Workpapers LIVE

Wednesday 3rd December 2025

London

Your Inflo team for the day:

David Goode
Head of Working Papers Solutions

Ryan Pickstock
Product Manager

Beatrice Williams
Product Manager

Emily Parrish
Junior Product Manager

Tim Bellhouse
Head of Customer Success

Louis Casimir - Cohn
Strategic Customer Success Manager

Maximus Belmega
Digital Audit Manager

David Sharp
Product Marketing Manager

Pre-event survey question

What is the one thing you really want to get from this event?

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What is the one thing you really want to get from this event?

Summary of Responses we got

A view of what's coming from Inflo

- "Direction of travel" (various lenses, from features to departmental level)
- Matching releases to feedback

Knowledge share - Collaborate with other firms/users

- Gain a better understanding of Workpapers
- Hear tips & tricks I may not already know
- To communicate and get feedback on my own ideas

How we can better leverage data within Inflo

Continue/build internal hype about Inflo

Pre-event survey question

What is the one thing you really want to get from this event?

What wasn't in the responses

To build connections and network

To have fun

Speaker Introductions

David Goode

Head of Working Papers Solutions

Emily Parrish

Junior Product Manager

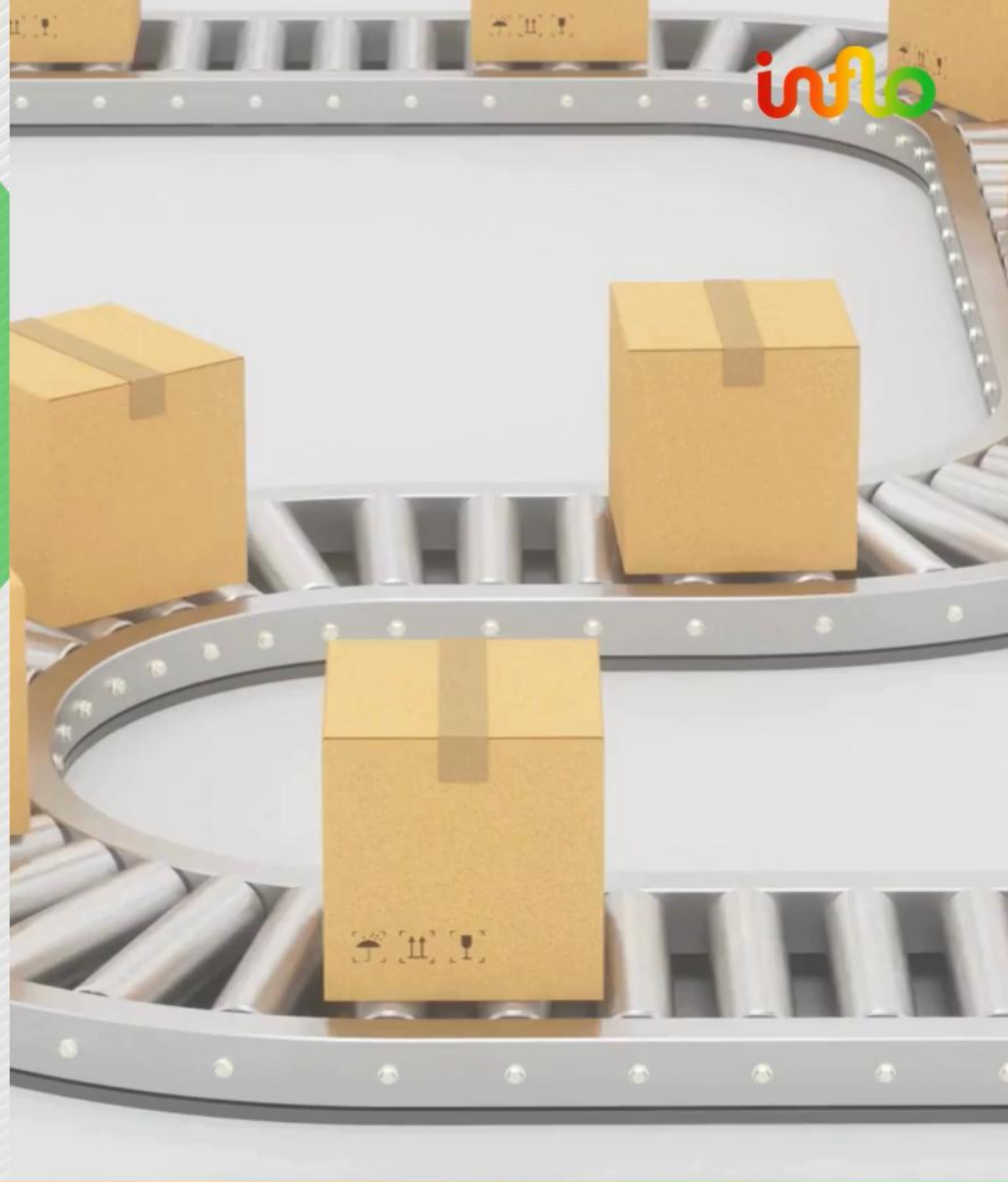
Beatrice Williams

Product Manager

Ryan Pickstock

Product Manager

Product Development Lifecycle



Inflo Product Development Lifecycle

Identify the problem

- Support Tickets
- NPS Feedback
- Customer Calls
- Suggestions
- New Industry Standards

Prioritise

- Look at other current wants/needs for the quarter
- Customer demand
- Strategic Value

Determine the solution

- Technical feasibility
- Proof of concepts
- Workshops with customers
- Consider user flow
- Create wireframes
- Size

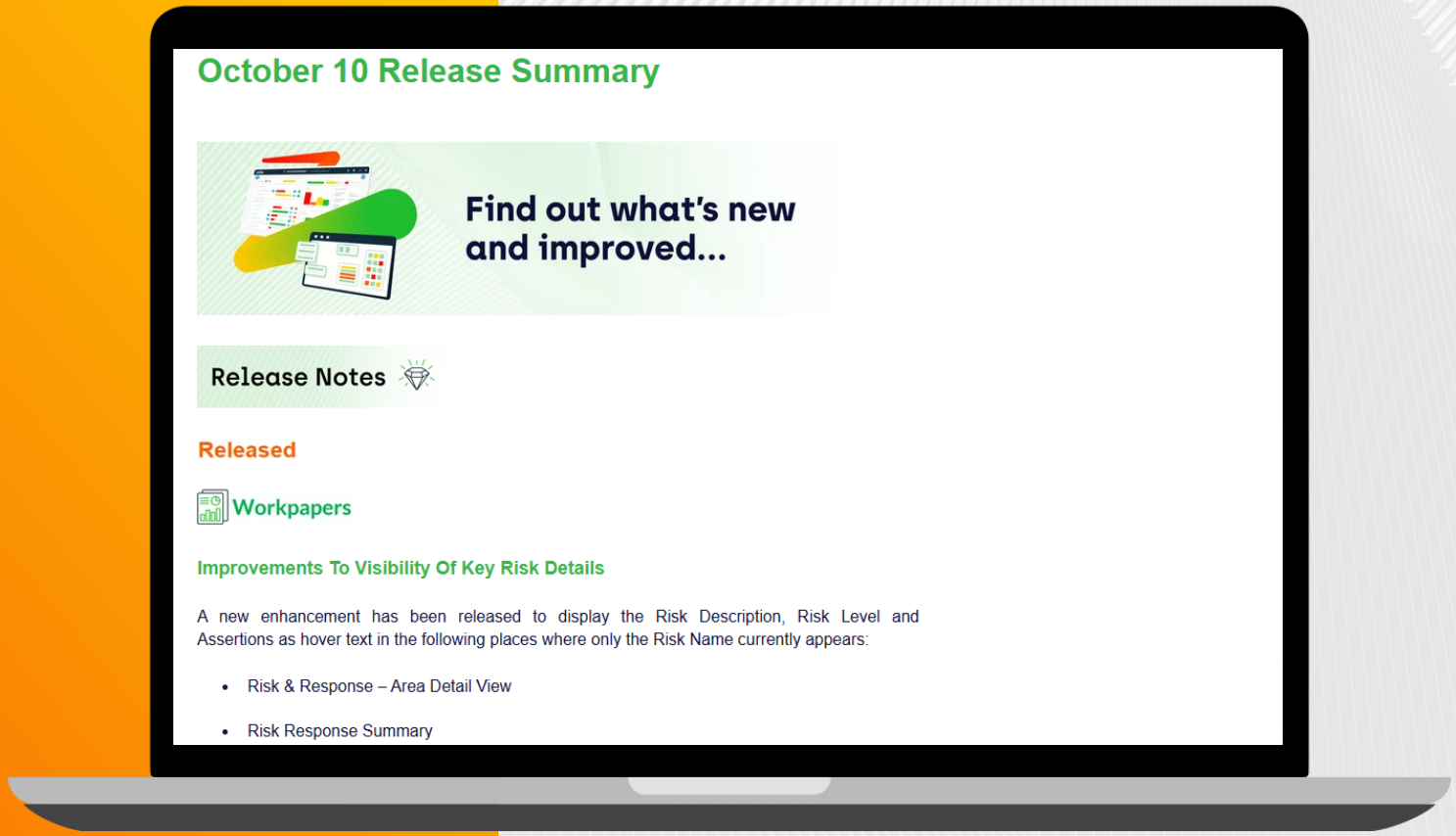
Development

- Mapping sessions to understand user flows
- Validate and test features
- Work broken down into pieces

Release

- Include in Current release of the release Hub
- Internal release review
- Turn on feature flags
- User feedback

Release Hub Showcase



October 10 Release Summary

Find out what's new and improved...

Release Notes

Released

Workpapers

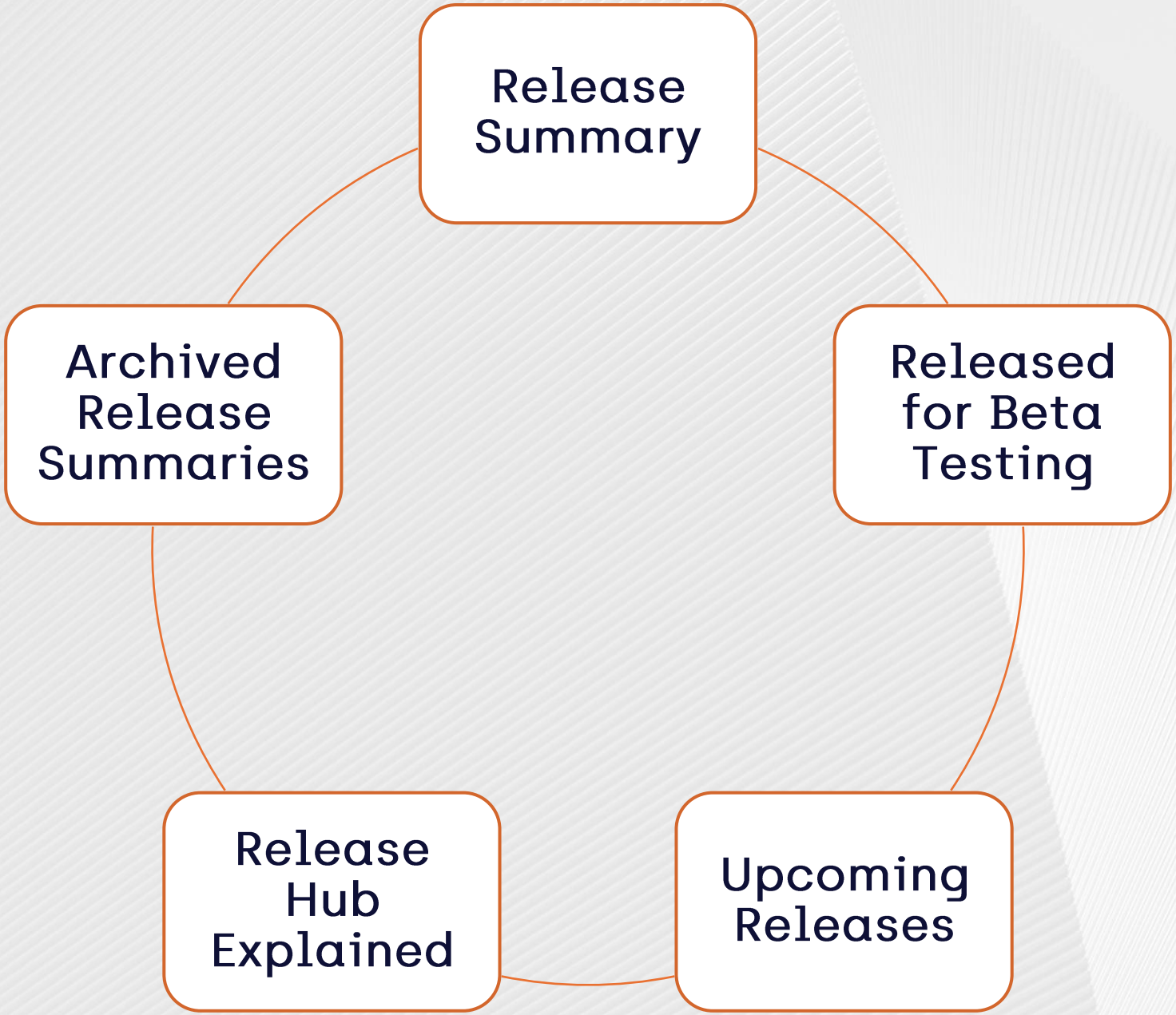
Improvements To Visibility Of Key Risk Details

A new enhancement has been released to display the Risk Description, Risk Level and Assertions as hover text in the following places where only the Risk Name currently appears:

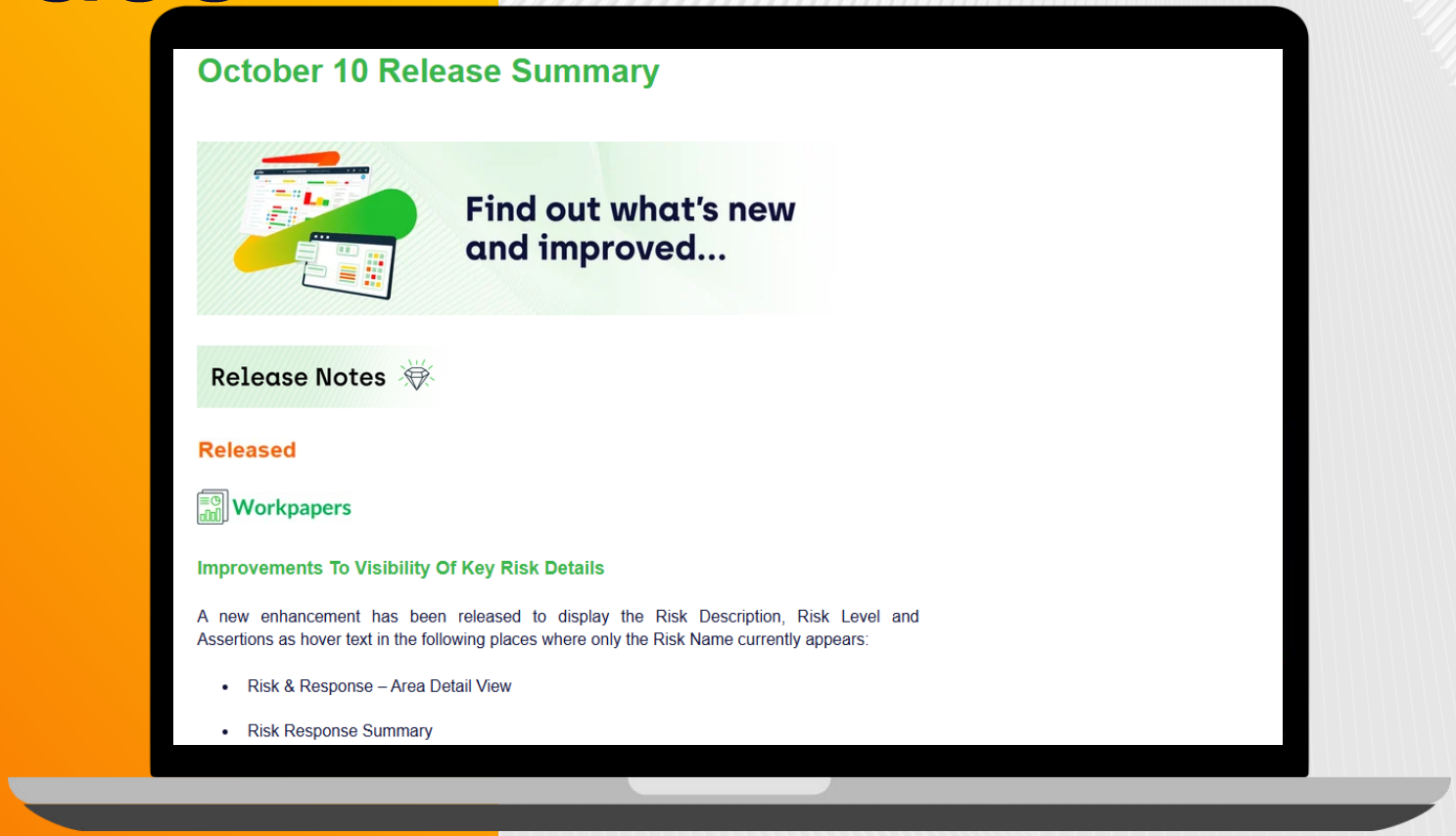
- Risk & Response – Area Detail View
- Risk Response Summary

Ask a Question

Why It Matters


Release Summary
Released for Beta Testing
Upcoming Releases
Release Hub Explained
Archived Release Summaries

Release Hub Showcase



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Ask a Question

Case Study:
Review Points

Case Study: Review Points

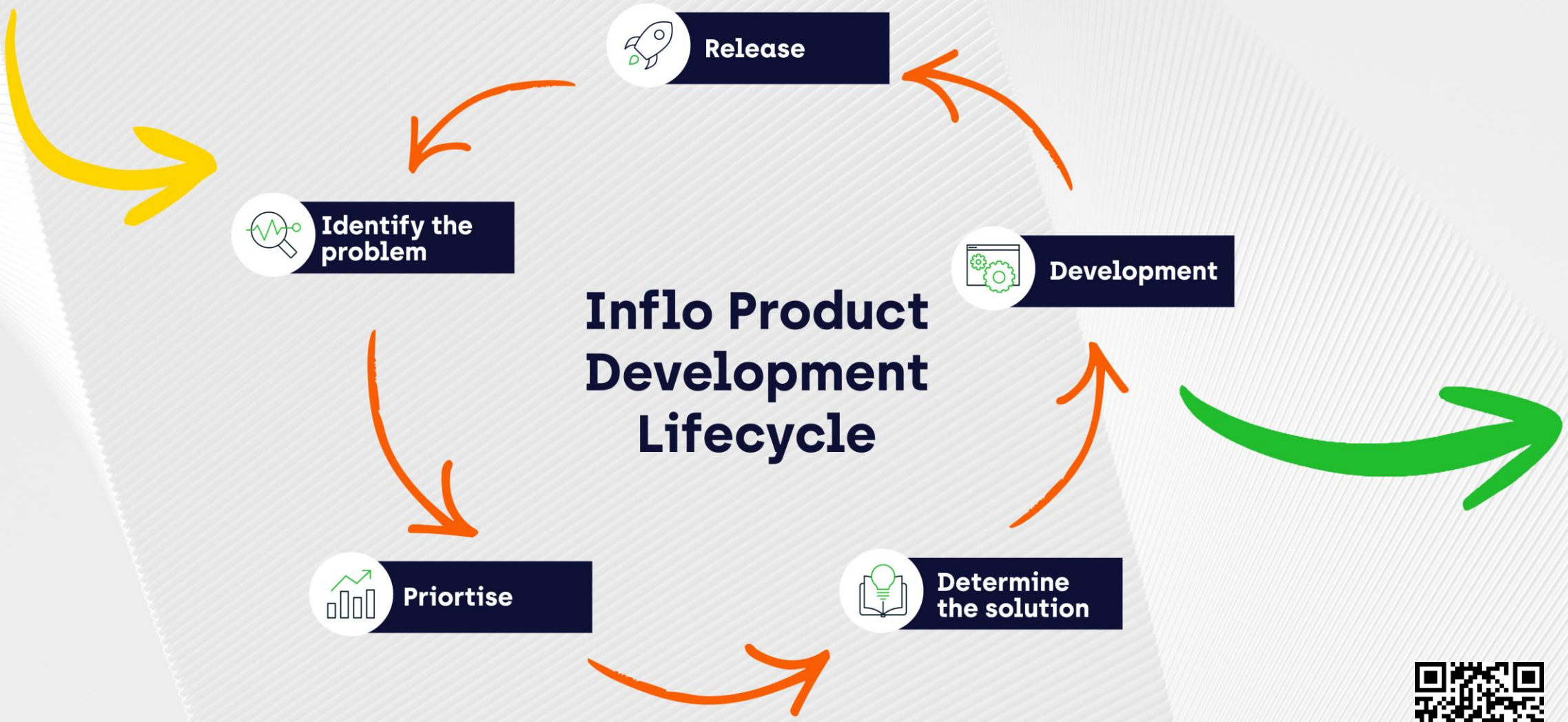
We know that review points have been a consistent pain point for users and we've taken that seriously.

Thanks to your feedback, through suggestions, support tickets, NPS responses, and direct conversations, we've identified the most pressing issues and prioritised small, high-impact improvements.

Using an Agile approach, we've focused on iterative delivery over the past 6 months:

- Breaking down larger challenges into manageable enhancements
- Delivering value quickly and continuously
- Concentrated on smaller improvements that are easy to implement alongside bigger projects

Let's put this into action



Ask a Question

Identifying the problem via Suggestions

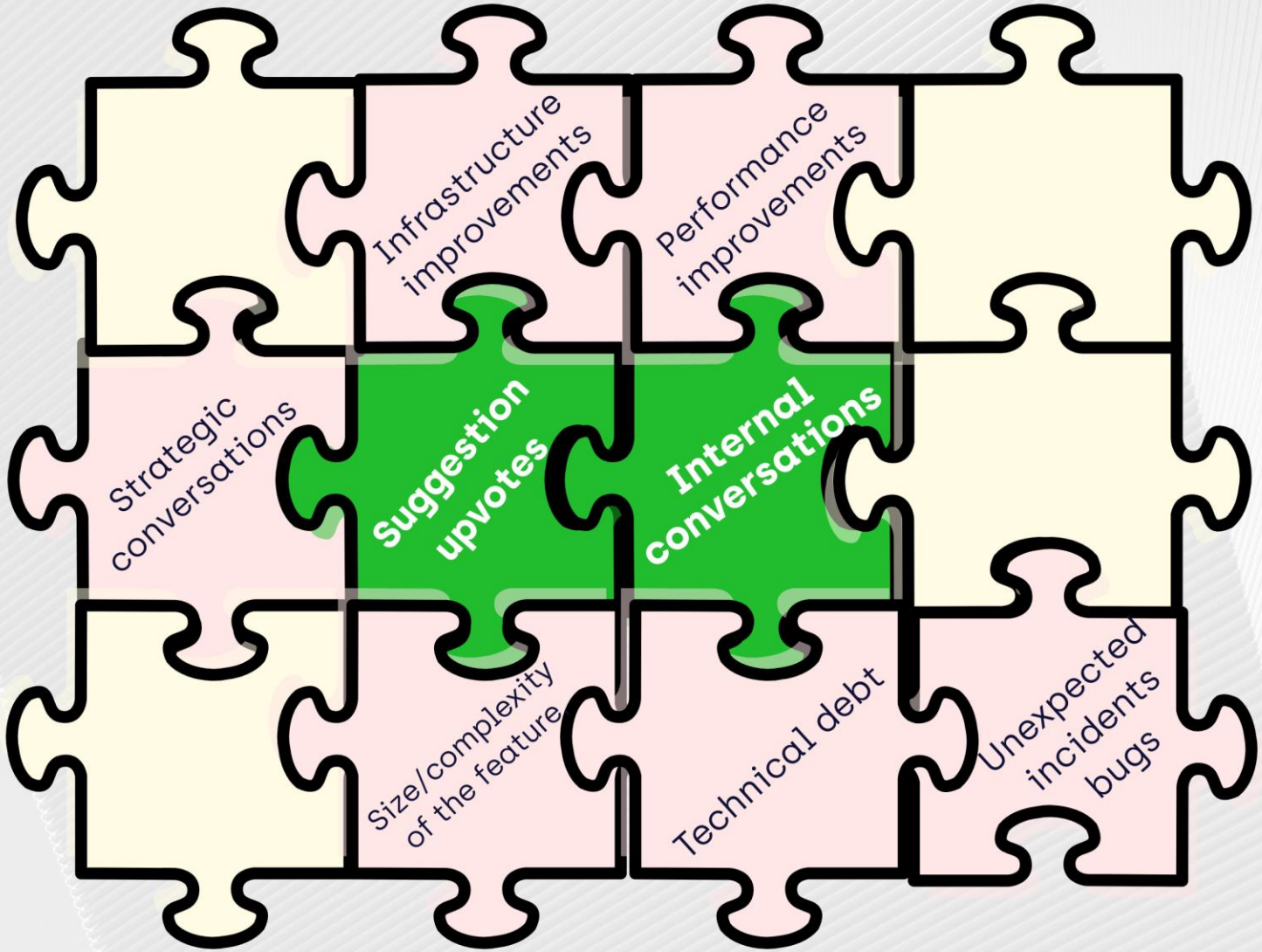
Suggestions

Status
Completed

Search
review points

Environment	Id	Name	Description	Date Created	Status	Upvotes
EMEA	680	Workpapers - Review points add filter	Add filter by workprogram to Review points advanced screen, so that it's clearer to the user that opening the summary screen from a workprogram is showing review points pre-filtered to that workprogram.	12/16/2022 12:12:56	Completed	48
EMEA	733	Workpapers - Add a 'General' Review Points	Allow a category of review note that relates to the whole file using the category "general" or similar rather than tying every review note to an individual workprogram/procedure. This will allow more flexibility.	1/30/2023 17:13:19	Completed	39
EMEA	749	Workpapers - Review points	Hi it would be really useful if review points could be filtered by the name of the person who raised them so we can check clearance thanks	2/7/2023 22:29:20	Completed	39
US	173	Workpapers - Review Points	Issue: When you open a review point and mark it as closed - ready to delete, it takes you back to all review points and not the filtered selection you had open. Solution #1: Ideally, it would take you back to the filtered screen Solution #2, set this up so when you click on the ID, it would allow you to open in new window (less ideal)	1/17/2025 23:28:25	Completed	27
EMEA	2600	Workpapers- Review point filters	Filters applied in review points screen should stay applied when clicking between review points. Currently keeps getting reset.	1/24/2024 10:25:23	Completed	13
EMEA	2667	Workpapers - Review Point Filter on ID	On the review points screen the functionality should be added to the search function to allow you to search for the review point Id number. E.g. you should be able to search for review point no. 42.	4/25/2024 05:13:59	Completed	13
EMEA	2594	Workpapers- Review points deletion	Allow for the creator of a review point to delete the review point if raised in error.	1/18/2024 14:34:55	Completed	11
EMEA	2816	Workpapers-Review points in new tab	Enable review point IDs to be opened in a new tab. Currently it takes you out the current page and you lose all filtering. This makes reviewing/raising/clearing review notes extremely inefficient.	12/17/2024 10:51:37	Completed	8

Next, we prioritise



Determine the solution

- Multi-select standard component already available in our system
- Benefit of Blazor framework → reuse and consistency
- Simple design process, no designer input required
- Simple so no prototypes/wireframes created
- User workshops not necessary

Development

Clued Up Corporation (06/2025) ▸ Workpapers ▸ Review Points

Search | Target User | Raised By User | Type: Action Required, Other | Priority | Status: Open, Resolved | Linked to | CLEAR FILTERS

Emily Manager

Id	Phase	Location	Original Note	Latest Note	Type	Priority	Due Date	Raised By	Target User	Review Note Status	Date Last Changed
2	Planning	Workprogram: Understand - Materiality	Materiality calculation not clearly documented — please include rationale and thresholds used.	Materiality calculation not clearly documented — please include rationale and thresholds used.	Action Required	Medium	26/11/2025	Emily Manager	Emily Manager	Resolved	26/11/2025
3	Planning	Workprogram: Commence - Independence	Independence confirmation missing from team members — obtain and file confirmations	Independence confirmation missing from team members — obtain and file confirmations	Action Required	Medium	26/11/2025	Emily Manager	Emily Manager	Open	26/11/2025
1	Planning	Workprogram: Identify & Assess - Risk assessment	Risk assessment documentation is incomplete — ensure all significant risks are identified and linked to audit procedures	Risk assessment documentation is incomplete — ensure all significant risks are identified and linked to audit procedures	Action Required	Medium	26/11/2025	Emily Manager	Emily Manager	Open	26/11/2025
4	Planning	Workprogram: Identify & Assess - Going concern	Going concern assessment is incomplete — ensure management representations and sensitivity analysis are included.	Going concern assessment is incomplete — ensure management representations and sensitivity analysis are included.	Other	Medium	26/11/2025	Emily Manager	Emily Manager	Open	26/11/2025

Entries per Page: 10

Showing 1 to 4 of 4 entries

1

Release

Review Points Open In A New Tab

Since we released Review Points in Blazor, we've seen and heard your feedback and suggestions (thank you!) that it's frustrating when you lose your applied filters once you open a workprogram. We're taking steps to improve this within this release by now opening review points in a new tab instead. This will increase the number of tabs being created, but will hopefully and more importantly allow you to retain your applied filters on your original tab.

Review Points – Enhanced Search And Filter Functionality

1. **Smarter Search:** You can now search for review points linked to areas **beyond Workprograms**. For example:
2. If a review point is linked to an **accounting estimate**, searching the estimate's name will return the relevant review point.
3. The same applies to **business processes** - searching their names will surface associated review points.
4. **More Flexible Filters (Coming Monday, August 11th):** We're introducing multi-select filters for the following fields:

- Target User
- Raised By
- Type
- Status

This means you can now filter by **multiple values at once**. For example, you can view all **open** and **returned** review points together - making it easier to manage and track progress.

Review Points - Enhanced Search Capabilities

You've asked, and we've listened! Ever wanted to quickly reference a review point to a colleague and have them find it effortlessly? Your suggestions have been heard, and we're excited to introduce this new enhancement. Thank you to those of you who raised and upvoted this suggestion on our product suggestions board.

What's New?

Search by Reference ID and Location: Now, you can search for review points not just by location, but also by their unique Reference ID. Simply type the ID and all relevant review points will appear.

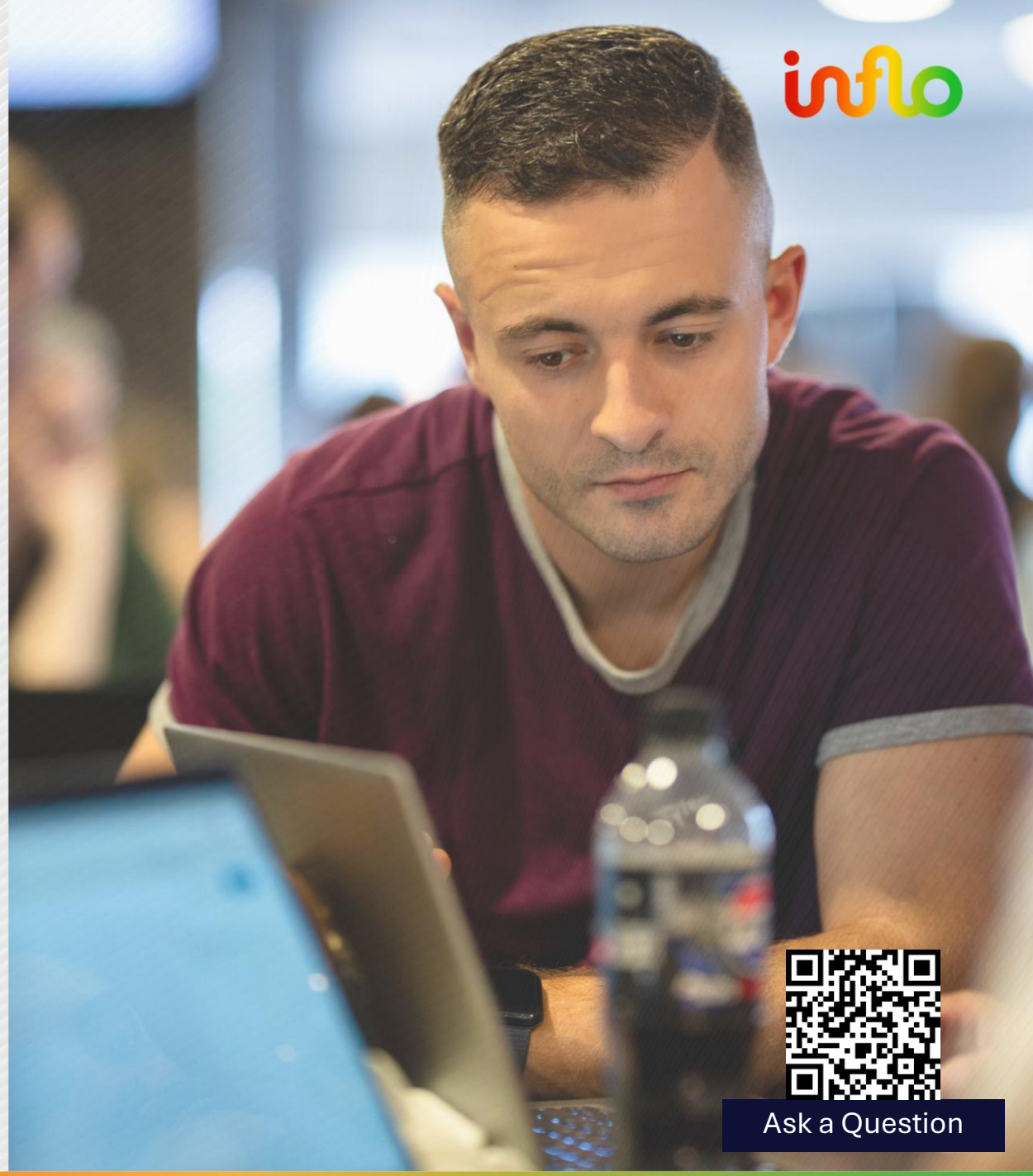
Review Points Improvements

We're on a mission to make using Review Points easier! Over the last couple of releases, we've already made some great progress, addressing a number of highly voted suggestions. In this release, we continue the trend with the following updates:

- When you see review points already linked to an object (for example a workprogram, procedure or accounting estimate), clicking the review points icon will open the review points screen with the status filter pre-applied, automatically hiding any closed review points. This matches the same solution that we implemented a few releases back where accessing the Review Points screen by clicking 'Review Points' from the Workpapers dashboard has pre-applied filters to hide closed review points by default.
- **Available from September 22** - Raised a review point in error? You can now delete review points that you created yourself. This was a highly voted suggestion! You can only delete review points created by yourself, you can't delete anybody else's, nor can they delete yours.
- **Available from September 22** - You can now leave a review point comment by pressing 'Enter' instead of needing physically click the button – this feels more natural and reduces clicks.
- **Available from September 22** - Line break is now available in Review Points, so you can create paragraph breaks within your comment. This makes it easier to structure your comments, improving readability.

Case Study:
Workpapers Dashboard

Identifying a trend...



Ask a Question

User Suggestions

US	278	Workpapers - Edit Sections	Currently you can only edit the responsible user and due date. We would like to be able to rename sections and reassign responsible reviewer as well.	03/06/2025 18:28:50	Open	32
US	249	Workpapers -Review Point Status Indicator	We would love if there was some indicator for the status of a Review Point. For example, when you are reviewing completed Workprograms and you see multiple Review Points, it is hard to tell if they are open, in process, or closed. You would need to open a separate window for Review Points and filter to see the status. Ideally you could see Review Points status as a color and be able to track these on the Dashboard like with Workprograms.	02/05/2025 16:33:50	Open	38
US	390	Workpapers - Tracking of Levels of Review	Is there a possibility to have separate identifiers for each level of review? This would help us easily identify what has been signed off by each level rather than the most recent or most senior level of review. The new hover functionality showing the latest and previous activity is helpful; however this requires each workprogram to be checked individually rather than being able to easily see the status of all workprograms at once (specifically whether the manager, EL, and quality reviewer have reviewed).	25/07/2025 13:23:57	Open	14
EMEA	2893	Workpapers -Sorting risk & response summary	It would be helpful to sort the riks and response summary as first in the list of working papers per section. Now it is in a fixed position and for some sections it is in a random place in the middle of the lists of working papers.	14/04/2025 09:42:17	Open	2
EMEA	2602	Workpapers - Re-ordering workprograms	It would be great if we could have an option to "re-order" the procedures that make up a workprogram. Often we may have procedures referenced as 1/2/3 but might need to manually add a "1a". At the moment, this goes to the end of the workprogram (after procedure 3). If possible, up/down arrows or a drag-and-drop option to reorder would be great. An alternative might be to "create a related procedure" which would work just as well! Thanks!	25/01/2024 10:19:07	Open	6

Post busy season feedback - conversations with customers

Ask a Question

Ad hoc feedback from other sources in the business

Ask a Question

Net Promoter Score

Our tech requirements

Microsoft

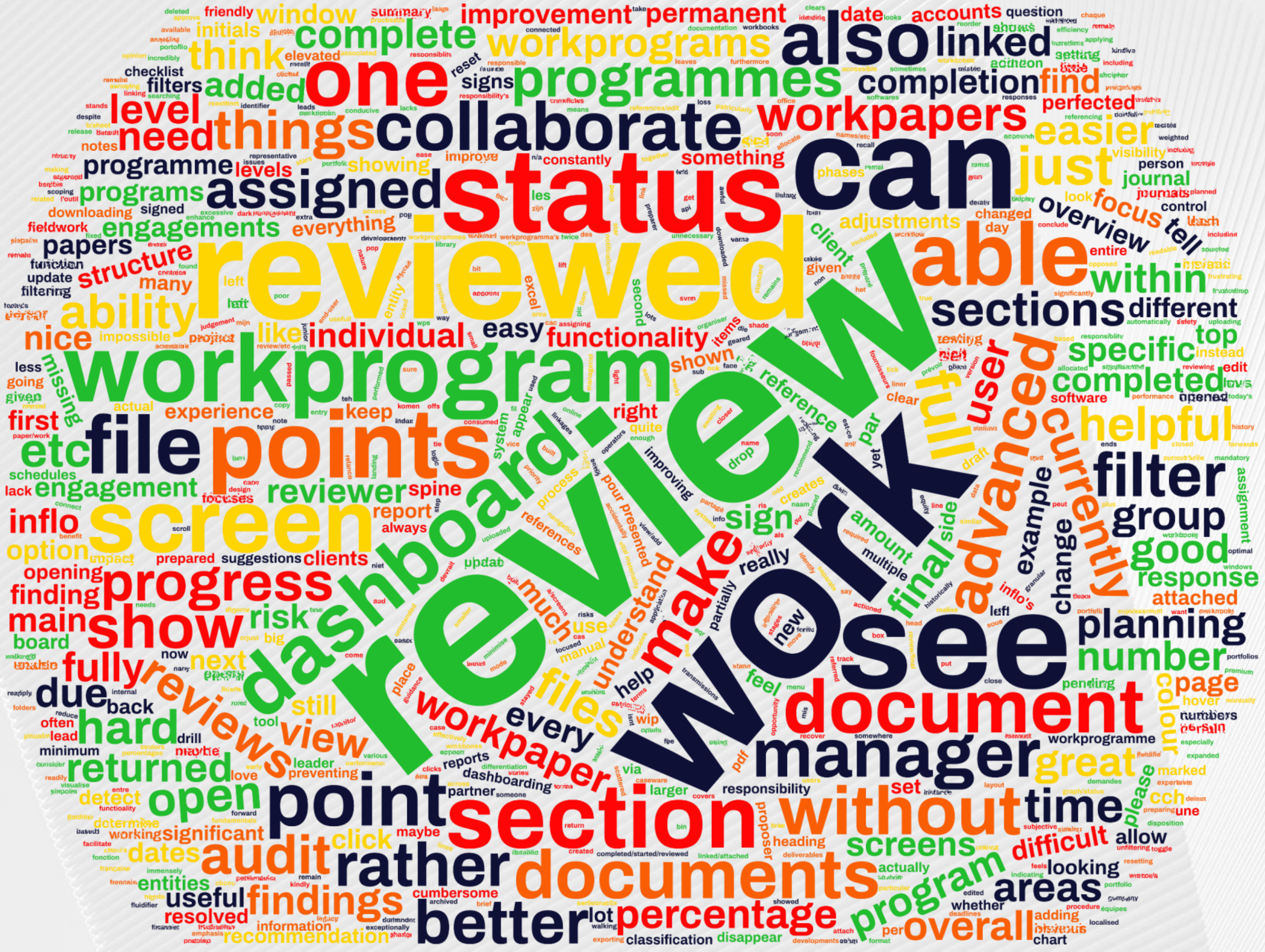
Blazor

Ask a Question

Bringing it all together

Ask a Question

Workpapers Dashboard: The Start



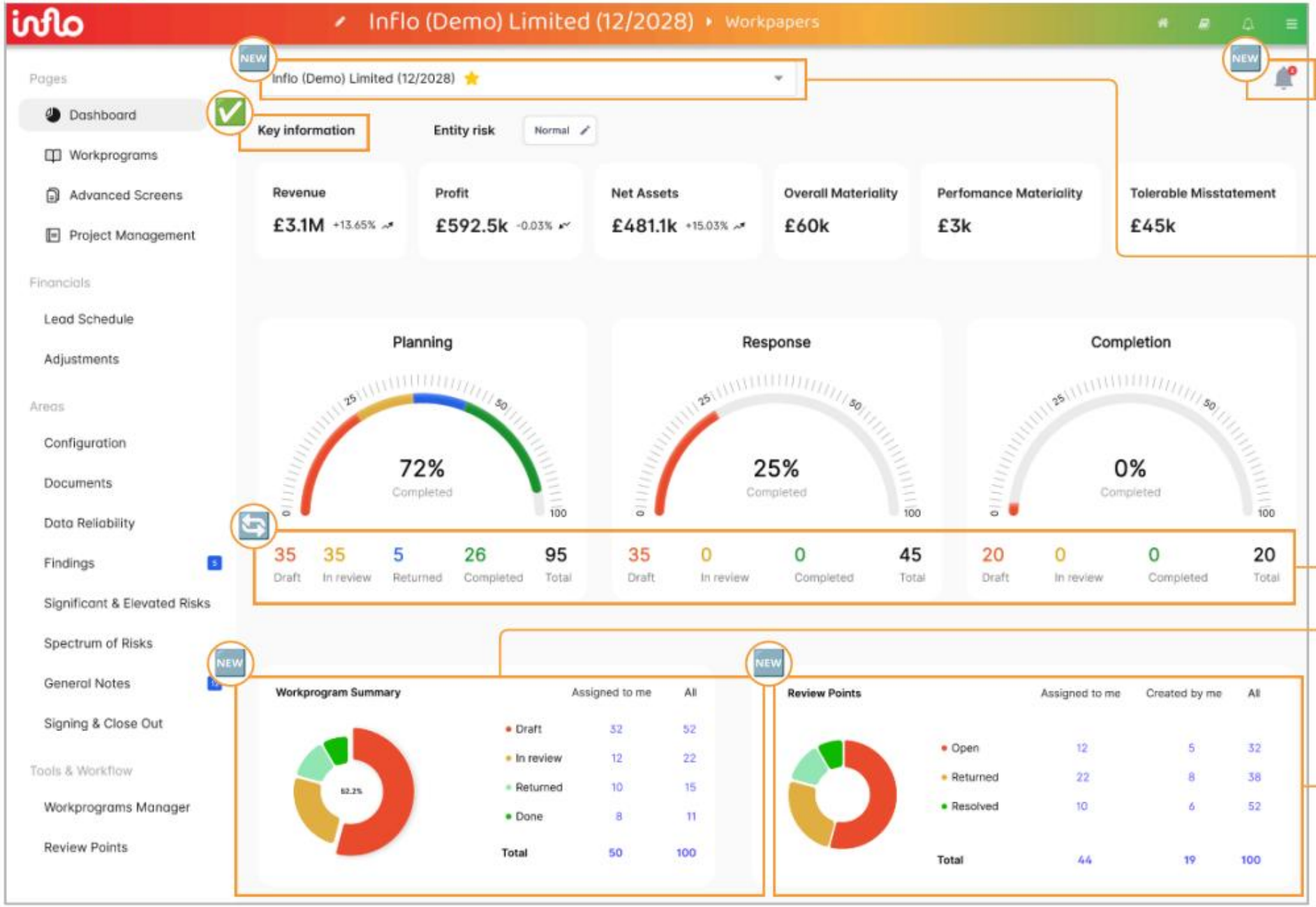
Workpapers Dashboard: The Start

Problem Statements	Solutions
Lack of visibility into who has reviewed what	• Review Report • Colour coding and icon indicators
Hard to project manage and track the progress of the audit	• Better use of data with helpful graphs • Visibility of bottlenecks • Detailed phase filters
Review Points are hard to track	• Add Review Point detail to dashboard • Improve filtering by adding more detail • Allow download of Review Points
Difficulty reviewing documents	• Sign-offs for documents
Navigation can be slow	• Optimise code to improve performance • Reduce number of clicks • More efficient user flows via filters

Workpapers Dashboard: The Design

1. Collaborative Redesign	2. Iteration and Review	3. Workpapers Dashboard Feedback Programme
• Customers • Technical Team • UX/UI Professionals • Audit Network	• Refining designs • Focus on pain points • Focus on recommendations	• Collated volunteers • Feedback Survey and focus groups

Dashboard View



Streamlined Notifications
No more dashboard banners - a tidy notifications section reduces dashboard clutter and keeps you focused.

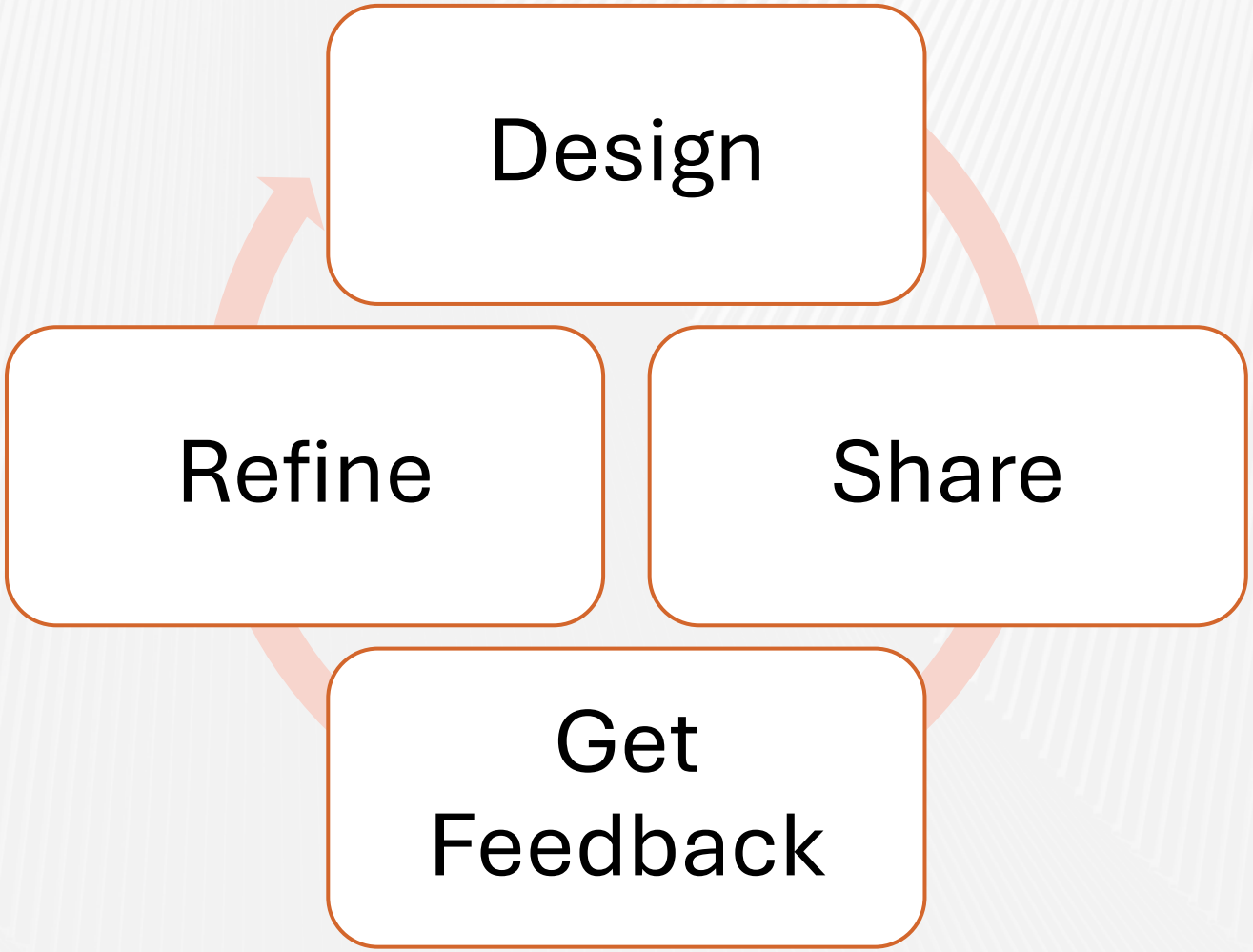
Quick Engagement Switching
A new drop-down for Group/Multi-Entity engagements lets you switch in just two clicks.

Phase Filters Made Easy
Filter workprograms by status and phase - no need to click into each phase to view this anymore.

Advanced Workprogram Filtering
Filter workprograms by status and by assignment: yours or all.

Smarter Review Point Access
Review points can now be accessed via the dashboard filtered by status, assigned to you or created by you with one-click access.

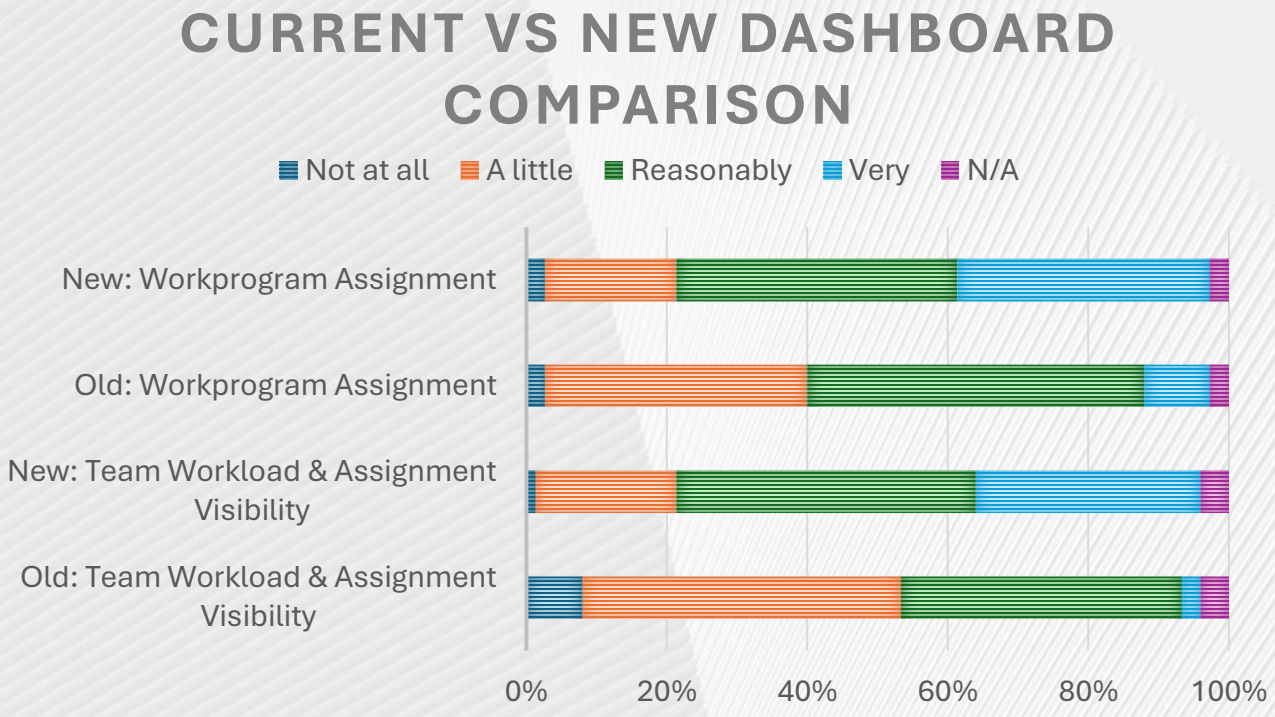
Workpapers Dashboard: Design Loop



Workpapers Dashboard: Closing the Loop

What's next?

- Analyse **feedback and comparative** data
- **Refine design** based on insights
- **Conduct A/B** testing on design
- **Prioritise improvements** for development
- Keep you updated via **the Release Hub**



Workpapers LIVE

Thank you for attending!

Drinks & Nibbles @ The Globe, Moorgate