

AUDIT READY PM

by OIS Partners

End-User Feature Guide

Step-by-step workflows for Project Managers & Team Members

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Review the updated items and proceed with task execution.

The latest checklist items from the template are pulled onto the task, replacing any existing unfilled items.

In the SOP Attachment component, click 'Reload SOP.'

Open the Task record.

Steps:

Your organization releases a new version of an SOP template after a task has already been created. Before you begin the task, use Reload to pull in the updated items so you are working from the latest version.

When to use Reload SOP:

⚠ Important: Reload SOP is only available when the SOP has NOT been completed and locked. Once a task's SOP is completed, it becomes uneditable and the Reload option is disabled. This is by design — completed, locked SOPs are part of your immutable audit record.

The Reload SOP feature lets you force-update the SOP checklist items on a task when a new version of the SOP template has been released. Use it before starting a task to ensure the latest template items are in place.

5.4 Reload SOP Items

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8.1 Create a Template from an Existing Project

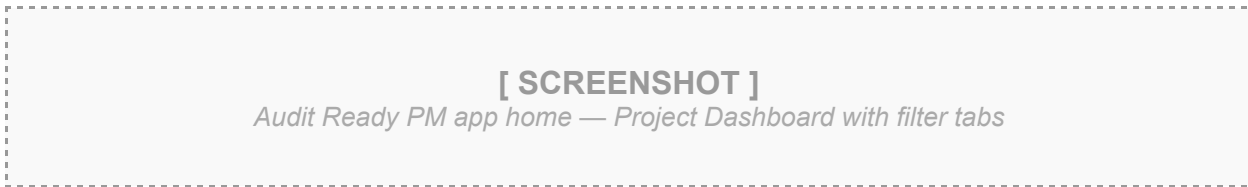
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1. Getting Started

Audit Ready PM is a project management and compliance tool built inside Salesforce. It lets your team manage projects, track tasks, capture SOP sign-offs, and generate audit-ready PDF reports — all without leaving your org.

Your Role	What You Can Do
OIS_PM (Project Manager)	Create & manage projects, milestones, tasks, templates, and audit reports.
OIS_My_Work (Team Member)	View and complete assigned tasks and checklist items.



2. Projects

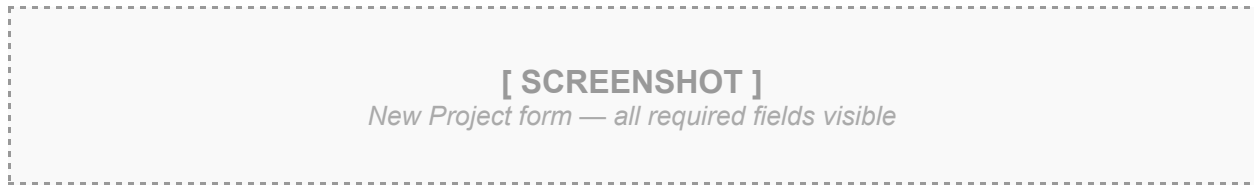
Projects are the top-level record. Every milestone, task, checklist, and audit report belongs to a project.

2.1 Create a Project

1. Open the Audit Ready PM app and navigate to the Projects tab.
2. Click 'New' in the top-right corner.
3. Enter the Project Name — use a clear, descriptive name (it appears on all reports).
4. Set Status to 'Not Started' (or 'In Progress' if already underway).
5. Set Health to 'On Track.'
6. Enter Start Date and End Date.
7. Optionally enter Description, Project Manager, and any integration lookups.
8. Click Save.

TIP

A Project Status Log entry is automatically created when you save. No manual action needed.



2.2 Project Status & Health

Not Started → In Progress	Manual status change by PM.
In Progress → At Risk	Manual change, or auto-cascade when a child milestone goes At Risk.
In Progress → Completed	Stamps Actual Completion Date and auto-generates an Audit PDF.
Health: On Track / At Risk / Off Track	Auto-updated when milestones change. Can also be set manually.

2.3 Project Dashboard

The dashboard on the app home page shows all projects you have access to, filtered by:

- All Projects — every project you can see
- My Projects — projects where you are the PM or an active member
- At Risk — projects with Health = At Risk or Off Track
- Completed — projects with Status = Completed

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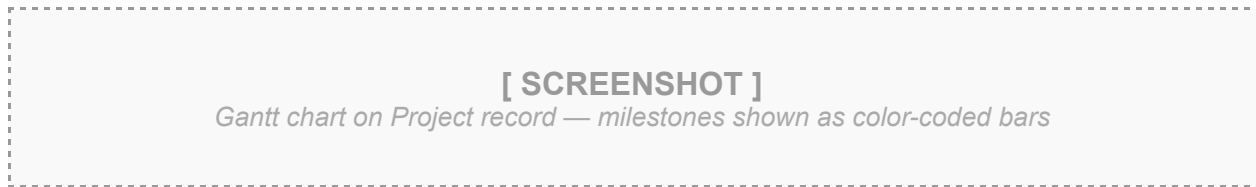
Project Dashboard — 'At Risk' filter tab active, showing red/orange project cards

3. Milestones

Milestones are major phases or deliverables within a project. They group tasks and appear as bars in the Gantt chart.

3.1 Create a Milestone

9. Open the parent Project record.
10. In the Milestones related list, click 'New Milestone.'
11. Enter a Milestone Name (e.g., 'Phase 1 – Discovery').
12. Verify the Project field is correct.
13. Set Status to 'Not Started.'
14. Set Due Date.
15. Click Save.



3.2 Milestone Automation

Daily at 01:00 UTC	Milestones past their Due Date are automatically set to 'At Risk.'
Status → At Risk	Parent project Health is set to 'At Risk' (if currently On Track).
Status → Completed	Completion Date is stamped automatically.

4. Tasks

Tasks are the individual units of work. They support time tracking, SOP attachment, external response requests, and budget rollup.

4.1 Create a Task

16. Open the parent Project record.
17. In the Tasks related list or Task Board, click 'New Task.'
18. Enter Task Name — be specific, as it appears in reports.
19. Verify Project is auto-populated.
20. Select a Milestone (optional, but enables milestone.task sequence numbering).
21. Set Status to 'Not Started.'
22. Assign to a user, set Priority and Due Date as applicable.
23. Click Save. A sequence number is assigned automatically.

[SCREENSHOT]

Task Board (Kanban) on Project record — tasks in Not Started / In Progress / Completed columns

4.2 Completing a Task

There are three ways to complete a task:

Manual	Open the task, change Status to 'Completed,' and save. Completion Date stamps automatically.
Via SOP Sign-off	Complete the SOP Execution Form on the linked Checklist Item. Timer hours are captured automatically.
Via External Acknowledgment	External user clicks the secure link and submits acknowledgment. Task is marked Completed automatically.

4.3 Task Timer

24. Open the Task record.
25. Click 'Start' in the Task Timer component.
26. Click 'Pause' to pause — elapsed time is saved. You can navigate away safely.
27. Click 'Start' again to resume — timer picks up where it left off.
28. The timer auto-pauses when you switch browser tabs.
29. When you complete the task via SOP sign-off, elapsed time is written to Actual Hours automatically.

[SCREENSHOT]

Task record page — Task Timer component showing elapsed time and Start/Pause buttons

5. SOP Checklists

Checklists are digital Standard Operating Procedure forms. Templates define the form structure; Checklist Items are the individual fields users fill in.

5.1 Create a Checklist Template

30. Navigate to the SOP tab in the app.
31. Click 'New Checklist Template.'
32. Enter Template Name and select a Category.
33. Check 'Is Active' so the template appears in the task attachment picker.
34. Click Save.
35. In the Checklist Items related list, click New and add fields: Name, Field Type, Section, Expected Value (if pass/fail logic needed).



TIP

Field types available: Checkbox, Text, Number, Date, Signature.

[SCREENSHOT]

Checklist Template record — Checklist Items related list with multiple field types

5.2 Attach a Checklist to a Task

36. Open the Task record.
37. In the SOP Attachment component, click 'Select SOP Template.'
38. Search for and select the desired template.
39. Click Save. The form items are now accessible from the task.

5.3 Execute a Checklist Item

40. Open a Checklist Item record linked to the task.
41. The SOP Execution Form renders the appropriate input field.
42. Enter or select your value (text, number, date, checkbox, or draw a signature).
43. Click 'Save Response.'
44. If PM review is required, the item moves to 'Pending Review' until the PM approves.

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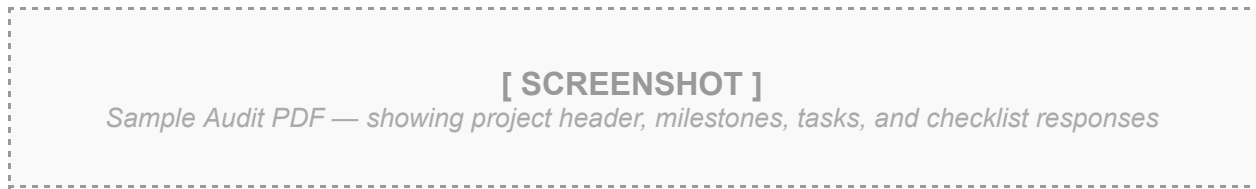
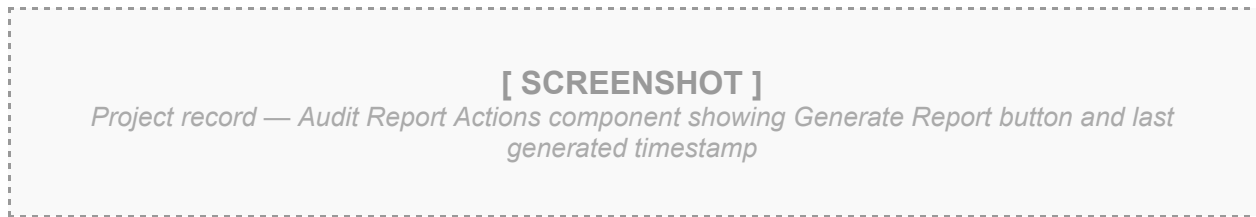
SOP Execution Form — signature-type item with signature pad visible

6. Audit Report Generation

Audit Ready PM generates a PDF report for each project capturing all milestones, tasks, checklist responses, and signatures.

6.1 Generate a Report On-Demand

45. Open the Project record.
46. Locate the Audit Report Actions component in the header area.
47. Click 'Generate Report.' A loading spinner appears.
48. The report completes within seconds. A Download link and generation timestamp appear.
49. Click 'Download' to open the PDF. It is also saved in the project's Files.



6.2 Automatic Report Generation

On Project Completion	A final report is generated automatically when Status changes to Completed.
Daily at 02:00 UTC	A fresh report is generated for every active project — reflects latest milestone and task data.

7. External Task Submission

Request sign-offs or information from vendors, clients, or contractors — no Salesforce login required.

7.1 Send an External Request (PM)

50. Open the Task record.
51. Locate the Request External Response component.
52. Click 'Request Response.'
53. Enter the recipient's email address.
54. Select Response Type: Acknowledgment, Text Response, File Upload, or Any.
55. Set the link expiry (7, 14, 30, or 60 days).
56. Enter any instructions for the external user.
57. Click 'Send Request.' An email is sent with a secure link.

[**SCREENSHOT**]

Request External Response component — form expanded with email, response type, and instructions fields

7.2 What the External User Sees

58. External user clicks the link in the email.
59. A page opens in their browser — no Salesforce login required.
60. The page shows the task name, project name, and PM's instructions.
61. User enters their name and completes the response (checkbox, text, or file upload).
62. User clicks 'Submit Response.' A success confirmation is shown.

[**SCREENSHOT**]

External Submit Page — showing task name, instructions, and acknowledgment checkbox

7.3 Review Submissions (PM)

63. Open the Task record.
64. In the Task Submissions related list, review all responses.
65. To accept a submission: open the Task_Submission__c record and set Status to 'Accepted.'
66. Once accepted, the token is locked — no further submissions possible.



TIP

Task_Comment__c records on the task provide a full audit trail of all submission activity.

8. Project Templates

8.1 Create a Template from an Existing Project

67. Open the Project record you want to use as a template.
68. Click the 'Promote to Template' quick action button.
69. Enter a Template Name and Category.
70. Click Finish. The template is created with all milestones and tasks as reusable records.

8.2 Create a Project from a Template

71. Navigate to Projects → New Project.
72. Select the desired template from the Template picker.
73. Enter the project Start Date. All due dates are calculated automatically from template offsets.
74. Click Save. The project is created with milestones and tasks pre-populated.

[SCREENSHOT]

New Project form — Template picker dropdown showing available templates

9. Budget & Hours Tracking

Track time at the task level and roll it up to the project alongside cost calculations.

Task Actual Hours	Set manually, by the task timer on SOP sign-off, or by PM override.
Project Total Hours	Auto-summed from all task Actual Hours on every task save.
Member Hourly Rate	Set on Project Member record. Used to calculate Actual Cost.
Project Actual Cost	Sum of (Member Hours × Member Hourly Rate) across all members.

To Log Hours

- Use the task timer and complete via SOP sign-off (hours captured automatically), OR
- Manually enter a value in Actual_Hours__c on the Task record.