

TeamMate Analytics 8.1 – IT Overview

April 2022

About this Document

This document is designed to answer pre-implementation questions about the TeamMate Analytics product. It is written for IT departments who are responsible for implementing TeamMate Analytics and need answers to specific questions and a high level overview before beginning the process. It is recommended to engage the IT Department before installing TeamMate Analytics.

TeamMate Analytics 8.1 has been certified to work with TeamMate AM June 2021 and TeamMate+ April 2022.

Specifications

TeamMate Analytics	
Excel Add-in to allow auditors to perform audit analytics on financial and non-financial data in an Excel worksheet.	<ul style="list-style-type: none"> • Written in C# .NET. • Integrates with installed version of MS Office via VSTO add-in. • Compatible with Excel 2013, 2016, 2019, 2021 and 365 (desktop). • Requires Microsoft .NET Framework 4.7.2 or above (Client and Extended). • Analytics Helper add-in written in VBA (an Excel Add-in) and adds undo, analyzing more than 1 million rows of data and re-enabling functionality to the main add-in. • Continuous Analyzer enables data analysis to be scheduled and run automatically. This uses Windows Task Scheduler. • Certain functionality – the ability to use the Expert Analyzer feature with more than 1 million rows of data – is not available when used with Excel 2013. • Other functionality – the ability to refresh data from a data source using Expert Analyzer – is not available when used with Excel 2013 or Excel 2016 MSI (Volume Licensing) version.
	<p>TeamMate Analytics uses licensed third party components and software for which copyright is held by their respective owners and summarized below.</p> <p>For further details, including the full licenses governing the use of these components, please refer to the file “ThirdParty_README.zip”, located in the TeamMate Analytics installation folder (normally c:\Program Files\TeamMate Analytics or c:\Program Files (x86)\TeamMate Analytics).</p> <p>PDFtoText – A PDF to TXT converter Copyright Glyph & Cog, LLC.</p>

TeamMate Analytics	
	<p>License: Commercial/OEM</p> <p>SQLite ODBC driver</p> <p><i>This is an optional installation, and only required for analyzing more than 1 million rows of data.</i></p> <p>Copyright Christian Werner (chw@ch-werner.de)</p> <p>License: BSD-type license</p> <p>SQLite database engine</p> <p><i>This is an optional installation, and only required for analyzing more than 1 million rows of data.</i></p> <p>License: Open-source</p> <p>Newtonsoft.Json</p> <p>Copyright: James Newton-King</p> <p>License: The MIT license</p> <p>.NET client for ASP.NET SignalR</p> <p>Copyright: Microsoft Open Technologies, Inc</p> <p>License: https://www.microsoft.com/web/webpi/eula/net_library_eula_ENU.htm</p> <p>QuickBooks</p> <p>QuickBooks-V3-DotNET-SDK</p> <p>Copyright 2021 Intuit Inc.</p> <p>License: Apache License</p> <p>Info.lundin.math - ExpressionParser</p> <p>Copyright: Patrik Lundin</p> <p>License: Microsoft Public License (MS-PL)</p> <p>Countly Windows SDK</p> <p>Copyright: Countly Ltd</p> <p>License: Commercial/OEM</p> <p>The add-in is always loaded, and is available when using Excel with or without TeamMate. The add-in is compatible with Excel working papers opened from TeamMate.</p>
Installation	<p>The installation of the TeamMate Analytics is based on Windows Installer 3.0 technology with EXE files provided to the customer. The EXEs can be provided in MSI format. The EXE and MSI installation files include all internally developed and licensed components needed to run the application as well as user manuals. The EXE installation files bundle the MSI file and will install Microsoft .NET 4.7.2 Framework if not previously installed.</p>
Web Services	<p>A web service is used to retrieve licenses (with regular licensing mechanism) and to check version numbers (if that is enabled in Options).</p>

TeamMate Analytics	
	<p>A web service is also used to submit error reports and suggestions; however, the user must actively submit. It does not happen automatically.</p> <p>A web service is used to send e-mail notifications to a specified user on the completion of running Continuous Analyzer tasks.</p> <p>A web service is also used to submit user activity logs (anonymous event logs) to the TeamMate Countly service.</p>
32-bit / 64-bit Excel	TeamMate Analytics is compatible with both 32-bit and 64-bit versions of Excel. For analyzing large data files (multiple millions of rows), 64-bit Excel is recommended.
Memory	At least 4GB RAM is recommended to analyze larger data files.

Compatibility with TeamMate
<p>When using TeamMate Analytics in conjunction with the TeamMate product suite, it is recommended that the desktop computer requirements outlined in the TeamMate IT Overview document are followed.</p> <ul style="list-style-type: none"> 64-bit Excel is supported by TeamMate Analytics; however, versions prior to TeamMate AM 12.0 do not support 64-bit Excel.

URL whitelisting

Sometimes, a firewall may block TeamMate Analytics accessing its licensing server to retrieve a license online, or log events.

This can normally be resolved by whitelisting the following URLs:

<https://license.teammateanalytics.com> on port 443

<https://wolters-kluwer.count.ly>

Configuration

The configuration (config) file is designed for companies to customize the way that TeamMate Analytics works for all their users.

The config file must be created and pushed out to users by the company. There is no facility in TMA to create or modify a config file.

Location

If it is installed to the installation folder for TMA (normally `c:\Program Files\TeamMate Analytics` or `c:\Program Files (x86)\TeamMate Analytics`), its settings will be read and applied. The file is not installed by the TMA installer, and most companies will not deploy a config file. If a config file is not present, TMA will simply operate as normal.

The file must be named “config.xml” to be read.

The config.xml file is a simple .xml file that lists certain settings.

The `<Config>` and `</Config>` tags must be placed at the start and end of the file.

The other parameters/tags. can be placed in any order.

An example of the .xml code is as follows:

```
<Config>
<BlockCheckForUpdates>1</BlockCheckForUpdates>
<BlockSuggestionBox>1</BlockSuggestionBox>
<BlockDemoTutorial>1</BlockDemoTutorial>
<DisableUserActivityLogging>1</BlockUserActivityLogging>
<EnableDebugLogging>1</EnableDebugLogging>
</Config>
```

BlockCheckForUpdates

This will deselect *check for updates* in Options and the option will be greyed out, so the user cannot enable it.

Some companies may want to do this to prevent data being sent to our servers. Other companies may do this because they push out updates internally and do not want users installing updates themselves.

If the value is 1 or “true” the block will apply. If the value is 0 or “false” or the parameter/tag is entirely missing, the block will not apply.

BlockSuggestionBox

This will prevent the Suggestion box tool from appearing in the Help menu.

Some companies may want to do this to avoid users being able to send confidential information outside the company.

If the value is 1 or “true” the block will apply. If the value is 0 or “false” or the parameter/tag is entirely missing, the block will not apply.

BlockDemoTutorial

This prevents the demo tutorial ever showing on start-up, including the first time the add-in is run.

Some companies want to do this as they provide training internally, or otherwise would prefer the tutorial not to show.

Companies can still replace the demo tutorial slides/images with customized versions if they wish. Including this parameter in the config file will block all demo tutorials from showing, whether the default TMA tutorial, or a customized one.

If the value is 1 or “true” the demo tutorial will not show. If the value is 0 or “false” or the parameter/tag is entirely missing, the demo tutorial will show, provided it has not been disabled by the user in the UI.

DisableUserActivityLogging

TeamMate Analytics anonymously logs when a tool is used and transmits it to a cloud-based tracking tool. This logging simply consists of event codes – no user-defined data, such as data files processed, names of custom functions, etc. is captured.

Some companies may choose to disable logging.

If the value is 1 or “true” all logging will be disabled. If the value is 0 or “false” or the parameter/tag is entirely missing, logging will be enabled.

EnableDebugLogging

This will create a log of debug steps for Continuous Analyzer in the DebugLog.txt file within the AppData folder for TeamMate Analytics. Enabling this option while running Continuous Analyzer tasks may assist with identifying reasons for failure.

If the value is 1 or “true” debug logging will be enabled and logs will be created as Continuous Analyzer tasks are run. If the value is 0 or “false” or the parameter/tag is entirely missing, logging will be disabled.

Disabling the add-in via the registry

In some cases, such as a Terminal Server environment, it may be desirable to have the add-in installed for all users, but only load for a selected subset of users (those licensed to use the software).

In these cases, the loading of the add-in can be controlled by adding one of two registry keys via group policy.

Option 1. Add-in will load but not be visible or require licensing

Key location: HKEY_CURRENT_USER\Software\TeamMate Analytics\Analytics\

Type: REG_DWORD

Value name: Disable

- To disable the add-in for the user, the key should have the value **1**.
- To enable the add-in for the user, the key should have the value **0**.
- If the key is not present, the add-in will be enabled, as normal.

NOTE: The add-in will still be loaded by Excel, since it is installed for all users; however, if it has been disabled, the ribbon will not be loaded and the licensing window (About Form) will not be shown for that user.

Option 2. Add-in will not load

NOTE: The key location below has changed between versions 6 and 7.

Key location: HKEY_CURRENT_USER\Software\Microsoft\Office\Excel\Addins\Analytics\

Type: REG_DWORD

Value name: LoadBehavior

- To disable the add-in for the user, the key should have the value **2**.
- To enable the add-in for the user, the key should have the value **3**.

TeamMate Support

If you are experiencing any technical difficulties, go to <https://www.wolterskluwer.com/en/solutions/teammate/support> for Technical Support contact information for your location.

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