

TeamMate Analytics (TMA) 8.1 Release Notes - April 2022

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 8.1	April 2022	TeamMate Analytics 8.1
Releases prior to 8.1		TeamMate Connect

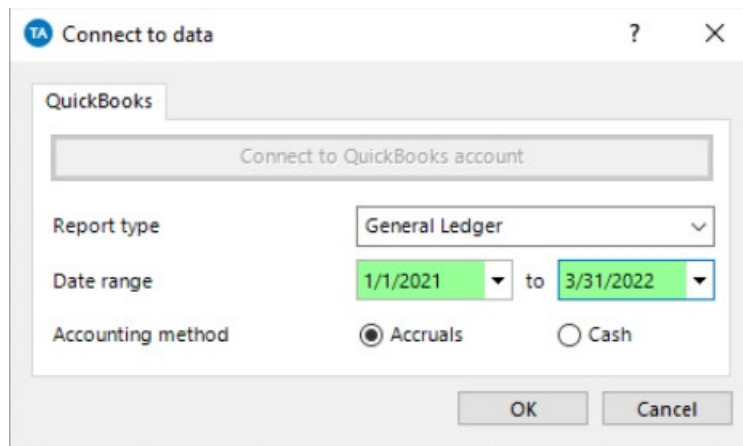
TeamMate Analytics 8.1 - April 2022

The release of TeamMate Analytics 8.1 delivers the following new tools and enhancements:

Data integration with QuickBooks Online

To make getting data easier, we have added integration with QuickBooks Online accounting software, which enables General Ledger, Journal, Transaction List and Trial Balance data to be downloaded straight into Excel and TeamMate Analytics ready for analysis.

If you are upgrading from a previous version of TeamMate Analytics, to see the Connect to Data option on the ribbon, you will need to enable the “Connect to Data” option in the Settings 2 tab of Options.



Connect directly to QuickBooks Online data

Performance improvement for Expert Analyzer with large data files

To get you to your analytics results quicker, we have made some significant improvements to Expert Analyzer performance, reducing processing time significantly when running workflows on very large data files (over 1 million rows).

‘Fill blank values with last non-blank value’ gets its own button on the ribbon

The “Fill blank cells with last non-blank value” option within the Fill Cells tool in the Manipulate fields menu is one that users turn to frequently. To save you valuable time we have added a new button on the ribbon to apply this in just one click.

New Revenue workflow

A new workflow for testing revenue, using General Ledger data has been added to standard workflows. This helps to understand revenue flows – the combinations of accounts that make up postings to revenue, to help you determine what is normal and what is unusual and potentially fraudulent. It also creates two dashboards that visualize transactions through the year in different ways to lead your audit of revenue.

Enhancements

Reference	Area	Details
S-54723	Various	Updated various third-party components to newer versions.
S-54858	Test Library	Updated Test Library to add workflows for tests that use the Same-Same Different duplicate tool.
S-55353, S-57365, S-57530, S-57709	Data Connection	Added the ability to import QuickBooks General Ledger, Journals, Transaction List, and Trial Balance data directly into Excel using the QuickBooks Online API.
S-55364, S-56030	Expert Analyzer	Enhanced Expert Analyzer performance to reduce processing time when running workflows on very large data files (over 1 million rows).
S-55377	Data Preparation	Added Fill Blank cells with last non-blank value tool to the ribbon under the data preparation section. The Global Find and Replace button has been moved to the Manipulate Fields menu.
S-56266	Options	Updated the standard dates lists to include public holidays for 2022.
S-57024	Standard workflows	Added new "Revenue (using General Ledger data)" workflow to TMA Standard workflows.

Defects

Reference	Area	Details
D-29927	Data Connection	Removed support for Connect to Data for Xero due to Xero API 1.0 no longer being supported by Xero.
D-30071	Expert Analyzer - Aging	Resolved a defect where an extra blank column is added in the pivot output.
D-30096	Options	Resolved a defect where user-created dates are not displayed in the Options date list after the Excel is restarted.
D-30129	Criteria Match	Resolved a defect where Criteria Match gives an error when run on a file opened directly from TeamMate+.
D-30401	Import Wizard	Resolved a defect where Batch import shows an exception with specific files and templates.
D-30681	Expert Analyzer – Cross Tabulate	Updated validation for calculation field when selected column is removed or changed.
D-30824	Continuous Analyzer	Resolved a defect where using an output file prefix containing a period/dot (.) character causes the output file to be saved without the correct file extension.
D-30928	Add-in	Resolved a defect where the TeamMate Analytics Helper Add-in was not certified as coming from Trusted publisher.

Caveats

Issue	Resolution
In some cases, when exporting a schedule to Excel, the TeamMate Analytics tab does not appear properly if Team Schedule 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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