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TeamMate+ 2.0

TeamMate+

Student Guide

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# Student Expectations

As a student, you will gain hands-on experience using the world’s leading audit management software. This experience working with information technology will make you more marketable regardless of the career path you choose. Your instructor will provide the URL for your institution’s hosted instance of TeamMate+. Your instructor will also provide you with the login credentials for the TeamMate+ website. All cases within the textbook are related. All information from the previous exercise should be used will be available. You should seek your instructor’s guidance before beginning any TeamMate coursework.

## Classroom Assignments

You will need to print the TeamMate Practice Case Workbook to view along with the case information found in selected chapters of the textbook. Each Practice Case Exercise includes detailed instructions requiring you to review subject matter from this guide.

The subjects within this guide are discussed with examples and are not intended to be re-performed.

## Ethics

It is imperative that you maintain a high standard of individual integrity in your scholastic work. Please refer to your institution’s academic honesty policy for more information.

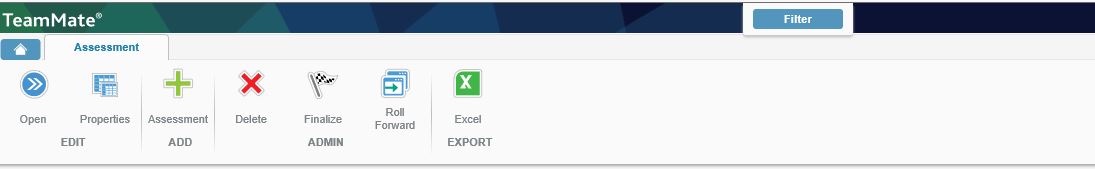
# Creating and Accessing Assessments

An Assessment allows you to define how the entities within your Primary and Secondary Dimensions relate to your known risks and controls. It then allows you to define and test your procedures and identify any issues. To get started, log in as the administrator (If using the sample Login: “admin”, Password: “password”).

To create and access assessments:

1. To access the Assessments, select  from the TeamMate+ home page.

Once you are in the Assessment landing page you can select an Assessment and perform various functions from the ribbon menu as follows:



**Open**: Allows you to open an existing Assessment by selecting the Assessment in the grid and then selecting this button.

**Properties**: Allows you to edit or view the Assessment Properties (only an Assessment Owner or Administrator can edit the properties of an Assessment).

**Add Assessment**: This allows you to create a New Assessment (only users in that are in the Administrator or Compliance Manager group have access to this).

**Delete**: Allows you to delete the selected assessment. Once deleted, the Assessment and any data added to it can’t be recovered.

**Finalize**: Will place the Assessment in Finalized state. This function is only available on an Open or Reopened Assessment.

**Roll Forward**: Allows you to roll a copy of the assessment forward.

**Excel Export**: Allows you to export a desired screen of data into an excel document.

1. Click on the **Add Assessment** icon  to create a new assessment.
2. Next, complete the Assessment Description with the following information:

**Title**: “2016 Financial Controls Assessment”

**Description**: “Assessment of the 2016 financial controls.”

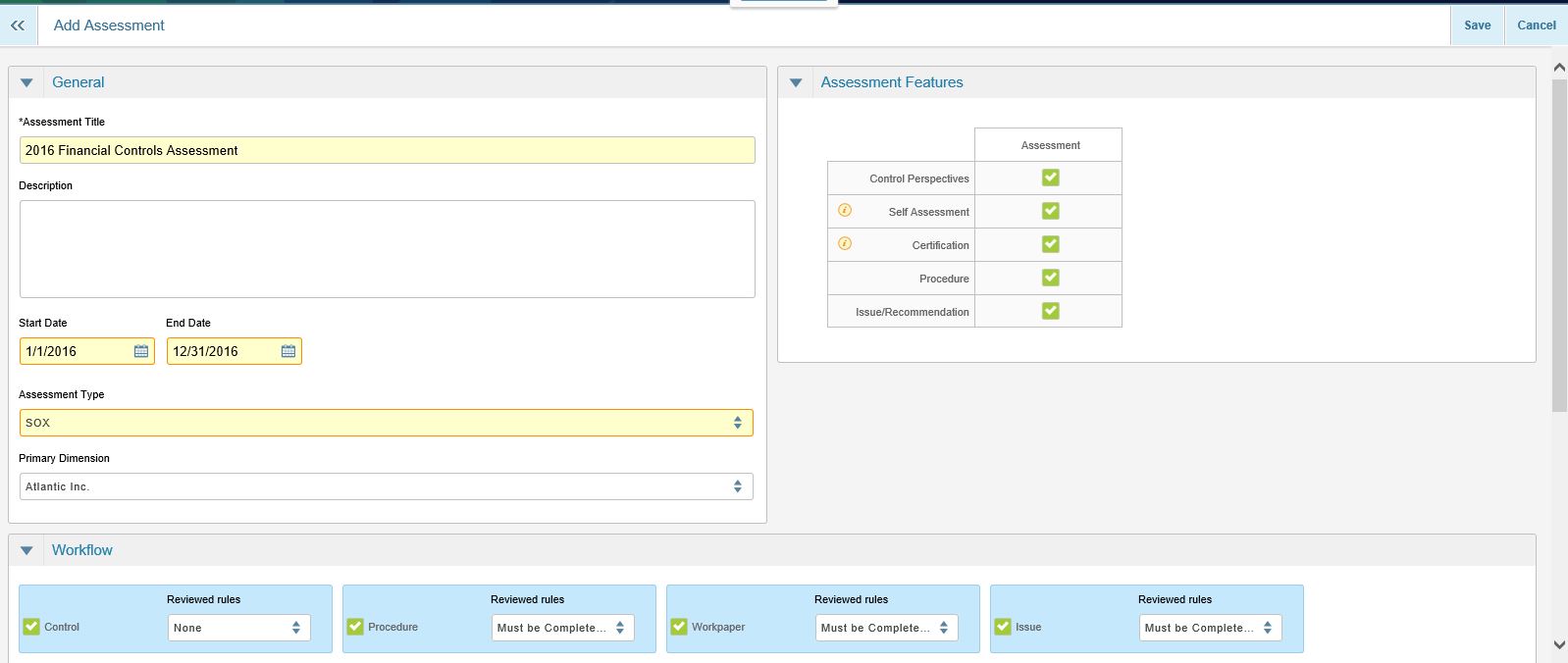
**Dates**: 1/1/16 - 12/31/16

**Type of Assessment**: SOX

**Primary Dimension**: You have the ability to select any of your dimensions as the primary dimension for an assessment.

1. For the Assignments option, click **GET**. The user selection side panel opens. Select Filter by Groups and select Observers and check the box next to the selected Observer. Select **Get**. He/She is added as an assessment observer. Select the X box to close the user selection box. Click **Save** in the top right corner.

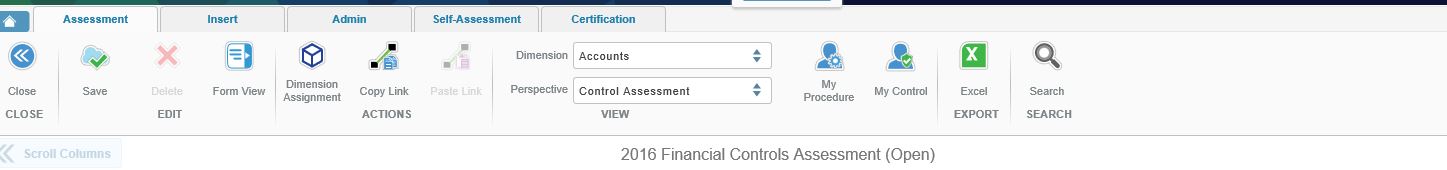
**NOTE:** Review the TeamMate+ Online Help ( icon in the top right corner of the application)to learn more about assessment groups and roles.



# Populating the Assessment

Once you are in the Assessment, you will see the live version of the Primary Dimension (in this case its the Organization Hierarchy). You can associate objectives, risks, controls, and test procedures to the entities by either adding new ones or getting existing ones from the TeamStore.

**NOTE**: You can ADD or GET items (Objectives, Risks, Controls and/or Procedures) in the Primary Dimension. Items added in the primary dimension can also be associated with secondary dimensions, and once associated the user can add or get items (Risks, controls, and procedures) from within the secondary dimensions.



**NAVIGATING TIPS:** To expand and collapse dimension entities, select the hierarchy icon  located to the left of each entity. To view the details of the objectives, risks, controls and/or procedures, simply select the title. Select the arrow located in the upper left corner to hide the details.

1. To start adding items to the assessment, select an entity in the Primary Dimension (TeamMate Hierarchy).

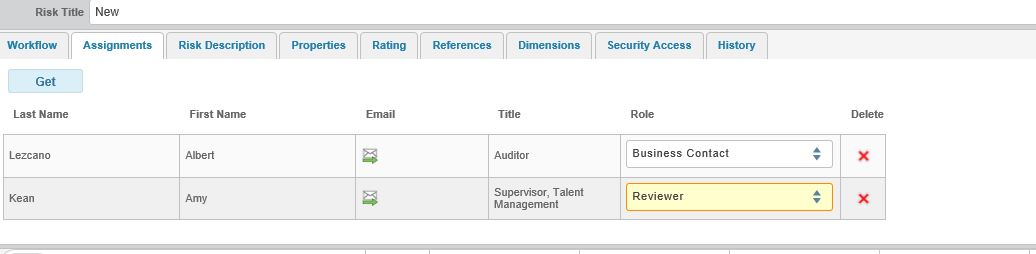
Objectives, risks, controls and procedures may be added to the assessment from the **Insert Ribbon**. Users may also get these items from the TeamStore by selecting the Get tab. It is not required to populate each entity in the assessment with objectives, risks, controls and procedures; you may choose to bring in only some, or all. For purposes of this exercise, we will add a risk, a control and a procedure to an entity.



1. Select an entity from the primary dimension listing and choose  to add a risk from the **Insert Ribbon** Add tab. Title the risk “Inaccurate sales tax calculation”.

* On the properties tab select the Risk Category as “Financial.”
* Assign a Business Contact within Assessment tab by selecting the  icon. Select the checkbox next to his/her name and click Get.
* Assign a Reviewer within Workflow tab by selecting the  icon. Select the checkbox next to his/her name and click Get.

**TIP:** Utilize the Search fields and/or Group filters to locate the users you wish to assign.



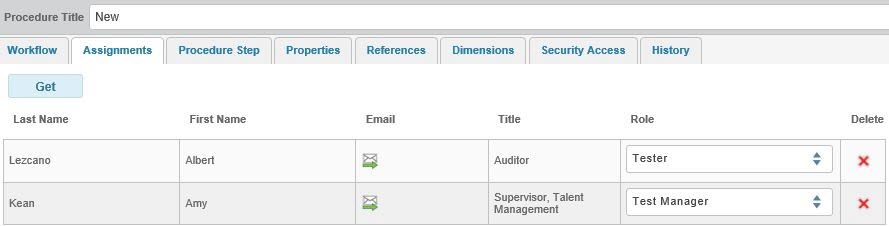
1. Next, with the risk selected, select  to add a new control from the **Insert Ribbon** Add tab. Title the control “Systemic recalculation”.

* On the properties tab select the Control Category as “Financial.” Check the box for Key Control and select “Q1” from the Self-Assessment (SA) Quarter drop down options.
* Assign a Business Contact and Business Reviewer within the Assessment tab by selecting the  icon. . Check the box next to the business contact and click **Get** to add him/her as the Business Contact. Repeat this process to get a Business Reviewer.



1. With the control selected, click to add a new procedure from the **Insert Ribbon** Add tab. Title the procedure “Verify the system recalculation is accurate”.

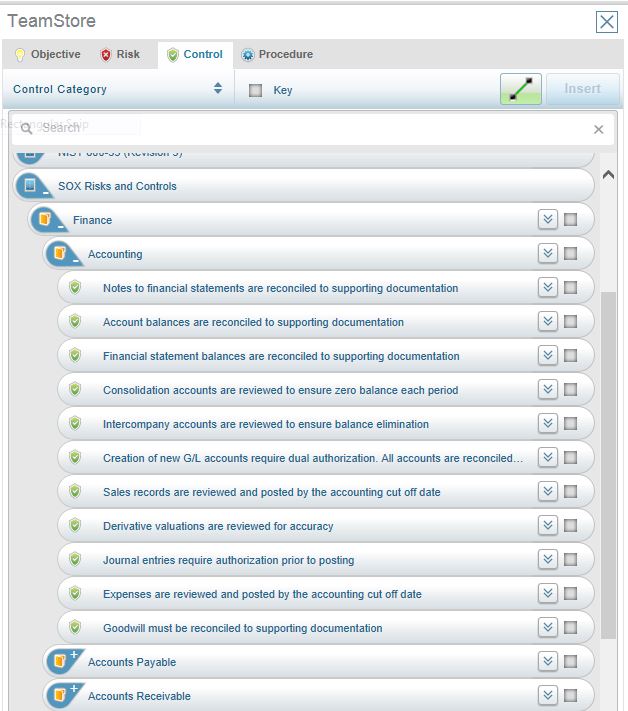
* On the properties tab select the type “Observation/Walk Through.”
* Assign a Tester and Test Reviewer within the Workflow tab by selecting the  icon. Check the box next to the tester and click **Get** to add him/her as the Tester. Repeat this process to get a Test Reviewer. Select a Due Date (optional).



**TIP:** Selecting the Form View icon  located in the Assessment or Insert ribbons will allow the contents of an object to be seen in an expanded view.

Objectives, Risks, Controls and Procedures may also be available within your TeamStore and brought into the assessment from the **Insert Ribbon** Get tab. The TeamMate+ Champion may have linked objectives to risks, risks to controls and controls to procedures within the TeamStore. For this exercise we will show how linking within the TeamStore can automatically add testing procedures to the assessment.

1. Select an entity from the Organization Hierarchy and select **Get Control** from the **Insert Ribbon** Get tab. In the side panel, (if using the sample) browse to SOX Risks and Controls>Finance>Tax and check the box next to the control titled “Tax returns are verified by the controller’s office prior to filling.” Select **Insert**.



Notice that the assessment is automatically populated with the risk and procedure that had previously been linked in the TeamStore. Select the X button in the top of the TeamStore Get window to close the TeamStore.

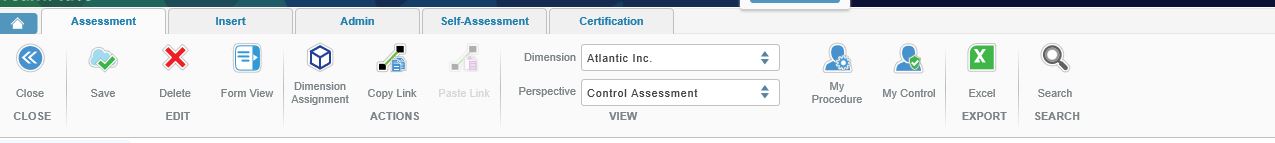
**TIPS:** If you do not want to bring in the linked TeamStore items, simply deselect the Get with Linked Items icon located in the upper right corner of the TeamStore window before selecting Insert.

1. Assign a Business Contact and Business Reviewer within the Assignments tab by selecting the icon. Check the box next to the business contact and click **Get** to add him/her as the Business Contact. Repeat this process to get a Business Reviewer.
2. Assign a Tester and Test Reviewer within the Assignments tab by selecting the Get User icon. Check the box next to the tester and click **Get** to add him/her as the Tester. Repeat this process to get a Test Reviewer. Select a Due Date (optional).

Now that the assessment has risks, controls, and test procedures, the next step is to assign the risks and controls to any applicable secondary dimensions.

# Dimension Assignments

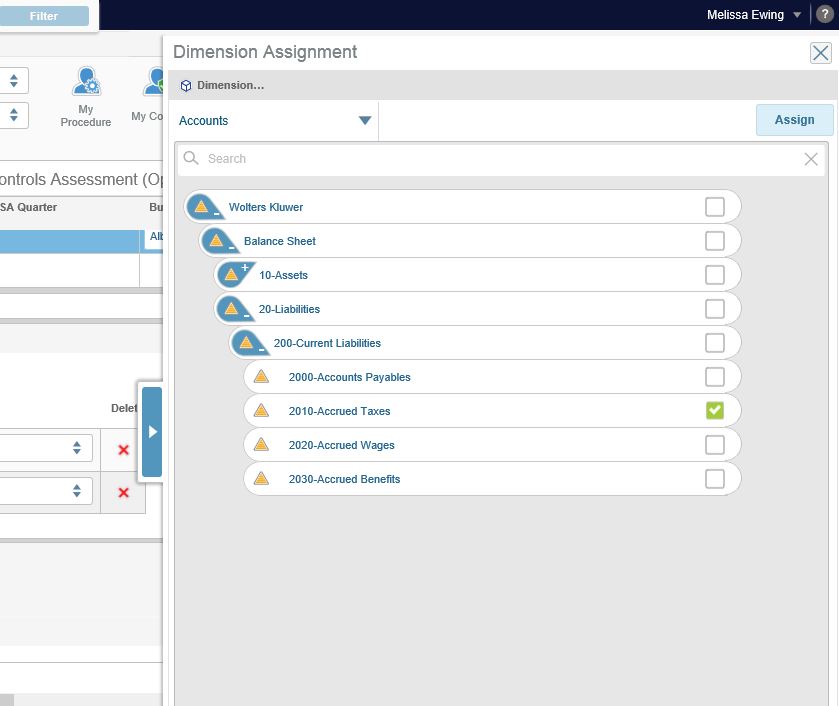
TeamMate+ allows you to assign a risk or control to a single entity or to multiple entities through the use of dimensions.



The next exercise will continue to use the ribbon menu above, but will focus on the Dimension Assignment functions.

To assign a risk to a secondary dimension:

1. Select the “Inaccurate sales tax calculation” risk from the previous exercise, and click the **Dimension Assignment**  button.
2. The Dimension Assignment panel will slide out from the right. If you are using the sample, there are several secondary dimensions to choose from. Pick the Accounts dimension, check the box next to the entity “2010 – Accrued Taxes” and click **Save**.



Notice that once the dimension assignment panel is open, it does not need to be closed to assign additional risks or controls to entities within the secondary dimensions. To view all existing dimension assignments, select the “Dimension Assignment” tab on the risk or control.

**TIPS:** Child or dependent risks or controls will inherit the assignments so there is no need to assign both to the same dimension entity. However, child items can have different assignments if necessary.

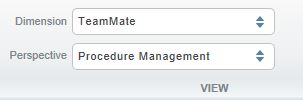
1. With the Dimension Assignment panel still open, select the control “Tax returns are verified by the controller's office prior to filing” from the previous exercise, and assign it to Account “2390 - Income Tax Payable.”

**TIP:** To remove dimension assignments - select the risk or control, select Dimension Assignment and uncheck the dimension. Select **Save**.

# Procedure Testing

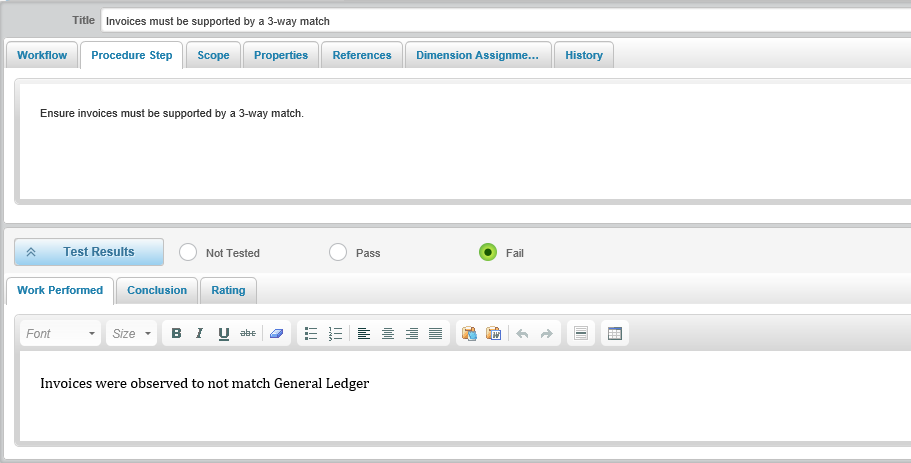
With procedure testing, **Testers** and **Test Reviewers** can access the procedures by drilling down in the Organization Hierarchy from the Control Assessment Perspective; however, to make testing simpler we have a procedure-specific perspective.

1. Since we are moving from control self-assessment to procedure testing, log into the assessment as our tester (if working in the Sample Login: Last Name, Password: “password”). Select **Assessment** from the Home page. Open the “2016 Financial Control Assessment” and from the **Assessment Ribbon**, change the Perspective to **Procedure Management**. Or, simply select **My Procedures**.



Like we saw before with the controls, the procedures are now listed without the Organization Hierarchy. From the top view, we can view and sort based on Tester, Due Date, and Test Reviewer, as well as other fields.

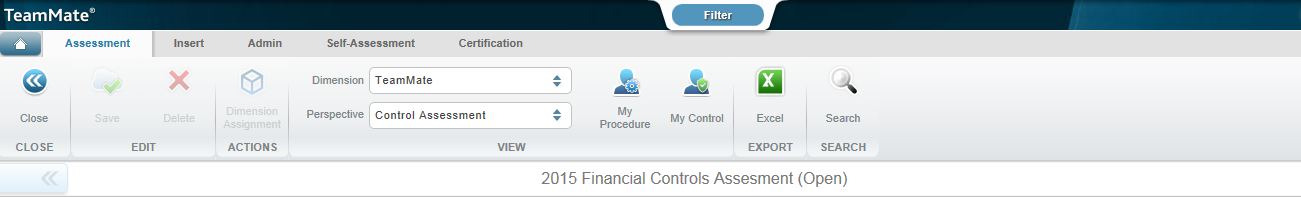
1. Select the procedure titled “Invoices must be supported to a 3 way match” to open the procedure details. Click on the **Maximize** button  to expand the procedure detail to full page. Here you see the Control and Procedure details. The procedure detail panel is broken up into two panels. The top area contains data about the overall test strategy while the bottom area is reserved for test results information. The tester has the ability to edit any of the fields within the procedure.
2. In the Work Performed for this procedure, type “Invoices were observed to not match General Ledger”, and mark the test result as “Fail”.



# Work Papers

By adding file attachments to work papers, you now have a more robust document management function. Work papers allow documents to track their own properties and assignments, they can go through their own workflow cycle, and you can even manage work papers at the entity level of each Assessment.

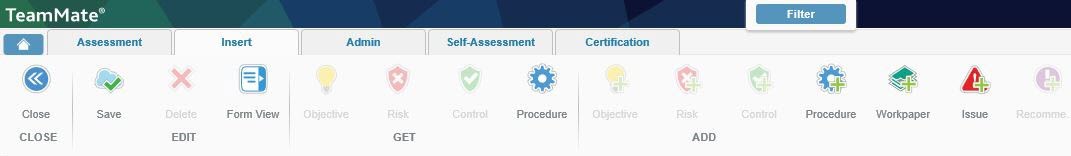
**NOTE:** You can ADD Work papers in Primary or Secondary Dimensions.



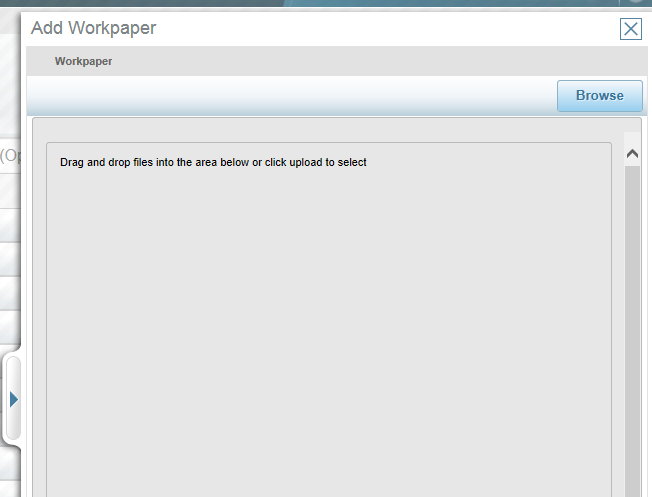
**NAVIGATING TIPS:** To expand and collapse dimension entities, select the hierarchy icon  located to the left of each entity. To view the details of the objectives, risks, controls and/or procedures, simply select the arrow to the right of the title.

1. To start adding work papers to the assessment, select an entity, objective, risk, control or test procedure in the Primary Dimension to associate with (TeamMate Hierarchy).

Work papers can be added to the assessment from the **Insert Ribbon**. For purposes of this exercise, we will add a work paper to a test procedure.



1. Choose  to add a work paper from the **Insert Ribbon** Add tab.

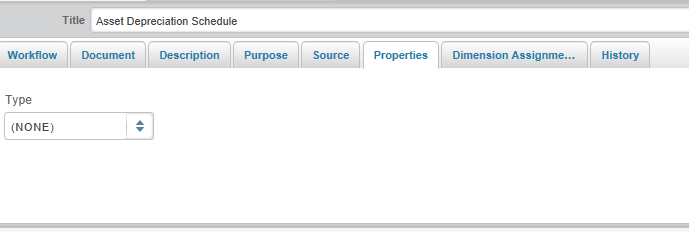


Assign a Manager and Reviewer within Assignments tab by selecting the  icon. Select the checkbox next to the name of the manager and click **Get**. Repeat this process to add a Reviewer.

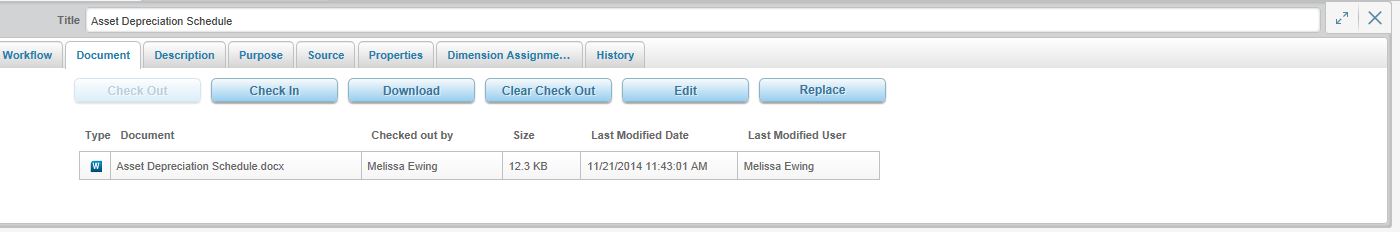
**TIP:** Utilize the Search fields and/or Group filters to locate the users you wish to assign.



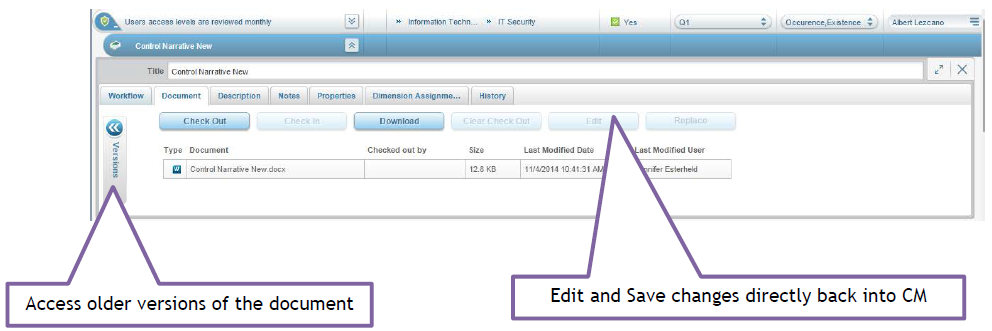
Work paper attributes can be documented by selecting one of the following tabs: Description, Purpose, Scope, Source or Properties. For this exercise, choose a type from the properties field.



1. Within the Documenttab you can administer changes to the work paper. These changes include the ability to “Check Out” documents so others cannot edit them at the same time. Select the document you have attached in step one and choose the “**Check Out**” icon.



1. Click **Check In** to create a new/updated version of the document. Old versions of the document are saved and can always be referenced within the Assessment. By clicking on versions.



1. Select the “update status” icon on the **Workflow Tab** and select **Completed** check box from the **Update Workflow State** panel. In the comments box, document that the work has been completed. Select **Update State**.

# Hyperlinking

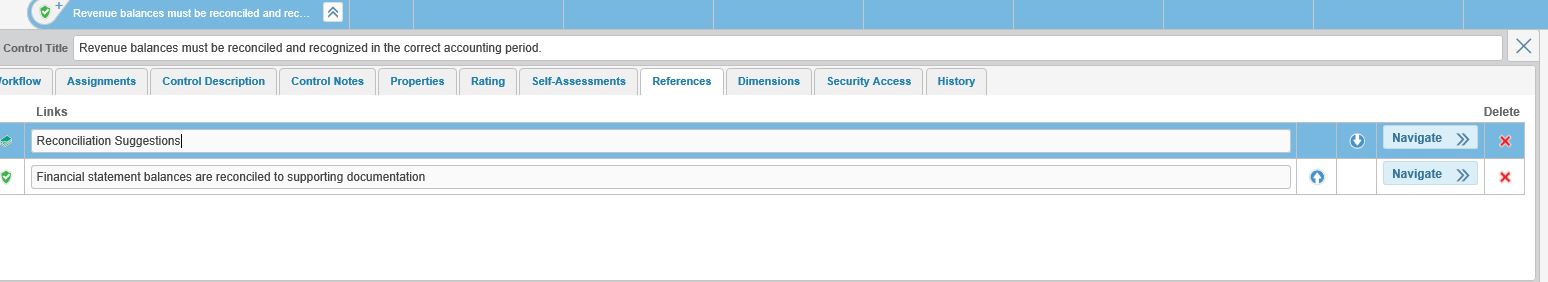
Hyperlinks, also known as object-to-object references, refer to the ability to hyperlink between objects (Objectives, Risks, Controls, Procedures, or Workpapers) within an assessment. This allows you to navigate between two objects by simply clicking on the hyperlink. This powerful feature is useful, for example, for linking different areas within the assessment.

To create a hyperlink:

1. Select the object where you wish to begin the hyperlink.

Select the  **Copy Hyperlink** button in the **Assessment** Ribbon or if in a work paper, the **TeamMate** Ribbon.

1. Select the object (Objective, Risk, Control, Procedure, or Workpaper) you wish to link to.
2. From the **Assessment** Ribbon select  **Paste Hyperlink** button**.**
3. This inserts a hyperlink allowing the user to navigate to and from the two objects within the Assessment.



# Documenting Issues

Since the test failed, you need to document an Issue. An Issue can be created on a Risk, Control, or Procedure within TeamMate+.

1. To create an issue, select the Procedure that failed, and click the **Add Issue**  icon from the **Insert Ribbon**.

The Issue/Recommendation form will be displayed allowing you to create one or more Issues on the parent item selected in the Assessment. One Recommendation will automatically be created, but more recommendations can be added using the **Add Recommendation** icon. More Issues can be added to the same item by selecting **Save and New** in the upper right corner. You can see the item that the issue relates to by clicking on the expander arrow on the top right corner.

1. For this example, type in the following information.

**Issue Title**: Lack of Review

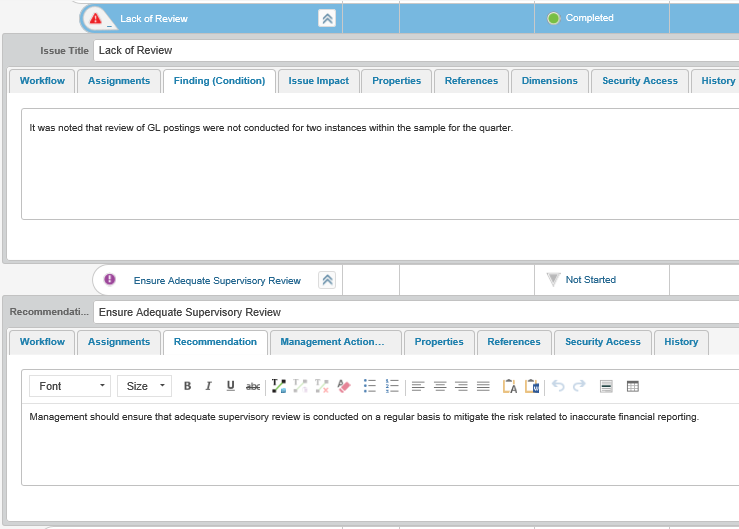
**Finding**: We noted that review of GL postings were not conducted for two instances within the sample for the quarter.

**Recommendation Title**: Ensure adequate supervisory review

**Priority**: High

**Recommendation**: Management should ensure that adequate supervisory review is conducted on a regular basis to mitigate the risk related to inaccurate financial reporting.

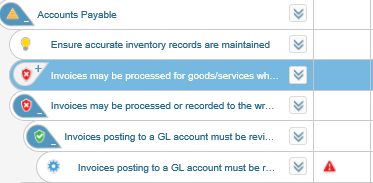
**Recommendation Due Date**: 3/31/18



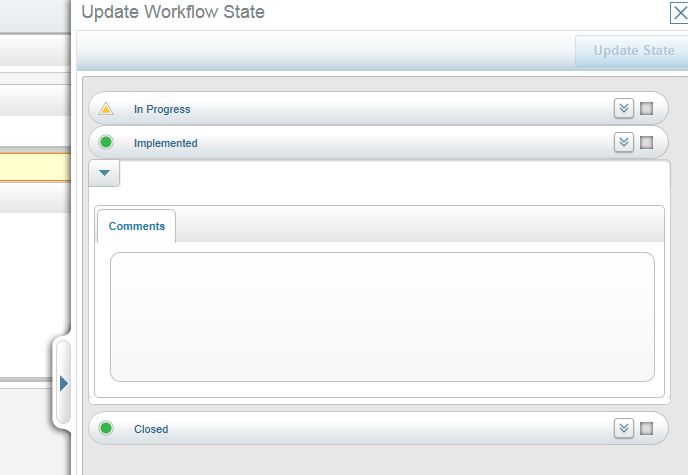
**NOTE:** The recommendation owner will be automatically assigned to the Business Contact responsible for that control linked to the procedure where the issue was noted. The due date within the recommendation workflow tab is set to the control due date and may need to be changed.

1. Once completed, click the Release button in the Issue Workflow tab to make the Issue available for follow up action in Issue Tracking. If Email notifications are enabled for the Issue Released template, an email will be sent to the Recommendation contacts and Issue owners if they are selected as recipients in the email template.

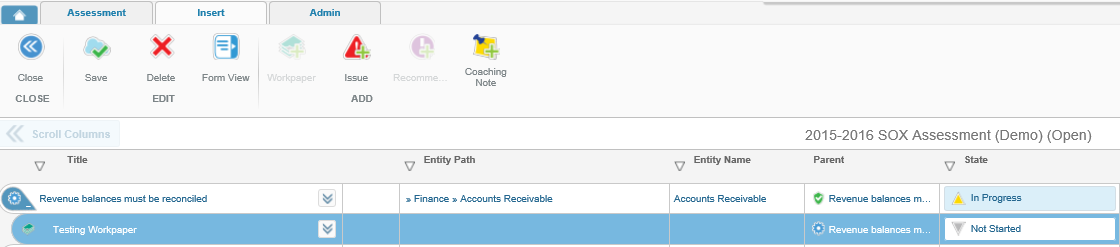
The Issue Owner default is the user creating the Issue, usually a compliance user, but a Business Contact can create an Issue as well within an assessment. The default Recommendation Business Contact is the business contact specified on the risk or control, or the parent control when the issue is created on a procedure. The Issue Owner and Recommendation Contact can be changed at any time if the user has the permissions to do so. When the Issue is saved, an indicator will appear on the item showing that an Issue has been created. Clicking on the Issue indicator will open the Issue/Recommendation form for editing.



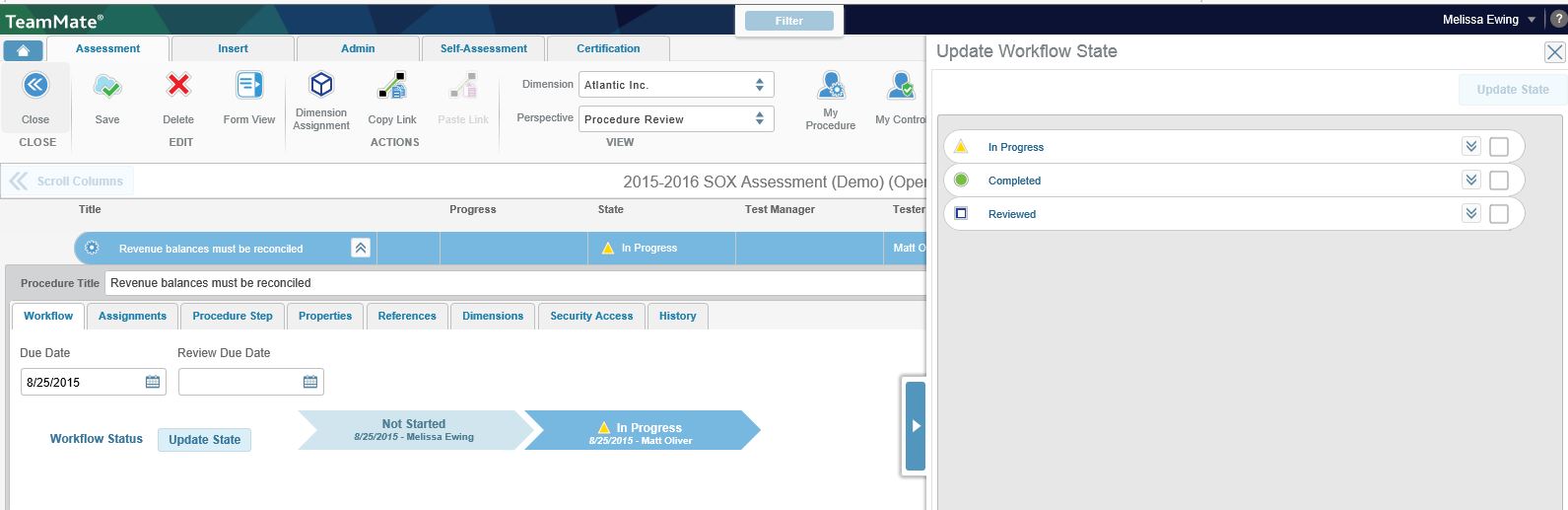
1. Once the procedure testing is complete, the Tester marks the procedure as **Complete** within the **Procedure Workflow** tab. The Procedure Progress is updated and the review option becomes available. If enable, a notification will be sent out to the Test Reviewer. They can then login to TeamMate+ and select their procedure to review. Multiple test reviewers are allowed as long as they are setup at the entity level. All reviews are viewable in the History tab.



1. Log out again, and log back in as Test Reviewer (If using the sample Login: Last Name, Password: “password”). Select Assessment from the Home page. Open the “2015 Financial Control Assessment.” Select **Procedure Management** perspective or select **My Procedures** from the **Assessment Ribbon**. Sort the column **Completed** to see those that have been marked as completed and ready for review. Expand the procedure detail by selecting the arrow  icon to the left of the procedure title.



1. Select the procedure title to open the procedure detail. Review the Tester’s work and select the **Review** icon within the procedure workflow.



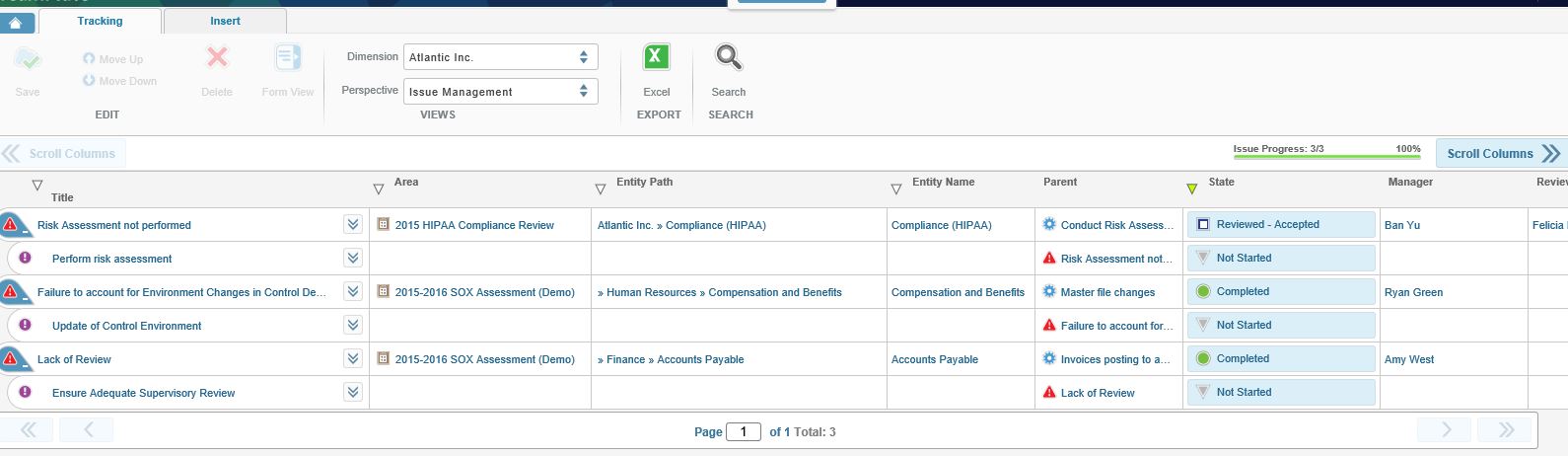
# Issue Management and Tracking

Once the issue was release by the tester in the previous exercise, an email notification, if enabled, would be sent to the Business Contact. The Business Contact assigned to the Recommendation is responsible for filling in responses, updating action text and/or adding attachments to document the work done to complete the Recommendation.

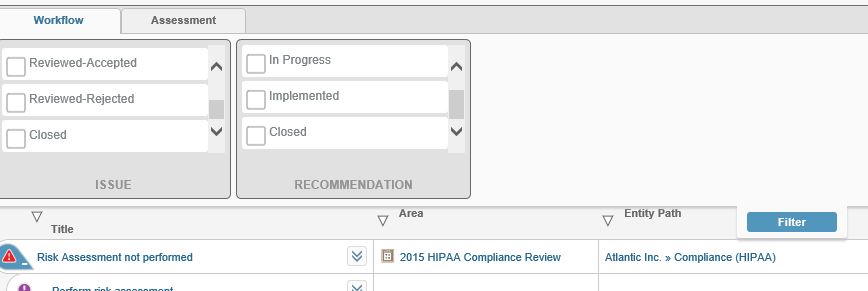
**NOTE:** The Assessment Owner is responsible for overseeing all of the information contained in the assessment. The assessment owner can change issue owners, recommendation contacts and other important information as needed. Additional recommendations may be added as well. Review the TeamMate+ Online Help to learn more about assessment groups and roles.

1. Login to TeamMate+ as the Business Contact (if using the sample, login: Last Name, password: “password”), and select **Issue Tracking** from the Home page. All Issues and Recommendations across Assessments are displayed in the Issue Tracking Module. However, the Issues and Recommendation shown are only those that the user has permissions to view.

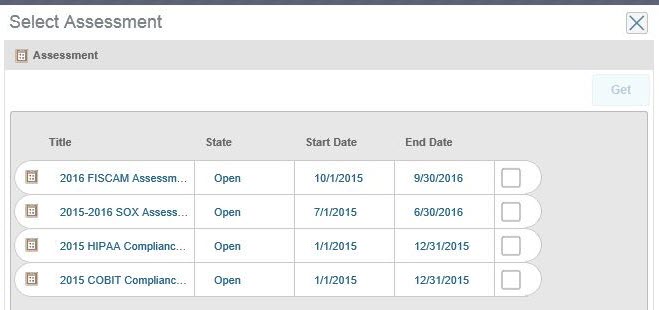
The Issue Tracking module will initially display the Issue Management perspective. Each Issue will be displayed with the corresponding Recommendations beneath.



1. Click on the Assessment Filter to make sure the example assessment is selected.

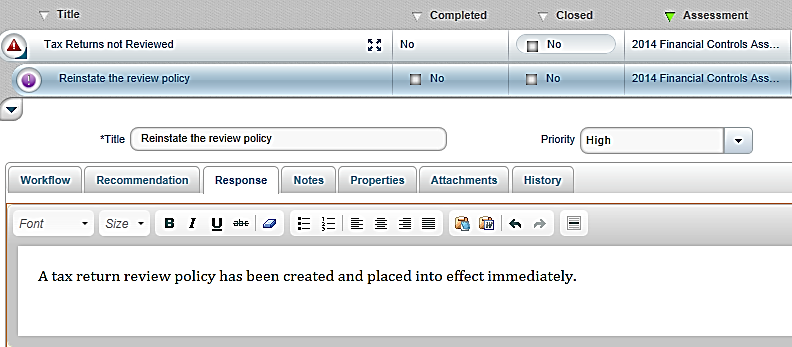


1. Check the box next to the assessment you want to see and click save.

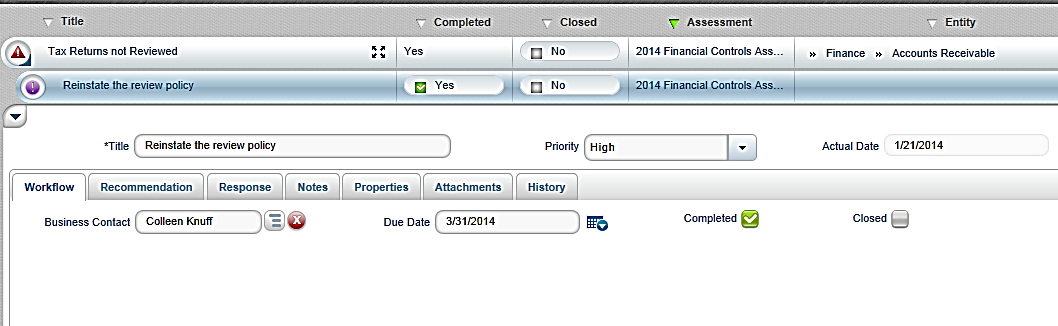


The Business Contacts have the responsibility to complete the recommendations.

1. Find the “Tax Returns not Reviewed” issue, and select the Recommendation title to open the recommendation detail. Enter in the following response “A tax return review policy has been created and placed into effect immediately” in the **Response** tab. The business contact may also utilize the **Attachments** tab within the recommendation to attach the corresponding documentation.



1. Once the recommendation and response has been completed, select **Completed** within the Recommendation Workflow tab.

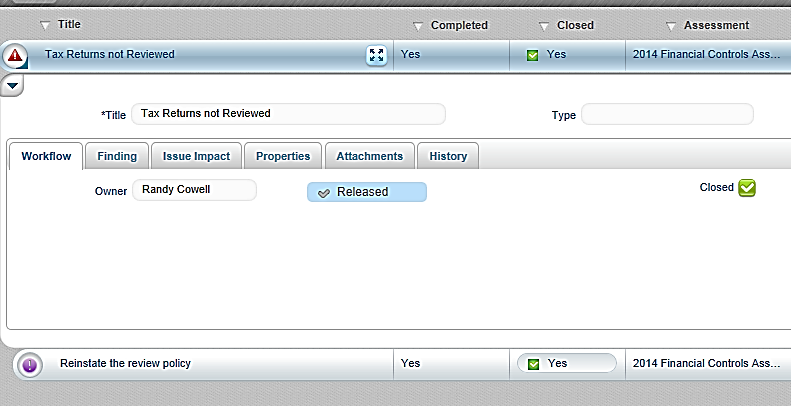


Once the last recommendation has been marked complete, the issue is then marked as complete. An email notification, if enabled, will be sent to the issue owner letting them know the issue is ready to be reviewed and closed.

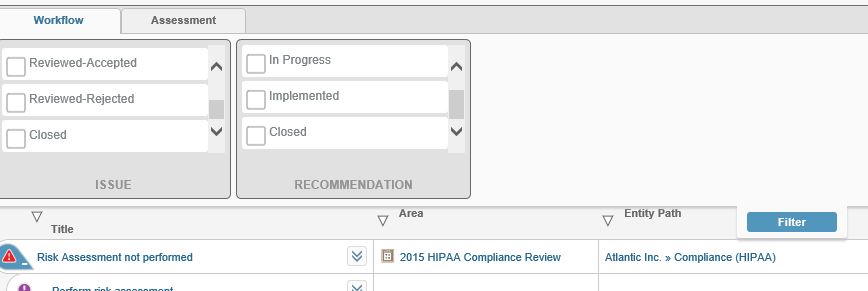
1. Login to TeamMate+ as the Tester/Issue Owner, (if using the sample login: Last Name, password: “password”), and select **Issue Tracking** from the Home page. All Issues and Recommendations across Assessments are displayed in the Issue Tracking Module. However, the Issues and Recommendation shown are only those that the user has permissions to view.

**NOTE:** The issue owner is the original creator of the issue; however, the issue owner can be changed as long as the issue is not closed.

1. Review the issue and recommendation response and/or attachments documented by the business contact. Select **Closed** from the Issue Workflow tab.



When an Issue is closed, all of its underlying Recommendations are closed. The Issue and Recommendation become read-only when they are closed, and can no longer be edited. Closed Issues and Recommendations can be filtered from the View. Issues and recommendations can also be exported to excel.



A few best practice notes:

* An Issue or Recommendation can be Re-Opened if the user permission allows this action. To cancel the Close action, uncheck the Closed button. If an Issue is re-opened, its underlying Recommendations will remain closed. If a Recommendation is re-opened, the Issue will automatically be re-opened.
* If an Issue has more than one recommendation, the order in which they appear under the Issue can be changed by selecting a recommendation row and using the move up/move down buttons in the ribbon.
* An Issue or Recommendation can be deleted if the user permissions allow this action. This action cannot be undone.
* There are four email templates/triggers available for Issue Tracking that can be enabled to facilitate the Issue Tracking workflow.
  + Issue Released
  + Issue Completed
  + Recommendation Due Soon
  + Recommendation Overdue

# TeamStore

|  |  |
| --- | --- |
|  | TeamStore is a knowledge base used to assist in Assessments and individual audit projects. It contains cabinets which house Objectives, Controls, Risks and Procedures used throughout an organization. When preparing an Assessment the items stored in the TeamStore library can be used instead of creating new items for every assessment. Their usage can then be tracked in Reports that display where TeamStore items have been used in an Assessment.  Only Administrators or Compliance Managers user roles can access and manage the TeamStore. The TeamMate+ Home Page will only display the TeamStore icon to users that belong to these two roles. To get started, log in as the administrator (If using the sample Login: “admin”, Password: “password”) since she is an Administrator.  TeamStore Views: There are four Views available in TeamStore that correspond to the item types contained in the TeamStore: Objective View, Risk View, Control View, and the Procedure View. |

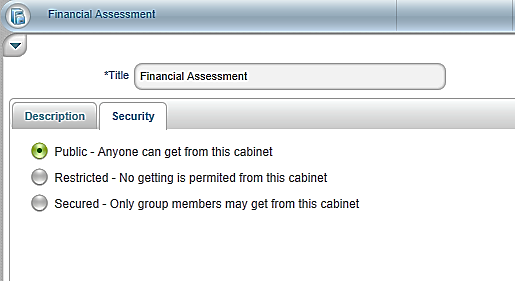
1. Simply click on the icon in the ribbon to change the view. We will start with the Control view. Switch to the Control View by using the Control View button on the ribbon.



Each View displays Cabinets at the topmost level of the TeamStore tree hierarchy.

1. To add a cabinet, simply select a cabinet row and click on the **Add Cabinet** icon in the **TeamStore Ribbon**. Title the cabinet “Financial Assessment”. You can type in the Title of the cabinet, optional author field, and a short description. Select the title to save.

The security tab determines how the cabinet can be shared in Assessments. The available options are:



* Public: Any user can get items from this cabinet in an Assessment.
* Restricted: Users cannot get items from this cabinet, and it will be hidden in all Assessments when Get is performed for the item type (Objective, Risk, Control, Procedure).
* Secured: Allows only certain User groups to get items from this cabinet. The pre-defined user groups are: Compliance Managers, Compliance Users, Testers, Observers, Business Contacts. One or more of these groups can be selected for cabinet use in an Assessment. If the user is not a member of the Secured group, the cabinet will not be displayed when Get is performed from within an Assessment.

### Objectives, Risks and Controls

Folders are used in TeamStore to organize the data within cabinets. Folders can contain subfolders or items. We will now create a folder for each view within the Financial Assessment Cabinet.

1. Switch to the Objective View by selecting **Objective** from the **TeamStore Ribbon**. To create a Folder, select the cabinet we just created and click on the **Add Folder** icon in the **TeamStore Ribbon**. Title the folder “Financial Reporting”. Repeat this step for the Risk View and Control View.

**NOTE:** If a folder contains items, a subfolder can no longer be created in the folder.

1. To add an Objective, select the **Objective** View from the **TeamStore Ribbon**. Expand the Financial Assessment cabinet by selecting the cabinet icon  located to the left of the cabinet title. Select the Financial Reporting folder within the Financial Assessment cabinet. Select the **Add Objective** icon located on the **TeamStore Ribbon**. Title the objective “All activities are to be performed efficiently and effectively.” Select the objective title to save.
2. To add a Risk, select the **Risk** View from the **TeamStore Ribbon**. Expand the Financial Assessment cabinet by selecting the cabinet icon  located to the left of the cabinet title. Select the Financial Reporting folder within the Financial Assessment cabinet. Select the **Add Risk** icon located on the **TeamStore Ribbon**. Title the risk “Notes to financial statements may not be properly stated.” Select the risk title to save.
3. To add a Control, select the **Control** View from the **TeamStore Ribbon**. Expand the Financial Assessment cabinet by selecting the cabinet icon  located to the left of the cabinet title. Select the Financial Reporting folder within the Financial Assessment cabinet. Select the **Add Control** icon located on the **TeamStore Ribbon**. Title the control “Notes to financial statements are reconciled to supporting documentation.” Select the control title to save.

### Procedures

Now we need to create a Cabinet and folder in the Procedure view. Procedures can only be added to folders, and not directly to cabinets. Switch to the Procedure View by selecting **Procedure** from the **TeamStore Ribbon**.

1. To add a cabinet, simply select a cabinet row and click on the **Add Cabinet** icon in the **TeamStore Ribbon**. Title the cabinet “Financial Assessment”. You can type in the Title of the cabinet, optional author field, and a short description. Select the title to save.
2. To create a Folder, select the cabinet we just created and click on the **Add Folder** icon in the **TeamStore Ribbon**. Title the folder “Financial Reporting”.
3. To add a Procedure, expand the Financial Assessment cabinet by selecting the cabinet icon  located to the left of the cabinet title. Select the Financial Reporting folder within the Financial Assessment cabinet. Select the **Add Procedure** icon located on the **TeamStore Ribbon**. Title the procedure “Notes to financial statements” and type in the description “Ensure notes to financial statements are reconciled to supporting documentation.´ Select the procedure title to save.

### Linking Objectives, Risks, Controls and Procedures

Items in TeamStore can be linked together to assist in getting related items when getting items in an Assessment. For example, if a risk is linked to a control, when a user in an Assessment does a GET of that risk, the related control will automatically come in as a child of the risk.

1. Select the procedure we created in the previous step. Select the **Link** icon from the **TeamStore Ribbon**. The TeamStore linking window opens from the right. Select the **Control** icon. Navigate to the Financial Assessment Cabinet and select the Financial Reporting folder. Place a check next to the control. Select **Link**.

**NOTE:** Linking can be done from Procedure to Risks and/or Controls. Only objectives can be linked to risks.

### Unapproved Cabinet

When a new Objective, Risk, Control or Procedure is created in an Assessment, it is automatically created in TeamStore in the Unapproved Cabinet (also known as Holding cabinet in AM TeamMate). A folder is created in the Unapproved Cabinet with the same name as the Assessment in which the item was created. These items remain in the Unapproved cabinet until an Administrator or Compliance Manager approves the item and moves it to a standard TeamStore cabinet.

*Refer to the TeamMate+ Online Help for more information on the TeamStore.*

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