**TeamMate and Working Paper Technical Guidance**

1. **Don’t manipulate large amounts of data within Excel Working Papers in TeamMate.** 
   * Teammate is prone to crashing when a process times out or one process runs into the next, and unfortunately Excel can require a lot of processing power and system resources which can slow your computer and contribute to TeamMate issues.
   * Avoid issues by performing resource intensive actions outside of TeamMate. Export working papers and close TeamMate to perform: substantial formatting, column resizing, or copying large amounts of content between worksheets or workbooks.
2. **Don’t overload your system memory with copied content.**
   * If you’ve copied a lot of content and performance is lagging try clearing your Microsoft Office clipboard.
   * Copied content persists in the Microsoft Office clipboard and can take up valuable memory space.
   * Review the clipboard contents to clear what is no longer required. ([Office Clipboard](https://support.office.com/en-us/article/copy-and-paste-using-the-office-clipboard-714a72af-1ad4-450f-8708-c2931e73ec8a?redirectSourcePath=%252fen-us%252farticle%252fshow-the-office-clipboard-e293e508-c0da-4de1-84ef-72bb7847db92&ui=en-US&rs=en-CA&ad=CA) / [Presse-papiers Office](https://support.office.com/fr-fr/article/copier-et-coller-%C3%A0-l-aide-du-presse-papiers-office-714a72af-1ad4-450f-8708-c2931e73ec8a))
3. **Don’t over use TeamMate hyperlinks.**
   * There is overhead associated with TeamMate hyperlinks. When a document is opened the hyperlinks are updated to indicate the latest status. TeamMate guidance cautions that using more than 20-30 hyperlinks will impact the time it takes to open the document.
   * TeamMate hyperlinks are meant to link to other working papers, not to reference areas within the same working paper.
4. **Don’t use “cut” or “delete” to remove TeamMate hyperlinks** 
   * TeamMate hyperlinks have multiple parts. The **menu option** “remove hyperlink” will remove both the hyperlink image and the corresponding database reference.
   * Using “cut” or “delete” will only remove the visible image causing the objects to remain permanently linked with no workaround to remove the unwanted reference.
5. **Don’t copy TeamMate hyperlinks.**
   * Copied hyperlinks in Working Papers share a single database reference and **removing one copy invalidates the others.**
   * Exporting a working paper and adding it as a new working paper is another way hyperlinks are copied. Deleting a hyperlink from the first working paper will invalidate the corresponding hyperlink in the copy. Deleting the first working paper will invalidate all corresponding links in the copy.
6. **Don’t exit a TeamMate project without first closing the Working Papers.**
7. **Don’t forget to activate automatic save/recovery in Word and Excel.**
   * Select **File > Options > Save** and enable **Save AutoRecover information** and set a value of 5 or 10 minutes.
   * keep the default **AutoRecover file location** set to “\AppData\Roaming\Micorsoft\Word\” or “\AppData\Roaming\Micorsoft\Excel\”
8. **Don’t sync when someone else is in the master version of the work paper(s) you are synching.**
   * Your changes can be overwritten when the reviewer is in your document at the moment you are synching. Your synch will not generate a conflict if the master version changes are not yet saved.
   * When the reviewer subsequently saves the document we would expect a conflict to be created but the document is overwritten instead. This is a limitation of the software which currently only generates a conflict during “merge” and “sync” processes.
   * The issue occurs more frequently when reviewer and preparer are working in tandem to complete work under deadline. Communication is essential to ensure the master documents are closed prior to the sync.
9. **Don’t click until the current action is complete.**

* An application error will occur if you attempt to navigate away or start a new activity without waiting for the current action to complete.
* The failure will cause TeamMate to stop working and force the application to close.

1. **Don’t use multiple displays when working with TeamMate Working Papers.**
   * In order to maintain active communication the TeamMate application and the Working Papers must use the primary display. A communication failure will cause TeamMate to stop working and force the application to close.
   * Ensure the monitor you want to use for TeamMate and Working Papers is your primary monitor. This will help ensure all dialogs show up where expected.
   * To get an application to always open on the same screen:
     1. Open the application.
     2. Re-size the window so that it is not maximized or minimized
     3. Move the window to the monitor you want it to open on by default
     4. Close the application. Do not re-size prior to closing
     5. Open the application. It should open on the monitor you just moved it to and closed it on
     6. Maximize the window
     7. The application will now open on this monitor by default. If you want to change it to another monitor, follow steps 1-6 again
2. **Don’t abandon working papers if the application appears frozen.**
   * A hidden dialogue may be waiting for user input and can be forced to display by following these steps:
     1. select **Alt+SpaceBar**
     2. select **move** from the displayed list of options
     3. click once on any **arrow** key
     4. move your **mouse**
   * If working papers are still frozen you may need to close other applications.
     1. save any changes made to TeamMate procedures but **don’t close TeamMate**
     2. save and close all other applications
   * If working papers are still frozen follow these steps:
     1. open **task manager**
     2. select the **application** tab
     3. select **TeamMate**
     4. click the **end task** button
     5. exit task manager
     6. **save** the working papers to a local folder like your desktop
     7. launch TeamMate, open your project, and use **replace working paper** to recover your changes from the saved copies in your local folder
   * If working papers are still frozen you will need to recover from an auto-saved copy:
     1. open **task manager** and select the application that is frozen and click **end task**
     2. **open** the application that was previously frozen
     3. **select** your document from the list of auto-recovered documents displayed
     4. or use **open document** and locate a copy of your document in one of the subfolders following:

c:\users\public\TeamMate\Temp\

c:\users\*<userid>*\AppData\Roaming\Micorsoft\Word\

c:\users\*<userid>*\AppData\Roaming\Micorsoft\Excel\

* + 1. **save** the copy as a new document to your desktop
    2. launch TeamMate, open your project, and use **replace working paper** to recover your changes from the saved copies in your local folder
  + Contact the helpdesk if this issue persists or occurs on a frequent basis.