

Personalizing your Teammate Analytics roll-out

Updated for Version 7.0

Contents

1. Personalizable Files	2
3. Company dates	5
4. Company words	5
5. Company normalization rules	6
6. Company formulas	6
7. Company workflows	7
8. Company test library	8
9. Config	9
10. Demo tutorial	10
11. Settings	11
12. Updating company content	13
13. Upgrading from Version 5.2 or earlier to Version 6.0 or later	13
14. Upgrading from Version 6.0 or earlier to Version 7.0 or later	14

Introduction

Organizations deploying TeamMate Analytics (TMA) to a substantial number of users can personalize the software. Several features may be personalized along with content types that can be distributed to users.

Options available for personalization have improved with the release of Version 6.0 of TeamMate Analytics, making the distribution, maintenance, and branding of content easier.

1 Personalizable Files

Primary Personalized Files

File	Filename	Description	When
Header Logo	HeaderLogo.png	Logo image appearing in the header of documents	At any time
Company icon	co_icon.png	Icon that appears to differentiate content created by the user's company	At any time
Company dates	co_dates.xml	Date lists created by the user's company for use in TMA tools	At any time
Company words	co_words.xml	Word lists created by the user's company for use in TMA tools	At any time
Company normalization rules	co_norm.xml	Normalization rule lists created by the user's company for use in TMA tools	At any time
Company formulas	co_formulas.xml	Formulas created by the user's company for use in TMA tools	At any time
Company workflows	co_modules.xml	Expert Analyzer workflows created by the User's company for use in TMA	At any time
Company Test Library	co_testlibrary.xml	A Test Library created by the User's company for use in TMA	At any time
Config	Config.xml	Configuration settings	At any time
Demo tutorial	Various	Tutorial slides to guide new users	At any time

Secondary Personalized Files

File	Filename	Description	When
Settings	Settings.xml	User settings for how the software will behave; date, word, normalization rule and formula lists created by the user	First install only

1. Header logo

File name **HeaderLogo.png**
Location **Program Files\TeamMate Analytics**

The header logo image appears by default in the document header of many of the TeamMate Analytics outputs, including Expert Analyzer workflows and the Header and Footer tool.

This file is installed along with the product and will overwrite any previous versions of this file.

A header logo image file can be pushed to users to provide an alternative to the installed logo.

The image can be nearly any size, but the following should be considered:

- The logo should be in .png format.
- The logo will be automatically resized (proportionally) to a given height, however, it is recommended that the logo file is significantly wider than it is tall for legibility (see the default logo below).
- The logo should be black and white as a color logo may force the printer to print in color.
- Crop the logo tightly at the left side of the image to ensure it aligns with the workpaper.
- Consider adding some white space above and below the logo. Experiment with what looks best.
- Ensure the image has a high resolution to ensure crispness, but do not make the file too large, as this will add to the file size of any workpapers with this header.

An example image (default) is shown below for illustration.

Note: the red dotted border is to highlight the boundary of the image but is not required in your image file.



The dimensions of this file are 767px (wide) by 170px (tall). The file size is 18.5KB.

2. Company icon

File name **co_icon.png**
Location **Program Files\TeamMate Analytics**

The Company icon provides the ability for in-house developed content to be branded which may differentiate that content from content created by TeamMate Analytics or the user.

‘Content’ refers to date lists, word lists, normalization rule lists, formulas, Expert Analyzer workflows and test library tests

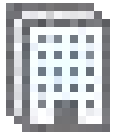
An icon appears in the following situations to signify Company content:

- In Options to show company content in Dates, Words, Normalization and Formulas tabs
- In various tools when selecting date, word, normalization, and formulas
- In the Workflow manager
- In the Expert Analyzer ribbon menu
- In the Test library

The icon file must adhere to the following:

- .png file format and file extension
- 16px × 16px

If no company icon file is present, company content will use the following icon:



3. Company dates

File name **co_dates.xml**

Location **Program Files\TeamMate Analytics**

TeamMate Analytics permits 3 sets of date lists:

- TMA dates – date lists created by and shipped with TeamMate Analytics
- User dates – date lists created by the user or imported from a file
- Company dates – date lists created and distributed by the user’s company

An organization may provide its own company dates file for users as additional date lists (such as public holiday, dates for a country not provided with TMA, or shutdown dates for an organization).

To create a company dates file:

1. Create user lists in Options > Dates
2. Select the lists to include in the company dates and export to a new file
3. Name the file co_dates.xml.

The TMA date lists (tma_dates.xml) includes public holidays for various countries.

The user date lists (stored in Settings.xml) are blank by default.

4. Company words

File name **co_words.xml**

Location **Program Files\TeamMate Analytics**

TeamMate Analytics permits 3 sets of word lists:

- TMA words – word lists created by and shipped with TeamMate Analytics
- User words – word lists created by the user or imported from a file
- Company words – word lists created and distributed by the user’s organization

An organization may provide its own company words file for users use as additional word lists (such as search terms that might indicate out of policy expenses or fraudulent journal entries).

To create a company words file:

1. Create user lists in Options > Words
2. Select the lists to include in the company words and export to a new file
3. Name the file co_words.xml.

TeamMate Analytics does not currently ship with a TMA word lists file (tma_words.xml).

The user word lists (stored in Settings.xml) are blank by default.

5. Company normalization rules

File name **co_norm.xml**
Location **Program Files\TeamMate Analytics**

TeamMate Analytics permits 3 sets of normalization rule lists:

- TMA rules – rule lists created by and shipped with TeamMate Analytics
- User rules – rule lists created by the user or imported from a file
- Company rules – rule lists created and distributed by the user’s organization

An organization may provide its own company normalization rules file and for users as an additional rule lists, such as replacement names for vendors or customers, or address substitutions for a different language.

To create a company normalization rules file:

1. Create user lists in Options > Normalization
2. Select the lists to include in the company rules and export to a new file
3. Name the file co_norm.xml.

The TMA normalization rule lists (tma_norm.xml) includes substitutions for streets, U.S. states, and other address terminology.

The user normalization rule lists (stored in Settings.xml) are blank by default.

6. Company formulas

File name **co_formulas.xml**
Location **Program Files\TeamMate Analytics**

TeamMate Analytics permits 3 sets of formulas:

- TMA formulas – formulas created by and shipped with TeamMate Analytics
- User formulas – formulas created by the user or imported from a file
- Company formulas – formulas created and distributed by the user’s organization

An organization may provide its own company formulas file for users as additional formulas, such as ratios for an industry.

To create a company formulas file:

1. Create user formulas in Options > Formulas
2. Select the lists to include in the company formulas and export to a new file
3. Name the file co_formulas.xml.

The TMA formulas (tma_formulas.xml) include various financial ratios.

The user formulas (stored in Settings.xml) are blank by default.

7. Company workflows

File name **co_modules.xml**

Location **Program Files\TeamMate Analytics**

TeamMate Analytics permits 3 sets of Expert Analyzer workflows:

- TMA workflows – workflows created by and shipped with TeamMate Analytics
- User workflows – workflows created by the user or imported from a file
- Company workflows – workflows created and distributed by the user’s organization

An organization may provide its own company workflows file for users as additional workflows (such as modifications to TMA workflows to fit a different methodology, or new workflows for other audit areas).

To create a company workflows file:

1. Create user workflows in the Workflow Manager
2. Click on Export
3. Select the workflows to include in the company workflows and export to a new file
4. Name the file co_modules.xml.

The TMA workflows (tma_modules.xml) include the following:

Workflow

Demo workflow
Accounts Receivable
Accounts Payable
Accounts Receivable balances
Accounts Payable balances
Fixed Assets
General Ledger Journals
Payroll
HR
Inventory
T&E Expenses

The user workflows (stored in Modules.xml) are blank by default.

8. Company test library

File name **co_testlibrary.xml**

Location **Program Files\TeamMate Analytics**

TeamMate Analytics permits 3 sets of Test Library content:

- TMA test library – tests created by and shipped with TeamMate Analytics
- User test library – tests created by the user or imported from a file
- Company test library – tests created and distributed by the user’s organization

An organization may provide its own Test Library file for users as additional tests (such as tests that are aligned to a firm’s methodology or tests for new audit areas).

To create a Test Library file:

1. Create user tests in Options > Tests
2. Click Export
3. Select the tests to include in the company Test Library and export to a new file
4. Name that file co_testlibrary.xml.

The TeamMate Analytics Test Library file includes the standard test library content, installed with the product. The TeamMate Analytics Test Library file will overwrite earlier versions. File content automatically appears in the test library.

The user Test Library (TestLibrary.xml) is generated when the first user tests are created.

To use the The TeamMate Analytics test library:

1. Locate tma_testlibrary.xml
2. Copy and paste the file into the AppData\Local\TeamMate Analytics folder
3. Rename the file TestLibrary.xml
4. Modify the tests in Options > Tests
5. Click Export
6. Select the tests to include in the company Test Library and export to a new file
7. Name that file co_testlibrary.xml.

9. Config

File name	Config.xml
Location	Program Files\TeamMate Analytics

The configuration file provides organizations the ability to personalize TeamMate Analytics.

An organization must create the config file and enable it for users. There is no operation in TMA to create or change a config file. Settings cannot be changed within the software.

If it is installed to the installation folder, its settings will be read and applied. The file is not installed by the TMA installer, and most organizations will not deploy a config file. If a config file is not present, TMA will 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.

Organizations may do this to prevent data being sent to our servers or because updates are pushed internally, and users should not install updates on their own.

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 prevents the Suggestion box tool from appearing in the Help menu.

Organizations may do this to avoid users being able to send confidential information externally.

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 from appearing on start-up. This including the first time the add-in is run.

Some organizations may do this as they provide training internally or prefer the tutorial not to show.

Organizations may still replace the demo tutorial slides/images with personalized versions. Including this parameter in the config file will block all demo tutorials from showing, whether the default TMA tutorial, or a personalized 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.

10. Demo tutorial

File names **Tutorial-1.jpg, Tutorial-2.jpg, Tutorial-3.jpg, etc.**

Location **Program Files\TeamMate Analytics**

The demo tutorial images display as a slide show when the user first runs the software or if they launch the demo tutorial from the ribbon within the software. These are installed with the product and will overwrite any earlier versions of the files.

A personalized demo tutorial (set of .jpg images) can be pushed to the users to personalize the tutorial, change branding or content, or link to an internal website. Personalized images must be created, using the follow:

- The image can be any size, but we recommend sticking to the defaults of 1280 x 720px.
- A region of 75 x 75px in the top-right of the image is clickable and will close the tutorial.
- A region of 300 x 125px in the bottom-left of the image is clickable and will go back to the previous slide. If the first slide is displayed, this region will not be clickable.
- A region of 300 x 125px in the bottom-right of the image is clickable and will advance to the next slide. If the last slide is displayed, this button will close the tutorial.
- The region between the bottom-left and bottom-right regions is clickable and will open a hyperlink specified in the image properties. If no hyperlink is set, this region will not be clickable.
- The tutorial can use any number of slides, which will advance in order based on the number in the file name.

11. Settings

File name **Settings.xml**
Location **AppData\Local\TeamMate Analytics**

The Settings file has user settings for software functionality. This is not created on install. If there is no settings file, the software will create one with default settings.

A personalized Settings file may be pushed to users to provide alternative default settings, such as adding number formats or changing how TeamMate Analytics behaves.

A personalized file may be created by modifying the settings as required and copying the Settings file on the user's machine.

WARNING: Personalized settings files should not be pushed for upgrades, only initial installations. Overwriting a user's existing settings file will remove any settings and word, date, formula or normalization lists they have created.

The Settings file controls a variety of parameters. Most are available through the Options form, but others are not. These are listed on the following page.

Setting	Used by
Standard Number format	Format as number tool
Standard Currency format	Format as currency tool
Standard Date format	Format as date tool
Show TeamMate Analytics test library	Test Library tool
Show Company test library	Test Library tool
Show User test library	Test Library tool
Preparer name	Project Details tool
Import Wizard Template Designer and preview row limit	Import Wizard Expert Analyzer CSV source preview
Add screenshot to Cell B1 comment	Various tools
Auto rename when you Show Detail on PivotTables	Overrides Excel functionality
Sort column when you double-click in Row 1	Overrides Excel functionality
Show Quick Stats on right-click menu	Quick Stats
Use undo	Various tools
Display outputs as Excel tables	Various tools
Show advanced options by default	Various tools
Show validation icons	All tools
Use company name / Use image file	Various tools
Check for updates / frequency	n/a
Sheet Check error tests	Sheet Checker
Language	n/a
Large file mode for Excel source files	Expert Analyzer
Default database destination folder	Expert Analyzer with >1m rows
Report output default maximum records	Expert Analyzer
Always use database for Expert Analyzer analysis	Expert Analyzer
Only use defined columns from Excel data files	Expert Analyzer
Project details	Various tools
Date lists	Exception Report / Specific Dates
Word lists	Words and Phrases
Normalization rule lists	Normalization
Formulas	Formula
Test Library Audit Program tests selected	Test Library
Test Library search settings	Test Library
Column statistics default selections	Column Statistics
Hide demo tutorial	Demo tutorial
Show Database connection guide	Expert Analyzer

12. Updating company content

Company content can be updated at any time – a TeamMate Analytics upgrade is not required. Since all company content is read-only within TMA, there is no need to be concerned about overwriting user-generated content.

To update content, replace the 'co_XXXXX' file on the user's PC (replacing XXXXX with the appropriate file name) with the updated version. The content will be displayed the next time TeamMate Analytics is used.

13. Upgrading from Version 5.2 or earlier to Version 6.0 or later

Options for managing content have changed from Version 5.2 to Version 6.0.

Previously, the only way to personalize content was to modify TMA or user content. This is now strongly discouraged. The new company content features should always be used.

Organizations upgrading users should be aware of the following:

Date, word, normalization rule, formula lists

Previously, all the above lists were stored in what are now User lists. If the user added content from TMA lists (for example, by using "Add standard dates"), there may now be duplication between content in the User lists and the TMA lists. The user would need to manually delete any list they no longer need.

Expert Analyzer

Previously, TMA placed a version of what is now the User workflows file, containing the content of the TMA workflows, at installation time. As such, there may now be duplication between User workflows and TMA workflows.

Please note that all TMA workflows have been updated for Version 6.0. Users should manually delete any unmodified 5.2 workflows that were shipped with TMA.

Test Library

User and TMA Test Libraries have always been separate files, so duplication is not expected.

Workflow updates

The workflow updates feature has been removed in Version 6.0. This functionality has been superseded by the ability to create and update Company workflows.

14. Upgrading from Version 6.0 or earlier to Version 7.0 or later

Version 7 of TeamMate Analytics includes significant enhancements to the Custom Module feature. 'Custom Modules' have also been renamed 'Expert Analyzer', and 'modules' are now referred to as 'workflows'.

To enable the new flexible workflows, the xml structure that describes each module needs to be updated.

Modules created in Version 6 and earlier can be converted to workflows automatically by TeamMate Analytics for use in Version 7.

User modules

The first time a user module is run or modified in Version 7, the user will be prompted to convert it. Conversion is a permanent one-way process, and once converted it will not be possible to use it again in Version 6, for example if exported and sent to another user running Version 6.

On installation or on upgrade to Version 7, existing user modules are automatically backed up in the C:\Users\[username]\AppData\Local\TeamMate Analytics\ folder so you can revert should you need to. The backup files will have a name like "modules20191010112537.xml". The number represents the date and time of the backup. For example:

modules	2019	10	10	11	25	37
	Year	Month	Day	Hour	Minute	Second
	10/10/2019 11:25:37 AM					

To reinstate a backup, import this file into the Expert Analyzer workflow manager.

TeamMate Analytics modules

The standard TeamMate Analytics modules have already been updated and converted to workflows for use with Version 7. They do not need to be converted and the user will not be prompted to do so.

Company modules

For company modules, companies have 2 options:

Option 1, don't update

In this case, each time a user runs an older company module in Version 7, they will be prompted to convert it. Since company modules are read-only, they are only temporarily converted, so the conversion will need to be repeated each time.

Option 2, update

In this case, all modules will be updated and converted for use with Version 7. The co_modules.xml file where these are stored will need to be re-deployed to users upgrading from Version 6. Following re-deployment, modules will not need to be converted by the user.

To update company modules, please follow the following steps.

1. Import the co_modules.xml file into the Workflow Manager.
2. For each module:
 - a. Click modify in the Workflow Manager
 - b. Accept the prompt to convert the module
 - c. Validate that the workflow has converted correctly in the workflow designer
 - d. Click Save and Close
 - e. We recommend testing the workflows by running them on sample data.
3. Export the converted modules from the Workflow Manager to a file named co_modules.xml