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Product Analytics Taxonomy

CaseWare Working Papers



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CaseWare International Inc.

1 Toronto St. Suite 1400, Toronto, ON M5C 2V6 Canada

Tel:416-867-9504 | Fax:416-867-1906 | www.caseware.com

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Event Category	Event Name	Event Description	Name	Sample Values	Comments
Copy Components					
File	start copy components	when the user clicks copy components			
File	complete copy components	when user enters copy components, where file = copy into this file	source	file, recent, template	to determine what users copy into the file
			components	true/false	
			component details	documents, grouping, issues, etc.	
			component clearing	fx, tags, annotations, etc.	
File	complete copy components	when user enters copy components, where file = copy into a new file	source	file, recent, template	to determine what users copy into the file
			components	true/false	
			component details	documents, grouping, issues, etc.	
			component clearing	fx, tags, annotations, etc.	
File	complete copy components	when user enters copy components, where file = copy into an existing file	source	file, recent, template	to determine what users copy into the file
			components	true/false	
			component details	documents, grouping, issues, etc.	
			component clearing	fx, tags, annotations, etc.	
File	cancel copy components	when the user cancels out of copy components			
Tracker					
File	start tracker	when the user clicks tracker			
File	close tracker	when the user exits out of tracker			
Engagement Properties					
Engagement	click engagement properties button	when user starts to populate engagement properties			
Engagement	cancel engagement properties	when the user cancels out of engagement properties			
Engagement	complete engagement properties	when the user enters engagement properties, where tab = name/address	cloud entity	entity selected from Cloud	to determine if the file is a hybrid file

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Event Category	Event Name	Event Description	Name	Sample Values	Comments
			synchronize engagement properties	true/false	to determine if client information is synchronized with Cloud
			engagement	ABC Company	to determine if users are entering data in this field
Engagement	complete engagement properties	when the user enters engagement properties, where tab = reporting dates	date sequence	monthly, quarterly, yearly. etc.	to determine what reporting periods are being used
Engagement	complete engagement properties	when the user enters engagement properties, where tab = period balances	period balances	true/false	to determine if this tab is being used
Consolidation					
Engagement	start consolidation	when the user selects the consolidation button			
Engagement	cancel consolidation	when the user cancels out of the consolidation			
Engagement	complete consolidation	when the user selects properties	entity detail	none/existing file	to determine if the files are internal or external
			fractional contribution	current year %, prior year %	to determine if this is being used
Imports					
Engagement	click import button	when the user clicks the import button to import data			
Engagement	start import	where user makes a selection	import type	Accounting software, ASCII, Excel	to determine which import type is being used
Engagement	cancel import	when the user cancels out of the import data modal			
Engagement	complete import	when the user successfully imports data, where import type = accounting software	import type	Accounting software	to determine which accounting packages are being used
			import from	AccPac, Sage, Xero	
			version	2016, 2017, 2018	
			import components	GL, TB	
Engagement	complete import	when the user successfully imports data, where import type = working paper software	import type	Working paper software	
			convert from	Accountant's dream, GoSystem	
			version	varies	version depends on the package
			import components	GL, TB	
Engagement	complete import	when the user successfully imports data, where import type = excel	import type	Excel	

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Event Category	Event Name	Event Description	Name	Sample Values	Comments
Engagement	complete import	when the user successfully imports data, where import type = ascii	import type	Ascii	
Engagement	complete import	when the user successfully imports data, where import type = xbrl	import type	XBRL	
Engagement	complete import	when the user successfully imports data, where import type = xml	import type	XML	
Engagement	complete import	when the user successfully imports data, where import type = prosystem fx	import type	ProSystem FX	
Exports					
Engagement	start export	where user makes a selection			
Engagement	cancel export	when the user cancels out of the export data modal			
Engagement	complete export	when the user successfully exports data, where export type = tax software	export type	Tax software	to determine if users are exporting data
			export to	CCH, Lacerte, etc.	
Engagement	complete export	when the user successfully exports data, where export type = gifi	export type	Gifi	
Engagement	complete export	when the user successfully exports data, where export type = risk alert	export type	Risk alert	
Engagement	complete export	when the user successfully exports data, where export type = bank link	export type	Bank link	
Engagement	complete export	when the user successfully exports data, where export type = adjustments	export type	Adjustments	
Engagement	complete export	when the user successfully exports data, where export type = caseware idea	export type	Idea	
Engagement	complete export	when the user successfully exports data, where export type = alpha tax	export type	Alpha tax	
Engagement	complete export	when the user successfully exports data, where export type = batch pdf	export type	Batch	
Year end close					
Engagement	click year end close	when the user clicks the year end close button	roll forward options	compress, update prior year, etc.	to determine which roll forward options are being used
			included in next year file	spreadsheet analysis, foreign exchange, etc.	to determine if these options are used

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Event Category	Event Name	Event Description	Name	Sample Values	Comments
			annotations	document references, tickmarks, etc.	to determine if users carry forward annotations
Engagement	complete year end close	when the user successfully finishes year end close			
Engagement	cancel year end close	when the user cancels out of the year end close modal			
Lockdown					
Engagement	click lockdown	when the user clicks the lockdown button	lockdown	lockdown now, lockdown after completion date	to determine which lockdown method is being used
Engagement	complete lockdown	when the user successfully finishes the lockdown			
Engagement	cancel lockdown	when the user cancels out of the lockdown modal			
Sign in/out					
Engagement	click sign out	when the user clicks the sign out button			to determine if this functionality is still being used
Engagement	complete sign out	when the user successfully signs out			
Engagement	cancel sign out	when the user cancels the sign out modal			
Check in/out					
Engagement	click check out	when the user clicks the check out button			to determine if this functionality is still being used
Engagement	complete check out	when the user successfully checks out			
Engagement	cancel check out	when the user cancels the checks out modal			
Assign users					
Document	click assign users	when the user clicks the assign users button			to determine if this is being used
Document	complete assign users	when the user successfully assigns users			
Document	cancel assign users	when the user cancels the assign users modal			
Compare					
Document	click compare	when the user clicks the compare button			to determine if this is being used
Document	complete compare	when the user successfully compares			
Document	cancel compare	when the user cancels the compare modal			
Print					
Document	click print	when the user clicks the print button			to determine if users are still printing their files

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Event Category	Event Name	Event Description	Name	Sample Values	Comments
Document	complete print	when the user successfully prints			
Document	cancel print	when the user cancels the print modal			
Adjusting Entries					
Account	click adjusting entries	when the user clicks the adjusting entries button	period type	yearly, monthly, quarterly	to determine if users are posting more than annual adjustments
			type	normal, reclass, tax, etc.	to determine the type of adjustments being made
			accounts	financials, map, group, etc.	to determine if users are posting to other than financial accounts
			misstatement	projected, factual etc.	to determine if users are associating the type of misstatement
			recurrence	none, recurring, reversing	to determine if this is being used
			calculated	true/false	to determine if calculated adjustments are being used
Account	complete adjusting entries	when the user successfully posts adjusting entries			
Account	cancel adjusting entries	when the user cancels the adjusting entries modal			
Other Entries					
Account	click other entries	when the user clicks the other entries button			to determine if write ups are being done
Account	complete other entries	when the user successfully posts other entries			
Account	cancel other entries	when the user cancels the other entries modal			
Mapping/Grouping					
Account	start mapping	when the user clicks the assign mapping			to determine if users are using mapping to link their files
Account	complete mapping	when the user successfully assigns accounts			
Account	cancel mapping	when the user cancels the assign mapping modal			
Account	start grouping	when the user clicks the assign grouping			to determine if users are using grouping to link their files
Account	cancel grouping	when the user cancels the assign grouping modal			
Account	complete grouping	when the user successfully assigns accounts to groups			

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Event Category	Event Name	Event Description	Name	Sample Values	Comments
Replace Server copy					
Cloud/SmartSync	start replace server copy	when the user clicks to replace server copy			to determine how often users have to replace the parent
Cloud/SmartSync	cancel server copy	when the user clicks to cancel replacing server copy			
Cloud/SmartSync	complete server copy	when the user successfully replaces the server copy			
Properties					
Cloud/SmartSync	start properties	when the user clicks to access properties			
Cloud/SmartSync	cancel properties	when the user clicks to cancel properties			
Cloud/SmartSync	complete properties	when the user successfully modifies properties	change location	true/false	to determine if users have to locate their parent
			repair	true/false	to determine if users have to repair their file
Show Conflicts					
Cloud/SmartSync	start show conflicts	when the user clicks show conflicts			to determine if users are creating conflicts
Cloud/SmartSync	cancel show conflicts	when the user clicks to cancel show conflicts			
Cloud/SmartSync	complete show conflicts	when the user successfully resolve conflicts			
Delete Copy					
Cloud/SmartSync	start delete copy	when the user clicks show conflicts			to ensure users are deleting their sync copies via the program
Cloud/SmartSync	cancel delete copy	when the user clicks to cancel delete copy			
Cloud/SmartSync	complete delete copy	when the user successfully deleted copy			
SmartSync Repair					
Cloud/SmartSync	start smartsync repair	when the user clicks smartsync repair			to determine if users are repairing their files
Cloud/SmartSync	cancel smartsync repair	when the user clicks to cancel smartsync repair			
Cloud/SmartSync	complete smartsync repair	when the user successfully repairs file			
Share					
Cloud/SmartSync	start share	when the user clicks share			to determine if users are sharing the file within the application
Cloud/SmartSync	cancel share	when the user clicks to cancel share			

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Event Category	Event Name	Event Description	Name	Sample Values	Comments
Cloud/SmartSync	complete share	when the user successfully shares file			

CaseView					
Event Category	Event Name	Event Description	Name	Sample Values	Comments
Export					
File	start export	when the user selects export			
File	cancel export	when the user cancels the export			
File	complete export	when the user successfully exports	export	html, pdf, rtf, etc.	to determine by what means users are exporting
Milestones					
File	start milestones	when the user clicks the milestones button			
File	cancel milestones	when the user cancels the milestones			
File	complete milestones	when the user successfully creates a milestone			
Design Mode					
View	start design mode	when the user clicks design mode			to determine how many users actually work in design mode
View	cancel design mode	when the user changes to form or edit			
Tables					
Insert	edit table properties	when the user clicks the table button			
Insert	cancel table properties	when the user cancels the table button			
Insert	complete table properties	when the user edits table properties	wide-table	true/false	to determine if wide-table printing is in use
New Link					
Insert	start new link	when the user clicks the new link			
Insert	cancel new link	when the user cancels the new link			
Insert	complete new link	when the user successfully sets up a link	KL filename	browse for link	to determine whether our library technology is being used.
			Action when different	DDB results	to determine how the update should behave when content is different.
			Save input values	DDB results	to determine how the update should handle manually entered data.
New Link from Index					
Insert	start new link from index	when the user clicks the new link from index			to determine if the KLI is being used.

CaseView					
Event Category	Event Name	Event Description	Name	Sample Values	Comments
Insert	cancel new link from index	when the user cancels the new link from index			
Insert	complete new link from index	when the user successfully sets up a link from index			
Table of Contents					
Insert	start new TOC	when the user clicks the TOC			
Insert	cancel new TOC	when the user cancels the TOC			
Insert	complete new TOC	when the user successfully sets up a TOC	title	manual entry	to determine if users are creating automatic TOCs.
			page title	manual entry	
Insert	complete new TOC	when the user successfully sets up a TOC entries	format level	numeric value	to determine if users are tying the TOC to styles
External Document					
Insert	start new external document	when the user clicks the external document			
Insert	cancel new external document	when the user cancels the external document			
Insert	complete new external document	when the user successfully sets up a external document	external document	DM/file path	to determine if users are including external documents in their CaseView reports.
			modifiable in form	true/false	to determine if users are editing the external document from within CaseView.
Settings					
Document	modify settings	when the user clicks the settings button			
Document	cancel modify settings	when the user cancels modifying settings			
Document	complete modify settings	when the user successfully modifies document settings: where file property is selected	backup	ddb result	to determine which backup options are set
			save	ddb results	to determine what save options are defined
			multiple users	true/false	to determine if multi user access has been granted to the document.
			hyphenate	ddb result	to determine what hyphenation is in use.
Document	complete modify settings	when the user successfully modifies document settings: where client options is selected	client default/sign field in linkage	true/false	to determine which sign is in use.

CaseView					
Event Category	Event Name	Event Description	Name	Sample Values	Comments
			map/group sign field	true/false	to determine which sign is in use.
			WTB report tab	true/false	to determine if report tab is used for cash flow
			document owns CV db records	true/false	
			CV db saved when document saved	true/false	
			include adjustments when calculating NI.	true/false	
			lock SS documents for exclusive use	true/false	
Document	complete modify settings	when the user successfully modifies document settings: where client options is selected	document default/sign field in linkage	true/false	to determine which sign is in use.
			map/group sign field	true/false	to determine which sign is in use.
			WTB report tab	true/false	to determine if report tab is used for cash flow
			document owns CV db records	true/false	
			CV db saved when document saved	true/false	
			include adjustments when calculating NI.	true/false	
			lock SS documents for exclusive use		
Document	complete modify settings	when the user successfully modifies document settings: where print is selected	changed cell value mark	true/false	
			diagnostics	true/false	
			override indicator	true/false	
			rounding indicator	true/false	
			pagination	true/false	
			background pagination	ddb results	
Document	complete modify settings	when the user successfully modifies document settings: where freeze is selected	draw border	true/false	to determine freeze preferences
			resizable	true/false	
			scrolls horizontally	true/false	

CaseView					
Event Category	Event Name	Event Description	Name	Sample Values	Comments
			display at bottom	true/false	
			include style window	true/false	
			flush freeze	true/false	
			equation bar	true/false	
			prevent scaling	true/false	
			editing options	no input, enable input but hide, enable input and display	
Document	complete modify settings	when the user successfully modifies document settings: where mode customization is selected	form mode with enable editing	not accessible, always accessible, accessible if...	
			design mode accessibility	not accessible, always, etc.	
			mode when opening	ddb result	
Document	complete modify settings	when the user successfully modifies document settings: where security configurations is selected	setting for selected operation	operation restricted, minimum level required	to determine if users are creating security configurations.
Document	complete modify settings	when the user successfully modifies document settings: where system database is selected	system database	add, delete	to determine if system databases are being used.
Document	complete modify settings	when the user successfully modifies document settings: where version information is selected	action for copy template	copy version, reset version, increment major version	to determine what version information is tracked during template updates.
			action for rollforward	copy version, reset version, increment major version	to determine what happens to version information on rollforward.
Document	complete modify settings	when the user successfully modifies document settings: where compatibility is selected	show table in sort preview	true/false	
			enable graph referencing	true/false	
			show default page range	true/false	
			save all input paragraphs	true/false	
			apply skipped page setups	true/false	
			keep with next	true/false	
			left align lines ending	true/false	
			use decimal precision	true/false	

CaseView					
Event Category	Event Name	Event Description	Name	Sample Values	Comments
			scale fonts	true/false	
Document	complete modify settings	when the user successfully modifies document settings: where note annotation layout is selected	header/footer	ddb result	
			apply style	true/false	
Document	complete modify settings	when the user successfully modifies document settings: where custom properties is selected	custom properties	add, delete	to determine if custom properties are being used.
Document	complete modify settings	when the user successfully modifies document settings: where repository is selected	repository	add, delete	to determine if repositories are being used.
Compare					
Document	start compare	when the user clicks the compare button			
Document	cancel compare	when the user cancels the compare			
Document	complete compare	when the user successfully compares	type of comparison	to another file, to KLI	
Note Number Styles					
Document	start note number styles	when the user clicks the note number styles button			
Document	cancel note number styles	when the user cancels the note number styles			
Document	complete note number styles	when the user successfully note number styles	style list	style names	to determine if users are creating note styles.
Cell Group					
Document	start cell group	when the user clicks cell group button			
Document	cancel cell group	when the user cancels cell group			
Document	complete cell group	when the user successfully creates a cell group; where new is selected	name of cell group	manual entry	to determine if users are creating cell groups.
Document	complete cell group	when the user successfully creates a cell group; where save is selected	save as	manual entry	to determine if users are saving cell groups for use elsewhere.
Document	complete cell group	when the user successfully creates a cell group; where load is selected	open	manual entry	to determine if users are sharing cell groups across files.
Conditional Formatting					
Document	start conditional formatting	when the user clicks conditional formatting button			
Document	cancel conditional formatting	when the user cancels conditional formatting			
Document	complete conditional formatting	when the user successfully creates a conditional formatting; where add rule is selected	add rule	format this cell, formatting, font style	to determine if users are adding conditional formatting to cells or paragraphs.

CaseView					
Event Category	Event Name	Event Description	Name	Sample Values	Comments
Rounding					
Tools	start rounding	when the user clicks the rounding button			
Tools	cancel rounding	when the user cancels the rounding button			
Tools	complete rounding	when the user successfully creates a rounding; where the user selects apply rounding	allow rounding in form mode	true/false	to determine if users are rounding in the document.
			round to	ddb result	
Tools	complete rounding	when the user successfully creates a rounding; where the user selects apply rounding relations	ignore flip sign of value	true/false	to determine if users are creating rounding relationships
			allow rounding in form mode	true/false	
			add	user sets up relationship	
Linkage					
Tools	start linkage	when the user clicks the linkage button			
Tools	cancel linkage	when the user cancels the linkage button	zero linkages created		
Tools	complete linkage	when the user successfully creates a linkage	number of linkages created	user clicks the +/- to enter values	
Tool					
Tools	start tool	when the user clicks the tool button			to determine if the calculation tools is being used.
Tools	cancel tool	when the user cancels the tool			
Tools	complete tool	when the user successfully evaluates equations	show cells	true/false	
			show groups	true/false	
Organizer					
Tools	start organizer	when the user clicks the organizer button			
Tools	cancel organizer	when the user cancels the organizer			
Tools	complete organizer	when the user successfully evaluates equations	find	search based on criteria entered by user	
Repository					
Tools	start repository	when the user clicks the repository button			
Tools	cancel repository	when the user cancels the repository			

CaseView					
Event Category	Event Name	Event Description	Name	Sample Values	Comments
Tools	complete repository	when the user successfully adds a repository	add	user populates the identifier, description and file path.	to determine if users are creating repositories.
User Defined Data					
Tools	start user defined data	when the user clicks the user defined data button			
Tools	cancel user defined data	when the user cancels the user defined data			
Tools	complete user defined data	when the user successfully adds user defined data			to determine if users are adding user defined data.
Diagnostics					
Tools	start diagnostics	when the user clicks the diagnostics button			
Tools	cancel diagnostics	when the user cancels the diagnostics			
Tools	complete diagnostics	when the user successfully adds diagnostics; where configure is selected	load	user loads a diagnostic file	to determine if users are creating diagnostics to share between files.
			add	user needs to select before they can populate the rest of the properties.	
			label	manual entry	
			description	manual entry	
			diagnostic	calculation	
			display diagnostic	each time calculation run, before printing, when locking, etc.	
		action to take if diagnostic fails	display message, disallow printing, etc.		
XBRL					
Tools	start XBRL	when the user clicks the XBRL button			
Tools	cancel XBRL	when the user cancels the XBRL			
Tools	complete XBRL	when the user successfully adds an XBRL taxonomy	global settings	user selects a taxonomy via options	
Section					
Home	start section	when the user clicks section button			

CaseView

Event Category	Event Name	Event Description	Name	Sample Values	Comments
Home	cancel section	when the user cancels section button			
Home	complete section	when the user successfully creates a section; where section is selected	logic	skip print, skip/hide condition	
			smart currency/unit	sinkin, rising, reapply every page, skip zero cells	
			smart underline		