



# TeamMate

R.10.1

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## Enhancements Overview

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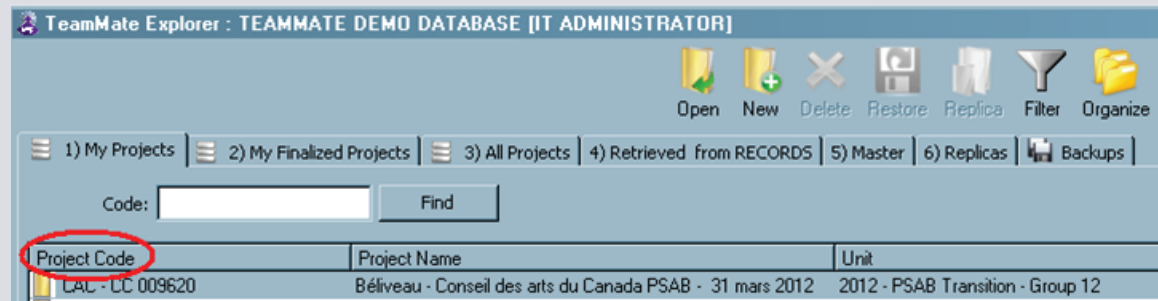
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## ► Terminology Changes

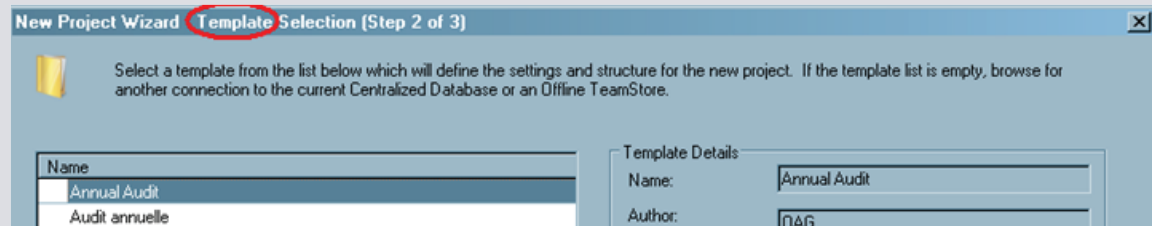
TeamMate R8	TeamMate R10	Sample #
1. Master	Project	
2. Code (file name)	Project code	1
3. Library	Template	2
4. CG: Current Year File	PG: Current Year File	3
5. Exceptions	Issues	4
6. Schedule Status	Signoff Status	5
7. PS (Procedure Summary)	PRG (Program)	6
8. Administrator Role	Project Owner	7
	New User Interface	

### Sample #1

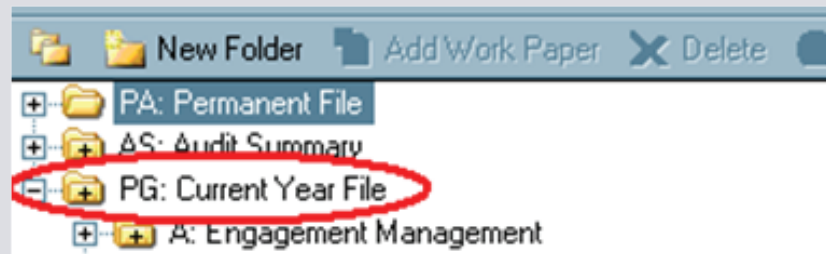




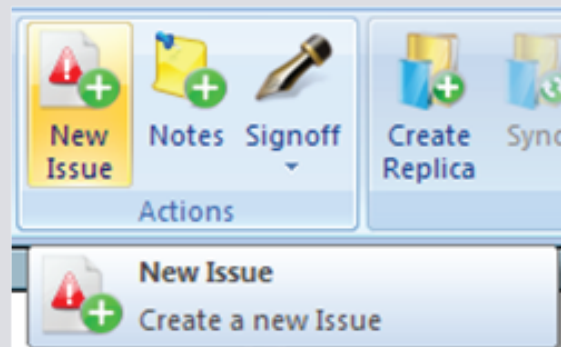
### Sample #2



### Sample #3

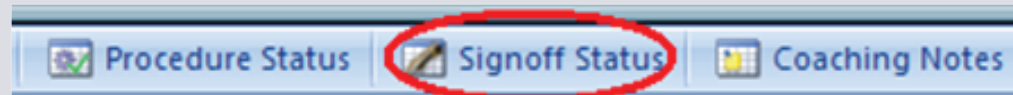


### Sample #4





### Sample #5



### Sample #6

Actions	Replication	
ARC	↑ State	Title
A.1.PRG	●	Client Acceptance/Continuance, Independence, Engagement Letter
A.1.1	□	Analyse de classement du CAC (PBC)

### Sample #7

Authorization

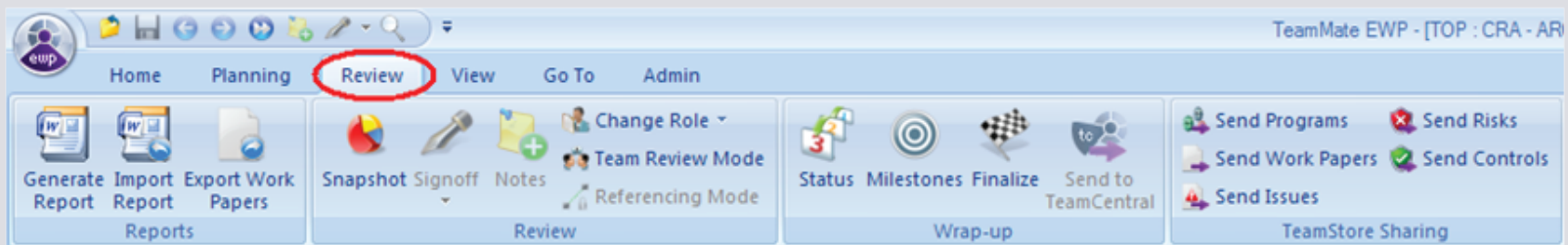
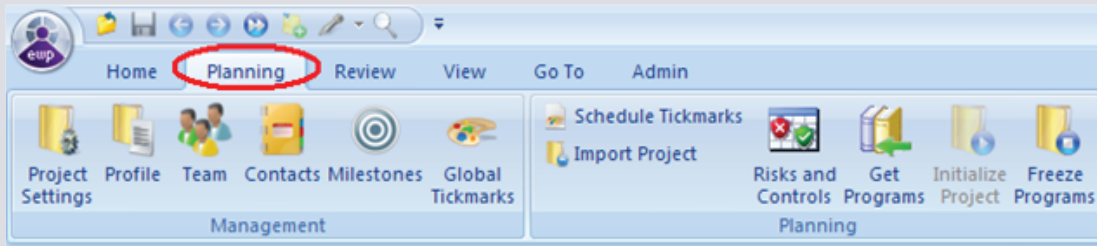
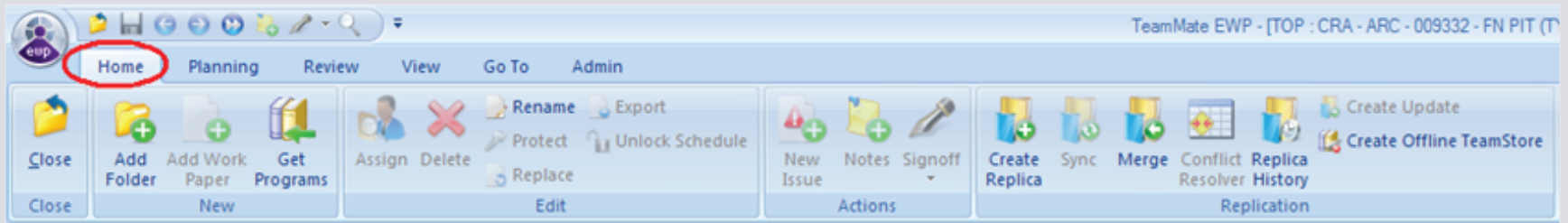
Role: Project Owner

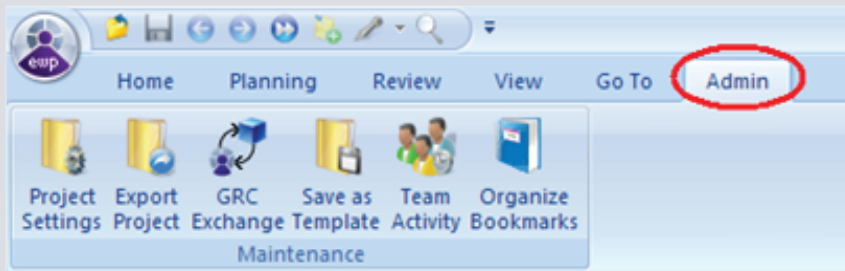
Level: n/a

Login Name: maltaijo



# ► New User Interface







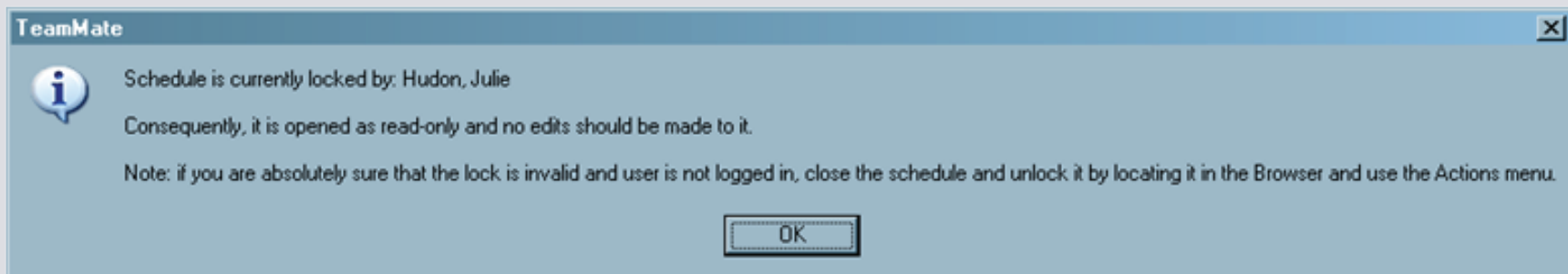
▶ **Centralized Database – major architectural change**

In the centralized model, all of the projects are stored in a single SQL database. This allows for significant performance improvements and strict use of database integrity rules.

▶ **Work directly in the project**

Since the centralized database is a true client-server application, you now can work directly in the Project (R8 – Master) when working in the Office or have good connectivity outside of the Office. This may reduce the times you need to use a replica.

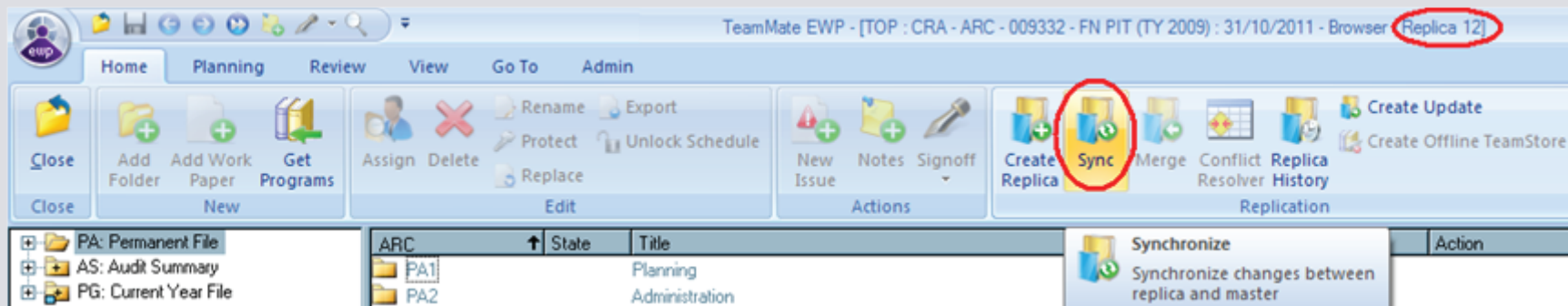
Only one person can be in a work paper or PRG (R8 – PS) at a time. If you try to access something that some else is already using, you will receive a message identifying that person. It is recommended that you do not break a lock, use a replica instead. Refer to TeamMate R10.1 Replication Best Practices for more information.





► **Replication model now contains a SYNC function**

Bi-directional Synchronization (also referred to as sync) gives remote team members the ability to share changes without the need to merge and recreate a new replica. With the Synchronization feature, the replica changes are uploaded to the project and the new changes in the project are downloaded to the replica simultaneously. There is no need to create a new replica daily as in the merge function. You must create an initial replica before you can use the SYNC functionality. The SYNC function is only available when working in a replica.







▶ **Fewer backups**

When working in the centralized database you will no longer need to backup the project. When using a replica however, make a backup of your replica before you sync or merge to the project.

▶ **TeamMate Replicas have better integrity**

TeamMate replicas are now stored in an Access database which has better database integrity rules to prevent project corruptions.

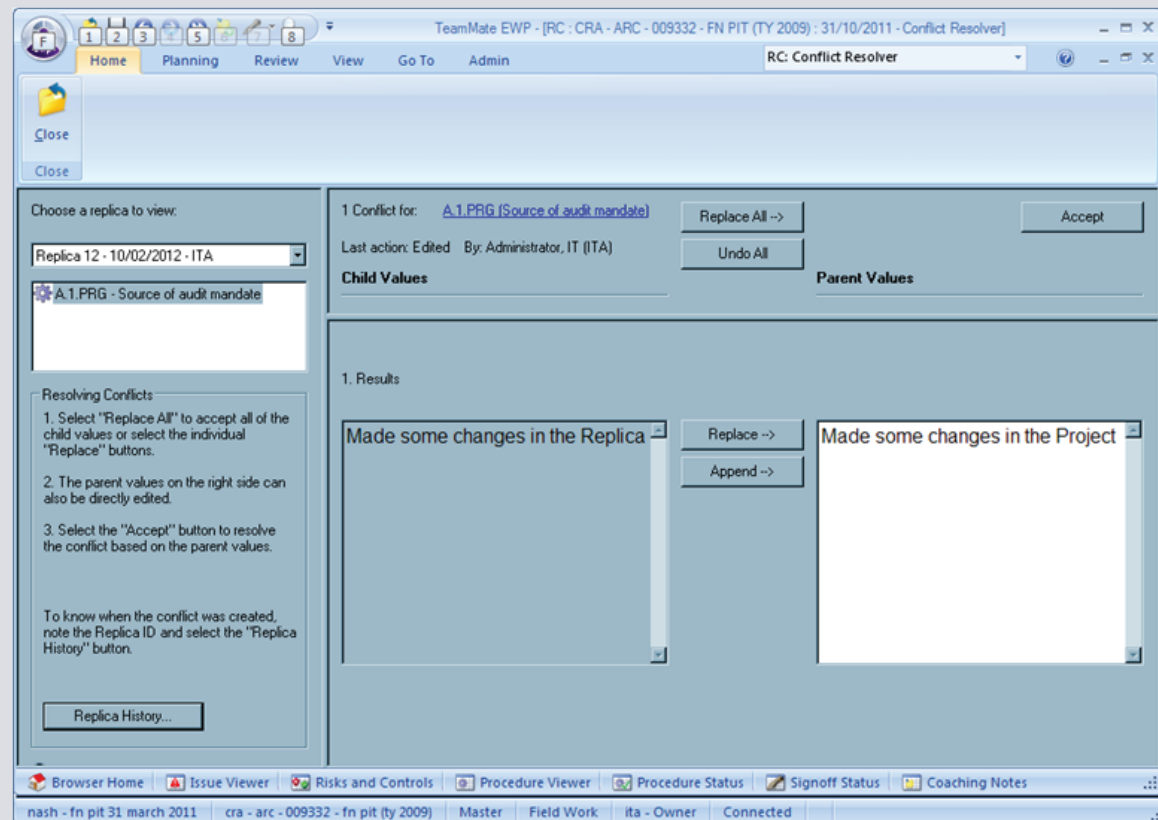
▶ **Tier 2 replication – creating a replica from a replica**

Since the project is stored in a centralized database, it is no longer possible to “Move” the project to a USB key in order to take the project off site. Instead, teams must create a replica (tier 1) on the USB key and team members then create their own replicas (tier 2) from the tier 1 replica using the USB key. The tier 2 replicas must be merged back to the tier 1 replica on the USB key before the replica on the USB key can be merged back to the database.



## ► New conflict resolution tool

The new conflict detector displays the specific differences between the value on the project and the replica for comparison with an easy accept or reject option. This is the centralized place to see and resolve conflicts rather than navigating in the files.





## ► Add users from centralized database

No need to type in new users when giving access to your project, there is a “Get” function which will add users from the centralized database.

Select team member ✕

Click Search to retrieve accounts.

Search Filter

Last Name:

First Name:

Email:

Select a user account from the list below and then click OK.

Drag a column header here to group by that column.

Last Name	First Name	Initials	Email
Abbott	James	JA	James.Abbott@oag-bvg.gc.ca
Abdelghaffar	Wagdi	WA	Wagdi.Abdelghaffar@oag-bvg.gc.ca
Abgrall	Riowen	RA	Riowen.Abgrall@oag-bvg.gc.ca



## ► Filterable TeamMate Explorer tabs

Your teammate explorer tabs are now customizable. You can filter the projects by Group (ie: 01), Type, (ie: Performance Audit), Location, (ie: Ottawa) or just display the projects that you have access to. By default you have 5 pre-configured tabs which display your active projects, your replicas, your finalized projects, all projects (active and finalized), and replica backups.

The screenshot shows the TeamMate Explorer toolbar with the 'Filter' icon circled in red. Below the toolbar is the 'Location Tab Filter' dialog box. The dialog box has the following fields and options:

- Group: OTT-01
- Type: Performance Audit
- Location: Ottawa
- Status:
  - Planning
  - Field Work
  - Draft Report
  - Responses Accepted
  - Issued
  - Implementation Tracking
  - Closed
- Show:
  - Finalized
  - Cancelled
  - Deferred
  - Assigned to me
- Start between: 10/02/2012 and: 10/02/2012
- Buttons: OK, Cancel



## ► New mandatory profile fields

In the Profile under the General tab, the Group (ie: 07), Type, (ie: Annual Audit), and Location, (ie: Ottawa) fields have to be filled in when creating a new project. These fields will allow you to filter the projects that you will see in your TeamMate Explorer tab.

The screenshot shows the 'General' tab of a project profile form. The fields are as follows:

Field	Value
Project Code:	CRA - ARC - 009332 - FN PIT (TY 2009)
Project Name:	Nash - FN PIT 31 March 2011
Audit Plan:	Default
Entities:	2011 - Attest - Group 7 Default > 2011 - Attest - Group 7
Unit:	2011 - Attest - Group 7
Group:	OTT-07
Type:	Annual Audit
Location:	Ottawa
Scope:	
Origin:	
Staff Type:	

The 'Group', 'Type', and 'Location' fields are circled in red, indicating they are mandatory for creating a new project.