R11 Upgrade Enhancements

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TeamMate AM R11 Enhancements
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Agenda

**Introduction**
- R10.4.5 to R11.1 Upgrade - Status Update
- Instructor Introductions
- Session Objectives

**End User Education**
- Suite Wide R11 Feature Enhancements
- TeamStore - Leveraging Content in Audit Projects
- TeamMate Analytics - Access & Quick Start Resources

**Summary & Wrap-up**
- Questions
- Evaluations
UC TeamMate
Suite Wide Accomplishments R10.4

Windows Authentication
TeamMate R10

Web Application Shortcuts
Application Toolbar
Suite Wide Ribbons
Connect
Expanded Compatibility

August 2014
UC TeamMate - Added Integration
Suite Wide Enhancements R11.1

TeamEWP

TeamMate R11

TeamMate Analytics
New Text Editor
Work Program Usability
Procedure Viewer
TeamTalk Sign-Off's
Custom Perspectives

Multiple Attachments
Intuitive User Interface
History Tab
New Action ICONS
Implementation Tracking Update

TeamCentral

When you have to be right
Session Objectives

- Understand Changes from R10.4 to R11
- Leverage new R11 features in our audits
- Leverage TeamStore Content in our audits
- Leverage TeamMate Analytics
Auditor Changes & Feature Enhancements

TeamEWP
- Text Editor - Platform Upgrade
- Procedure Viewer - Work Program Usability Improvements
- Editable Hyperlink Labels

TeamTalk
- View & Add Notes Buttons
- Preparer & Reviewer Sign-off

TeamTEC
- Copy Timesheet | Multiple Approval Roles

TeamCentral
- Implementation Tracking Changes
- Survey Enhancements
Auditor Changes & Feature Enhancements
TeamEWP Enhancements

- Usability Enhancements
  - More control of information displayed on screen

R11 R11.1

Text Editor Platform Upgrade
- Format Ribbon
- Spell as you type
- Zoom-In on Text

Procedure View Enhancements
- Full Grid View
- Split View
- Details Pane View

Custom Procedure View
- Column Manager
- Hide / Unhide Fields
- Re-Order Fields

Filtering & Grouping
- Slide Out Panel
- Convenient Checkboxes
- Selected Filters at Top

Other
- Editable Hyperlink Labels

Wolters Kluwer
Audit, Risk & Compliance
When you have to be right
Text Editor - Platform Upgrade

- Format ribbon

Format ribbon appears at the top of the editor window

Many styles of fonts and bullets are supported

Some modification of information systems programs or system parameters will be necessary during the application life cycle.

- Changes may be required by program problems, variance in internal operations, competitive demands, or other factors, such as regulatory changes.

1. Whatever the justification, program and parameters changes must be strictly controlled and documented to prevent fraudulent or inadvertent modification.

1) Select the last 5 changes made to the systems and review the change information for adequacy.
Text Editor - Platform Upgrade

- Spell Check as you type with Suggestions

Spell check as you type with suggested alternative words.
Text Editor - Platform Upgrade

- Zoom-In/Out to increase/ decrease visible text size

Audit Procedure

- Carry out a physical check based on the Fixed Asset Listing.
- Check the details i.e. chassis number etc with the listing.
- Identify the function of the vehicle and the reasonableness.
- Identify the person responsible to the vehicles.

Zoom In on Text to make it easier to read on small screens.
Procedure View Enhancements

- OLD - Procedure Layout & Perspectives
Procedure View Enhancements

- NEW Procedure Layout - SPLIT VIEW
Procedure View Enhancements

- NEW Procedure Layout - FULL GRID VIEW
Procedure View Enhancements

- NEW Procedure Layout - DETAILS PANE VIEW
Procedure View Enhancements

- NEW Procedure Layout - EXPAND PANE OPTION
# Procedure View Enhancements

- NEW Procedure Layout - CUSTOM VIEW
### Procedure View Enhancements

- **NEW Procedure Layout - PROCEDURE FILTERING**

![Image of Procedure View](image_url)
Procedure View Enhancements

- NEW CUSTOM HYPERLINKS
TeamTalk Enhancements

- NEW Preparer and Reviewer Signoff Buttons

- Support for Undo Signoffs
TeamTalk Enhancements

- **NEW Workflow ICONS**
  - Locked states replace state of open or closed notes
  - Icons match workflow for procedures and issues

- **Distinct Add & View Notes Buttons**
  - OLD-Single Button
  - NEW-Separate Function Buttons
TeamTEC Enhancements

- Copy Timesheet / Project time entry prompt

*Message from webpage*

One or more rows in the timesheet does not have any time charged. These rows will be removed when the timesheet is saved. Are you sure you want to save?

OK Cancel

*Copy timesheet option*
TeamTEC Enhancements

- NEW - Support for Multiple Approvers
TeamCentral Enhancements

**Improved User Interface**
- Convenient Project Access
- New Action Icons
- Visible History Tab

**Implementation Tracking**
- Multiple Attachments
- Separate Attachments in History
- Separate Revision Policy

**Survey Enhancements**
- Re-Open / Delete Closed Surveys
- Copy / Paste Survey Questions
- Send Reminder Button
TeamCentral Enhancements

- Intuitive User Interface

New Implementation Tracking Action Icons match follow-up workflow

New link to Project gives easy access to Profile information

New History Tab provides easy view of recommendation history
TeamCentral Enhancements

- Multiple Workpaper Attachments for all TeamCentral Actions

Attachments shown as separate files in History
TeamCentral Enhancements

- Issue Tracking - Date Revision Policy

- Permit implementation dates to be revised:
  - By Auditors
  - By Contacts
  - Require comments for all revised dates
TeamCentral Enhancements

- New - Online Survey workflow features

- Copy and Paste questions for easier creation of star ratings.

- Re-open action now on main action bar allows more survey responses when recipients need more time.
TeamCentral Enhancements

- New Field Chooser - save customizations
  - Hide columns - check on/off
  - Move columns
  - Group, Sum, Count, Sort, etc.
Continued TeamStore Initiatives

**Audit Net**
- Access to AuditNet TeamStore in Projects
- Procedures, Workpapers, Risks and Controls
- Access to AuditNet website via Connect

**ACUA**
- Access to ACUA TeamStore in Projects
- Risks and Controls library
- Get Risks brings linked controls automatically

**TeamStore**
- Provides efficiency in audit work
- Search content by cabinet and/or object
- Send data from project to TeamStore
TeamStore and Risk & Controls

- TeamMate TeamStore Content-R11.1 UPDATE
TeamStore and Risk & Controls

- ACUA Risk & Control Library Content
TeamStore and Risk & Controls

- TeamStore Search and Document Review
  - Quick launch and review
TeamMate Analytics

**Microsoft Excel**
- Convenient Excel Add-in
- Accessible within EWP Excel workpapers

**Key Features**
- Over 130 powerful data analysis tools
- Specifically designed for Auditors and Accountants

**Resources & Updates**
- Embedded Help Guide
- Online Connect How to Videos
- Check for Updates in Excel
TeamMate Analytics

- **Tools and Features**

**Section Modules**
Revolutionary account-area focused modules that allow you to perform up to 17 tests at once on a single report.

**Data Analysis**
The core tools that allow you to test in many different ways, including Benford’s testing, summarization, gaps, duplicates, outliers and many more...

**Sampling**
4 sampling routines including Monetary Unit Sampling (MUS) and random sampling.

**Engagement Setup**
Store engagement details for recall and produce lead schedules.

**Toolbar**
Data cleansing and excel productivity tools to make day-to-day working in excel easier and more efficient.

**Plus**, context-sensitive help, a comprehensive user manual and forum access.
TeamMate Analytics Quick Start Resources

TeamMate Analytics Resources on TeamMate Connect  [https://university-of-california-system-teammategroup.teammateconnect.com/main](https://university-of-california-system-teammategroup.teammateconnect.com/main)

**What's New**

- TeamMate R11 Upgrade
  - TeamMate IT Overview 11.1
  - What's New in TeamMate 11.1?
  - What’s New in TeamMate 11.0?

**TeamMate Analytics**

- TeamMate 3.3 IT Overview
- TeamMate 3.3 Release Notes
- TeamMate Analytics Overview
- TeamMate Analytics Quick Start Guide
  - MS Excel Sample Files
- TeamMate Analytics Demo
- TeamMate Analytics: When and How to Use It

**TeamMate Analytics Quick Start**

TeamMate Analytics includes more than 130 audit tools and runs on top of Excel, allowing auditors to easily perform powerful data analysis and deliver significant value without the need for extensive training. The following quick start tools and resources are a great way to start on deploying data analytics on every audit.

**Accessing TeamMate Analytics**

The TeamMate Analytics tab located in MS Excel documents that are contained in TeamMate EWP projects.

**TeamMate Analytics Examples Overview and Sample Excel files**

Use the PDF overview and associated Excel sample files to help you execute some of the TeamMate Analytics functions on your own. For more details about the functions, consult the TeamMate Analytics Training Videos link or TeamMate Analytics help.

*Note: always make a copy of the Workbook you are working in just in case you make a mistake and need to start over.*

**TeamMate Analytics Sample Files -**

- Excel Sample Files.zip
TeamMate Analytics Quick Start Resources

TeamMate Analytics Online Training Videos:
https://www.youtube.com/playlist?list=PLCiuk-IyTcc1aV37193pWHmkV6q1AS04P
TeamMate Analytics Quick Start Resources

TeamMate Analytics Embedded Help Guide - Click Help from within the TeamMate Analytics TAB
Leveraging TeamMate User Community

- Central Repository for content sharing
- Document management
- Self service
- Group collaborating

UC TeamMate Group

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UC TeamMate Group

- E-Mail Invitation

This email is your invitation to join the “University of California System TeamMate Group” at TeamMate Connect.

Use the link below as it has a unique invitation key created just for you.

The UC System TeamMate User Group site on TeamMate Connect provides a central resource for content sharing, document management, enterprise search, regarding Internal Audit and our use of the TeamMate Suite. Joining the UC Systems TeamMate User Group also provides access to over 6,700 TeamMate user site to stay on top of all the latest TeamMate developments.

Once registered, the “Read Me First! Getting Started with UC TeamMate Group” makes initial registration and setup quick and easy. Also, review the Tour Guide document to start leveraging UC TeamMate content on your first login.

Please contact Craig Flexo (cflexo@iadi.ucla.edu<mailto:cflexo@iadi.ucla.edu>) or Deb Collins (deb@ucsc.edu<mailto:deb@ucsc.edu>) with any questions.

Join now:
https://university-of-california-system-teammategroup.teammateconnect.com/member/new?invite_key=5B047D77E1746E24C7E58C8AD41F61299C81ECE3

Connect with people and browse content at TeamMate Connect
Learn more at https://teammateconnect.com

If you believe this message is SPAM, please forward the message to:
clientrelations@wolterskluwer.com
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- TeamMate Connect Registration

![TeamMate Connect Registration](image-url)
UC TeamMate Group

- Access UC TeamMate Group
UC TeamMate Group

- Getting Started Guides
  - 1. Read Me First! Getting Started with UC TeamMate Group
  - 2. Tour: Features & Navigation
Innovation & Enhancement Ideas Group

Submit your TeamMate enhancement requests on TeamMate Connect or search for existing requests and LIKE to make your vote count!