

# How to Use TeamTalk

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## How to Use TeamTalk

### Introduction

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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.

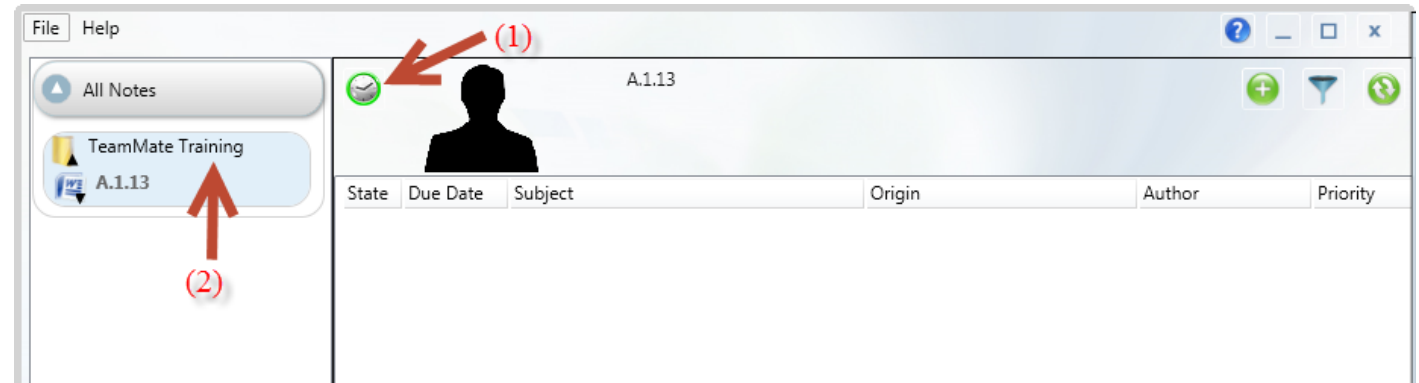
## How to Use TeamTalk

### Accessing notes

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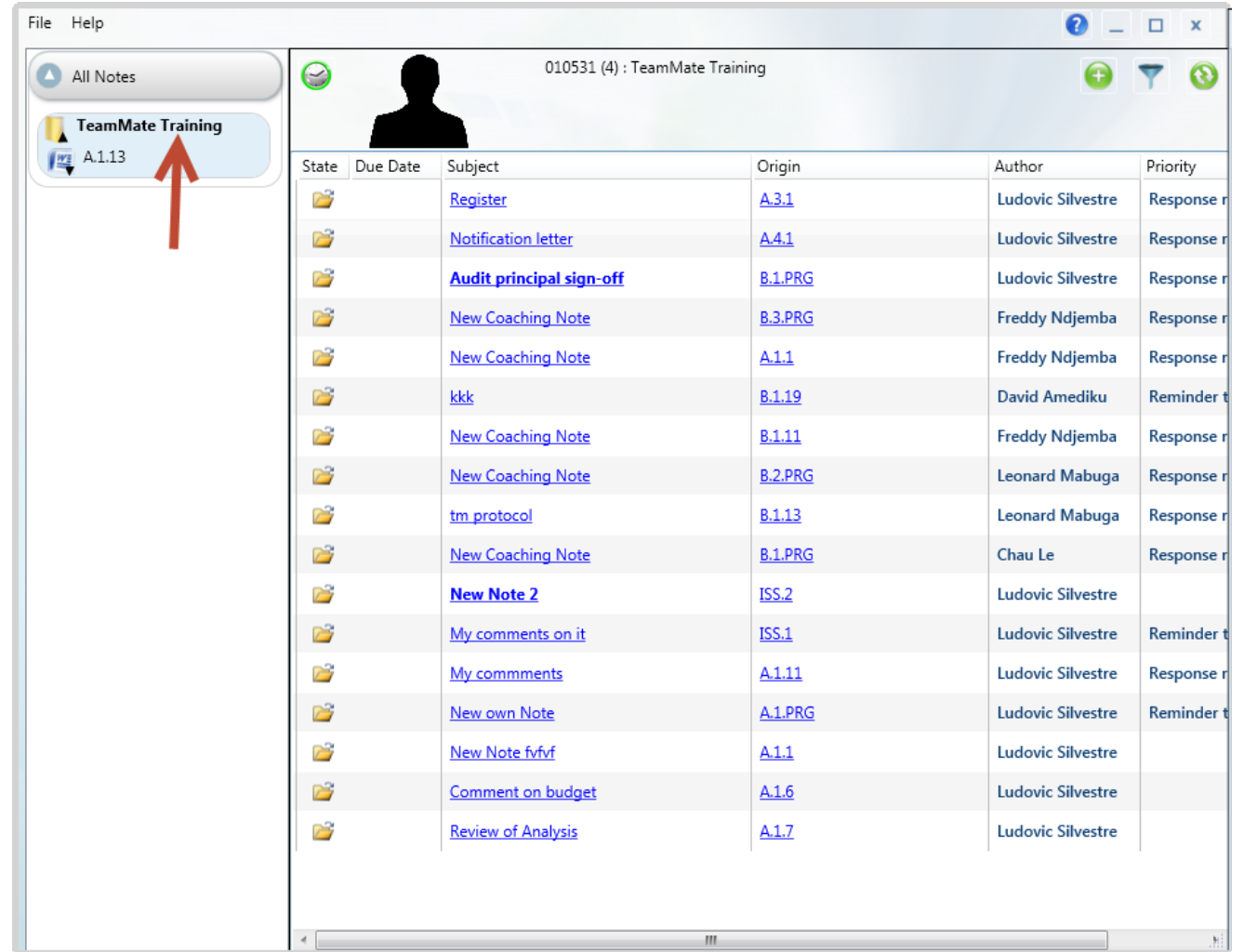
TeamTalk is launched when you create a new note or when you view all available notes.

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



## How to Use TeamTalk

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



The screenshot displays the TeamTalk application window. On the left sidebar, there are two buttons: 'All Notes' and 'TeamMate Training'. The 'TeamMate Training' button is highlighted in blue and has a red arrow pointing to it. Below this button, the text 'A.1.13' is visible. The main area of the window shows a table of notes for the project '010531 (4) : TeamMate Training'. The table has columns for State, Due Date, Subject, Origin, Author, and Priority. The notes listed are:

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

## How to Use TeamTalk

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.

State	Due Date	Subject	Origin	Author	Priority
		<a href="#">Audit principal sign-off</a>	<a href="#">TeamMate Training</a>	Ludovic Silvestre	Response required
		<a href="#">New Coaching Note</a>	<a href="#">Do not delete</a>	Alain Roy	
		<a href="#">New Coaching Note</a>	<a href="#">TeamMate Training</a>	Freddy Ndjemba	Response required
		<a href="#">New Coaching Note</a>	<a href="#">TeamMate Training</a>	Freddy Ndjemba	Response required
		<a href="#">New Coaching Note</a>	<a href="#">Do not delete</a>	Lise McGillis	Reminder to self
		<a href="#">Review</a>	<a href="#">Snapshots from update #3</a>	Igor Volzhanin	Response required
		<a href="#">hhhhh</a>	<a href="#">Snapshots from update #3</a>	Igor Volzhanin	Reminder to self
		<a href="#">&lt;No Subject&gt;</a>	<a href="#">Snapshots from update #3</a>	Igor Volzhanin	
		<a href="#">&lt;No Subject&gt;</a>	<a href="#">Snapshots from update #3</a>	Igor Volzhanin	
		<a href="#">&lt;No Subject&gt;</a>	<a href="#">Snapshots from update #3</a>	Igor Volzhanin	
		<a href="#">&lt;No Subject&gt;</a>	<a href="#">Demo on Method 1 and 2 &lt;&lt;D</a>	Hugh McRoberts	Reminder to self
		<a href="#">Have you seen it?</a>	<a href="#">TeamStore RAM (English)</a>	Ludovic Silvestre	
		<a href="#">kkk</a>	<a href="#">TeamMate Training</a>	David Amediku	Reminder to self
		<a href="#">Changes in legislation</a>	<a href="#">Annual Audit Methodology Upc</a>	Gregg Ruthman	
		<a href="#">Special OAG projects</a>	<a href="#">Annual Audit Methodology Upc</a>	Gregg Ruthman	
		<a href="#">Changes re. continous improvement</a>	<a href="#">Annual Audit Methodology Upc</a>	Gregg Ruthman	
		<a href="#">Two way xrefs</a>	<a href="#">Annual Audit Methodology Upc</a>	Gregg Ruthman	
		<a href="#">trace items listed in b.5 to C.1.1</a>	<a href="#">Annual Audit Methodology Upc</a>	Gregg Ruthman	
		<a href="#">test</a>	<a href="#">Do not delete</a>	Lise McGillis	
		<a href="#">Nouvelle note d'encadrement</a>	<a href="#">Do not delete</a>	Marc-Andre Binet	

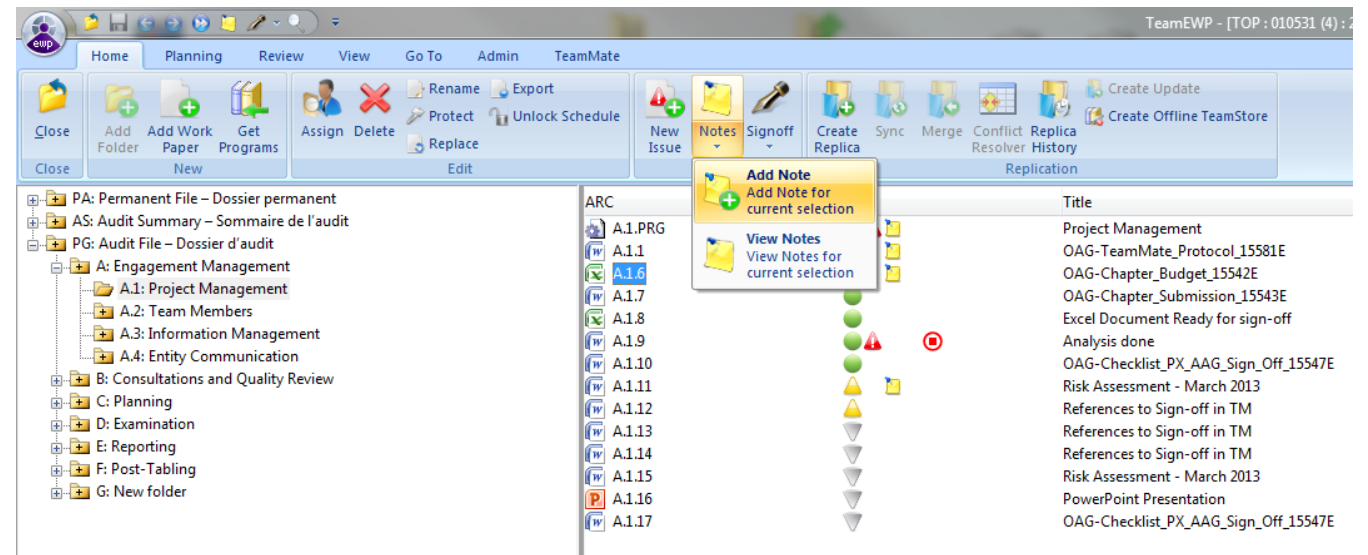
# How to Use TeamTalk

## Creating notes

To create a Note:

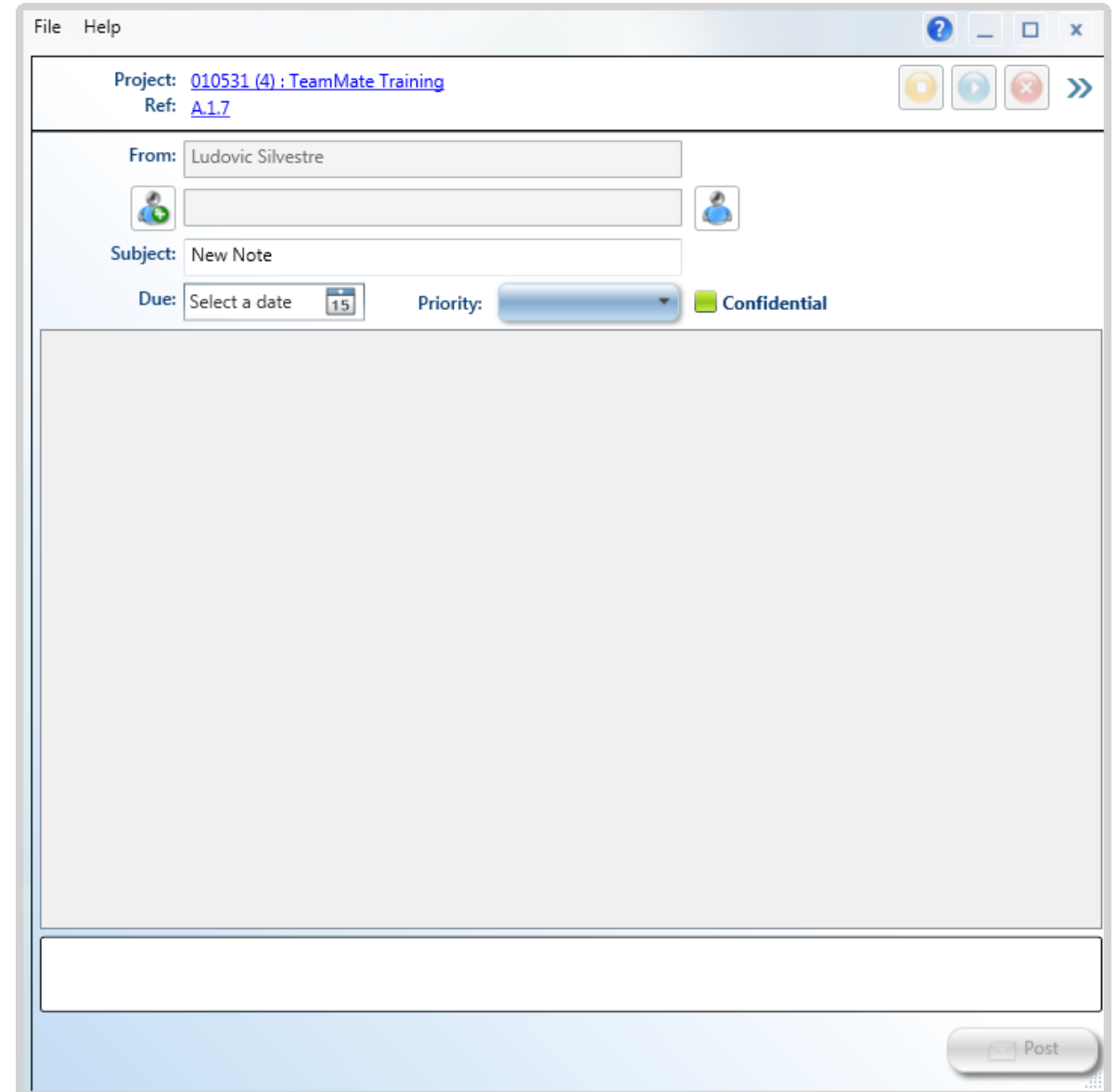
Place your cursor in the schedule in which you want the Note's link to appear.

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



## How to Use TeamTalk

A blank note ready to be completed will open.




The screenshot shows a web-based form for creating a new note. At the top, there is a header bar with 'File' and 'Help' menus, and window control icons (question mark, minimize, maximize, close). Below the header, the form is organized into several sections:

- Project:** 010531 (4) : TeamMate Training
- Ref:** A.1.7
- From:** Ludovic Silvestre
- Subject:** New Note
- Due:** Select a date (calendar icon) 15
- Priority:** (dropdown menu)
- Confidential:** (checkbox icon)

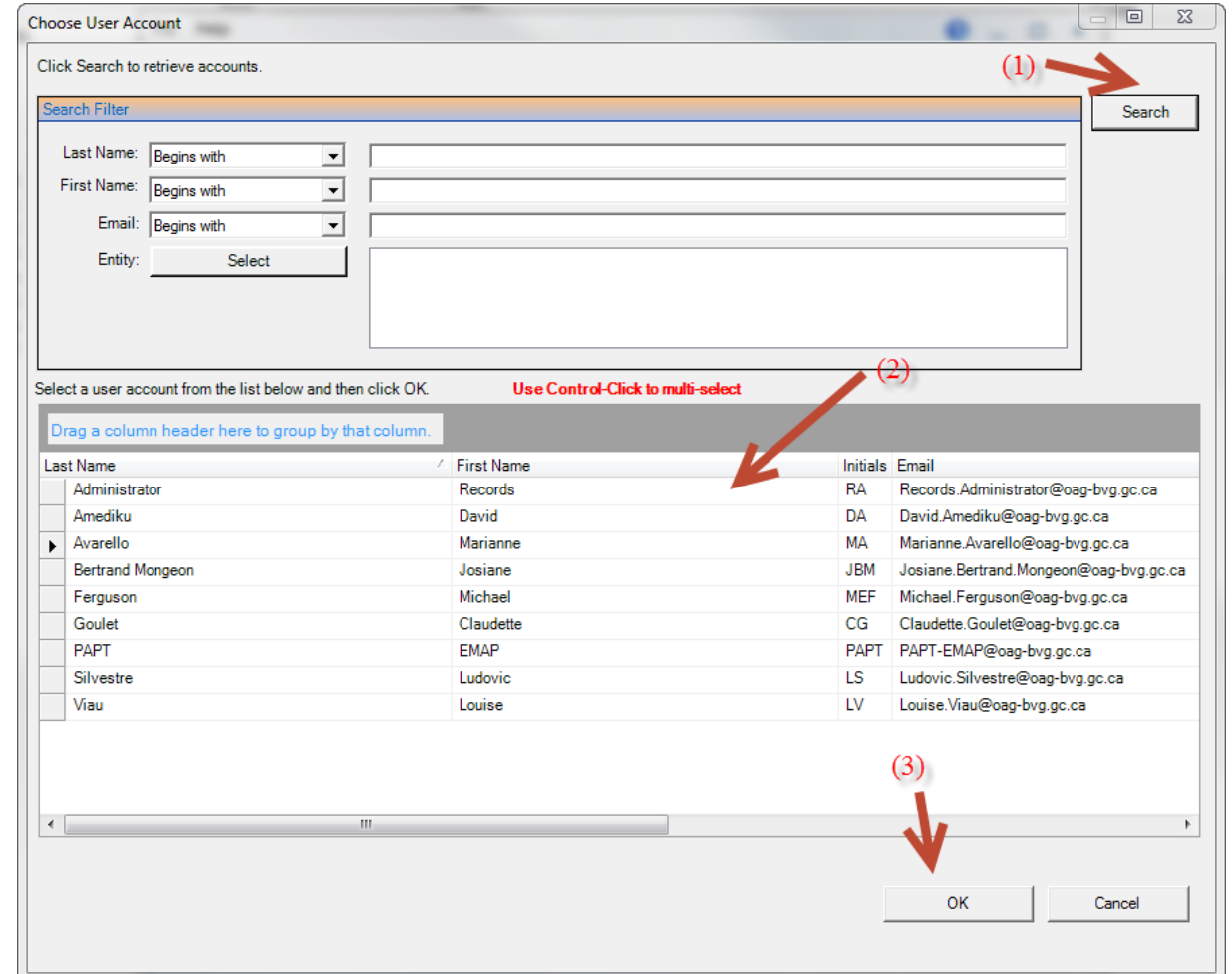
The main body of the form is a large, empty text area for writing the note. At the bottom right, there is a 'Post' button with a paper plane icon.

## How to Use TeamTalk

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).



Choose User Account

Click Search to retrieve accounts.

(1) → Search

Search Filter

Last Name: Begins with [ ] [ ]

First Name: Begins with [ ] [ ]

Email: Begins with [ ] [ ]

Entity: Select [ ]

Select a user account from the list below and then click OK. Use Control-Click to multi-select

Drag a column header here to group by that column.

Last Name	First Name	Initials	Email
Administrator	Records	RA	Records.Administrator@oag-bvg.gc.ca
Amediku	David	DA	David.Amediku@oag-bvg.gc.ca
▶ Avarello	Marianne	MA	Marianne.Avarello@oag-bvg.gc.ca
Bertrand Mongeon	Josiane	JBM	Josiane.Bertrand.Mongeon@oag-bvg.gc.ca
Ferguson	Michael	MEF	Michael.Ferguson@oag-bvg.gc.ca
Goulet	Claudette	CG	Claudette.Goulet@oag-bvg.gc.ca
PAPT	EMAP	PAPT	PAPT-EMAP@oag-bvg.gc.ca
Silvestre	Ludovic	LS	Ludovic.Silvestre@oag-bvg.gc.ca
Viau	Louise	LV	Louise.Viau@oag-bvg.gc.ca

(2) → [User List]

(3) → OK

Cancel



## How to Use TeamTalk

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).

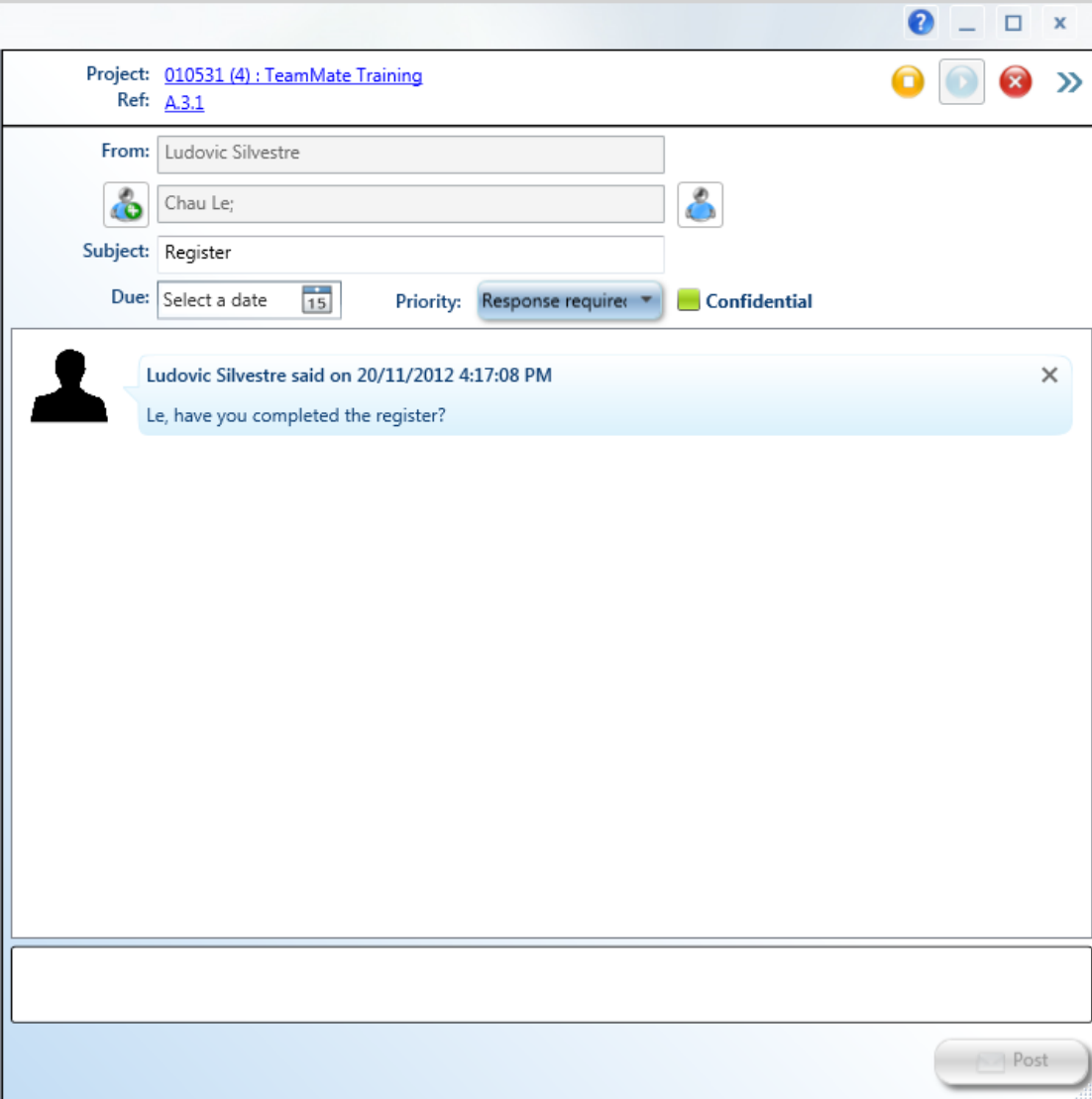
The screenshot displays the TeamTalk interface for creating a note. The window title is "File Help". The project information is "Project: 010531 (4) : TeamMate Training" and "Ref: A.1.7". The form fields are as follows:

- From:** Ludovic Silvestre (indicated by arrow 1)
- To:** Josiane Bertrand Mongeon; (indicated by arrow 1)
- Subject:** Review of Analysis (indicated by arrow 1)
- Due:** Select a date (calendar icon) (indicated by arrow 2)
- Priority:** (none), Reminder to self, Response required (indicated by arrow 3)
- Confidential:** (indicated by arrow 4)

The main content area is a large text box for the note (indicated by arrow 5). At the bottom right, there is a "Post" button (indicated by arrow 6).

## How to Use TeamTalk

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.



The screenshot displays the TeamTalk interface for a project note. At the top, the project is identified as "010531 (4) : TeamMate Training" with a reference "A.3.1". The note is from Ludovic Silvestre to Chau Le, with the subject "Register". It has a due date of the 15th, a "Response required" priority, and is marked as "Confidential". A comment from Ludovic Silvestre, dated 20/11/2012 at 4:17:08 PM, asks "Le, have you completed the register?". A "Post" button is visible at the bottom right.

Project: [010531 \(4\) : TeamMate Training](#)  
Ref: [A.3.1](#)

From: Ludovic Silvestre  
To: Chau Le;  
Subject: Register  
Due: Select a date  Priority: Response required  Confidential

Ludovic Silvestre said on 20/11/2012 4:17:08 PM  
Le, have you completed the register?

Post

## How to Use TeamTalk

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

The screenshot shows the TeamTalk interface with a project tree on the left and a list of items in the center. The list has columns for ARC, State, and Title. A red arrow points to a note icon in the State column of the first row.

ARC	State	Title
A.1.PRG	[Note Icon]	Project Management
A.1.1	[Yellow Triangle]	OAG-TeamMate_Protocol_15581E
A.1.6	[Green Circle]	OAG-Chapter_Budget_15542E
A.1.7	[Green Circle]	OAG-Chapter_Submission_15543E
A.1.8	[Green Circle]	Excel Document Ready for sign-off
A.1.9	[Green Circle]	Analysis done
A.1.10	[Green Circle]	OAG-Checklist_PX_AAG_Sign_Off_15547E
A.1.11	[Yellow Triangle]	Risk Assessment - March 2013
A.1.12	[Yellow Triangle]	References to Sign-off in TM
A.1.13	[Yellow Triangle]	References to Sign-off in TM
A.1.14	[Yellow Triangle]	References to Sign-off in TM
A.1.15	[Yellow Triangle]	Risk Assessment - March 2013
A.1.16	[Yellow Triangle]	PowerPoint Presentation
A.1.17	[Yellow Triangle]	OAG-Checklist_PX_AAG_Sign_Off_15547E

## How to Use TeamTalk

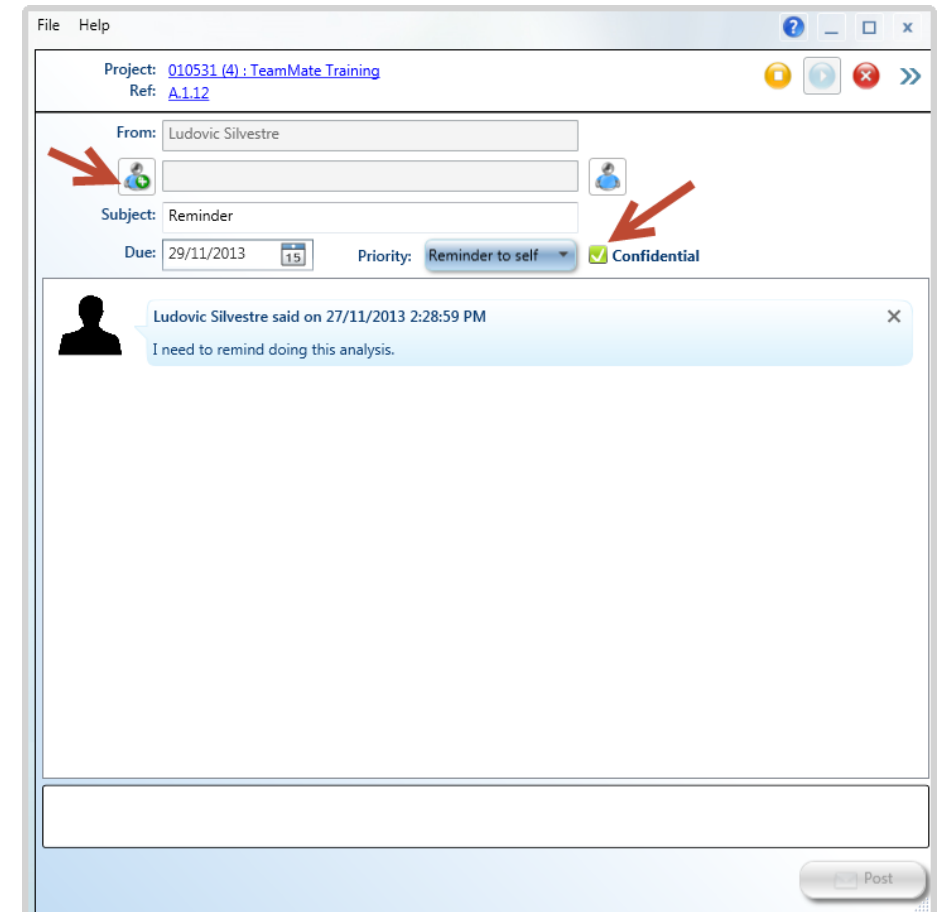
### Creating a note to yourself

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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.



## How to Use TeamTalk

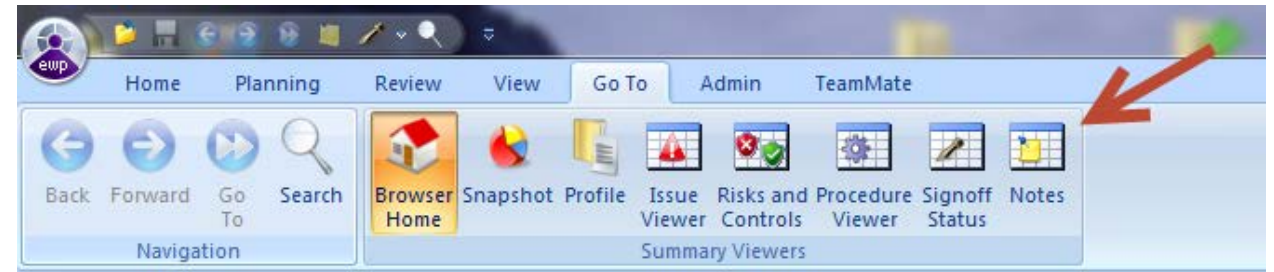
### Using notes

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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.

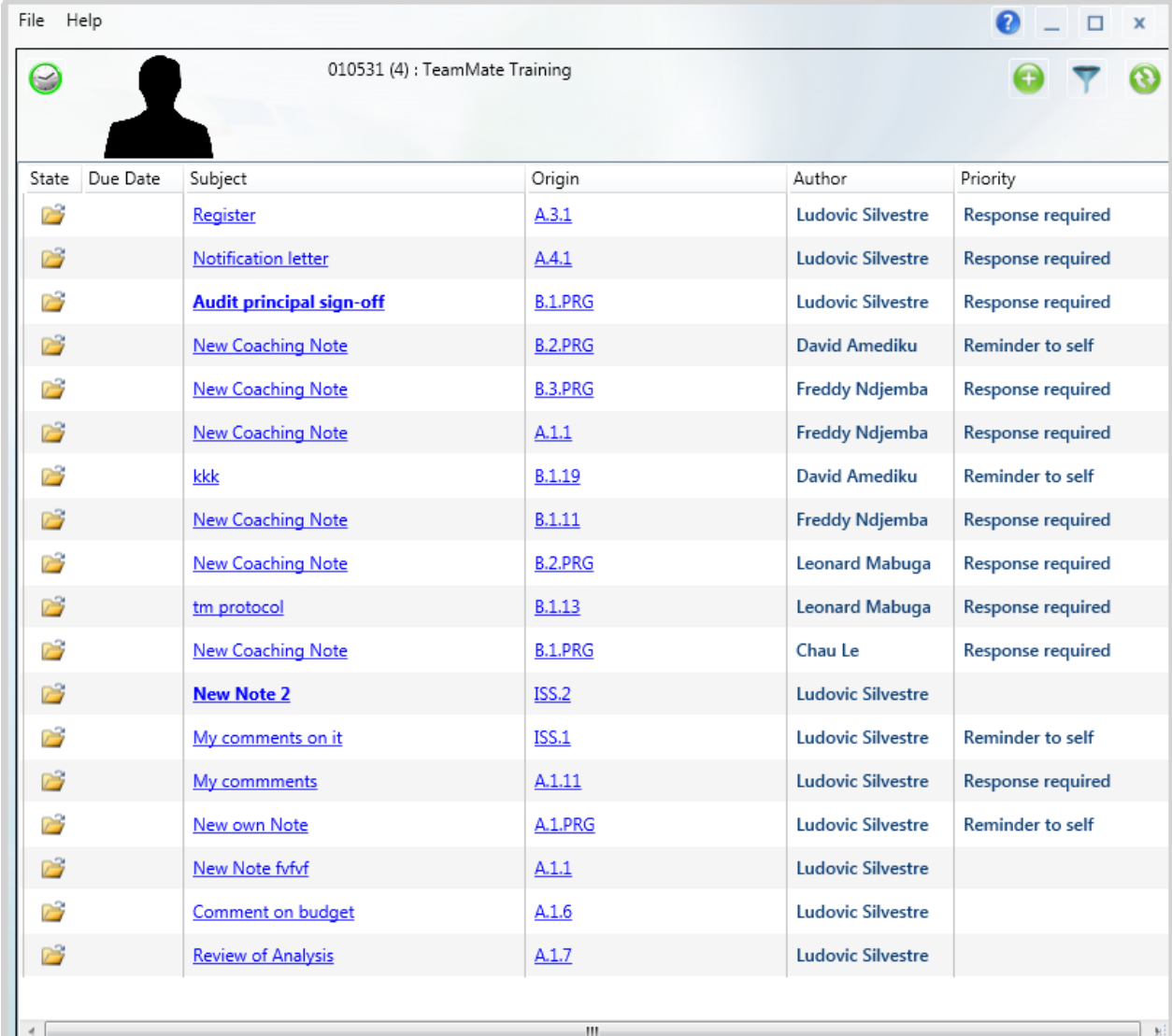
Click on the “Go To” Menu Ribbon and select “Notes”.



## How to Use TeamTalk

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
		<a href="#">Register</a>	<a href="#">A.3.1</a>	Ludovic Silvestre	Response required
		<a href="#">Notification letter</a>	<a href="#">A.4.1</a>	Ludovic Silvestre	Response required
		<b><a href="#">Audit principal sign-off</a></b>	<a href="#">B.1.PRG</a>	Ludovic Silvestre	Response required
		<a href="#">New Coaching Note</a>	<a href="#">B.2.PRG</a>	David Amediku	Reminder to self
		<a href="#">New Coaching Note</a>	<a href="#">B.3.PRG</a>	Freddy Ndjemba	Response required
		<a href="#">New Coaching Note</a>	<a href="#">A.1.1</a>	Freddy Ndjemba	Response required
		<a href="#">kkk</a>	<a href="#">B.1.19</a>	David Amediku	Reminder to self
		<a href="#">New Coaching Note</a>	<a href="#">B.1.11</a>	Freddy Ndjemba	Response required
		<a href="#">New Coaching Note</a>	<a href="#">B.2.PRG</a>	Leonard Mabuga	Response required
		<a href="#">tm protocol</a>	<a href="#">B.1.13</a>	Leonard Mabuga	Response required
		<a href="#">New Coaching Note</a>	<a href="#">B.1.PRG</a>	Chau Le	Response required
		<b><a href="#">New Note 2</a></b>	<a href="#">ISS.2</a>	Ludovic Silvestre	
		<a href="#">My comments on it</a>	<a href="#">ISS.1</a>	Ludovic Silvestre	Reminder to self
		<a href="#">My comments</a>	<a href="#">A.1.11</a>	Ludovic Silvestre	Response required
		<a href="#">New own Note</a>	<a href="#">A.1.PRG</a>	Ludovic Silvestre	Reminder to self
		<a href="#">New Note fvf</a>	<a href="#">A.1.1</a>	Ludovic Silvestre	
		<a href="#">Comment on budget</a>	<a href="#">A.1.6</a>	Ludovic Silvestre	
		<a href="#">Review of Analysis</a>	<a href="#">A.1.7</a>	Ludovic Silvestre	

## How to Use TeamTalk

### Filtering notes

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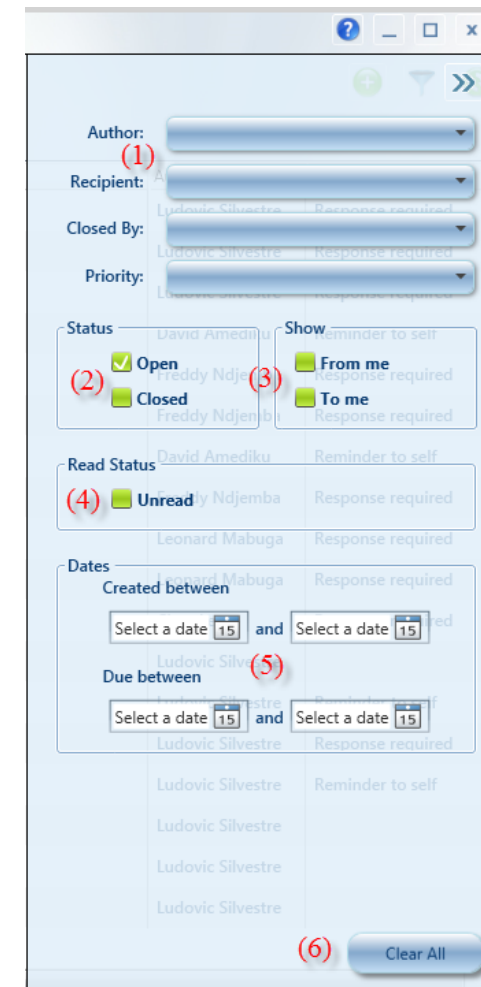
To facilitate the review of the notes, you need to filter them by clicking on  (top right corner).

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)



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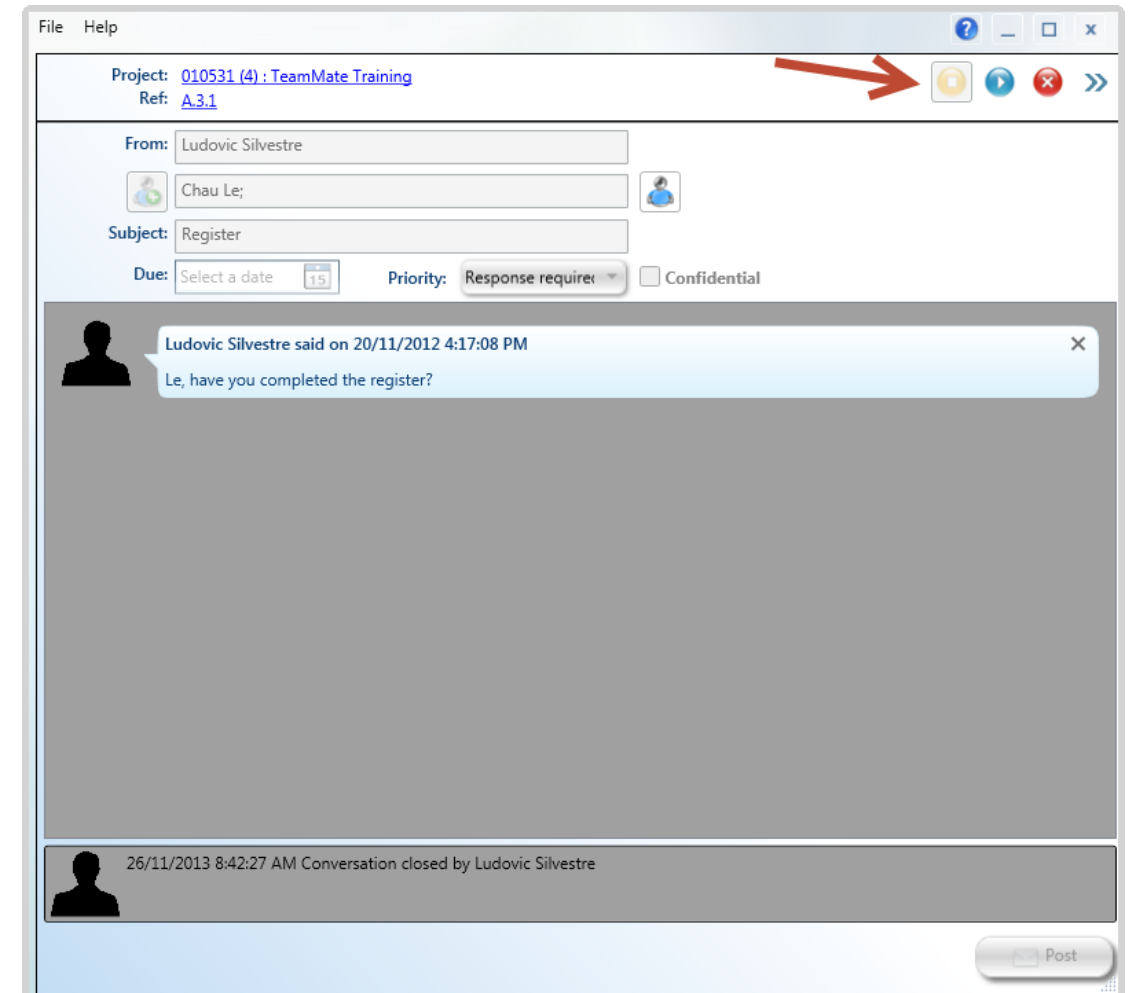
### Closing notes

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.



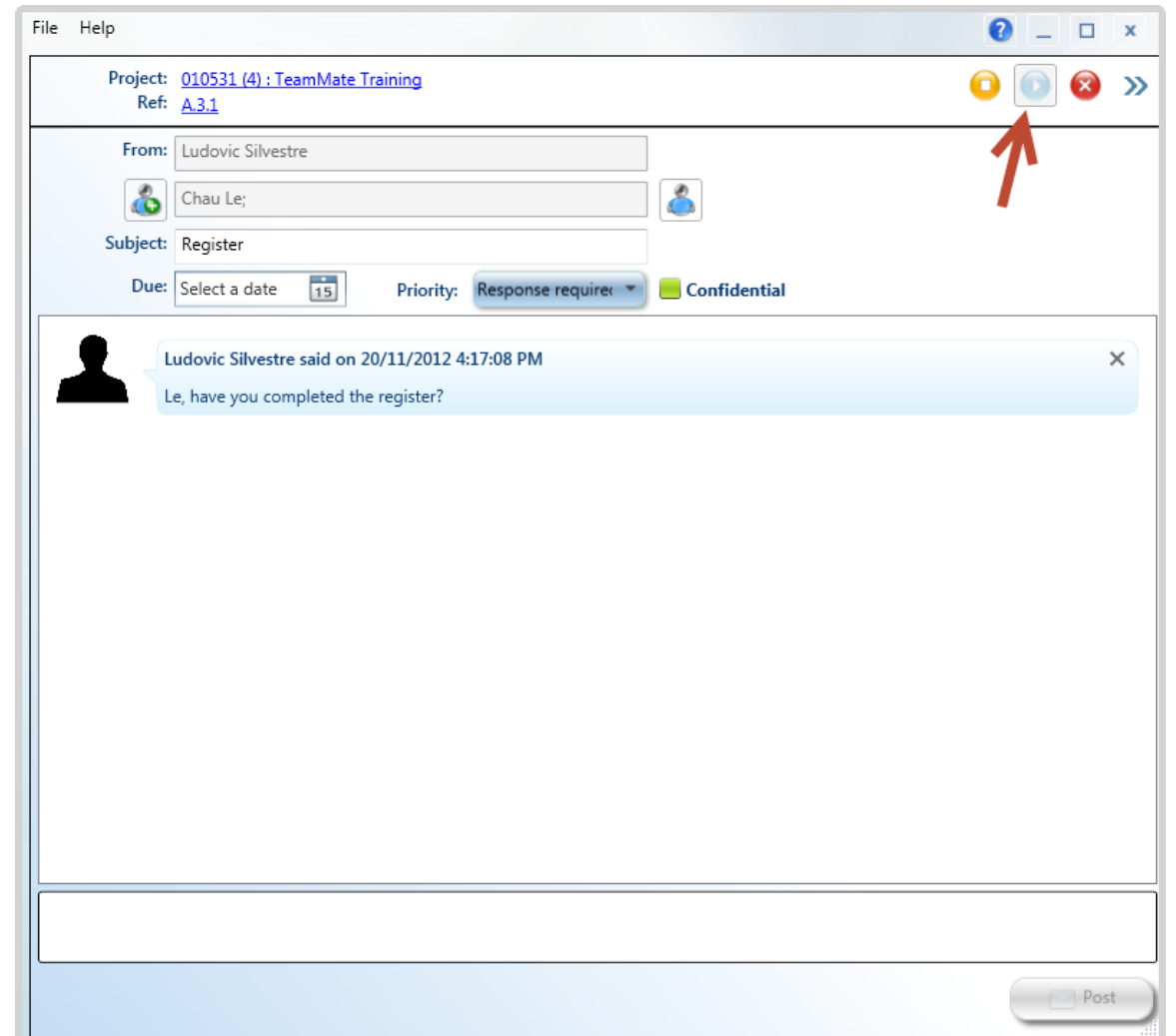


## How to Use TeamTalk

### 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.



## How to Use TeamTalk

### 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 prompted 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.

