

TeamMate Document Linker 1.1 – IT Overview

December 2023

About this Document

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

TeamMate Document Linker 1.1 has been certified to work with:

- TeamMate Analytics 8.2.2
- CCH ProSystem fx Engagement 2022.2.2
- CCH Axxess Engagement April 2023
- TeamMate+ Nov 2023.
- TeamMate AM April 2023

Specifications

TeamMate Document Linker

An Excel add-in that allows auditors to link data in an Excel worksheet to text in PDF and image files.

- Written in C# .NET.
- Integrates with installed version of MS Office via VSTO add-in.
- Compatible with Microsoft supported versions of Excel 2016, 2019, 2021 and 365 (desktop).

Requires Microsoft .NET Framework 4.8 or above (Client and Extended). If the Framework hasn't been installed previously, it's necessary to install it. The add-in is always loaded and is available when using Excel. The add-in is compatible with Excel working papers opened from TeamMate+, TeamMate AM, CCH Axxess Engagement and CCH ProSystem fx Engagement.

TeamMate Analytics uses licensed third-party components and software for which the copyright is held by their respective owners and summarized below.

Countly Windows SDK

Copyright: Countly Ltd.

License: Commercial/OEM

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.

Installation	TeamMate Document Linker installation is based on Windows Installer 3.0 technology with EXE and MSI format provided. The EXE and MSI installation files include all internally developed and licensed components needed to run the application as well as links to user manuals. The EXE installation file bundles the 32-bit and 64-bit MSI files.
Web Services	<p>The Microsoft Azure Cognitive Service for Vision is used to extract text from documents. This is hosted in the United States.</p> <p>A token-based web service is used to validate that calls to the cognitive service originate from TeamMate Document Linker. This is hosted in the United States.</p> <p>A web service is used to retrieve licenses (with the standard licensing mechanism) and to check version numbers. This is hosted in the United States.</p>
32-bit / 64-bit Excel	TeamMate Document Linker is compatible with both 32-bit and 64-bit versions of Excel. For working with large data sets or many large documents, 64-bit Excel is recommended.
Memory	At least 4GB RAM is required, 8GB or more is recommended.

URL whitelisting

Firewalls may block TeamMate Document Linker accessing the licensing server, help documentation or cognitive service for vision. This can normally be resolved by whitelisting the following URLs:

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

Vision Service: <https://proddlgateway.teammatehosting.com/zuse1d011b188fnap1tmdl01/Analyze>

Help docs: <https://tmdl.teammatedocs.com/aug2023/Default.htm>

County usage statistics: <https://wolters-kluwer.count.ly>

Configuration

The configuration (config) file enables companies to customize the way that TeamMate Document Linker works for their users.

Location

The config file *TeamMateDocumentLinker.config* is located in the installation folder for TeamMate Document Linker - normally *c:\Program Files\TeamMate Document Linker* or *c:\Program Files (x86)\TeamMate Document Linker*. If a config file is not present or malformed, TeamMate Document Linker will not operate properly.

The `<configuration>` and `</configuration>` 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 configuration file is as follows:

```
<configuration>
<appSettings>
  <add key="EnableDebugLogging" value="0" />
  <add key="MaximumIndividualFileSize" value="100" />
  <add key="MaximumNumberOfFiles" value="1000" />
  <add key="MaxUtilization" value="99" />
  <add key="MaxLinkSearchFilterCount" value="500" />
  <add key="MaxLinkSearchDataCount" value="1000000" />
</appSettings>
</configuration>
```

There may be additional parameters/tags in this file. Those tags should not be modified, or TeamMate Document Linker may not function properly. TeamMate recommends making a copy of the original file installed with the product prior to making any changes to this file.

EnableDebugLogging

If the value is 1 or “true” debug logging will be enabled, and debug logs will be created as Document linker is being used. If the value is 0 or “false” or the parameter/tag is entirely missing, logging will be disabled.

Log files will be created in *C:\work\DocLinker.log*

MaximumIndividualFileSize

If specified, when a user adds a document greater than this file size, in MB, the application will display an error message and not send the document to the cognitive vision service. The user will not be able to create links on this document.

MaximumNumberOfFiles:

If specified, when a user adds a number of documents greater than this limit, the application will display an error message and not send the documents to the cognitive vision service. The user will not be able to create links on these documents.

MaxUtilization:

If specified, and Windows memory usage exceeds the defined limit (in percent), additional documents will not be added to TeamMate Document Linker and a warning message will be displayed. The valid range is from 1 to 100. If this is not specified, 99 percent will be used by default. This configuration only applies to 64 Bit versions of Excel.

MaxLinkSearchDataCount:

This parameter represents the maximum number of words, across all documents, that will be considered when searching in the links tab.

MaxLinkSearchFilterCount:

This parameter represents the maximum number of search results that will be displayed to the user in the search dropdown in the links tab. If this is not specified, the first 500 matching results will be displayed to the user.

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 modifying a registry key via group policy.

Key location:

HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\Excel\Addins\TeamMateDocumentLinker\

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**.

Support

If you are a TeamMate customer, please visit <https://www.wolterskluwer.com/en/solutions/teammate/support> for Technical Support contact information for your location.

If you are a CCH customer, please visit <https://support.cch.com/>.

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