

## TeamMate Analytics (TMA) 8.2 Update 1 Release Notes

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### *TeamMate Analytics Release History*

Please note, we have revised our types of updates and how TeamMate Analytics versions are released:

- **Release** – releases contain significant functionality, are often architectural changes, or could be a language edition requiring several changes to files. These are full installations and will update existing versions. Examples of releases are: 1.0, 1.1, 2.0, 3.0.
- **Update** – updates combine defects or functionality that is considered critical on a scheduled basis (previously referred to as “Service Packs”). Updates may also be a minimal number of urgent defects or security vulnerabilities (previously referred to as “Hotfixes”). Examples of updates are: Release 1.2 Update 2 and Release 2.0 Update 1.

Version	Release Date	Release Notes
TeamMate Analytics 8.2 Update 1	March 2023	<a href="#">TeamMate Analytics 8.2 Update 1</a>
TeamMate Analytics 8.2	January 2023	<a href="#">TeamMate Analytics 8.2</a>
Releases prior to 8.2		<a href="#">TeamMate Connect</a>

## TeamMate Analytics 8.2 Update 1

The release of TeamMate Analytics 8.2 Update 1 fixed one defect.

### Defects

Reference	Area	Details
S-61948	Monetary Unit Sampling	Resolved a defect in the standalone Monetary Unit Sampling Evaluation tool. In some cases, there were multiple understatements in the High Value Items worksheet, they were not all summed in the evaluation of differences found in High Value items. Sample estimation and extraction were unaffected.

**Note:** If you use the Monetary Unit Sampling tool to extract samples with TeamMate Analytics 8.1 or prior versions then you cannot evaluate those samples with TeamMate Analytics 8.2 or later versions.

## TeamMate Analytics 8.2 – January 2023

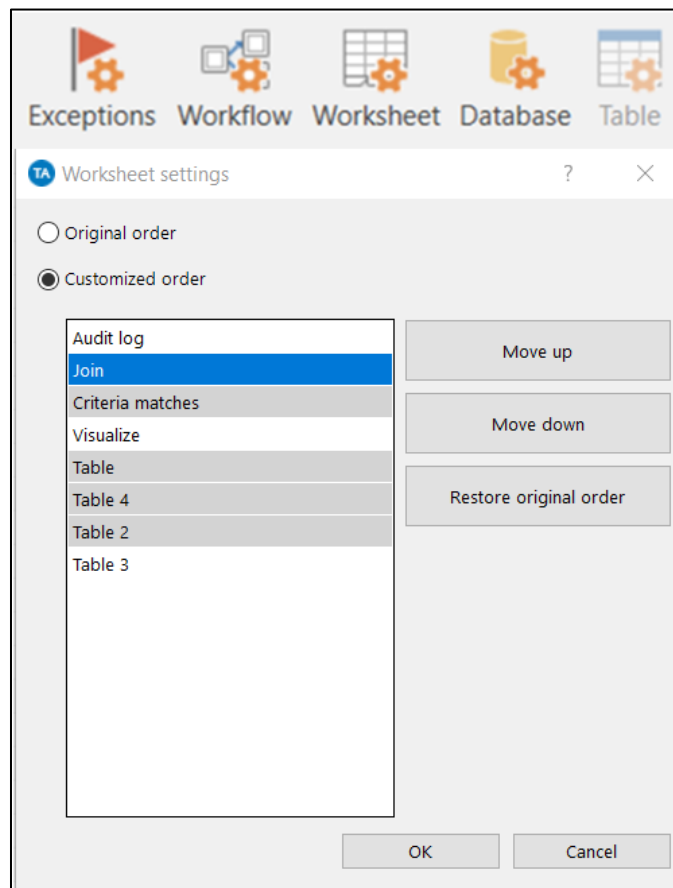
The release of TeamMate Analytics 8.2 delivers the following new tools and enhancements:

### Make analytics automation with the Expert Analyzer even more flexible

*Customize output worksheet order:*

To show the most important outputs as the first worksheets in your output workbook, or shift less important outputs to the end, you can now specify the order you want output worksheets to appear in once the workflow is run. You can always revert back to the original order from a customized worksheet order.

These settings can be reached through the new 'Worksheet' button on the workflow designer ribbon.



*Worksheet settings*

### Customize Columns in report output:

To simplify your Expert Analyzer output reports, and only show relevant columns, you can now select which columns appear in the report output. Columns can be added or removed from report both in the workflow designer, and when running a workflow too if required.

Report output settings

Sort by

Original order

Column Table 2\_ID

Ascending

Descending

Responses to include

Criteria met

Criteria not met

Record limit

Maximum records 50000

Columns to include

- Table 2\_ID
- Table\_ID
- Supplier Code
- Supplier Name
- Invoice Reference
- Invoice Date
- Due Date
- Transaction Type
- Amount
- Posted by
- Posted Date
- Posted Time
- NEW
- TC\_OVER\_AMOUNT1
- TC\_CRITERIA\_MATCH

OK Cancel

Report output settings

### Save in-progress workflows

While designing big or complex workflows, you can now periodically save the workflow in its current state without closing the workflow designer or validating it for errors. You can then resume designing a partially complete workflow from the last saved point. You won't be able to run the workflow until you have validated it with the Save and Run or Save and Close buttons.

## Mask confidential data with ease

“Mask confidential values” is a new data management tool, appearing in the Manipulate text menu, which can be used to hide confidential data like social security numbers, salary information, or other personal or sensitive data. It encrypts the data to a text string, using a seed number. By using the same seed, the same start values are encrypted to the same result, enabling multiple files to remain consistent for later matching.

## Align Monetary Unit Sampling with your sampling methodology

Organizations can now customize how the Monetary Unit Sampling tool appears to its users. This includes renaming inputs to match your own methodology or replacing the percentage input box for “Required reliability level” with a dropdown box where the organization can customize and standardize the selections and associated percentages available. This capability is available through the TeamMate Analytics configuration file.

Users can also override the High-value threshold, which defaults to be the same as the Sampling interval, with a lower value. This can be used to ensure all transactions over a specified value, such as Materiality, are included in the sample.

The sample outputs have also been updated with a new column where the user can provide a comment on each transaction without needing to unprotect the worksheet.

TA Monetary Unit Sample ? X

[What does this tool do?](#)

Sampling column: Amount

Positive value items:  2,526,640.53

Negative value items:  1,751,478.76

All items (absolute values):  4,278,119.29

Confidence Level New(%): Medium

Material error value (\$): 1000000

Expected Error New: 10000

BBP(%)New: 100

Estimate sample size

Approximate sample size: 5

Sampling interval: 505,328.11

Change high value threshold: 400000

Random seed: 312141

OK Cancel

Monetary unit sampling

## Enhancements

Reference	Area	Details
S-58594	Expert Analyzer	Added the ability to save a workflow without correcting errors or closing the workflow designer
S-58604, S-58643, S-58644	Expert Analyzer	Added the ability to customize the order of expert analyzer worksheet output.
S-58649, S-59949, S-59950	Expert Analyzer	Added the ability to customize report columns in the expert analyzer report output.
S-58645	Sampling – MUS	Added the ability to add Comments for High values and MUS Samples outputs in an unprotected area
S-58648	Sampling – MUS	Added the ability to set the “High value threshold” to a value lower than the sampling interval.
S-58916, S-59029	Sampling – MUS	Added the ability to customize captions, default option for Positive/Negative/All value items, and use a drop-down box to select Required reliability level from a set of preset values, using a configuration file
S-58901	Data Preparation – Mask confidential data	Added the ability to hash a column to obscure confidential information
S-59947	Continuous Analyzer	Ability to save workflow results when the user selects the destination folder to a path containing the ‘.’ dot/period character.
S-56992	Various	Updated various third-party components to newer versions.
S-59850	Options – Dates	Updated the TeamMate Analytics standard date list to include 2023 public holidays

## Defects

Reference	Area	Details
D-29458	Expert Analyzer - Visualize	Resolved a defect where visualizations were not created when using the German language pack
D-29754	Expert Analyzer - Filter	Resolved a defect with the Filter tool where a locked test would be unlocked after switching to another block
D-31092	Right click tool – Quick Extract	Resolved a defect where Quick extract created additional duplicated worksheets
D-31814	Integration- TeamMate+	Resolved a defect where user is not able to upload newly created workbook back to TeamMate+ system

## Caveats

Issue	Resolution
In some cases, when exporting a schedule to Excel, the TeamMate Analytics tab does not appear properly if Team Schedule is open.	The workaround is to click the Close button after exporting a schedule to Excel and prior to opening the exported schedule in Excel.

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