

# Release Overview: TeamMate Analytics 7.0

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## Introduction

This document covers each new feature and the value it provides your organization.

## Automate complex data analysis flows

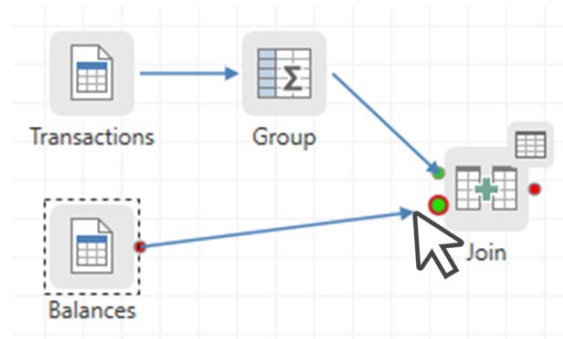
### Expert Analyzer

Expert Analyzer allows you to package up data analysis expertise so that it can be quickly, easily, and consistently applied on any audit.

Expert Analyzer replaces Custom Modules and delivers a revolutionary new level of flexibility, allowing you to automate multi-step analysis with an intuitive graphical workflow designer and you don't have to write codes or scripts. Expert Analyzer includes all the features of Custom Modules, with the additional options of:

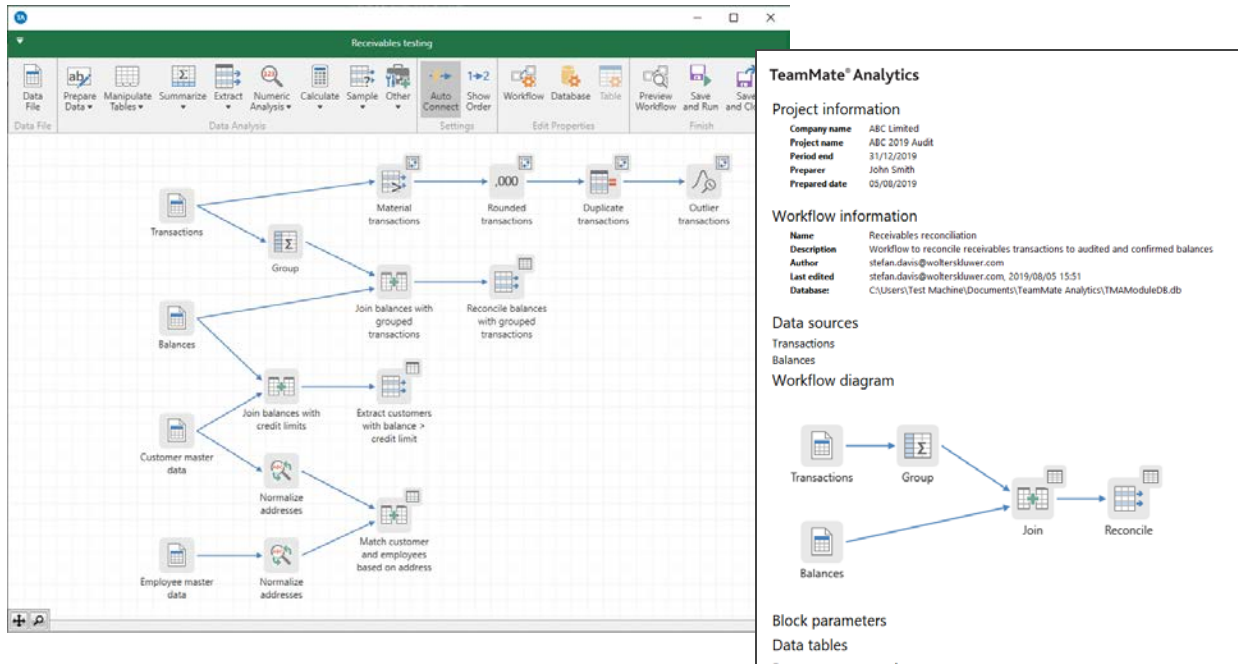
- Using multiple data files
- Joining two data files together
- Grouping, then further analyzing the grouped data
- Filtering, then further analyzing just the filtered data
- Branching data to multiple independent flows

This additional flexibility enables you to create easy-to-run workflows for almost any analysis task and any audit - operational, compliance, financial, IT, or whatever is on your audit plan.



*Visual Expert Analyzer workflow designer*

The new workflow designer makes creating these workflows a breeze; dragging and dropping icons for each test onto a canvas and connecting them together however you wish. The Audit Log has also been updated to more clearly document the analysis performed for reviewing or reproducing in the future.



*Expert Analyzer workflow designer and enhanced Audit Log*

## Sample very large data files

### *Monetary Unit Sampling in Expert Analyzer*

Monetary Unit Sampling (MUS) is no longer limited to data files with less than 1 million rows. By adding MUS to Expert Analyzer, we've enabled sampling of very large data files, along with the existing Random Sampling functionality.

You can also integrate MUS into your Expert Analyzer workflows and you can now extract MUS samples at the same time as performing detailed analysis on Journals, Payables, Expenses, or any other audit area.

## Pull clean data directly from Xero

### *Xero API integration*

TeamMate Analytics now has direct integration with the Xero online accounting platform. This enables you to simply and directly download Journals, Invoices, and Trial Balance data for your clients, in a ready-to-use format that requires no additional data manipulation.

Logging into the Xero website via TeamMate Analytics creates an authorization code that provides a temporary direct connection using the Xero API.

## Create more flexible Lead Schedules

### *Lead Schedule enhancements*

New additions to the Lead Schedule tool allow you to:

- Specify a second level of account code and description – you might use this for cost center or subaccount code

- Customize the captions for the headers of each account column to match the terminology used by your organization
- Extract each lead schedule page to a separate workbook to distribute amongst your team or file under each audit section

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