



TeamMate

R.10.1

Replication Best Practices

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► When to use a replica

Even though the new technology introduced with TeamMate R10 supports audit teams working directly in the Project, there are often times when taking a replica will be required. For instance:

1. When two team members are assigned to work in the same folder. When one team member is active in a folder, the folder will be locked for other users. It is recommended that the team members communicate exactly where they will be working within that folder. Then it is recommended that one or both of the team members work in a replica to avoid the creation of conflicts.
2. When you will be working outside the office and you are not sure how stable the connection is or you do not have a connection. See below for best practices when working outside the office.
3. When you would like to make a copy of the project to preserve a “snapshot” of the state of the project at that point in time. With R10, backups of the project are no longer necessary as they were with R8. Taking a replica of the project in R10 performs the same function. See below for best practices when using replication to preserve a copy of a project.

For instructions on how to take a replica, go to [OAG Campus](#) to view TeamMate R10 On-line Tutorials – *Working in the Master*.

Terminology

- “Tier 1” replica is a replica that was created from your project.
- “Tier 2” replica is a replica that was created from a tier 1 replica.



▶ When working with replicas

1. **Always** create a backup of your replica **before** you sync. You can backup anytime by clicking the EWP icon and selecting "backup".
By default you are prompted to make a backup when you exit the replica. If you backup before you sync, then exit, you do not need to backup when you exit.
2. After a sync you may receive an error message telling you to take a new replica. **Do not disregard** the message and continue to work in the old replica; your old replica can no longer be synched or merged.
3. If you find a conflict was created as a result of a sync, it is important you **resolve the conflict before** making further edits to the schedules in conflict. Conflicts between the project and a Tier 1 replica must be resolved in the project. Conflicts between a Tier 1 replica and a Tier 2 replica must be resolved in the Tier 1 replica before you merge the Tier 1 replica with the project.
4. Note that creating simultaneous replicas can cause **significant delay** in the project for other team members **and cause replication to fail**. As a best practice, you can minimize this risk by ensuring that only one team member in your project is creating or merging replicas. To proceed, you need to check "Team Activity" under the tab "Admin" and individually **communicate** (phone or email) with the team members who are active to ensure they are not taking a replica or merging at the same time.



► **Using replication to preserve a copy of your audit file**

Some users find it useful to keep a local copy, a copy on your hard drive, of the audit file. In R10 we can no longer make a copy of the project through the use of a back-up because it is part of the larger centralized database. However, it is still possible to take a copy of the project, through the use of a replica, even after a project is finalized.

Refer to TeamMate R10 On-line Tutorials – *Searching for Audit Projects at OAG Campus* and review the section “*Creating a New Tab*”. The new tab should be for “distributed” databases and point to a folder where you intend to keep your local copies (ex: C:\Documents and Settings\...\My Documents\TeamMate\My Copies).

Either choose the new tab when creating your replica or you can move your replica from the replica tab to your newly created tab.

Because this replica is not intended to be merged back to the project, advise the project owner to discard this replica from the replica history list if the project is still un-finalized.



▶ Working outside of the Office using replication

1. If you have a good network connection to the Office, it is recommended that you work directly in the project.
2. If you do not have a good network connection to the Office, then working using replicas is recommended.
3. If you are not sure of your network connection, it is recommended that you take a replica with you when you leave the Office in case you find it difficult to work in the project. If you are travelling as a team see the guidance below for using tiered replicas.

▶ Travelling as a team

If you are travelling as a team and are not sure of your network connection or will not have a network connection, it is recommended that you create a full replica on a USB key. For additional instructions go to [OAG Campus](#) to view TeamMate R10 Tutorials – *Replica on USB Key*.

Before leaving the Office to work in the field, create a full “Tier 1” replica on a USB key. Remember to always stop the USB key before removing it from your computer. If you are not sure how to stop a USB device then see *Encrypted USB Key – User Guide on the TeamMate Local Guidance page on the Intranet*.

Each auditor will create a “Tier 2” replica using the “Tier 1” replica that is on the USB key. It is more efficient to create a discrete replica only selecting those sections that you are currently working in. However, if you need to access the new work papers created by your colleagues you should create a full replica.



Remember to backup the “Tier 2” replica before you sync with the “Tier 1” replica. There is no way to set an automated reminder for this backup.

When you return to the Office:

- Merge all “Tier 2” replicas to the “Tier 1” replica that is on the USB key.
- If you are not going to merge a “Tier 2” replica then discard it from the “Tier 1” replica that is on the USB key.
- Merge the “Tier 1” replica that is on the USB key back to the project.

