TeamMate

R.10.1

and Microsoft Office Best Practices

▶ Contents

Working inside and outside of TeamMate simultaneously

When working with Word and Excel documents in TeamMate, do not open a Word or Excel document externally; doing so may result in a loss of data or TeamMate crashing. If this scenario is absolutely necessary, follow these steps to reduce the risk:

a) If TeamMate is open, make sure all Word or Excel documents inside of TeamMate have been closed. Minimize TeamMate.

b) Open an external Word or Excel document by clicking on *Start – Programs – Microsoft Office Excel\Word 2007.*

c) Return to TeamMate by maximizing it.

d) Open, edit and close documents in TeamMate and external to TeamMate as necessary.

* It is recommended that the **external** Word or Excel documents be opened **first** followed by TeamMate documents.

▶ TeamMate and PROxI

PROxI and TeamMate should not be open at the same time; doing so may result in loss of data in your Word or Excel documents or TeamMate and/or PROxI crashing. Disable PROxI before opening TeamMate. To disable PROxI, follow these steps:

    a) If TeamMate is open, close it.

    b) If Word or Excel documents are open, close them.

   c) Right click on the IT Service Agent icon on your Windows task bar and select **Disable PROxI**.
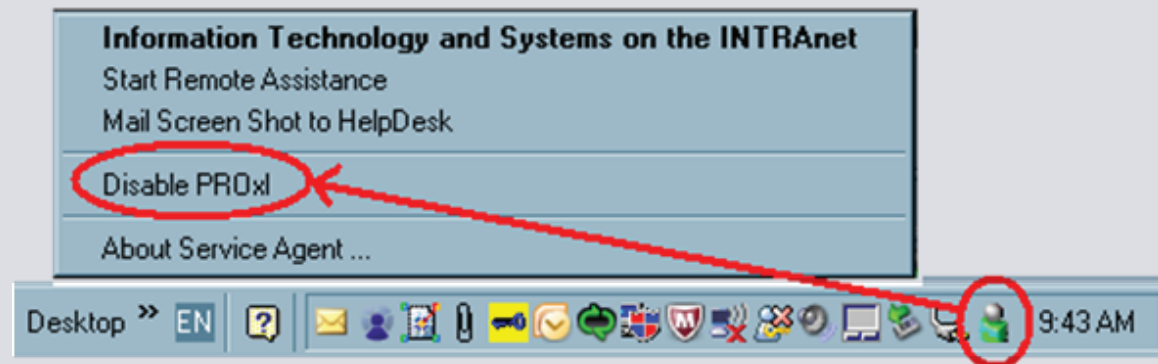
    d) Re-open TeamMate.

▶ Exiting Excel

Never exit Excel using *File – Exit Excel*. Use *File – Close* instead. This will leave an empty Excel session open.

Do not close the empty Excel session while in TeamMate. It will be closed automatically when you exit TeamMate; if you do close the empty Excel session, the next time you access an Excel spreadsheet, TeamMate will crash. The solution to fix this is to close and reopen Teammate.
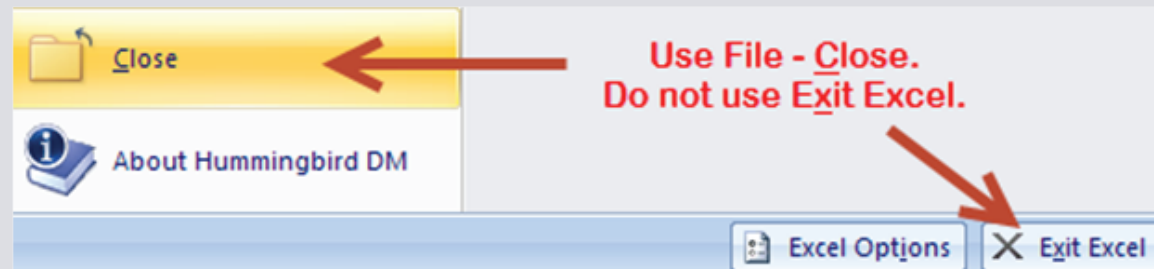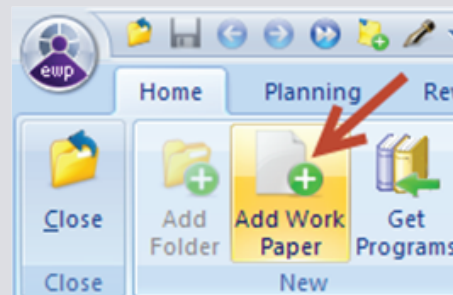

▶ Saving your work

The correct way to save an Office document is to use *"File – Save" followed by "File Close"*.

If you are performing extensive edits to a document, **save it periodically** as described above. Re-open the document and continue working on it.

Creating documents

Word or Excel documents should be created from the ***Add Work Paper*** menu. Do not create new documents when inside of a Word or Excel document using the ***File – New option***.

Take your time

Always wait until an operation has completed before performing the next action or you will risk losing your work. For example, when inserting a TeamMate object (coaching note, hyperlink, issue) into a working paper, wait until the insertion is complete before beginning another operation.

Importing Word 2003 documents

Save 2003 files as 2007 before importing them into TeamMate as working papers. If you want to import a document from an older project, export it to your desktop, open it and convert the document to 2007, then you can import it into TeamMate.

▶ Office Documents from the entity/client

Always open the documents that you have received from the entity/client outside of TeamMate first to see if there are any issues. If you have problems opening them, resolve the issues prior to putting them in TeamMate.

▶ Hyperlinks and comments

There is a known issue with inserting hyperlinks into Word Review Comments which could cause document corruption. Do not insert TeamMate hyperlinks in Word Review Comments.

▶ Excel workbook size

Storing Excel documents takes significant memory on the network and your computer. Large workbooks are more likely to become corrupted than smaller workbooks. It is recommended that you keep your workbooks under a 1000KB.