TeamMate Analytics 7.2 Update 1
Release Notes – May 2020

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 7.2 Update 1	May 2020	TeamMate Analytics 7.2 Update 1 (Combined 7.2 Release and Update 1)
Releases prior to 7.2		Support Site

TeamMate Analytics 7.2 Update 1 – May 2020

The release of TeamMate 7.2 Update 1 contains a resolution of the following defect:

Defect

Reference	Area	Details
D-26399	Import Wizard	Resolved a defect where editing an Import Wizard for a PDF file that previously had a blank character width resulted in recalculation of the character width and in some cases the template became misaligned with the data.

TeamMate Analytics 7.2 - April 2020

The release of TeamMate Analytics 7.2 delivers the following new tools and enhancements.

Import Wizard is easier to use with PDF files

There is no longer a need to set the PDF file type or character width – you can get straight into building your import template. Import Wizard will now automatically work out, by scanning your PDF file, how best to extract the text from that file.

Import Wizard checks for problems with your template

The new 'Check for missed characters' feature will prevent fields being accidentally cut off. It scans your whole data file for any characters that fall just outside of a field in your import template. It will show you these within your data, so you can adjust your template to avoid missing any important characters.

Check for missed characters in Import Wizard

New Expert Analyzer workflows in Test Library

Taking full advantage of the flexibility of Expert Analyzer, an additional 40 tests in the test library can now be run automatically including Trial balance roll-forward (journal completeness). A further 17 have been updated to provide more valuable results and automate all analysis steps.

Updated Journals standard workflow

The standard Journals Expert Analyzer has been updated to add new tests for credits to cash accounts; manual entries; Benford's testing; and end-of-year journals. Journals containing words and phrases test now include a list of keywords you can use, and riskiest journals are extracted for review.

Stratification with text columns

Data can now be split into groups using the values in up to 6 text columns, then sample from each of those groups separately. For example, you could split a customer list up by Country and City and select a sample of 5 customers from each Country/City combination.
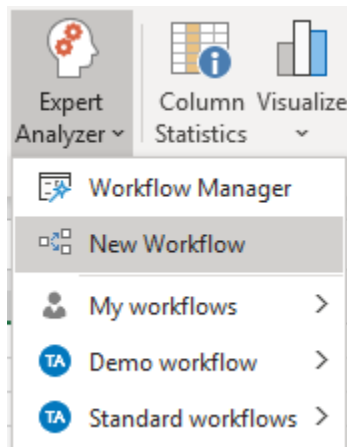

Text stratification and automatic sample allocation

Automatic sample allocation in stratification

As well as selecting an equal sample from each group, you can now allocate a sample (for example 30 items) across all groups based on the number of items or total value of items in that group. So larger groups will have more samples and smaller groups less. This is a popular sampling strategy which can now be performed easily in TeamMate Analytics with text, numeric or date columns.

Reducing clicks for creating a new Expert Analyzer workflow
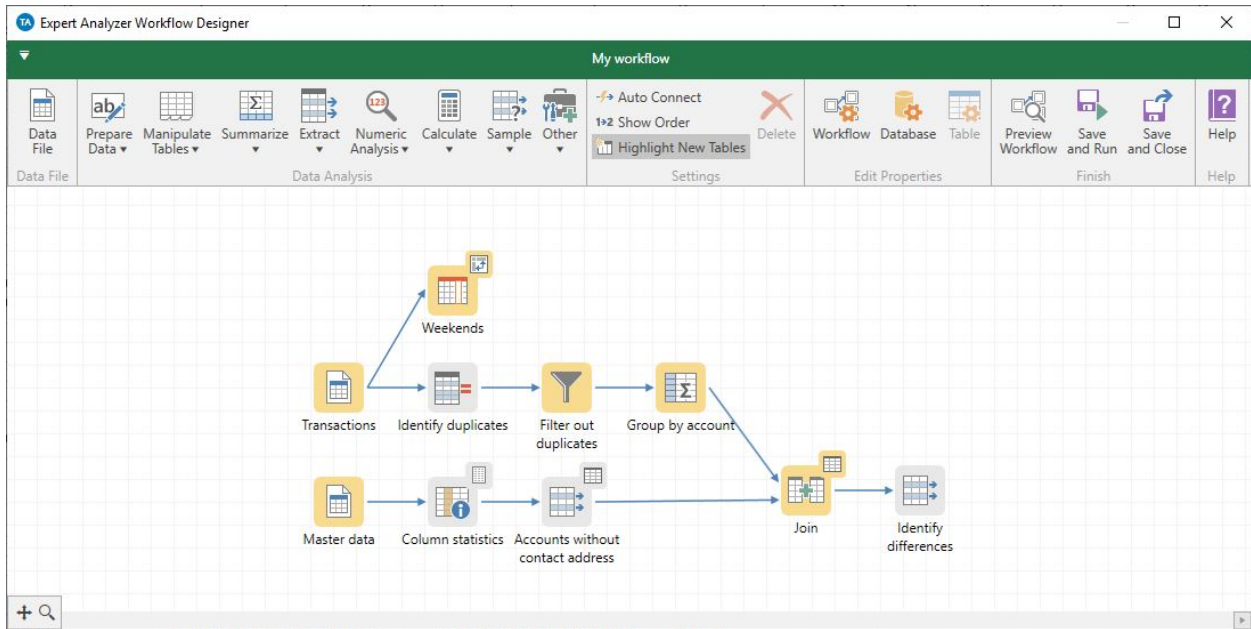
Create a new workflow straight from the Expert Analyzer ribbon menu, as well as via the workflow manager.

Create new workflows straight from the ribbon

Helping to visualize data flows in Expert Analyzer

The new "Highlight new tables" button in the workflow designer makes understanding data flow between tables (created behind the scenes) easier.

Visualize where new tables are created in Expert Analyzer

Enabling attributes sampling of small populations

Now, you are no longer restricted to populations of 5,000 or more transactions – attributes sampling now considers the population size to enable more efficient samples to be calculated for small datasets.

Attributes sampling with small populations

This version comes in the form of full installs only and will upgrade existing TeamMate Analytics installations.

Enhancements

Reference	Area	Details
S-43849 S-44198 S-44537 S-45824	Stratification	Added stratification for text fields, allowing stratification by up to 6 different text fields
S-43851 S-44589	Stratification	Added the ability to split a sample across groups based on the number or total value of items in each group. Allocation methods Round, Round Up, Round Down and Largest Remainder can be selected.
S-43850	Stratification	Updated form layout with numerous changes including reversing position of "Amount" and "Group by" inputs, changing terminology from "band" to "Group", simplifying numeric and date band definition parameters.
S-43850	Stratification	Removed previous "Group by" options. The new "Group by" options perform a different function.
S-43850	Stratification	Removed "Summary" and "Chart results" output options.
S-44865	Expert Analyzer	Added "Highlight new tables" button to the Expert Analyzer workflow designer to make visualization of data flows clearer.
S-44866	Expert Analyzer	Added "New workflow" button to the Expert Analyzer ribbon to make creating workflows quicker and easier. Also added a form for the selection of a group to the new workflow process.
S-44867 S-46538	Attributes Sampling	Modified sampling logic to incorporate the population size. This allows for small populations to be used with this sampling method.
S-44868	Import Wizard	Added automatic scanning of PDF files to calculate the appropriate settings (line printer vs table, and character width) to use for PDF conversion. Added a button to the Fixed Width Template Designer to enable these settings to be overridden by the user, and a tool to calculate settings based on parameters selected by the user.
S-45170	Import Wizard	Added "Check for missed characters" function to the Fixed Width Template Designer, accessed via a button.
S-45663	Various	Updated third party components to their latest version

Defects

Reference	Area	Details
D-25038	Expert Analyzer	Resolved two defects with locking whole tests in the workflow designer – dependent tests would not become automatically unlocked when the parent was unlocked, and the PivotTable settings were not always checked for dependencies on locking tests.
D-25348	Expert Analyzer	Updated message referencing "Custom Modules" instead of "Expert Analyzer" when importing a .xml file that does not contain the right type of data.
D-25707	Quick Visualizer	Resolved a defect where, on copying the chart, closing Quick Visualizer and selecting a different Excel ribbon tab, Excel would freeze requiring a restart.
D-25860	Import Wizard	Resolved a defect where after importing large files to CSV, used memory would not be released, resulting in greater memory usage than necessary.
D-25987	Import Wizard	Consolidated two PDF to text conversion tools into one.