

TeamMate Analytics 8.2 – IT Overview

December 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 8.2 has been certified to work with TeamMate AM October 2022 and TeamMate+ November 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 Microsoft supported versions of 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</p>

TeamMate Analytics	
	<p>Copyright Glyph & Cog, LLC. License: Commercial/OEM</p> <p>SQLite ODBC driver <i>This is an optional installation, and only required for analyzing more than 1 million rows of data.</i> Copyright Christian Werner (chw@ch-werner.de) License: BSD-type license</p> <p>SQLite database engine <i>This is an optional installation, and only required for analyzing more than 1 million rows of data.</i> License: Open-source</p> <p>Newtonsoft.Json Copyright: James Newton-King License: The MIT license</p> <p>.NET client for ASP.NET SignalR Copyright: Microsoft Open Technologies, Inc. License: https://www.microsoft.com/web/webpi/eula/net_library_eula_ENU.htm</p> <p>QuickBooks QuickBooks-V3-DotNET-SDK Copyright 2021 Intuit Inc. License: Apache License</p> <p>Info.lundin.math - ExpressionParser Copyright: Patrik Lundin License: Microsoft Public License (MS-PL)</p> <p>Countly Windows SDK Copyright: Countly Ltd. License: Commercial/OEM The add-in is always loaded and 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 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>

TeamMate Analytics	
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> <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	<p>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.</p>
Memory	<p>At least 4GB RAM is recommended to analyze larger data files.</p>

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 deselects *check for updates* in Options and the option is 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 applies. If the value is 0 or “false” or the parameter/tag is entirely missing, the block does not apply.

BlockSuggestionBox

This prevents 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 applies. If the value is 0 or “false” or the parameter/tag is entirely missing, the block does not apply.

BlockDemoTutorial

This prevents the demo tutorial from 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 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 blocks all demo tutorials from showing, whether the default TMA tutorial, or a customized one.

If the value is 1 or “true” the demo tutorial does not show. If the value is 0 or “false” or the parameter/tag is entirely missing, the demo tutorial does 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, and so on, is captured.

Some companies may choose to disable logging.

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

EnableDebugLogging

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

Monetary Unit Sampling customizations

The config.xml file is also used to customize the Monetary Unit Sampling tool. For details on these specifications, see the separate document that further describes how these are enabled using the configuration file.

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 is controlled by adding one of two registry keys via group policy.

Option 1. Teammate Analytics 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 is still loaded by Excel, since it is installed for all users; however, if it is disabled, the ribbon is not loaded, and the licensing window (About Form) is not shown for that user.

Option 2. Teammate Analytics 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**.

Key location: \HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\16.0\Excel\Options\

Type: REG_SZ

Value name: OPEN

- To disable **helper add-in**, search for “AnalyticsHelper.xlam” and delete the registry entry. This may be necessary if the helper add-in keeps re-enabling the TeamMate Analytics add-in.

TeamMate Support

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

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