voucher includes 1 days training for up to 2 people, though you can include additional trainees for a fee. A typical training day runs from 9am to 3.30pm, allowing for a half hour lunch.

## Training Credits

Credits can be purchased for online training which is ideally for up to 2 people, but more can be accommodated. Please note that the timings will increase if there are more trainees.

Training Credits are purchased in a block of 6 and can be used as follows:

- 6 x 1-hour online sessions
- 2 x half day online sessions (3 hours - AM or PM)
- A combination of the above (i.e. 1 x half day session, 1 x 2-hour session and 1 x 1-hour session = a total of 6 hours)

Vouchers or Credits do not have an expiry date so can be used as and when required.

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.

The sections are colour coded as follows:

Section	Description
Read Only	Applies to Users who want to understand the functionality of Sigma, but do not need to update or input details.
Standard User	Applies to Users who will be importing data, entering Manual Bills, Electronic Bills and create Queries from the Bills and create Payment Files. The Standard User will be able to: <ul style="list-style-type: none"> <li>• Enter/export Manual Meter Readings and import Half Hourly Metering Data, as well as monitoring for any problems with the Half Hourly Data</li> <li>• Add Consumption Data values to the Consumption Data Channels</li> <li>• Run and schedule Reports in Sigma and Energy Intelligence</li> </ul> Standard Users will also need to complete the Read Only training.

<b>Advanced User</b>	<p>Applies to Users who need to maintain Sigma. The Advanced User will be able to:</p> <ul style="list-style-type: none"> <li>• Create Items individually such as Sites, Meters, Accounts, Monitoring Points, Property Keys</li> <li>• Update Supply Contracts and Account numbers and deal with Budgeting</li> <li>• Copy and edit reports in Energy Intelligence</li> </ul>
<b>Super User</b>	<p>Applies to Users who need to create Users and Items in Sigma. The Super User will be able to:</p> <ul style="list-style-type: none"> <li>• Create Users and reset Passwords</li> <li>• Set up Energy Viewer Users</li> <li>• Create additional Items, for example, Sites, Accounts, Meters, Consumption Data Channels and Associated Items such as Floor area etc in the database</li> <li>• Set up Sigma for EDI Billing and Validation</li> </ul>
<b>Tenant Billing User</b>	<p>Applies to users who will be using Sigma for billing Tenants</p> <ul style="list-style-type: none"> <li>• Provide the end-to-end Tenant Billing service including creating/validating bills, change of tenancy and all other charging options</li> </ul>

## Administration

Course Code	Subject	Description	Approx Length
A1	Administration	<ul style="list-style-type: none"> <li>• Set Password Complexity</li> <li>• Admin Dashboard</li> <li>• Reset Passwords</li> </ul>	15 minutes
A2	Restricting Access	Restrict Access to particular Sites etc (Energy Viewer Users)	15 minutes
A3	Creating Users	Create New Users and Roles	15 minutes
A4	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
A5	Energy Viewer	<ul style="list-style-type: none"> <li>• Set up Energy Viewer Users</li> <li>• Restrict User access to particular Sites</li> </ul>	15 minutes

## Setting up and Maintaining the Database

Course Code	Subject	Description	Approx Length
SD1	Creating Items - Sites, Meters, Accounts etc	Create Sites, Meters, Accounts etc in bulk using a CSV File	30 minutes
SD2	Adding Asset Types	Add Asset Types on Items such as Accounts, Meters, Supply Points etc	15 minutes
SD3	Creating Items - Consumption Data Channels	<ul style="list-style-type: none"> <li>• Create Consumption Data Channels for Scope 3 Reporting in bulk</li> <li>• Import Consumption Data Channels</li> </ul>	30 minutes

Course Code	Subject	Description	Approx Length
SD4	Creating Items - Associated Data channels	<ul style="list-style-type: none"> <li>Create Associated Data Items and Values</li> <li>Import Associated Data Items</li> </ul>	30 minutes
SD5	Creating Items - Degree Days Channels	<ul style="list-style-type: none"> <li>Create Degree Days Data Channels</li> <li>Import Degree Days Data</li> <li>Import Degree Day Data</li> </ul>	30 minutes
SD6	Creating Items - Cost Definitions	<ul style="list-style-type: none"> <li>Understand Cost Definitions ie: Day Rate, Day and Night Rate</li> <li>Create Cost Definitions</li> </ul>	15 minutes
SD7	Creating Items - Monitoring Points	Create Monitoring Points in bulk	15 minutes
SD8	EDI Billing - EDI Set up	Set Up Sigma to enable Bulk Billing	15 minutes
SD9	Billing - Importing Bills in bulk	<ul style="list-style-type: none"> <li>Create the CSV File to import Bills</li> <li>Import the File</li> </ul>	30 minutes
SD10	Billing - Adding Bill Validation	<ul style="list-style-type: none"> <li>Add Validation for Manual and/or EDI Bills</li> <li>Remove Bill Validators</li> </ul>	30 minutes
SD11	Billing - Bill Templates	Create, Amend and Delete Bill Templates	15 minutes

## Getting Started/ Read Only

Course Code	Subject	Description	Approx Length
RO1	Introduction to Sigma	<ul style="list-style-type: none"> <li>Log In and Out</li> <li>Navigate Sigma</li> <li>Overview of available Activities</li> <li>Help available</li> </ul>	1 hour
RO2	Searching	<p>Understand the common Search methods:</p> <ul style="list-style-type: none"> <li>Tree Selector</li> <li>Item Finder</li> <li>Multi-List Selector</li> <li>Global Search</li> </ul>	30 minutes
RO3	Advanced Searching	<p>Understand the Advanced Searching methods:</p> <ul style="list-style-type: none"> <li>Item Finder searching using Property Keys, Commodity etc</li> <li>Filter within Multi-List Selector</li> <li>Stored Searches</li> </ul>	30 minutes

Course Code	Subject	Description	Approx Length
RO4	Viewing the Estate	<ul style="list-style-type: none"> <li>View Supply Points, Sites, Accounts, Meters etc</li> <li>View other Items such as Associated Data, Property Keys etc</li> <li>Move to and from other Activities such as Bill Entry and Reporting</li> </ul>	30 minutes
RO5	Overview of Billing	Search and view Bills using: <ul style="list-style-type: none"> <li>Bill Entry Activity</li> <li>Bill View Activity</li> <li>EDI Billing Batches (bills entered in bulk)</li> </ul>	15 minutes
RO6	Overview of Metering Data	<ul style="list-style-type: none"> <li>View Meters and Channels</li> <li>View Non-Periodic Channels</li> <li>Browse Periodic (Half Hourly) Metering data</li> </ul>	15 minutes
RO7	Overview of Reporting	<ul style="list-style-type: none"> <li>View Reporting Activity</li> <li>View Energy Intelligence Reporting</li> </ul>	15 minutes
RO8	Overview Activities	View the Overview Activities such as: <ul style="list-style-type: none"> <li>Events Overview</li> <li>Performance Overview</li> <li>Period Summary Overview</li> <li>Site Overview</li> </ul>	15 minutes
RO9	Available Help	<ul style="list-style-type: none"> <li>Navigate to Online User Manual</li> <li>Search and understand the Manual</li> </ul>	5 minutes

## Maintaining the Database

Course Code	Subject	Description	Approx Length
MD1	Creating Items - individually	<ul style="list-style-type: none"> <li>Create Commodities</li> <li>Create individual Supply Points, Sites, Accounts, Meters etc               <ul style="list-style-type: none"> <li>Use the Set Up Wizard</li> <li>Set up individually</li> </ul> </li> </ul>	30 minutes
MD2	Creating/Updating Associated Data - individually	<ul style="list-style-type: none"> <li>Use the Associated Data Wizard to set up Floor Area, Degree Days etc</li> <li>Set up Floor Area, Degree Days etc individually</li> <li>Update Associated Data values</li> <li>Use the Manage Associated Data popup</li> </ul>	30 minutes
MD3	Creating Cost Definitions - individually	<ul style="list-style-type: none"> <li>Create Cost Definitions (used in Reporting)</li> <li>Update Cost Definitions</li> </ul>	15 minutes

Course Code	Subject	Description	Approx Length
MD4	Creating Monitoring Points - individually	<ul style="list-style-type: none"> <li>Use the Wizard to Set Up</li> <li>Set up individually</li> <li>Edit/Delete</li> </ul>	15 minutes
MD5	Creating Property Keys - individually and in bulk	<ul style="list-style-type: none"> <li>Create Individual Property Keys</li> <li>Create Property Keys in bulk</li> </ul>	15 minutes
MD6	Creating Consumption Data Channels - individually	Create Consumption Data Channels for Scope 3 Reporting individually	15 minutes
MD7	Creating Stored Searches	Create a Stored Search	15 minutes
MD8	Retrieving Item Data	Create spreadsheets of Items such as Sites, Meters, Accounts, Supply Points and Channels	15 minutes
MD9	Editing/Deleting Items	<ul style="list-style-type: none"> <li>Amend Data in bulk (such as adding Addresses, Post Codes, Channel ID)</li> <li>Delete Items</li> </ul>	15 minutes
MD10	Supply Point Contracts - Changing Contracts and Account Numbers	<ul style="list-style-type: none"> <li>Change Account Numbers individually and in bulk</li> <li>Change Contracts and Account Numbers individually and in bulk</li> </ul>	15 minutes
MD11	Billing - Amending/removing existing Validation	<ul style="list-style-type: none"> <li>View and understand existing Validators</li> <li>Amend and/or Remove existing Validators</li> </ul>	15 minutes
MD12	Importing Degree Days values	Import monthly Degree Days values	15 minutes

## Entering Manual Bills and Queries

Course Code	Subject	Description	Approx Length
MB1	Understanding Bill Entry Activities	<ul style="list-style-type: none"> <li>Introduction/Searching</li> <li>View the existing Bills (Manual and EDI)</li> </ul>	15 minutes
MB2	Entering Manual Bills	<ul style="list-style-type: none"> <li>Enter Manual Bills</li> <li>Understand the Validation errors</li> <li>Amend/Delete Bills</li> <li>Customise the screen</li> </ul>	45 minutes
MB3	Creating Queries (optional)	Create a Query from a Manual Bill	15 minutes

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## Entering Electronic Bills (EDI Files) and Queries

Course Code	Subject	Description	Approx Length
EB1	Understanding the Bulk Bill Activities	View/understand the Bulk Bill Activities	15 minutes
ED2	Entering EDI Files	<ul style="list-style-type: none"><li>• Load EDI Files in Batches</li><li>• Understand the Validation errors</li><li>• Check the Batch and load Bills into Sigma</li><li>• View and delete EDI Bills</li><li>• Remove a Batch</li></ul>	1 hour 30 minutes
ED3	Creating Queries (optional)	Create a Query from a Manual Bill	15 minutes

## Managing Billing Queries

Course Code	Subject	Description	Approx Length
Q1	Managing Billing Queries	<ul style="list-style-type: none"><li>• View all outstanding Queries (created from Manual Bills or Electronic Files)</li><li>• Update an existing Query</li><li>• Close a Query</li><li>• Report on Queries</li></ul>	30 minutes

## Creating Payment Files

Course Code	Subject	Description	Approx Length
AL1	Configuring Sigma for Payment Files	<ul style="list-style-type: none"><li>• Configure Sigma to include Manual Bills in Payment Files</li><li>• Configure EDI Batch Management to include Bills in Payment Files</li></ul>	15 minutes
AL2	Creating a Payment File	<ul style="list-style-type: none"><li>• Understand what the Accounts Link Activity is for</li><li>• Choose the Bills you want to Export</li><li>• Run a Summary Report</li><li>• Export the Bills</li><li>• View previous Export Files</li></ul>	1 hour
AL3	Downloading a Payment File	Download the Payment File	15 minutes
AL4	Checking the Bills	Check Bills to see if they have been included in a Payment File	30 minutes

## Entering and Exporting Manual Metering Data

Course Code	Subject	Description	Approx Length
M1	Inputting/Deleting Meter Readings	<ul style="list-style-type: none"> <li>Input and Delete Individual Readings</li> <li>Energy Viewer Meter Reading section</li> </ul>	15 minutes
M2	Importing Readings in bulk	Import Readings in bulk using the Data Input Activity	30 minutes
M3	Exporting Meter Readings	<ul style="list-style-type: none"> <li>Export Meter Readings/Values for an individual Channel</li> <li>Export Meter Readings/Values for ore than one Channel</li> </ul>	15 minutes
M4	Setting Meter Relationships	Set Meter Relationships (Parent/Child Meters)	15 minutes

## Importing and Viewing Half Hourly Metering Data

Course Code	Subject	Description	Approx Length
HH1	View Half Hourly Data	Browse Half Hourly Metering Data	15 minutes
HH2	Setting up Meters and Channels ready for Half Hourly Data	Set up Meters and Channels ready for importing	30 minutes
HH3	Manually importing Half Hourly Data	<ul style="list-style-type: none"> <li>Create File for importing Half Hourly Data</li> <li>Import Half Hourly Data manually</li> </ul>	30 minutes
HH4	Scheduling Imports of Half Hourly Data	Schedule Imports of Half Hourly Data	15 minutes
HH5	Exporting Half Hourly Data	Export Meter Readings/Values for an individual Channel	15 minutes
HH6	Setting Meter Relationships	Set Meter Relationships (Parent/Child Meters)	15 minutes

## Monitoring Half Hour Metering Data

Course Code	Subject	Description	Approx Length
MH1	Setting up Data Monitoring Strategies	Set up Strategies including: Data Gaps, Overdue Data and Unexpected Data	30 minutes
MH2	Setting up Profile Monitoring Strategies	Set up Profiles including: Fixed and Dynamic Profiles	30 minutes
MH3	Working through Notifications	Use the Data Monitoring Activity to work through Notifications	30 minutes

Course Code	Subject	Description	Approx Length
MH4	Understanding the Data Quality Dashboard	Data Quality Dashboard in Energy Intelligence	15 minutes

## Adding Consumption Data Valules

Course Code	Subject	Description	Approx Length
CD1	Adding Consumption Data values - individually	Add Consumption Data manually	15 minutes
CD2	Adding Consumption Data values - in bulk	Import Consumption Data in bulk	15 minutes

## Budgeting

Course Code	Subject	Description	Approx Length
B1	Creating Budgets	<ul style="list-style-type: none"> <li>• Create a Budget Group</li> <li>• Create a Budget</li> </ul>	15 minutes
B2	Managing Budgets	Manage a Budget	15 minutes

## Energy Viewer Option

Course Code	Subject	Description	Approx Length
EV1	Using the Energy Viewer	<ul style="list-style-type: none"> <li>• View Billing Data</li> <li>• Enter Meter Readings</li> <li>• View Metering Data</li> </ul>	15 minutes

## Basic Reporting

Course Code	Subject	Description	Approx Length
R1	Using Monitoring Points in Reporting	Understand using Monitoring Points (grouping items together to allow certain Reports to run)	15 minutes
R2	Running Reports	<ul style="list-style-type: none"> <li>• Run Reports</li> <li>• View Reports</li> <li>• Download Reports</li> </ul>	45 minutes
R3	Scheduling Reports	<ul style="list-style-type: none"> <li>• Schedule Reports to run to the Document Library Activity</li> <li>• View Reports in the Document Library</li> <li>• Schedule Reports to reoccur at defined intervals</li> </ul>	15 minutes
R4	Creating Regression, CUSUM and Control Charts	<ul style="list-style-type: none"> <li>• Run the Period Comparison Report</li> <li>• Create a Correlation</li> <li>• Create Regression. CUSUM and Control Charts</li> </ul>	30 minutes



## EI (Energy Intelligence)

Course Code	Subject	Description	Approx Length
EI1	EI Configuration	Understand and configure the following EI elements: <ul style="list-style-type: none"> <li>• Data Sources</li> <li>• Estimation Techniques</li> <li>• Forecasting</li> </ul>	30 minutes
EI2	Refreshing EI	Refresh options	5 minutes
EI3	Running Reports	<ul style="list-style-type: none"> <li>• Overview and understand of Energy Intelligence Activity</li> <li>• Run Reports</li> </ul>	30 minutes
EI4	Sharing and Distributing Reports	<ul style="list-style-type: none"> <li>• Export Reports</li> <li>• Share Reports</li> <li>• Distribute Reports</li> </ul>	15 minutes

## EI (Energy Intelligence) Editing

Course Code	Subject	Description	Approx Length
EI3	Copying a Report	Copy and amend existing Reports	30 minutes
EI4	Creating a Report	Create new Reports	30 minutes
EI5	Creating a Dashboard	Add existing or newly created Reports to a Dashboard	15 minutes
EI6	Creating a Storyboard	Create a Storyboard using existing and newly created Reports	30 minutes

## Tenant Billing

Course Code	Subject	Description	Approx Length
TB1	Understanding Sigma	<ul style="list-style-type: none"> <li>• Logging into Sigma</li> <li>• Searching Methods</li> <li>• Understanding the Billing and Metering components</li> </ul>	1 day
TB2	Understanding Tenant Billing	Understand the Tenant Billing components	
TB3	Creating Tenant Bills	<ul style="list-style-type: none"> <li>• Pre-Checks/Reports</li> <li>• Initiate the Billing Run</li> <li>• Check, Approve and Issue Tenant Bills</li> <li>• Print/Save the Bills</li> </ul>	
TB4	Creating Payment files	<ul style="list-style-type: none"> <li>• Creating a File for Accounts</li> <li>• Downloading the Payment File</li> </ul>	
TB5	Changing Charging Options	Change Charging Options	1 day
TB6	Change of Tenancy Actions	Perform Change of Tenancy actions	
TB7	Maintaining Data	<ul style="list-style-type: none"> <li>• Maintenance of Accounts, Contracts etc</li> <li>• Set up/Maintain Billing runs</li> </ul>	

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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 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.*