Curtin University

INTERNAL AUDIT

CCH TeamMate

Administration

Version 1.1 – 30 Jan 2013

Contents

NOTE 1: The official CCH Team Mate Administration document is found on J drive at J:\ODVC\PQ\AUDIT\OPERATIONAL MANAGEMENT\Procedures\CCHTeamMate Administration.

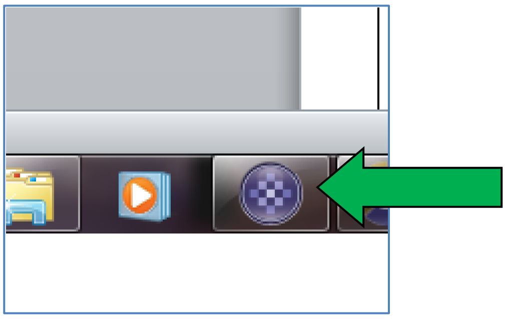
NOTE 2: This document provides only basic information pertaining to administering the EWP module only.

NOTE 3: Further detailed information on CCH TeamMate may be obtained from various CCH TeamMate user guides which are available by clicking on the HELP button while logged into the relevant system module.

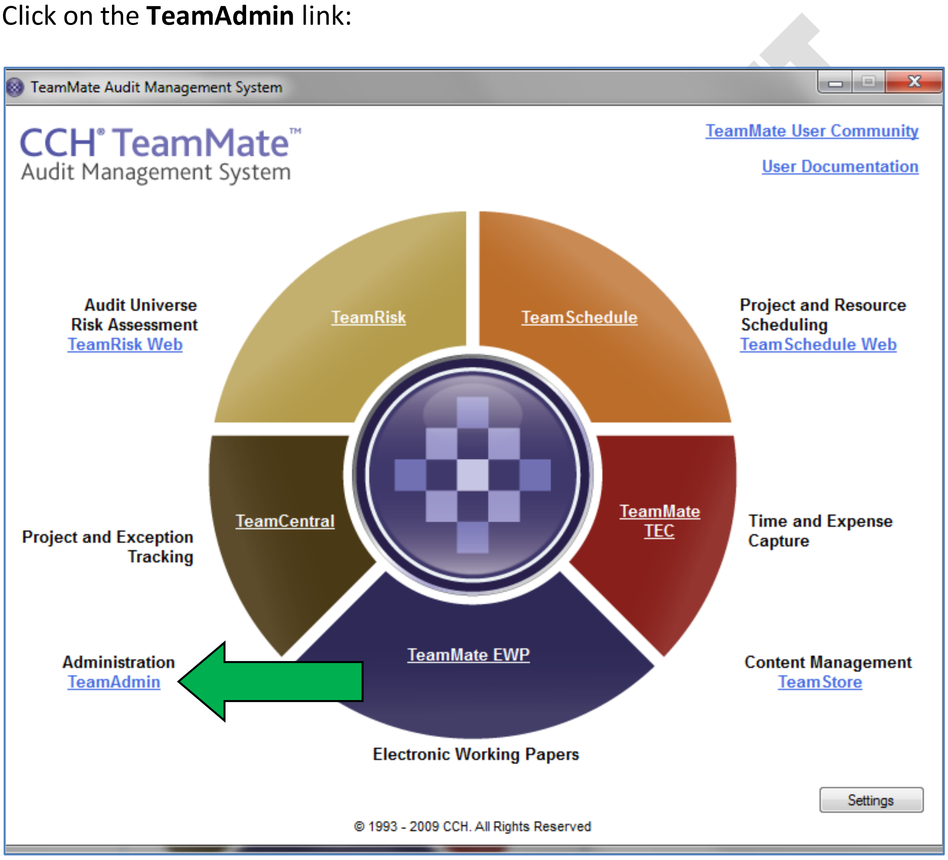
SYSTEM ACCESS

HOW TO LOGIN TO TEAMADMIN

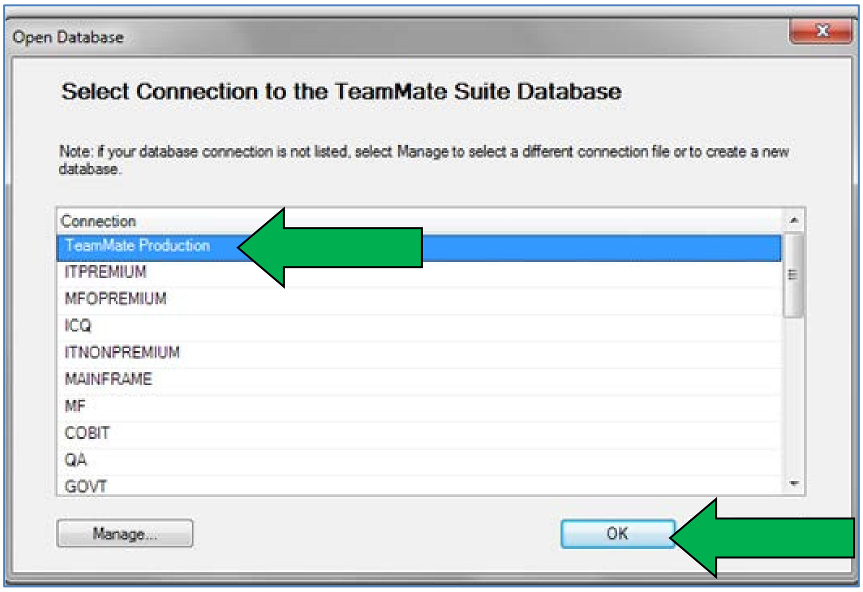
- Click on the **TeamMate LaunchPad** icon on your task bar:



- Click on the **TeamAdmin** link:

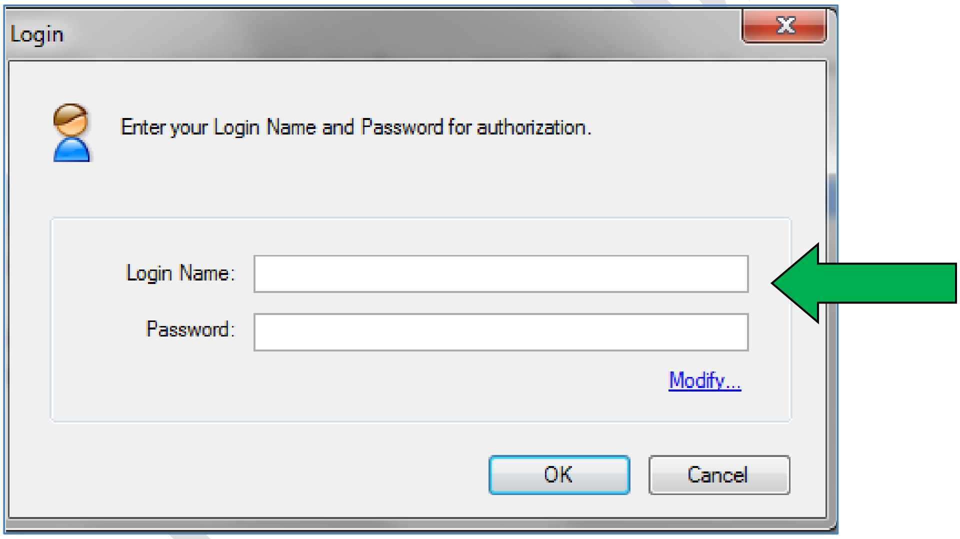


- When requested to open the database, select the connection database **TeamMate Production**, then click OK:

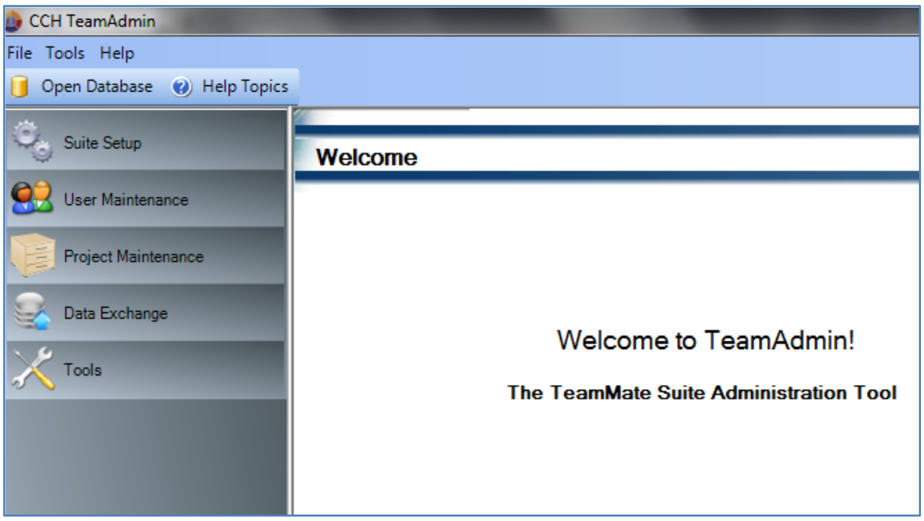


- Enter your **login** and **password** when requested to do so (see below) and click **OK**.

  NOTE: You will need to be defined as an Administrator in CCH TeamMate to be able to access TeamAdmin.



- You should then be brought to the main TeamAdmin web page:



ADMINISTRATION CATEGORIES

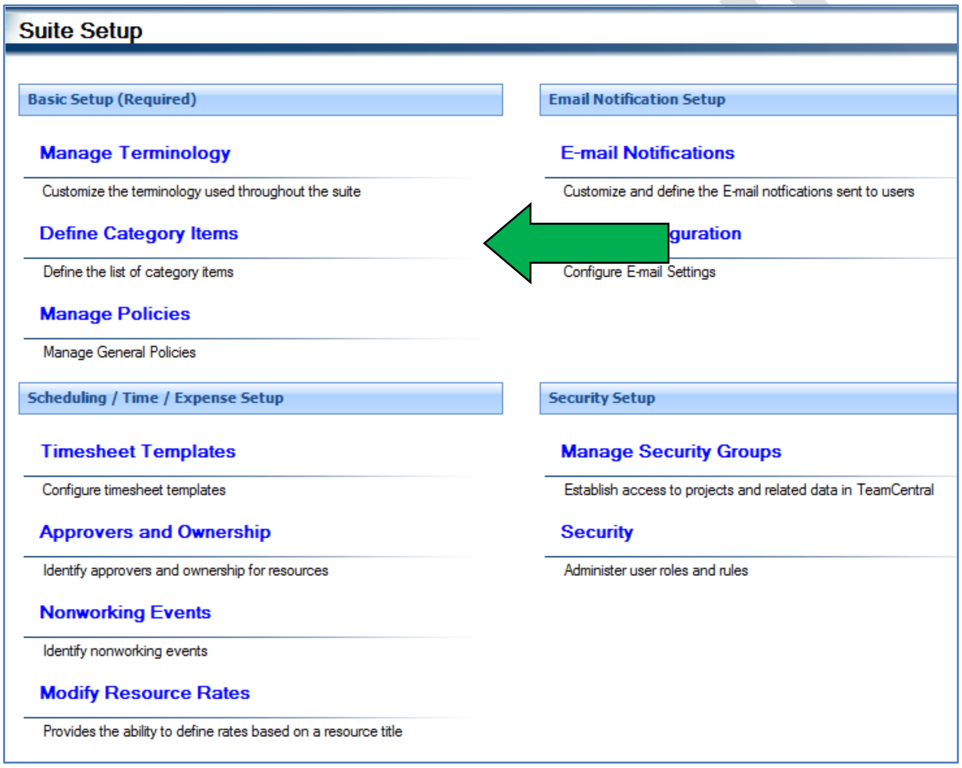
GENERAL

- The main TeamAdmin web page provides you with **5 options**:

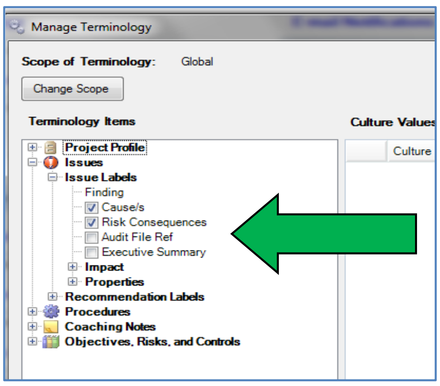
    - Suite Setup
    - User Maintenance
    - Project Maintenance
    - Data Exchange
    - Tools

SUITE SETUP

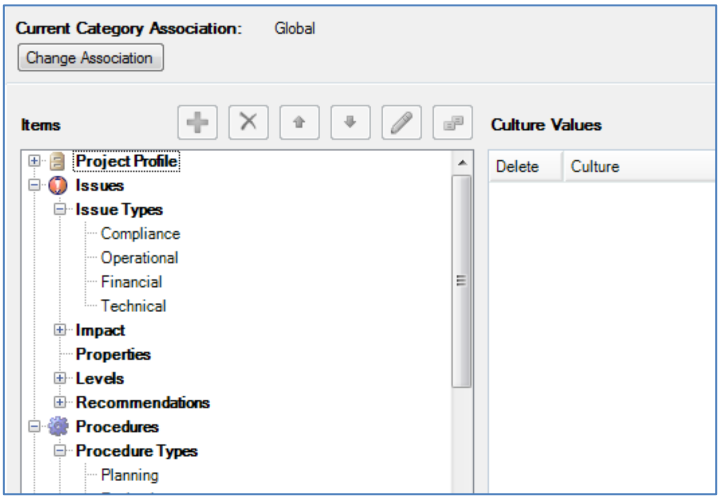
- Suite Setup should not be used normally as it concerns configuration details which are rarely changed. Of most importance is the **Basic Set up** section:



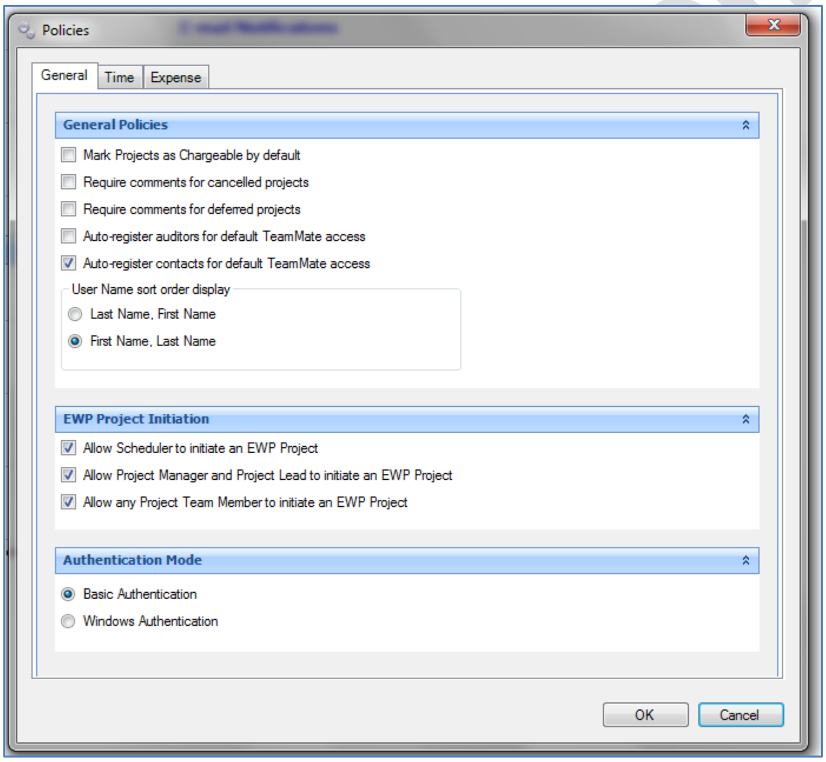
- **Manage Terminology**: enables you to turn on and off, and rename tabs which represent data fields in the system e.g.



- **Define Category Items**: enables you to define drop down lists of values to be selected for various data fields e.g.

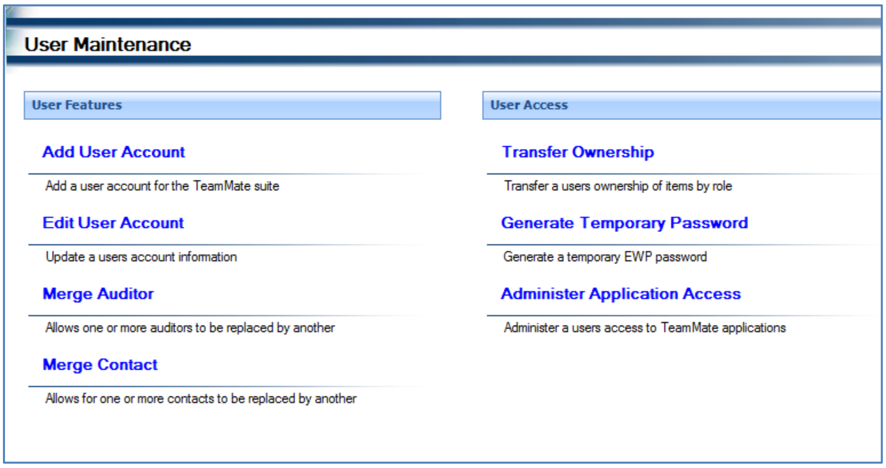


- **Manage Policies**: some general policies that are of no real interest.



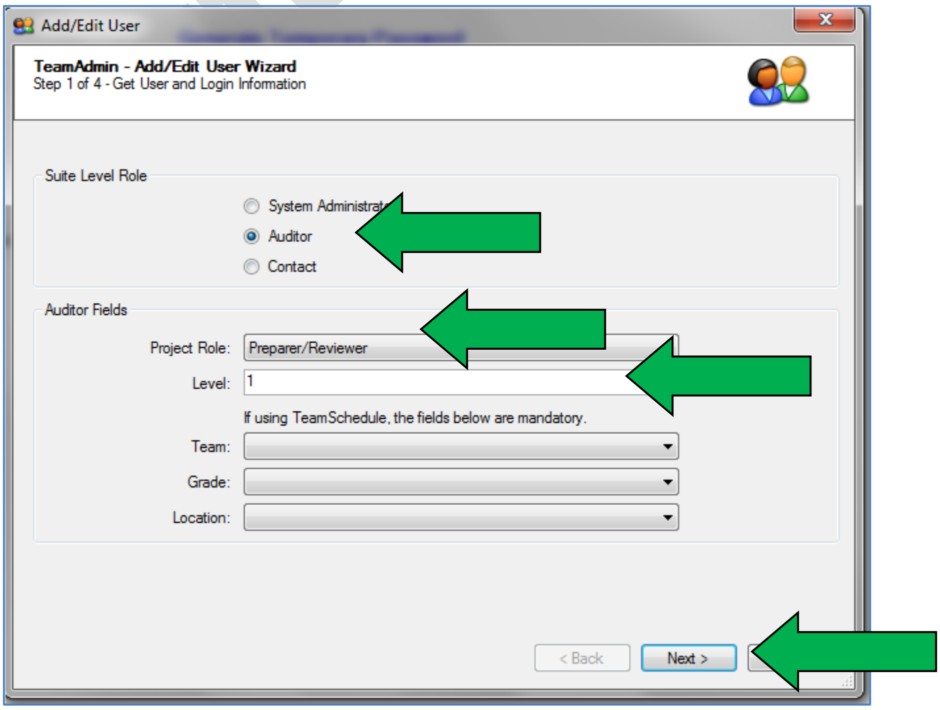
USER MAINTENANCE

- This is the main section that is used in TeamAdmin i.e. to **create new users** and **modify existing users**.

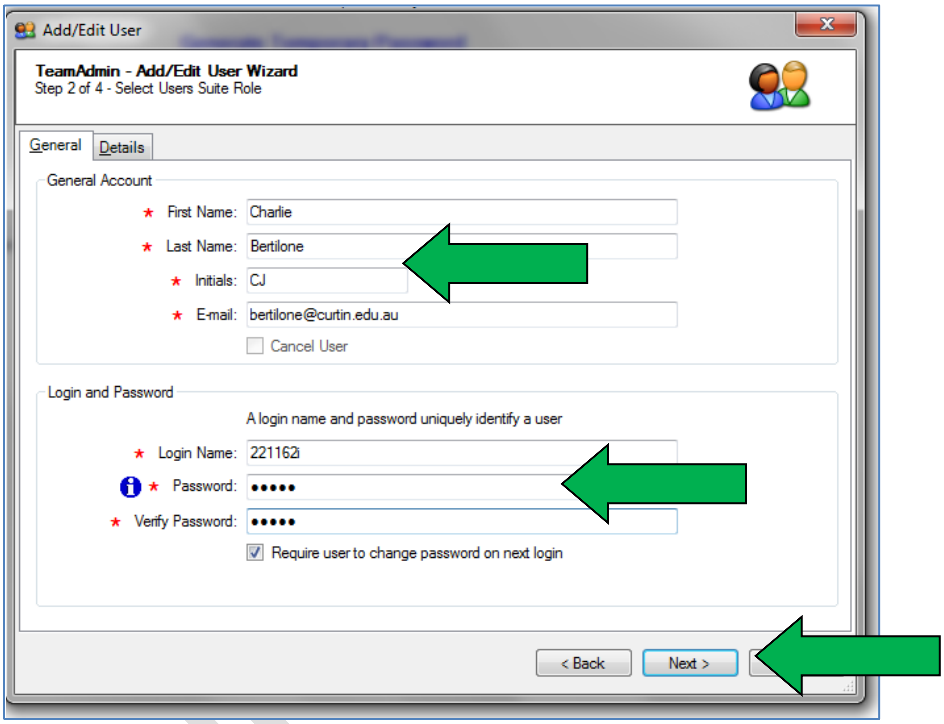


CREATE A NEW USER ACCOUNT

- Click on **Add User Account** (see above) and you will be taken to the **Add/Edit User Wizard** pane. Select the following:
  - **Suite Level Role** — For new auditors, choose **Auditor**. For new auditees, choose **Contact**.
  - **Project Role**: — For Senior Auditors, choose **Project Owner**. For Assistant Auditors, choose **Prepare/Reviewer**.
  - **Level**: — Levels are 1 to 99; the higher the level, the greater the authority. For all auditors, choose **1**. For the Director Internal Audit (if that officer also performs audits), choose **90**. For the special DIA logon (who reviews the work of the Director), choose **99**. Then click **NEXT**.

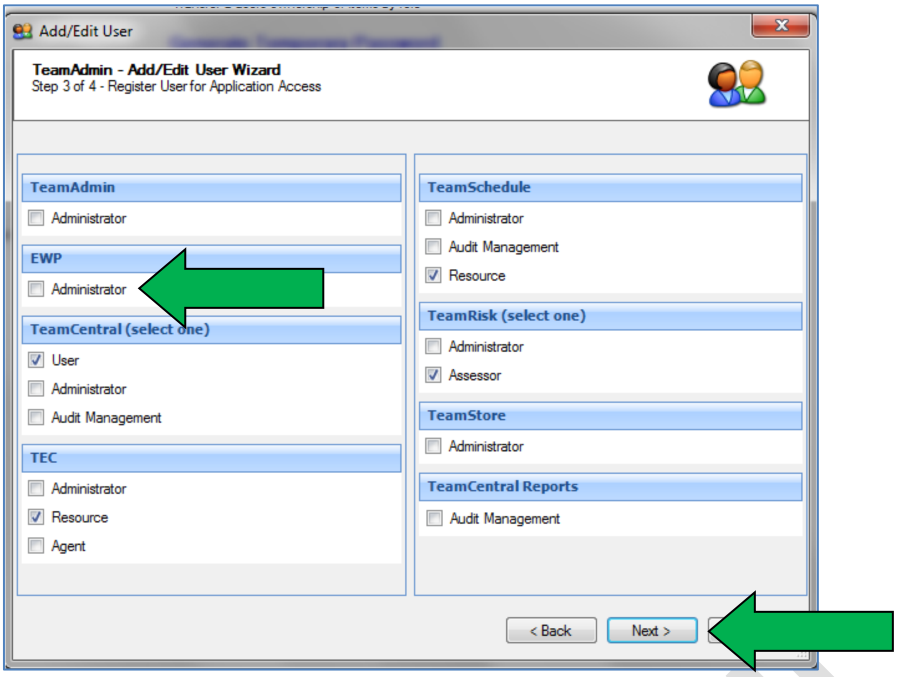


- On the next pane, enter:
    - **General Account**: **Name and details** of the new user.
    - **Login Name:** The **Staff Id** of the new users e.g. "221162i".
    - **Password:** A **temporary password**, and then repeat it in the **Verify Password** box.
    - **Change Password box:** Tick this box so that the first time the new user logins in, they will be forced to **change their password**. Then hit **Next**.



- On the next pane, enter the **level of access** required for the new user:

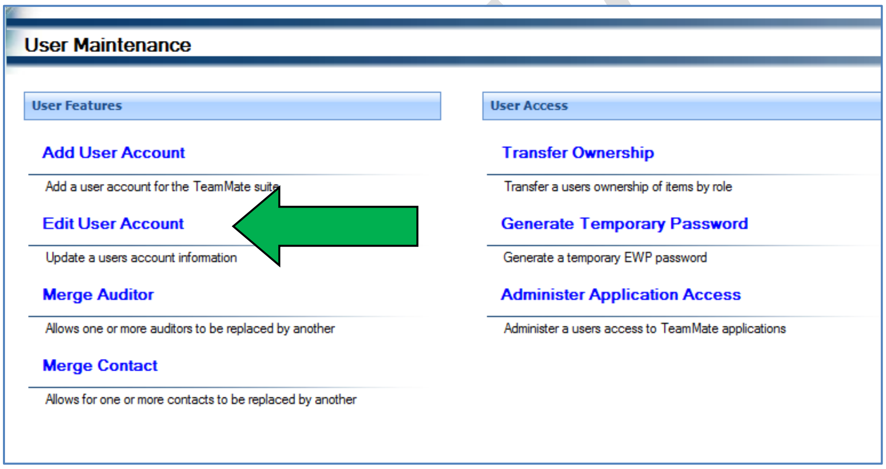
  NOTE: **Only tick the ADMIN boxes for new administrators**. Administrators are required for all modules except TeamCentral Reports. If unsure of what access to give to auditors, simply review another existing user's account first.



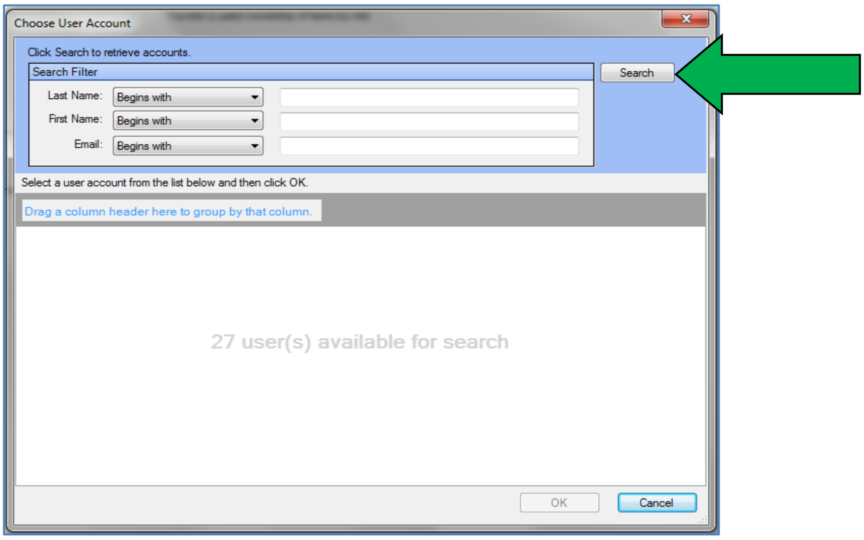
- When finished, click **Next**, and the user's account will be created.

EDIT A USER ACCOUNT

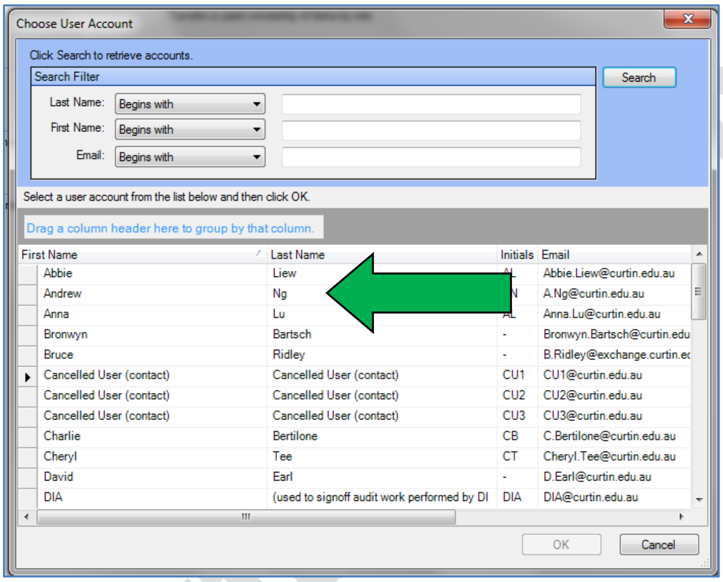
- To edit an existing user account, click on **Edit User Account**:



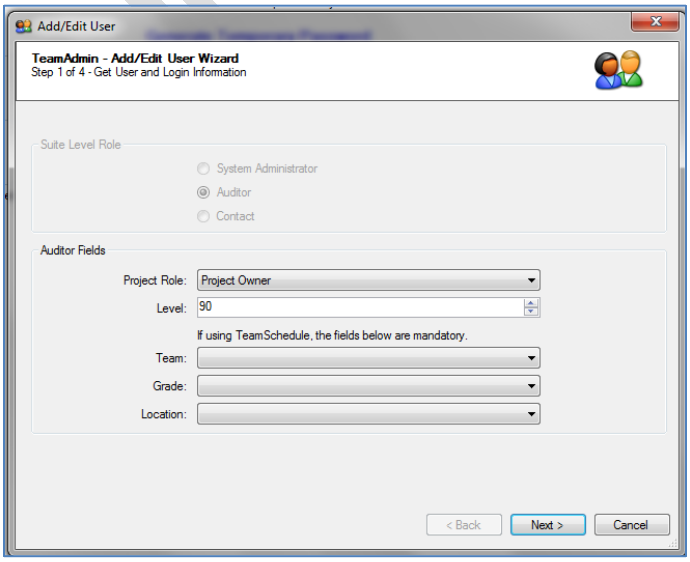
- You will be taken to the following screen. Then click on the **Search** button with blanks in all other fields:



- Choose the user account you wish to **modify**, then click **OK.**



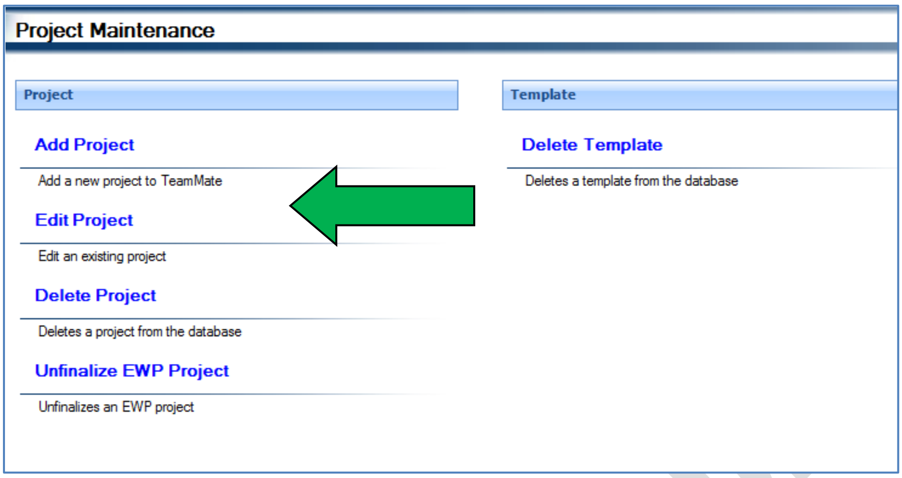
- This will take you to the **Add/Edit User** pane, from which you can them make your changes.



PROJECT MAINTENANCE

- The **Project Maintenance** screen is used to perform a variety of EWP audit project-related functions:

  NOTE: **Take care** when using this screen as you could delete entire audits from the database.



  - **Add or Edit a Project**: Add or Edit an audit project (though you will usually do this via the EWP module).

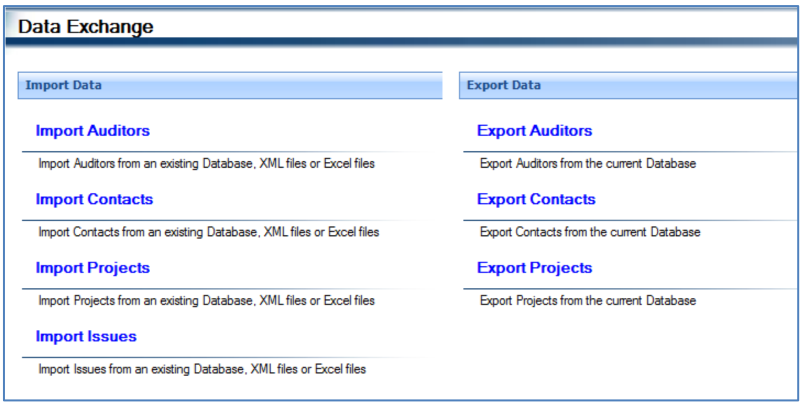
  - **Delete Project:** Delete an entire audit project **(USE WITH CAUTION)**.

  - **Unfinalize EWP Project**: Required only if an administrator has finalised/signed-off a completed audit project via EWP, but it then later needs to be unfinalised (for whatever valid reason).

  - **Delete Template**: Each audit project set up in EWP is based on a template stored in the system. Use this to delete any old versions of templates no longer in use **(USE WITH CAUTION).**

DATA EXCHANGE

- Normally not used:



TOOLS

- Not used: