AUDIT READY PM

by OIS Partners

End User Feature Guide

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For Project Managers, Team Members & Stakeholders

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1. Getting Started

Audit Ready PM lives inside Salesforce. You access it the same way you access any other Salesforce app — through the App Launcher (the grid icon at the top left). Look for Audit Ready PM: Console.

Everything you do in the app — completing a task, signing a form, changing a project status — is automatically timestamped and attributed to your user. Completed and signed records are locked. This is intentional: the audit trail only works if it cannot be changed after the fact.

The core idea
Most project tools show you what you planned to do.
Audit Ready PM proves what actually happened — and nobody can change it.

2. Projects

What Is a Project?

A Project is the top-level container for all work. It has a name, owner, status, health indicator, start and end dates, and a set of milestones and tasks underneath it.

Project Status Values

Status	Meaning
Planning	Project is being set up. Work has not started.
In Progress	Active work is underway.
On Hold	Project is paused. No active work.
Completed	All work finished. Completion date is stamped automatically.
Cancelled	Project was cancelled. Reason should be documented.

Project Health

Health	Meaning
On Track	Project is progressing as expected.
At Risk	Project has issues that need attention. Set automatically when a milestone becomes overdue.
Off Track	Significant issues. Likely to miss deadline.

Project Actions

From a Project record page you can:

- Close Project — marks the project Completed and stamps the completion date
- Cancel Project — marks the project Cancelled
- Generate Report — produces a PDF audit report of the entire project

Important
Closing or cancelling a project is permanent. The action and timestamp are recorded in the audit trail.
You cannot reopen a Completed or Cancelled project without administrator intervention.

3. Milestones

Milestones are the major phases or deliverables within a project. They appear on the Gantt chart and drive the project health calculation.

Milestone Status Values

Status	Meaning
Not Started	Work on this milestone has not begun.
In Progress	Work is underway.
At Risk	Milestone is behind or has issues. Automatically escalates project health to At Risk.
Completed	All tasks under this milestone are done. Completion date is stamped.

Overdue Milestones

A daily automated check runs every morning. Any milestone with a status of Not Started or In Progress that has passed its due date is automatically set to At Risk. This cascades to the parent project health.

4. Tasks

Tasks are the individual work items within a milestone. Every task has a name, assignee, due date, priority, and status.

Task Status Values

Status	Meaning
Not Started	Work has not begun.
In Progress	Assignee is actively working on this task.
Completed	Task is done. Completion date is stamped automatically and cannot be changed.

Completing a Task

1. Open the task record
2. Click Complete Task — or change Status to Completed
3. The completion date and time are stamped immediately
4. If the task has a governance form attached, you must sign and lock the form before or after completion

Task Timer

Use Start Timer to begin tracking time on a task. The timer records elapsed time against the task for reporting purposes. Click Stop Timer when you finish or pause work.

Task Comments

Add comments to a task to log activity, document decisions, or communicate with team members. Comments are timestamped and attributed to your user. They cannot be edited or deleted after saving.

5. SOP Governance Forms

An SOP (Standard Operating Procedure) Governance Form is a structured checklist attached to a task. It defines required steps, evidence collection, and sign-off requirements for that task. When you sign and lock a governance form, it becomes permanently immutable.

Working Through a Governance Form

5. Open the task record
6. Scroll to the SOP Governance Form section
7. Work through each checklist item — enter responses, check confirmations, enter dates as required
8. Required items are marked Required. You cannot sign the form until all required items are complete.
9. When all required items are complete, click Sign & Lock Form
10. Confirm the action — you are confirming that all required items have been completed and the information is accurate

Sign & Lock is permanent
Once you click Sign & Lock, the governance form cannot be edited by anyone.
The lock banner shows who signed and when.
If a mistake is discovered after signing, contact your project manager or Salesforce administrator.

Reloading an SOP

If the SOP template has been updated since it was applied to your task, a Reload SOP button appears. Reloading pulls in the latest version of the template. Completed steps are reopened for re-review, but your previous responses are preserved. A snapshot of the form is saved for audit purposes before reloading.

6. Request External Response

If a task requires sign-off from someone who does not have a Salesforce login (a client, vendor, or external contact), you can send them a one-time secure link.

How It Works

11. On the task record, scroll to the Request External Response section
12. Enter the recipient's email address
13. Select the Requested Response Type: Sign Off, Acknowledgment, or Approval
14. Set the link expiry (default 30 days)
15. Add optional instructions for the recipient
16. Click Send Secure Link

The recipient receives an email with a secure one-time link. They can respond without logging in to Salesforce. Their response is recorded on the task and timestamped.

Note
The recipient does not gain access to your Salesforce org.
The link expires after the period you set. Expired links cannot be reused.
All external responses are permanently recorded and cannot be edited.

7. PDF Audit Reports

Audit Ready PM can generate a self-contained PDF audit report for any project. The report includes the full project timeline, all milestones and tasks, all governance form responses, all status log entries, and a complete audit trail.

Generating a Report

17. Open the project record
18. Click Generate Report
19. Select the report type if prompted (Full Compliance, Summary, or Executive)
20. Click Generate — the report is created and saved as a Salesforce File attached to the project
21. Download or share the PDF from the Files related list

Court-ready documentation
The PDF captures the state of the project at the moment it is generated.
It includes all signed governance forms, completion timestamps, and the signing user for every locked record.
Generate the report after project closure for the cleanest compliance record.

8. Project Templates

Project Templates let your organization define a standard project structure once and reuse it consistently. Templates define the milestones, tasks, and SOP requirements that should appear on every project of a given type.

Creating a Project from a Template

22. From the Projects list, click New Project
23. Select a template from the Project Template field
24. Fill in the project name, owner, and dates
25. Click Save — the template milestones, tasks, and SOP attachments are automatically created

Templates are maintained by your Salesforce administrator. If you need a new template or changes to an existing one, contact your admin.

9. Project Dashboard

The PM Home Page shows all your projects in a card grid. Use the filter tabs at the top to view All, My Projects, In Progress, On Hold, or Completed projects.

Each project card shows:

- Project name and current status badge
- Health indicator (On Track, At Risk, Off Track)
- Project owner
- Progress bar showing overall completion percentage

Click any project card to open the full project record.

10. Tips & Best Practices

- Complete tasks promptly — completion timestamps reflect when you click Complete, not when the work was done
- Add comments before completing a task if there is anything auditors should know
- Sign governance forms before closing a project — unsigned forms are a gap in the audit trail
- Use Start Timer when you begin work so time tracking is accurate
- If you make an error in a required field on a governance form, correct it before signing — you cannot edit after sign-off
- Generate the PDF report immediately after project closure while the record is still fresh

Getting Help

Contact your Salesforce administrator for:

- Permission or access issues
- New project templates
- Integration setup (connecting to Opportunities, Cases, etc.)

Contact OIS Partners support for application issues:

Email: ccooper@opintelstrategy.com

Monday-Friday, 9am-5pm Mountain Time