

AUDIT READY PM

by OIS Partners

Admin Implementation Guide

Version 1.13 | June 2026

For Salesforce Administrators

Table of Contents

1. Overview

Audit Ready PM is a fully native Salesforce project management application designed for organizations where compliance documentation is not optional. The app enables teams to create, execute, and lock project work in a tamper-evident audit trail, with one-click PDF export for regulatory reporting.

What the App Installs

Component	Description
Custom Objects	13 objects: Project, Milestone, Task, Checklist Item, SOP Template, Project Member, Status Log, and more
Apex Classes	License enforcement, sharing service, sample data installer, PDF report generator
Flows	Before/after-save triggers, scheduled overdue checks, audit trail automation
LWC Components	Project Dashboard, Gantt Chart, Task Board, SOP Builder, License Setup, Sample Data Setup
Permission Sets	ARPM_Admin, ARPM_User, ARPM_ReadOnly
Custom Settings	LicenseSettings__c (license state), OIS_Setup_Config__c (integration toggles)
Custom Metadata	License_Config__mdt (tier definitions and pricing)

Supported Editions
Enterprise, Unlimited, Performance, Developer Edition
Requires Lightning Experience. Classic is not supported.
Experience Cloud (optional): requires separate Experience Cloud license

2. Installation

Step 1 — Install the Managed Package

Install Audit Ready PM from the Salesforce AppExchange. During installation:

- Select Install for All Users or Install for Admins Only (you can adjust permission sets afterward)
- When prompted about third-party access, click Continue — the app is fully native and makes no external callouts
- Installation typically takes 2–5 minutes

Step 2 — Run the Post-Install Script

The app includes a PostInstallScript that runs automatically on install. It initializes two custom settings:

- LicenseSettings__c — sets your trial start date and tier to Trial
- OIS_Setup_Config__c — initializes integration toggles to false

To verify initialization ran correctly, run this SOQL query in Developer Console or Workbench:

```
SELECT Current_Tier__c, Trial_Start_Date__c FROM oispm__LicenseSettings__c LIMIT 1
```

Expected result: Current_Tier__c = 'Trial', Trial_Start_Date__c = today's date.

If the post-install script did not run

This can happen in Developer Edition orgs. Run the init script manually:

Setup > Developer Console > Execute Anonymous > paste the init script from OIS support

Or contact ccooper@opintelstrategy.com for the init script.

3. Permission Sets

Audit Ready PM ships with three permission sets. Assign at least one to every user who will use the app.

Permission Set	Who Gets It
oispm__ARPM_Admin	Salesforce admins and project managers who need full access including configuration, template management, and sample data
oispm__ARPM_User	Team members who create and work on projects, tasks, and checklists
oispm__ARPM_ReadOnly	Stakeholders and observers who need read-only visibility into projects

Assigning Permission Sets

1. Go to Setup > Users > Users
2. Click a user's name
3. Scroll to Permission Set Assignments and click Edit Assignments
4. Move the appropriate ARPM permission set to Enabled
5. Click Save

Alternatively, use the Data Loader or Execute Anonymous Apex for bulk assignment.

4. App Builder & Page Layouts

Lightning App

The Audit Ready PM: Console app is included in the managed package. To make it visible to users:

6. Go to Setup > App Manager
7. Find Audit Ready PM: Console and click Edit
8. Go to User Profiles and add System Administrator and any other relevant profiles
9. Click Save

Home Page Components

Add the following LWC components to your Lightning Home Page or App Page:

- oispm:projectDashboard — project card grid with status filters. Set defaultFilter property if desired (e.g., 'In Progress')
- oispm:licenseSetup — displays current license tier, usage counts, and trial status
- oispm:sampleDataSetup — 4-step setup wizard for first-time configuration (hide after setup is complete)

Project Record Page Components

Add to the Project__c Lightning Record Page:

- oispm:ganttChart — Gantt timeline showing milestone progress
- oispm:taskBoard — Kanban board grouped by task status

Template Record Page Components

Add to the Project_Template__c record page:

- oispm:templateCsvUpload — bulk import of template tasks from CSV

Managed Package FlexiPage Note

The managed package includes pre-built FlexiPages for the Home Page and Project record page.

In subscriber orgs, these deploy automatically. You may need to re-assign them in App Builder if they do not appear.

Custom component names in FlexiPage XML use the oispm: namespace prefix.

5. Salesforce Object Integrations

Audit Ready PM can optionally link projects to standard Salesforce objects: Opportunity, Contract, Case, and Asset. Each integration adds a lookup field on the Project object and must be enabled in the Setup wizard.

Enabling Integrations

10. Navigate to the Audit Ready PM app and open the Setup tab
11. On the Integrations step, toggle on the objects you want to connect
12. Click Save — this updates OIS_Setup_Config__c for your org

Integration	What It Does
Opportunity	Adds Opportunity__c lookup on Project. Opportunity record shows Project__c lookup and Project_Created__c formula field
Contract	Adds Contract__c lookup on Project
Case	Adds Case__c lookup on Project — useful for service organizations tracking remediation projects
Asset	Adds Asset__c lookup on Project — useful for maintenance and inspection projects

All integrations are optional and operate entirely within your Salesforce org. No data is sent externally.

6. Experience Cloud (External Users)

Audit Ready PM supports external user access via Salesforce Experience Cloud. This allows clients and vendors to view limited project information without a full Salesforce license.

Requirements

- Salesforce Experience Cloud license (separate purchase from Salesforce)
- An active Experience Cloud site
- External users provisioned as Community or Partner users

Sharing Model

Project__c OWD is set to Private. External users gain access only through Apex Managed Sharing, which is automatically managed by the app when Project Members are added.

Project Member Role	Access Level
Project Manager	Edit
Team Lead	Edit
Contributor	Edit
Stakeholder	Read
Observer	Read

Community Components

Add these components to your Experience Cloud pages:

- oispm:communityProjectOverview — read-only project header and milestone list
- oispm:communityTaskList — read-only list of tasks assigned to the running user

Important
Do NOT expose internal-only components (projectDashboard, taskBoard, ganttChart) on community pages.
Template objects (Project_Template__c, Template_Task__c) are internal-only and should never be accessible to community users.

7. Sample Data

The app ships with a sample data installer that creates 5 demonstration projects with realistic milestones, tasks, checklists, and team members. This is useful for onboarding users and demonstrating the app to stakeholders.

Installing Sample Data

13. Open the Audit Ready PM app and navigate to the Setup tab
14. Complete the Licence and Integrations steps
15. On the Sample Data step, click Install Sample Data
16. Wait for the confirmation message — installation takes 10–30 seconds

Removing Sample Data

All sample records are tagged with `Is_Sample_Data__c = true`. To remove them:

17. Return to the Setup tab
18. On the Sample Data step, click Remove Sample Data
19. Confirm the action — all `Is_Sample_Data__c` records are permanently deleted

Note
Sample data removal is permanent and cannot be undone.
Locked checklist records (signed governance forms) within sample data will also be deleted.
Sample data is tagged on: Project, Milestone, Task, Task Comment, Project Member, Checklist Item, Project Template, Template Task, Account, Contact, Opportunity.

8. Licensing

Tier	Details
Trial	30-day full-feature trial. All features available. Begins on install date.
Pro	\$39/user/month. 5 user minimum, 25 user maximum.
Enterprise	\$10,000/year flat rate. Unlimited users and projects.

License state is stored in LicenseSettings__c (Hierarchy custom setting) and managed exclusively by the LicenseService Apex class. Do not edit this record manually.

To upgrade your license or discuss Enterprise pricing, contact: ccooper@opintelstrategy.com

9. Troubleshooting

Symptom	Resolution
App not visible in App Launcher after install	Go to Setup > App Manager > Audit Ready PM > Edit > User Profiles > add System Administrator
LWC components not appearing in App Builder	Verify permission sets are assigned. Check that Lightning Experience is enabled.
Sample data install fails	Verify ARPM_Admin permission set is assigned to your user. Check Setup logs.
Trial shows expired immediately	Post-install script may not have run. Contact support for the init script.
External users cannot see projects	Verify Project Member record exists with active User__c. Check that Is_Active__c = true on the Project Member.
PDF report is empty or errors	Ensure the project has at least one milestone or task. Check Apex debug logs for GenerateAuditReport flow errors.

Support

Email: ccooper@opintelstrategy.com

Response within 1 business day, Monday–Friday 9am–5pm Mountain Time.