How to Use TeamTalk

Table of Content

Introduction

In TeamMate, you can communicate using TeamTalk. When participants in a TeamTalk conversation are online, they can have a real time conversation with new messages and comments available as soon as they have been added. Like email, when participants in a conversation are disconnected, TeamTalk messages are delivered to recipients when they next login. All notes created with TeamTalk are contextual with links to working papers, audit procedures or programs.

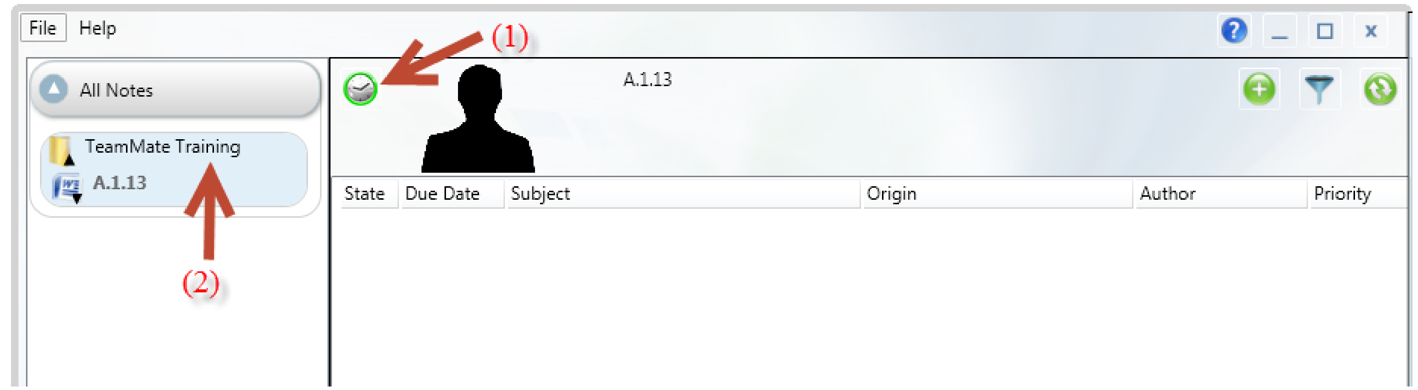
TeamTalk notes are centralized in the database and a manager that oversees different audit projects at the same time can see all the notes associated to his/her active projects in one place, without having to individually open each TeamMate files to access them.

Within the project file, **any team member** (except those in a ‘Read Only’ role) can create and respond to Notes, exchanging information with any other team member regardless of role or level.

Accessing notes

TeamTalk is launched when you create a new note or when you view all available notes.

To access notes, click on  (Top left corner) (1). The pane will slide and you will see your current TeamMate project (2).



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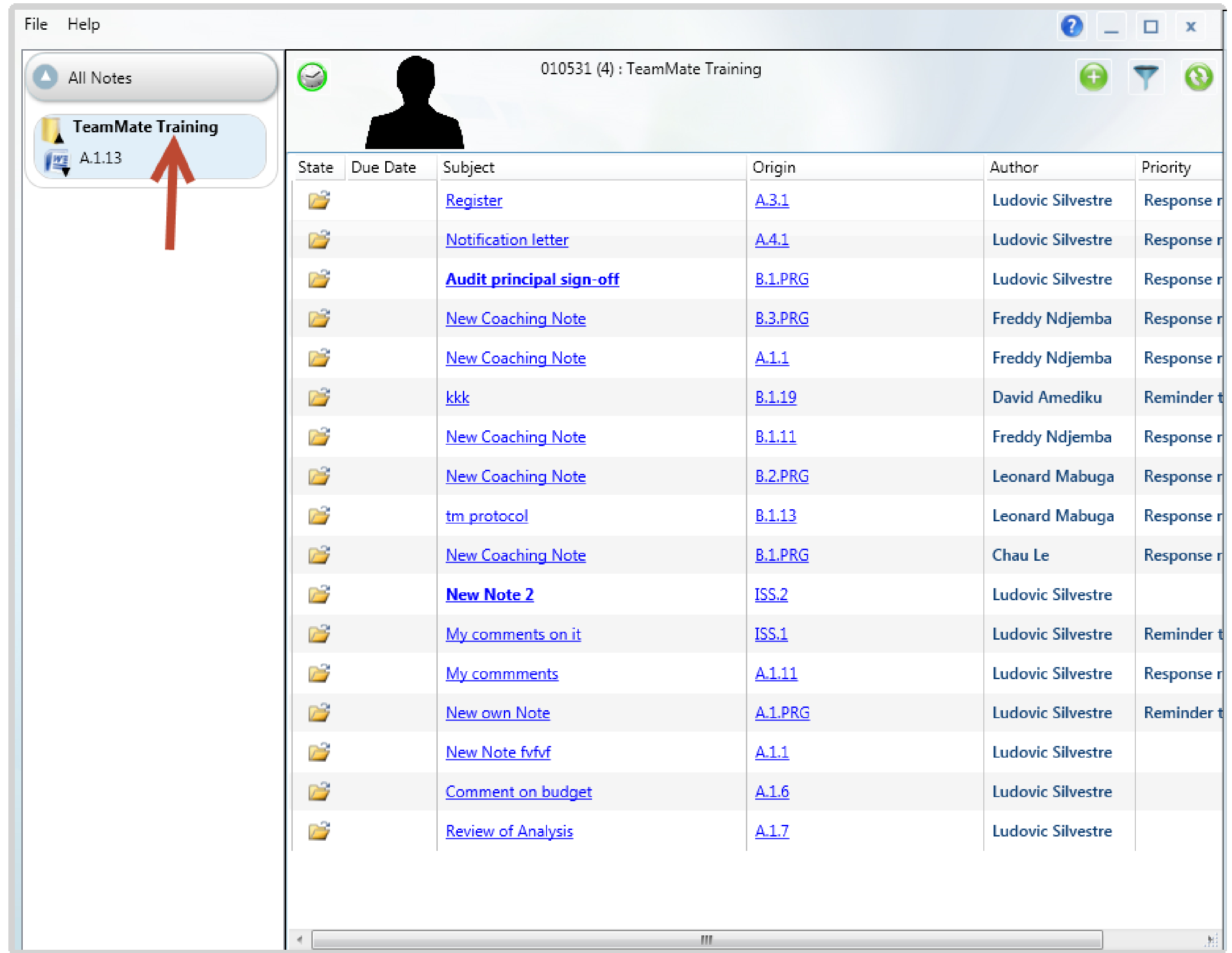
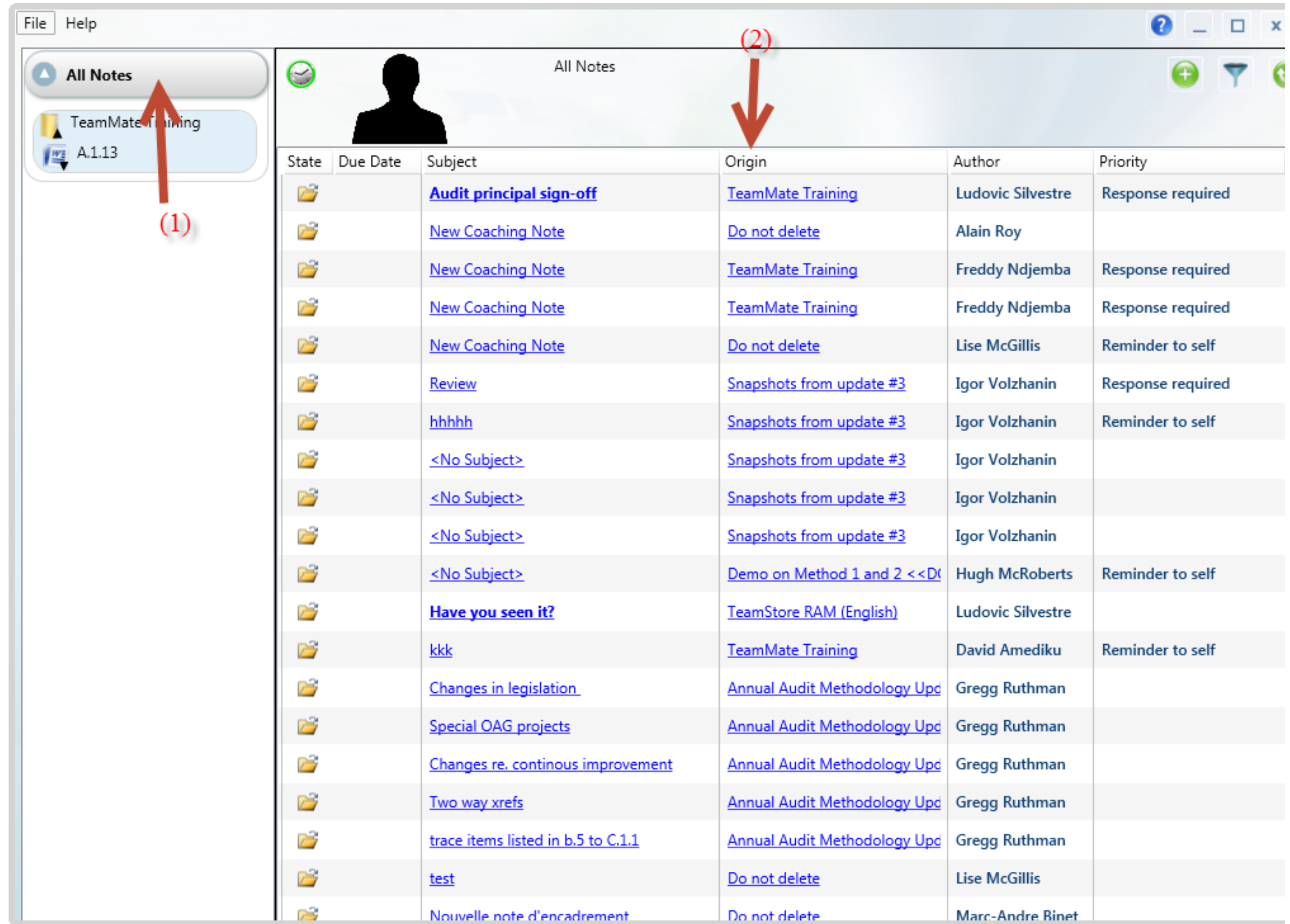
If you click on the project title, all notes created on that project will appear.



If you click on the “All Notes” button (1), you will have access to the notes created in **all the projects that you have access to** (not only your currently opened project).

The “Origin” column (2) provides the title of the TeamMate audit projects that you have access to.

This function is useful for reviewers who work on multi-audits, since they can review notes sent to them without having to open multiple projects.

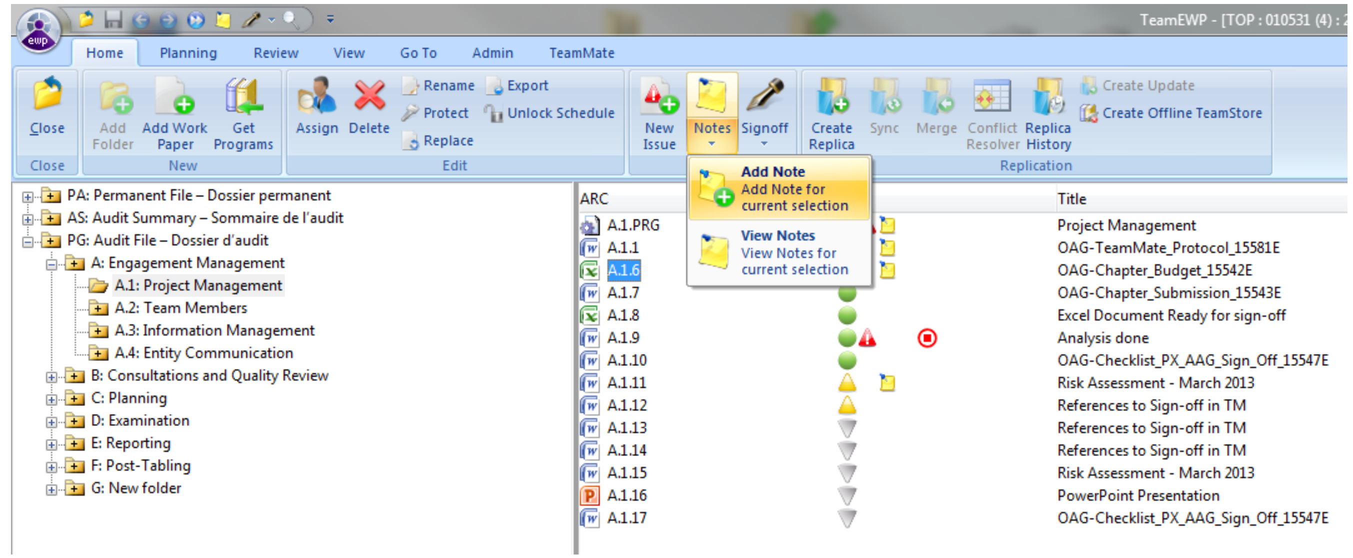


Creating notes

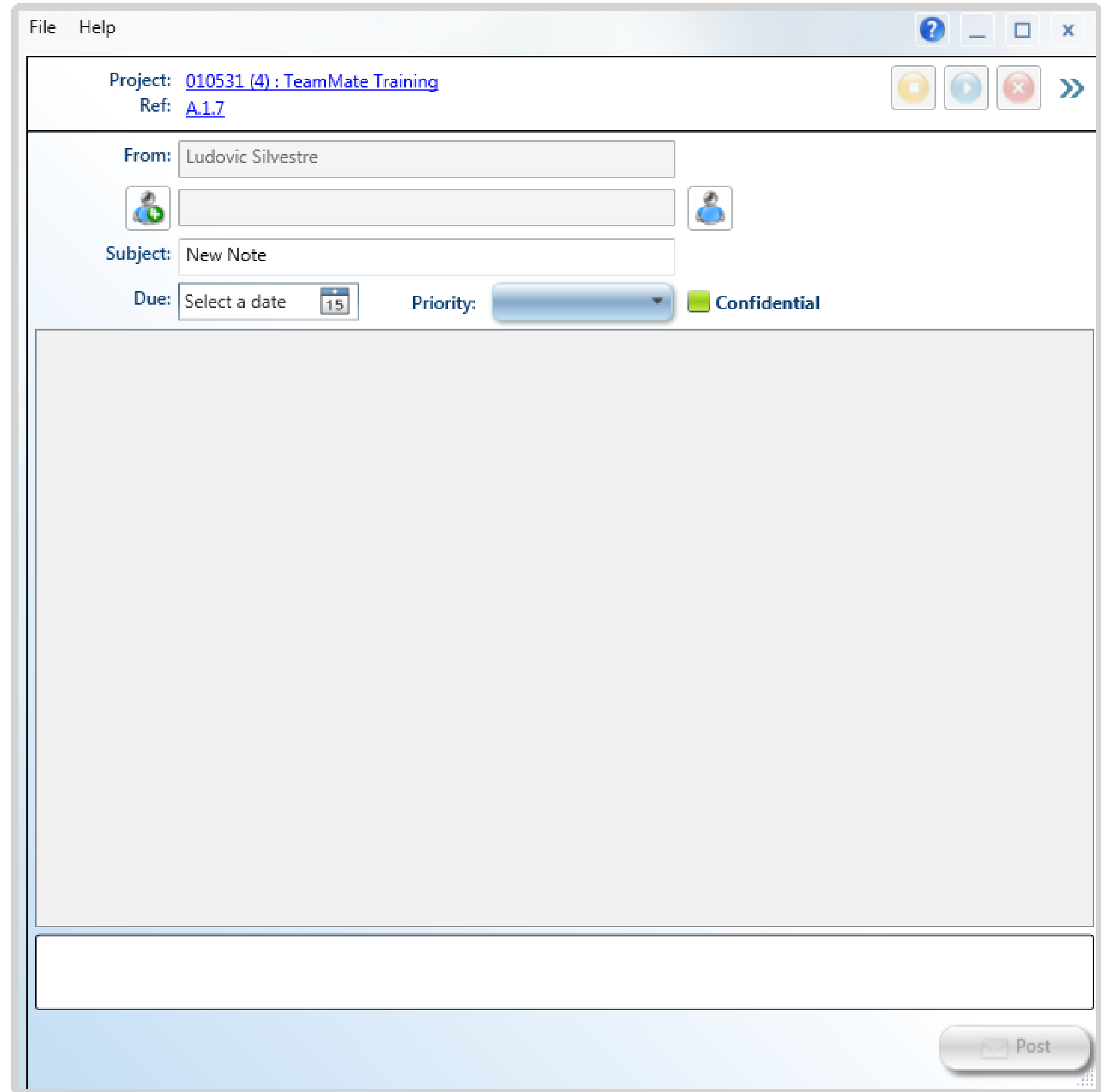
To create a Note:

Place your cursor in the schedule in which you want the Note's link to appear.

Using the Menu Ribbon, click on the arrow at the bottom of the Notes icon and select "Add Note".



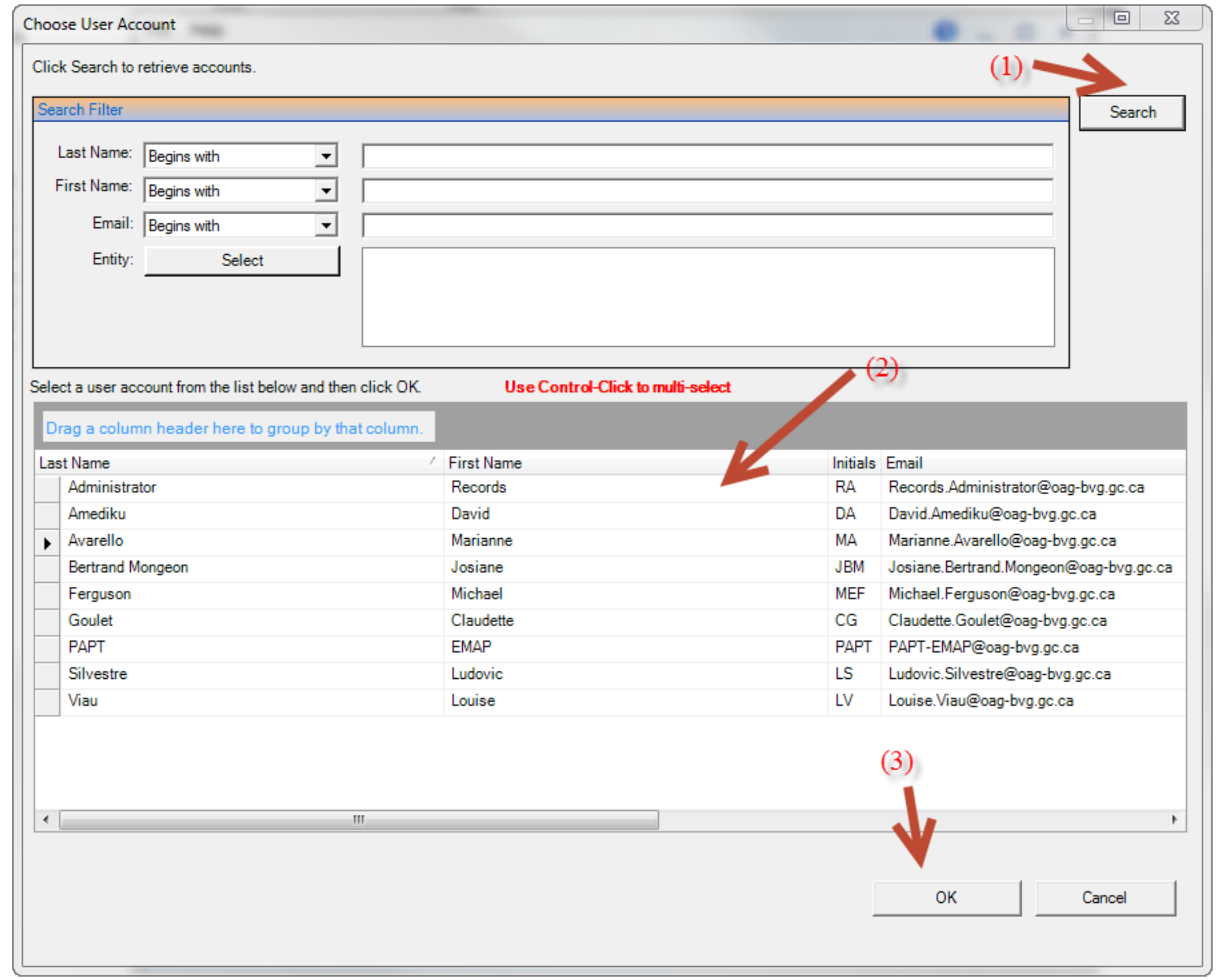
A blank note ready to be completed will open.



Using , select the team member to whom you wish to address the note. To search for team members, click on the Search button (1) without entering any information in the available fields.

The list of project team members will appear.

Select the team member to whom you would like to send your note (2) and click on “OK” (3).



In the Subject field, add the subject of your note (1).

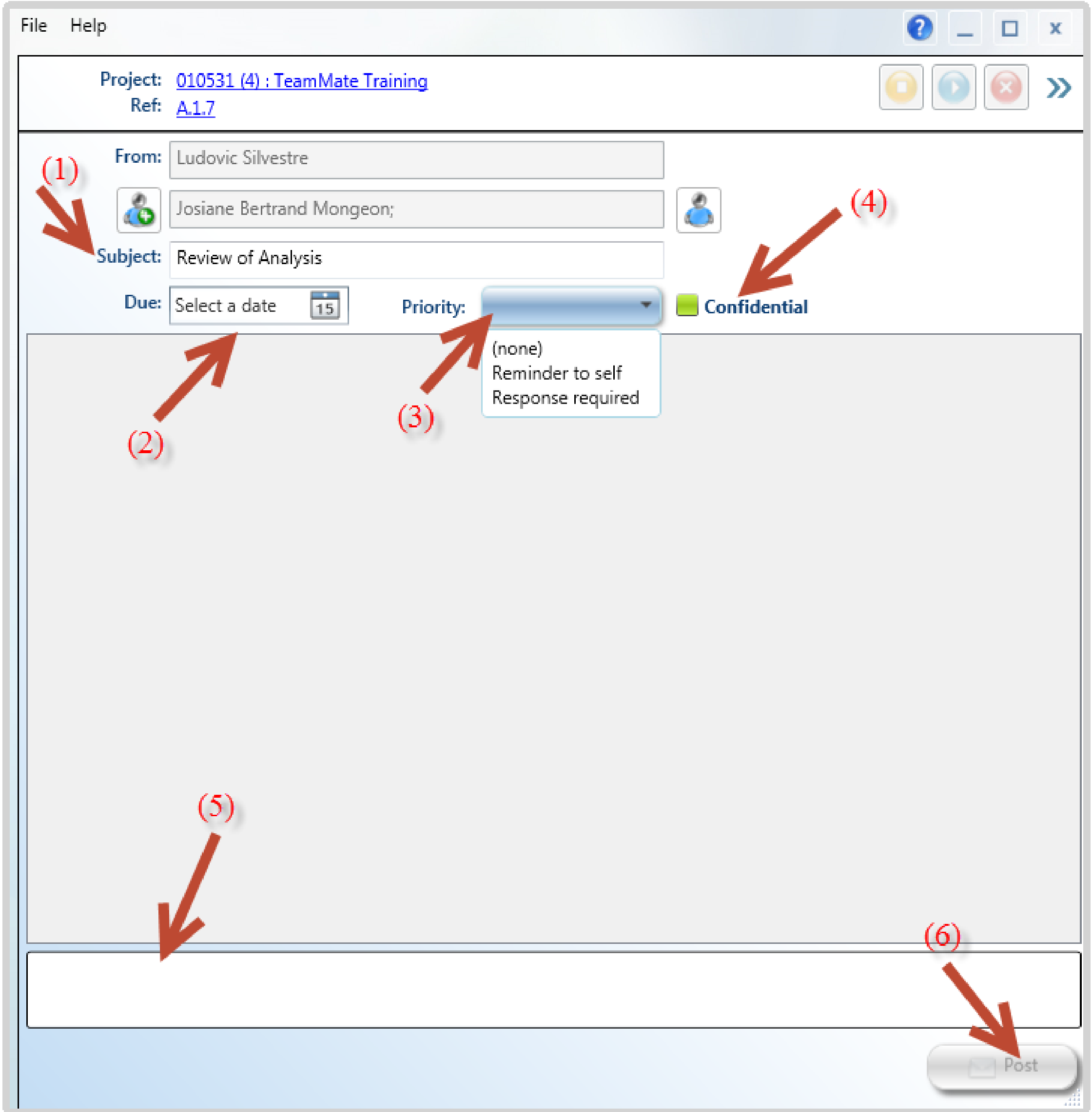
If, needed, select a due date (2).

Select the priority (reminder to self or response required) (3).

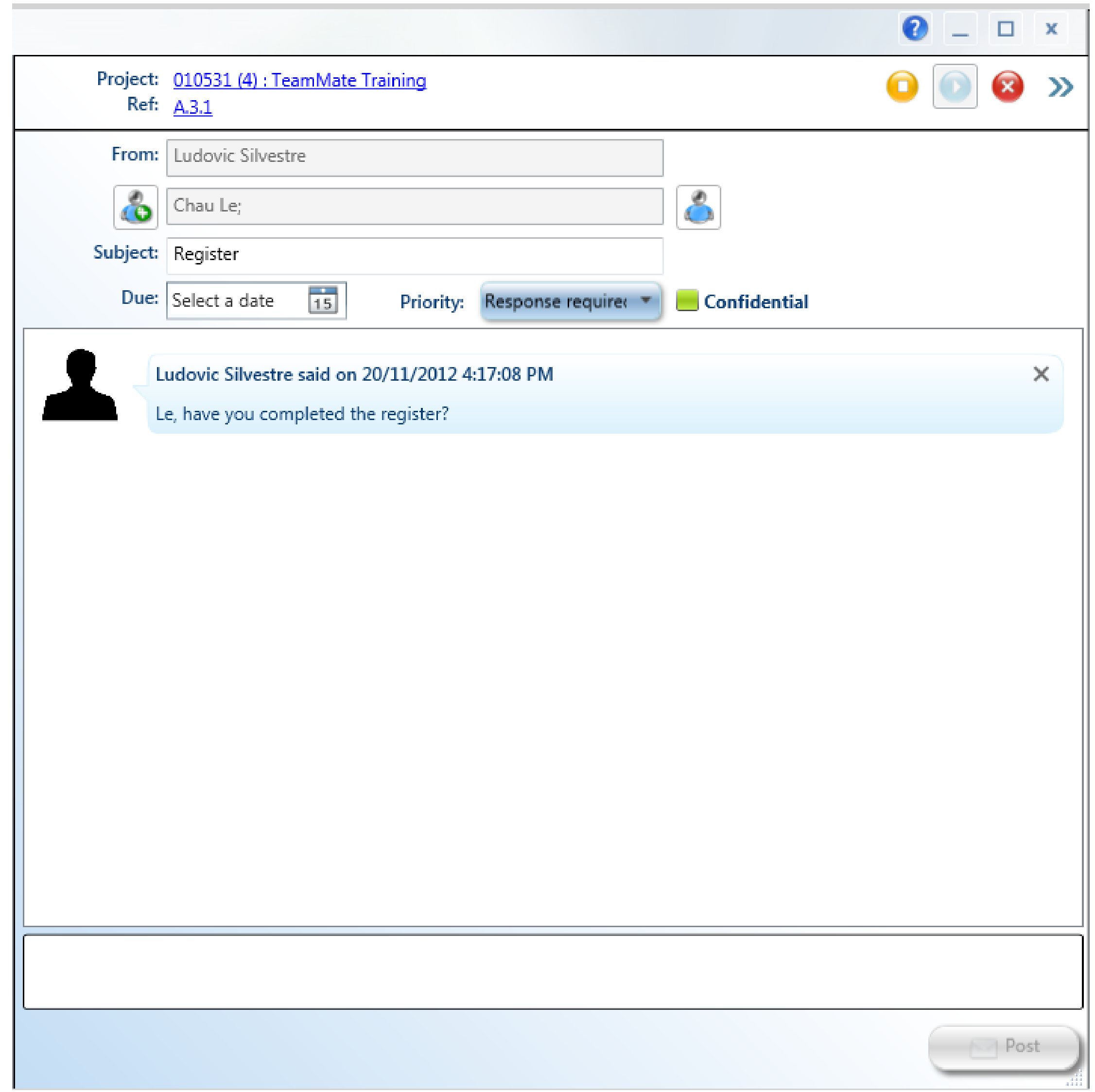
If you need to create a note to be viewed by the recipient only and no other team members, select confidential (4).

Enter your question or comment in the Note box (at the bottom of the screen) (5).

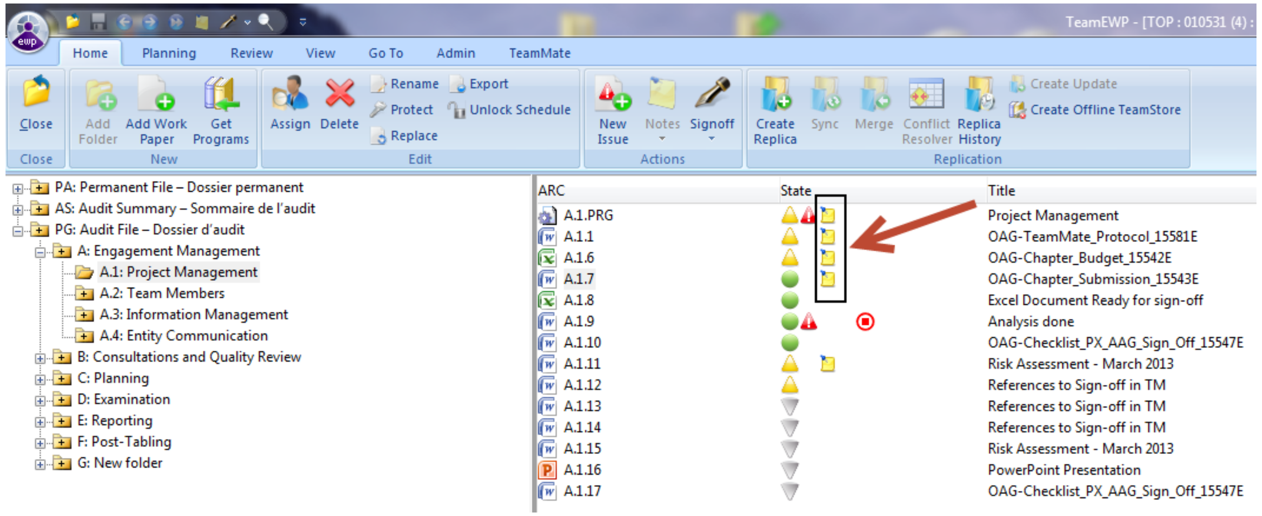
When ready, click on Post to send your note (6).



When the note is posted, you will see your name with your comment. When the recipient adds his/her comment, it will appear below your initial comment, like a conversation.



A link to the note is now created and a Note icon now appears in the Browser window, under the “State” column.

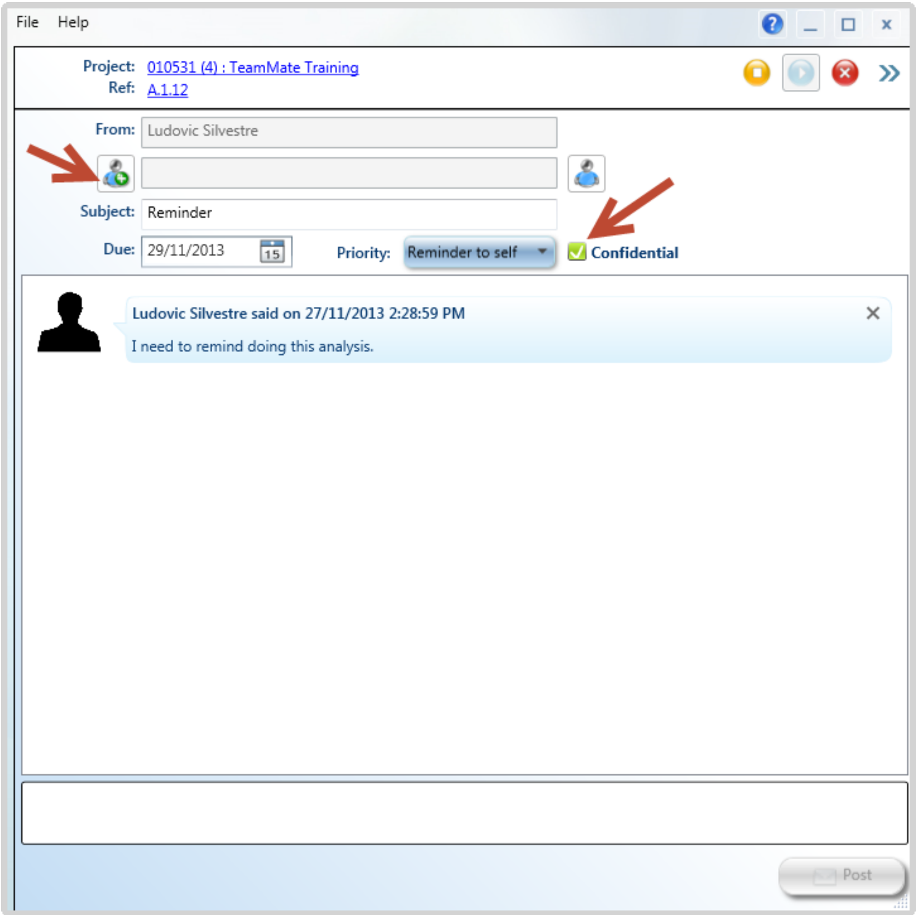


Creating a note to yourself

When needed, you can create a note to yourself (Reminder to self).

The process to create the note is the same, except that you do not have to add a recipient.

You can also select confidential – that way the note will only be visible to you and nobody else.

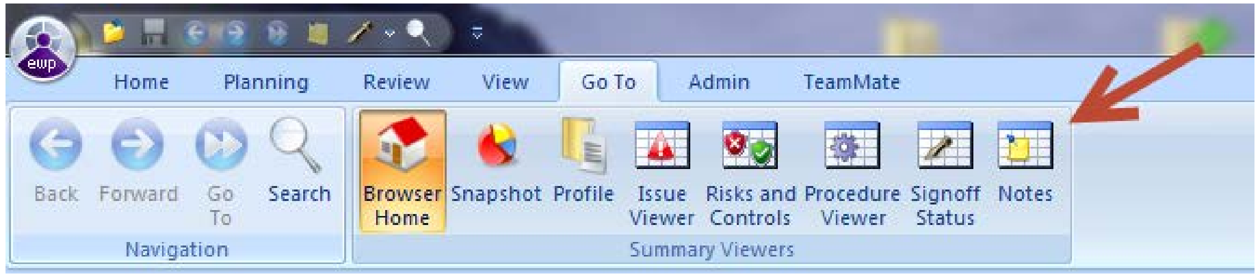


Using notes

When a note is send to you, you should respond to it in a reasonable amount of time.

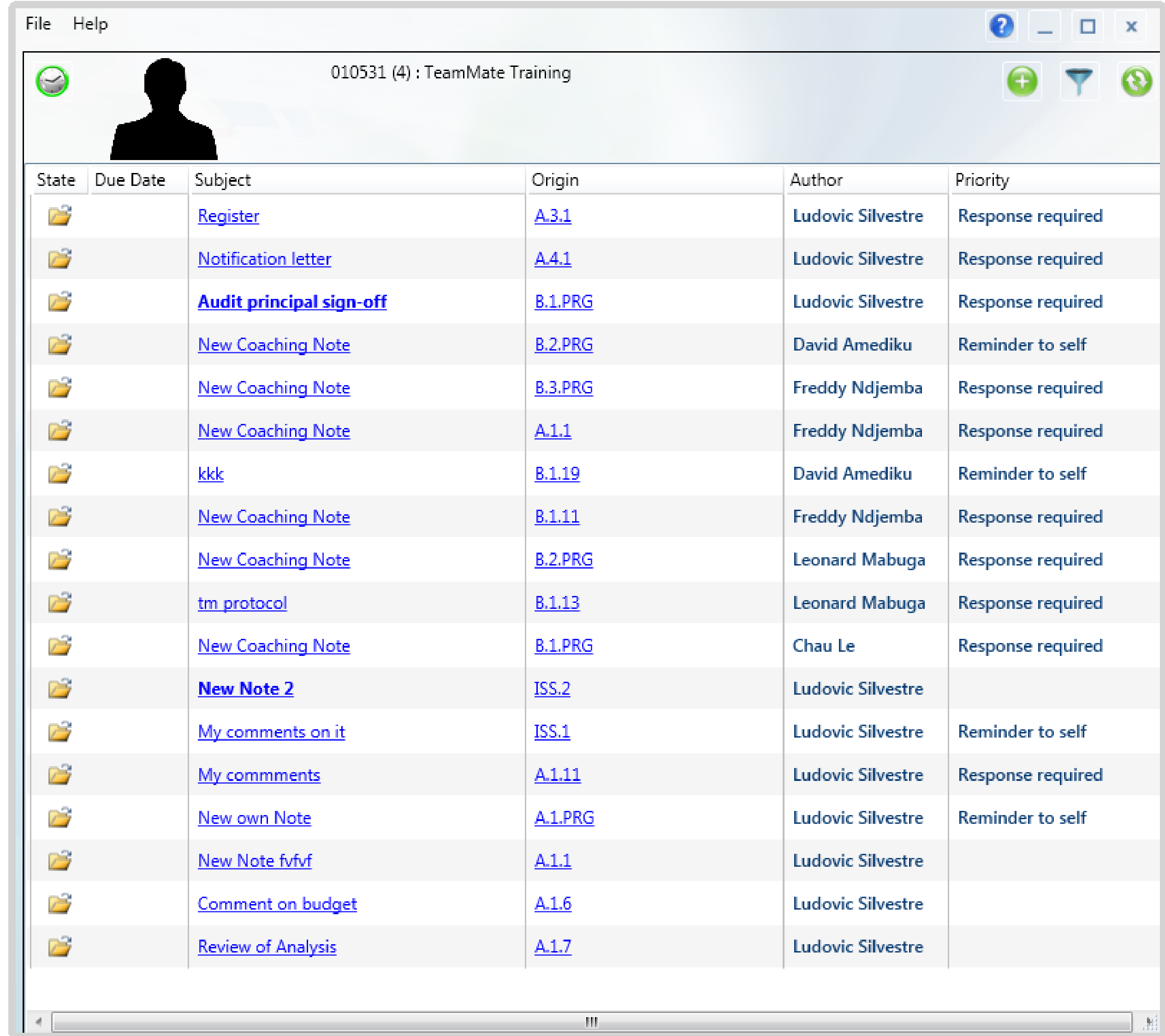
Regularly, during the course of an audit, you should access the "Note Summary" to verify whether you have received any new notes.

Click on the "Go To" Menu Ribbon and select "Notes".



You will see the list of all the notes created by team members for the audit project that is currently opened.

Notes in bold are notes that have not yet been reviewed or notes for which a new comment has been added to the conversation.



State	Due Date	Subject	Origin	Author	Priority
		Register	A.3.1	Ludovic Silvestre	Response required
		Notification letter	A.4.1	Ludovic Silvestre	Response required
		Audit principal sign-off	B.1.PRG	Ludovic Silvestre	Response required
		New Coaching Note	B.2.PRG	David Amediku	Reminder to self
		New Coaching Note	B.3.PRG	Freddy Ndjemba	Response required
		New Coaching Note	A.1.1	Freddy Ndjemba	Response required
		kkk	B.1.19	David Amediku	Reminder to self
		New Coaching Note	B.1.11	Freddy Ndjemba	Response required
		New Coaching Note	B.2.PRG	Leonard Mabuga	Response required
		tm protocol	B.1.13	Leonard Mabuga	Response required
		New Coaching Note	B.1.PRG	Chau Le	Response required
		New Note 2	ISS.2	Ludovic Silvestre	
		My comments on it	ISS.1	Ludovic Silvestre	Reminder to self
		My commments	A.1.11	Ludovic Silvestre	Response required
		New own Note	A.1.PRG	Ludovic Silvestre	Reminder to self
		New Note fvfvf	A.1.1	Ludovic Silvestre	
		Comment on budget	A.1.6	Ludovic Silvestre	
		Review of Analysis	A.1.7	Ludovic Silvestre	

Filtering notes

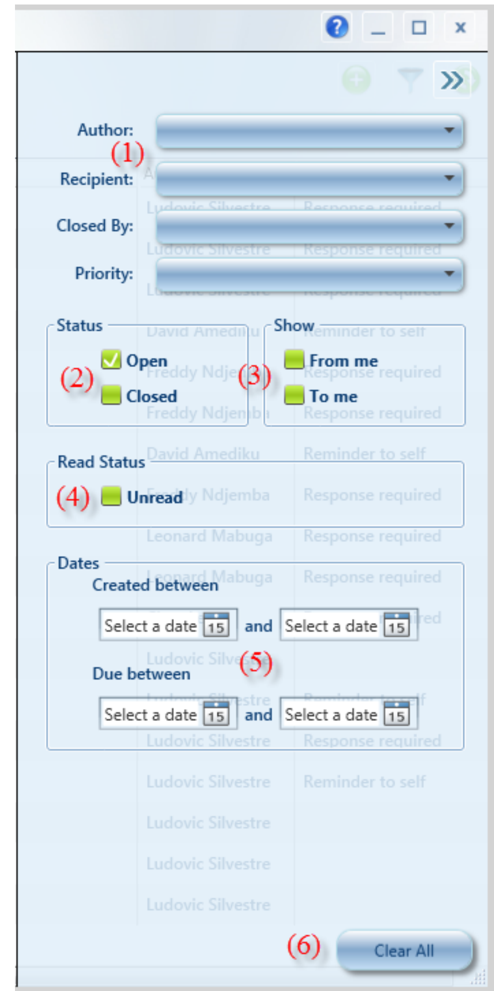
To facilitate the review of the notes, you need to filter them by clicking on  (top right corner).

You can filter notes by Author, Recipient (1), by Status (notes that are opened or closed) (2). You can also filter notes that were created by you (From me) or sent to you (To me) (3). Finally you can sort notes that are unread by selecting the Read Status (4), or filter by dates (5).

It is important to remember that your **filter options remain unchanged until you clear them**, using the "Clear All" Button (6).

When your filter options are activated, the Filter Icon changes for 

To exit the filter panel, click on  (top right corner)



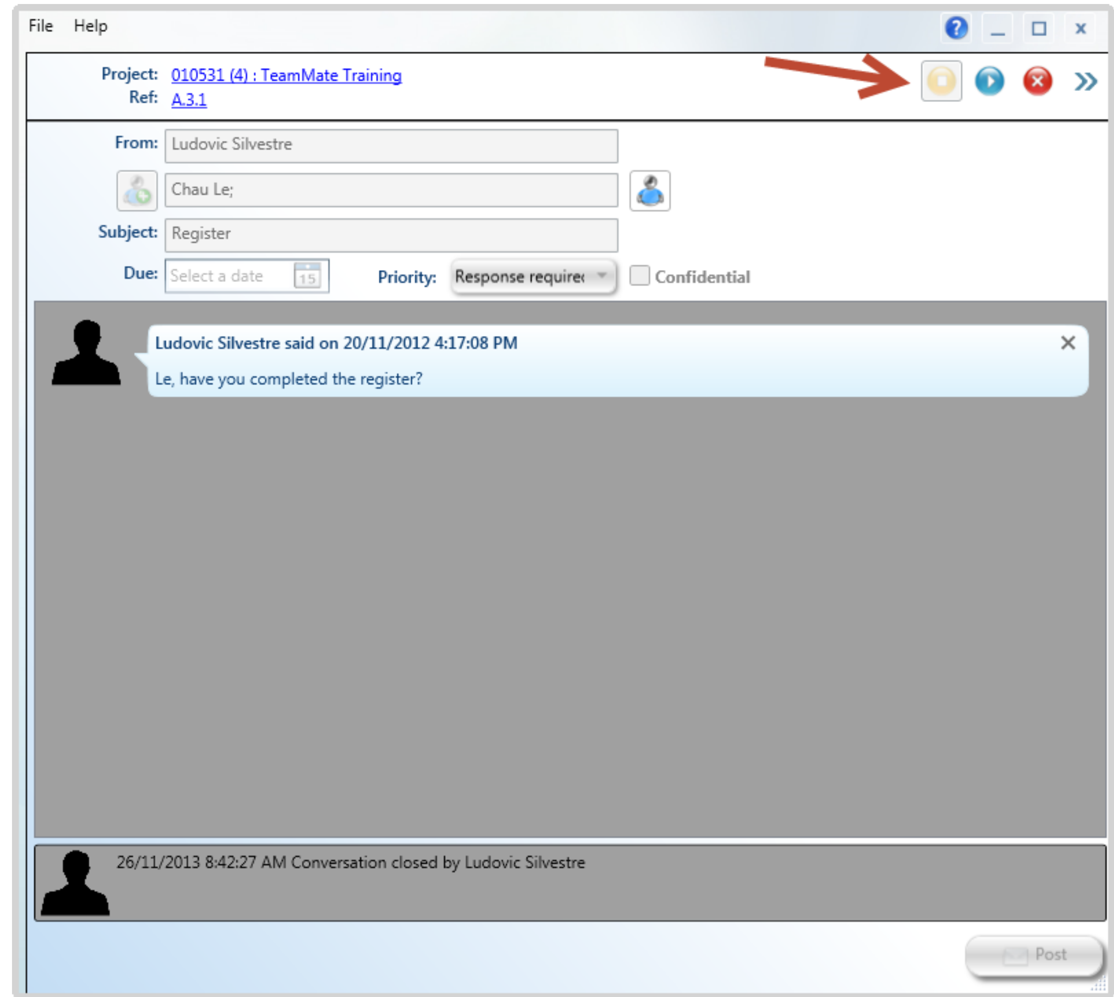
Closing notes

Once notes have been addressed, they need to be closed, to avoid having too many active notes opened in TeamTalk.

Closing a note means that it has been reviewed. The team may choose to keep closed notes for a period of time, for reference purposes, before deleting them.

To close a note, review the note and click on  . The conversation is now closed (all fields are in grey).

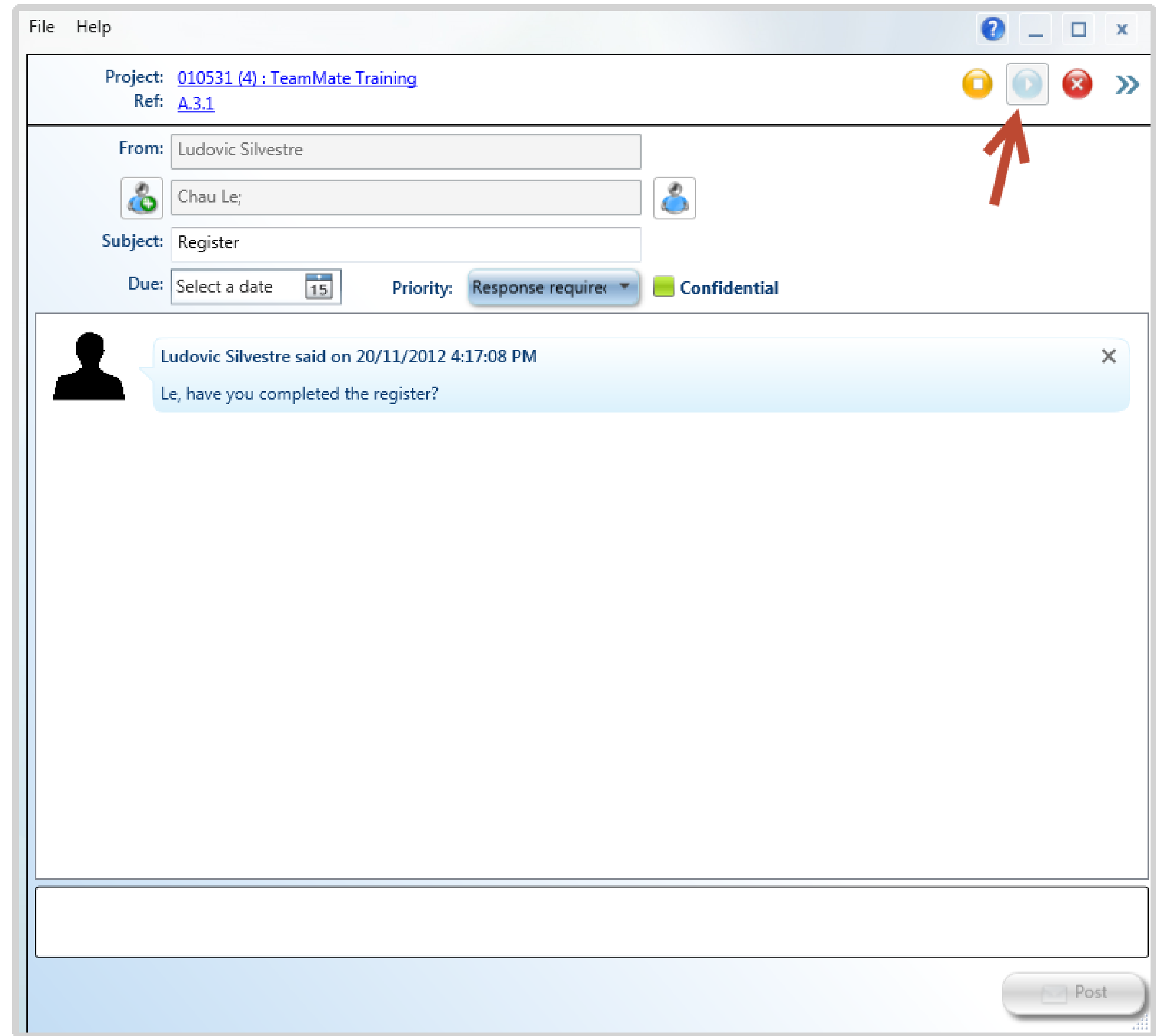
To access closed notes use the filter and in the "Status" select "Closed", all closed notes will appear.



Re-opening notes

A note that is closed (reviewed) can be re-open, if necessary.

To proceed, access the note and click on . The status of the note will automatically change from “Closed” to “Open” and the conversation on the same subject can continue.



Deleting notes

Once notes are no longer needed, they can be deleted.

Important:

- A note that is deleted is permanently deleted and can no longer be retrieved, so make sure that it is what you want to do.
- Only people at the same authorization role or higher role in TeamMate can delete a note, whether the note was initially created by them or not.

To delete a note, access the note and click on  (1). When prompt to do so, click on “Yes” (2). The note is permanently deleted.

By default, notes that are not manually deleted will be deleted upon completion of the project, as part of the TeamMate project finalization process.