

Task Workflows for SOXHUB

Summary

Controls testing is the most time consuming activity in the SOX cycle. Currently the control testing statuses "Open" and "Complete" don't appropriately capture all of the sub-testing steps you perform like walkthroughs, population collection, sample selection, evidence collection, control testing, etc. In Q1 2025, we are excited to roll out the first phase of **Task Workflows**, which will help bring clarity to and standardize testing activities across auditors so that teams can granularly track, manage, and report on key testing activities.

Task Workflows will add an additional view to the current control test details you see today in sections like "Test 0: Walkthrough" and "Test 1: Interim" with the list of tasks each tester needs to complete in order for the section to be considered complete. Now, testers will know exactly the next step they need to take in their testing responsibilities and managers will understand the granular status of each test.

What's In It For You?

- **Increase Efficiency:** Streamline the testing process, reducing manual steps and enabling faster action for your team and stakeholders.
- **Enhance Reporting and Visibility:** Improve the visibility and status reporting of testing tasks.
- **Improve User Experience:** Provide an intuitive and configurable way to manage, track, and report on testing activities, reducing friction with control, process, and IPE owners.

Why This Matters

- **Higher Productivity:** Spend less time on admin work and more time on actual testing.
- **Risk Reduction:** Enhance focus on testing and uncover deeper insights for more comprehensive, risk-aware audits.
- **Talent Retention:** Foster a better work experience by reducing burnout and empowering your team with a user-friendly interface that enhances their job satisfaction.

The Q1 release will include all US-based customers who test controls in SOXHUB.
Future releases will include non-US-based customers and OpsAudit customers.

Task Workflows Rollout Timeline

Request a Test Site



Now through Jan 15

Request a preview site to test Task Workflows in a demo environment

Explore the Feature



Jan 30 - Archival

Test Task Workflows in your preview site or opt-in to the feature in your production environment

Feature Go-Live



Archival - FY25

Start using Task Workflows for your FY25 SOX cycles (will be automatically enabled in your site upon archival)

What This Means for Your FY25 Planning

- Once the new Task Workflow features are enabled (either by you opting-in prior to your FY24 archival or automatically once you complete your FY24 archival), the changes will be permanent and this will be the experience starting FY25. Please be on the lookout for all of the resources coming to you as part of this rollout to help you and your team prepare.
- Once the feature set is enabled, System Admins will need to perform some initial setup activities to use Task Workflows. More information to come!

This Is Just The Start!

Phase 1 of this feature rollout will focus on predefined workflows for test tasks like population and evidence collection and will introduce a “Control Task View” to help track, manage, and report on key testing activities. Future iterations will introduce:

- Ability to create new workflow templates
- Ability to assign additional reviewers
- Ability to automate sample selection
- Enhanced notifications for “Task View” steps
- Enhanced list views for Control tasks and statuses
- Enhanced reporting for Control tasks and statuses

Interested in testing out the new feature in a test site? If you're the SOXHUB System Admin for your company, [join the waitlist!](#) Please note that not all customers who join the waitlist are guaranteed a preview site.