PROJECTS

A Project is the top-level container.

Status Values

Planning	Setup, not started
In Progress	Active work
On Hold	Paused
Completed	Done, date stamped
Cancelled	Cancelled

Health

On Track	Progressing normally
At Risk	Issues — needs attention
Off Track	Significant issues

Actions

- Close Project — marks Completed, stamps date
- Cancel Project — marks Cancelled
- Generate Report — exports PDF audit report

At Risk is set automatically when a milestone becomes overdue.

MILESTONES

Milestones are the phases within a project. They appear on the Gantt chart.

Status Values

Not Started	Work not begun
In Progress	Work underway
At Risk	Behind or issues
Completed	Done, date stamped

Overdue Check

A scheduled job runs every morning at 1:00 AM UTC. Any milestone past its due date that is Not Started or In Progress is automatically set to At Risk, which cascades the project health to At Risk.

Gantt Chart

The Gantt chart on the Project record page shows all milestones as timeline bars. Hover a bar for details.

TASKS

Tasks are individual work items within a milestone.

Status Values

Not Started	Work not begun
In Progress	Actively working
Completed	Done — permanent

Completing a Task

1. Open the task record
2. Click Complete Task or set Status = Completed
3. Completion date stamps automatically
4. Sign governance form if attached

Task Timer

Click Start Timer to track time. Click Stop Timer when done. Timer runs against the task record.

Task Comments

Comments are timestamped and locked immediately. Use them to document decisions before completing a task.

Kanban Board

The Task Board on the Project record shows tasks grouped by status. Drag tasks between columns to update status.

SOP GOVERNANCE FORMS

A governance form is a structured checklist attached to a task. It defines required steps, evidence, and sign-off requirements.

Working Through a Form

5. Open the task record
6. Scroll to SOP Governance Form section
7. Complete each checklist item — enter responses, check confirmations, enter dates
8. Required items must be completed before signing
9. Click Sign & Lock Form when ready
10. Confirm — action is permanent

Sign & Lock is permanent.

Once signed, the form cannot be edited by anyone. The lock banner shows who signed and the exact timestamp.

Reloading an SOP

If the template was updated since it was applied, click Reload SOP to pull in the latest version. Previous responses are preserved. A snapshot is saved automatically before reload.

REQUEST EXTERNAL RESPONSE

Send a secure one-time link to someone without a Salesforce login (client, vendor, external contact).

11. Scroll to Request External Response on the task record
12. Enter recipient email address
13. Select response type: Sign Off, Acknowledgment, or Approval
14. Set link expiry (default 30 days)
15. Add optional instructions
16. Click Send Secure Link

Recipient gets an email link. They respond without logging in. Their response is timestamped and locked on the task.

PDF AUDIT REPORTS

17. Open the project record
18. Click Generate Report
19. Select report type if prompted
20. Click Generate
21. Download the PDF from the Files related list

The PDF includes all milestones, tasks, governance form responses, status logs, sign-off timestamps, and the full audit trail. Generate after project closure.

PROJECT TEMPLATES

Templates define standard milestones, tasks, and SOPs. Select a template when creating a new project to pre-populate the structure.

Creating a Project from a Template

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

QUICK REFERENCE — DO & DON'T

DO	DON'T
Add comments before completing a task	Sign a form with incomplete required items
Sign governance forms before closing	Assume you can edit a locked form
Generate PDF after project closure	Close a project before signing all forms
Use Start Timer when work begins	Backdate completions — use real-time

SUPPORT

App issues: ccooper@opintelstrategy.com
Mon-Fri 9am-5pm Mountain Time
Admin issues: contact your Salesforce administrator