

TeamMate Analytics 7.0 IT Overview

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.

Specifications

TeamMate Analytics	
Excel Add-in to allow auditors 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 Excel 2010, 2013, 2016, 2019, and 365 (desktop). • Requires Microsoft .NET Framework 4.5 or above (Client and Extended). • Analytics Helper add-in written in VBA (an Excel Add-in) and adds undo and re-enabling functionality to the main add-in. • Certain functionality – the ability to use the Custom Module feature with more than 1 million rows of data – is only available when used with Excel 2016
	<p>Version 7.0 utilizes licensed third party components and software for which copyright is held by their respective owners and summarized below. 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 Copyright Glyph & Cog, LLC., 1996-2014 License: Commercial/OEM</p> <p>SQLite ODBC driver <i>This is an optional installation, and only required for analysing more than 1 million rows of data.</i> Copyright Christian Werner (chw@ch-werner.de)</p>

TeamMate Analytics	
	<p>License: BSD-type license</p> <p>SQLite database engine</p> <p><i>This is an optional installation, and only required for analysing more than 1 million rows of data.</i></p> <p>License: Open-source</p> <p>Newtonsoft.Json</p> <p>Copyright: James Newton-King, 2007</p> <p>License: The MIT license</p> <p>.NET client for ASP.NET SignalR</p> <p>Copyright: Microsoft Open Technologies, Inc</p> <p>License:</p> <p>https://www.microsoft.com/web/webpi/eula/net_library_eula_ENU.htm</p> <p>XeroAPI .NET Library</p> <p>Copyright: Xero Limited, 2011</p> <p>License: The MIT license</p> <p>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.</p>
Installation	<p>The installation of the 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 4.5 Framework if not previously installed.</p>

Desktop Computer Requirements

TeamMate Analytics	
Web Services	Web service is used to retrieve licenses (with regular licensing mechanism) and to check version numbers (if that is enabled in Options). Web service is also used to submit error reports and suggestions; however, the user must actively submit. It does not happen automatically.
32-bit / 64-bit Excel	TeamMate Analytics is compatible with both 32-bit and 64-bit versions of Excel. For analysing large data files (multiple millions of rows), 64-bit Excel is recommended.
Memory	At least 4GB RAM is recommended to enable larger data files to be analysed.

License check URL whitelisting

Sometimes, a firewall may block TeamMate Analytics accessing its licensing server and retrieving a license online.

This can normally be resolved by whitelisting the following URL:

https:\\license.teammateanalytics.com on port 443

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.

The config file functionality was added in TMA Version 5.0. It will not work in earlier versions.

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>true</BlockCheckForUpdates>
<BlockSuggestionBox>true</BlockSuggestionBox>
<BlockDemoTutorial>true</BlockDemoTutorial>
</Config>
```

BlockCheckForUpdates

This will deselect check for updates in Options and the option will be greyed out, so the user cannot enable it.

Some companies wish to do this to prevent data being sent to our servers. Others do this because they push out updates internally and do not want users installing updates themselves.

If the value is “true” the block will apply. If the value is “false” or the parameter/tag is entirely missing, the block will not apply.

BlockSuggestionBox

This will prevent the Suggestion box tool from appearing in the Help menu.

Some companies wish to do this to avoid users being able to send confidential information outside the company.

If the value is “true” the block will apply. If the value is “false” or the parameter/tag is entirely missing, the block will not apply.

BlockDemoTutorial

This will prevent the demo tutorial ever 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 would 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 will block all demo tutorials from showing, whether the default TMA tutorial, or a customized one.

If the value is “true” the block will apply. If the value is “false” or the parameter/tag is entirely missing, the block will not apply.

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 that are licensed to use the software).

In these cases, the loading of the add-in can be controlled by adding one of two registry keys via group policy.

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

Option 2. Add-in will not load

Key location:

HKEY_CURRENT_USER\Software\Microsoft\Office\Excel\Addins\TeamMateData.TeamMateAnalytics\

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**

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