TeamMate Analytics 7.0 Release Notes – October 2019

TeamMate Analytics Release History

Please note, we have revised our types of updates and how TeamMate 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 7.0	October 2019	TeamMate Analytics 7.0

TeamMate Analytics 7.0 – October 2019

The release of TeamMate Analytics 7.0 delivers new and exciting features and enhancements, including:

Expert Analyzer

The next generation of Custom Modules enables much greater flexibility. You can now use multiple data sources; join, filter and group data and run completely independent analyses within a single workflow. A brand new visual workflow designer makes setting up complex analysis quick and easy.

Monetary Unit Sampling in Expert Analyzer

With Monetary Unit Sampling now available in the Expert Analyzer, you can combine it with other steps in a workflow and sample datasets with more than 1 million rows

Xero integration

Integration with Xero online accounting software allows reports to be downloaded straight into Excel and TeamMate Analytics ready for analysis.

Enhancements

Lead schedules

Enhancements have been added to improve flexibility, including

- The ability to include a second level of account code and description in schedules
- Extracting each schedule to its own workbook

Import Wizard

Updated, more intuitive interface to make importing data more straightforward

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

Please review the Caveats section at the bottom of this document.

Enhancements

Reference	Area	Details
Various	Expert Analyzer	Added new visual workflow designer to replace the Custom Module designer.
S-41979	Expert Analyzer	Added new Audit Log to replace Summary worksheet from Custom Modules with additional detail.
S-40871	Expert Analyzer	Added ability to use multiple data files within a workflow.
S-41220	Expert Analyzer	Added Join tool to Expert Analyzer to enable data files to be combined within a workflow.
S-41254	Expert Analyzer	Added Filter tool to Expert Analyzer to enable a subset of data to be taken for further analysis in a workflow.
S-41669	Expert Analyzer	Added Group tool to Expert Analyzer to enable grouped data to be used for further analysis in a workflow.
S-40880	Expert Analyzer	Added ability to branch data flows in Expert Analyzer to enable multiple independent analyses to be performed on data.
Various	Expert Analyzer	Converted all existing Custom Module tools to use the Expert Analyzer workflow. This includes: Manipulate field; Normalize fields; Aging; Cross-tabulate; Dashboard; Summarize; Visualize; Between dates, Between times; Day of week; Duplicates; Criteria match; Gaps; Grouped criteria match; Out of mask; Specific dates; Split transactions; Top and bottom; Words and phrases; Benford's testing; Negative zero positive; Outliers; Over amount; Rounded amount; Column statistics; Formula; Depreciation; Random sample; Information; and Transaction scoring.
S-40854	Expert Analyzer	Combined Current workbook and Delimited text file data sources from Custom Modules into a single Data file tool in Expert Analyzer and added the ability to change the data source type when the workflow is run.
S-40868	Expert Analyzer	Added the ability to use other worksheets within the current workbook, and other workbooks to the Data file tool in Export Analyzer.
S-42403	Expert Analyzer	Moved Database settings from the Data file tool to the ribbon in the workflow designer.
S-41783	Expert Analyzer	Added conversion tool to automatically convert Custom Modules created with version 6 and earlier for use with Expert Analyzer.
S-43706	Expert Analyzer	Updated Large File Mode logic to account for multiple data files in a workflow.

Reference	Area	Details
S-42727 S-42779	Monetary Unit Sampling – Expert Analyzer Monetary Unit Sampling – Standalone	Added Monetary Unit Sampling tool to Expert Analyzer. Updated standalone Monetary Unit Sampling logic to ensure identical samples are extracted for standalone and expert analyzer tools with the same data files and parameters.
S-43810	Test Library	Removal of the ability to merge multiple tests from the library to a single module/workflow
S-43684	Lead Schedule	Added the ability to specify a second account code and account description. Added the ability to choose between extracting schedules to separate worksheets in a single workbook (as per 6.0) or separate workbooks. Added the ability to customize the headings for the Account code and account name columns. Removed inputs for project details and moved project details button to the bottom of the form.
S-40454	Add-in platform	Updated Add-in platform from COM to VSTO.
S-43419 S-43637	Import Wizard	Updated PDFtoText to Version 4.01.04.
S-42804	Import Wizard	Updated primary form to improve ease of use. Updated the point at which a new Import Wizard template is saved from before the template is created to after.
Various	Xero integration	Added the ability to import Xero Journals, Invoices and Trial Balance data directly into Excel using the Xero API.
S-42780	Aging - Expert Analyzer	Enabled aging to be performed without an amount column being selected.
S-42781	Aging - Standalone	Enabled aging to be performed without an amount column being selected.
	Standard workflows	Updated standard workflows (Accounts Payable, Accounts Payable Balances, Accounts Receivable, Fixed Assets, Journals, HR, Inventory, Payroll, T&E Expenses), as follows: • Removed separate workflows for more than 1 million rows of data – the same workflow can be used now for all data sizes. • Updated workflows to allow them to be used on more than 1 million rows. • Updated response captions to reduce length and therefore improve speed and reduce memory usage.

Defects

Reference	Area	Details
D-24076	Import Wizard	Fixed a defect where data files with curly brackets "{" or "}" in the name would show an error message.
D-23298	Installer	Fixed a defect where the installer would include "TopCAATs" instead of "TeamMate Analytics" on a warning message when Excel is open.
D-23616	Various	Fixed a defect where a drill down from some PivotTables created by TeamMate Analytics tools showed only the first 256 characters.

Caveats

Issue	Resolution