PolicyPro™ User Guide

A complete reference for navigating PolicyPro™, Release 1.3

Product: PolicyPro™ | Audience: Compliance Administrators | Version: 3.0 (Release 1.3) | August 2026

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1. Solution Overview

PolicyPro™ is Exostar's compliance automation tool that helps organizations build, maintain, and document security policies across all 14 CMMC domains. Rather than writing policies from scratch, users answer a structured questionnaire and PolicyPro™ uses those responses to automatically generate complete, audit-ready policy documents.

PolicyPro™ is built on a question-and-answer model. Each CMMC domain contains a set of questions about how your organization operates. Your answers become the factual foundation of every policy document generated, ensuring the output is specific to your organization and defensible in a compliance review.

Two Ways to Provide Answers

PolicyPro™ offers two methods for providing answers to the questions.

Method	Best Used When
Chat Interface	You are working through a policy interactively and want to answer questions one at a time with AI-guided prompts on the Policy Screen.
Import	You need to collect answers offline, collaborate with subject matter experts who are not PolicyPro™ users, or update many answers at once.

Export/Import and Chat work together

You may choose either method to provide answers to the questions, or use a combination of both, whatever is easiest for you.

Key Capabilities

Capability	Description
Questionnaire Management	Answer questions for each of the 14 CMMC domains through the chat interface or via Import.
Progress Tracking	See completion status for every domain on the Main Screen with visual progress bars.
Policy Generation	Generate complete policy documents automatically from your answers, at any completeness level.
Policy Version History	View prior versions of any generated policy document and restore a previous version if

	needed.
Export	Download your questions and current answers as a CSV file for offline use or sharing.
Import	Upload a completed CSV file to bulk-update answers for one domain or across all domains.
Selective Import	Review every proposed change before applying, and choose exactly which answers to update.
Workspaces	Move between client organizations you support without signing out.
User & Role Management	Invite users, assign roles, and manage workspace access.
Audit Log	A defensible, queryable record of every membership and role change.

2. Navigating PolicyPro™

PolicyPro™ has two primary screens: the Main Screen and the Policy Screen. The application header is consistent across every screen.

Application Header

The header appears at the top of every screen and contains the following elements:

Element	Location	Description
My Policies	Center	Navigation link to the Main Screen. A navy underline indicates the active page.
Users (New)	Center	Opens the Manage Users screen for the current workspace. Visible to Admins only. See Section 13.
Workspace switcher (New)	Header	Appears only if you belong to more than one workspace. Lets you move between workspaces without signing out. See Section 3.
User avatar (initials)	Right	Displays your account initials. Click to access account settings or to sign out.

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3. Switching Between Workspaces NEW

If you support more than one client organization, PolicyPro™ lets you move between their workspaces without signing out. This section covers how workspaces are assigned, how to choose one at login, and how to switch between them afterward.

What Is a Workspace?

A workspace holds a single organization's questionnaire answers, generated policies, and user list, kept separate from every other organization's workspace. You are a member of one workspace per organization you support, with a role assigned in each -- see Section 15.

Selecting a Workspace at Login

If you belong to exactly one workspace, PolicyPro™ signs you directly into My Policies for that workspace and the selector screen is never shown. If you belong to two or more workspaces, PolicyPro™ presents the Workspace Selector screen immediately after you sign in.

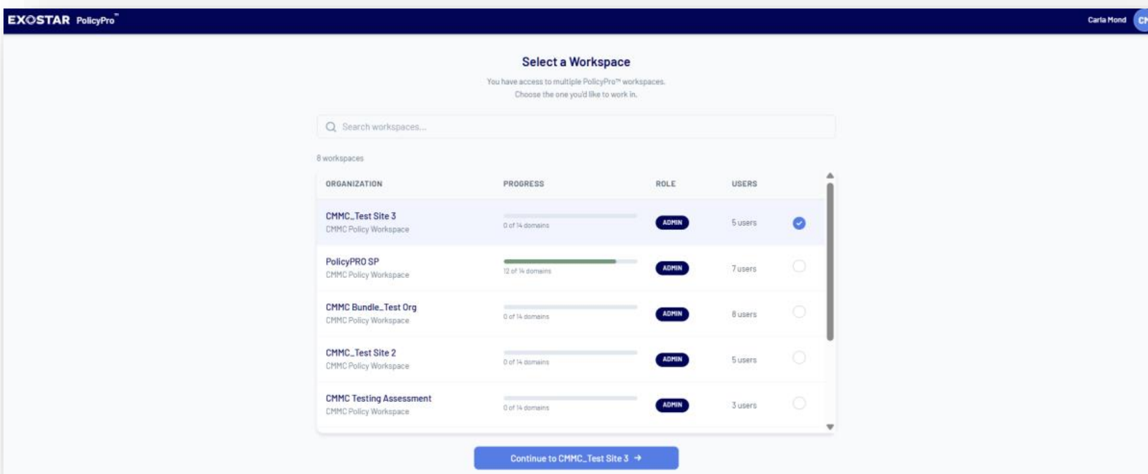

Figure 1 — The Workspace Selector screen, showing the searchable workspace table with Role pill and radio selection.

Using the Workspace Selector

1. Review the list of workspaces available to you. A count above the table shows the total (for example, "14 workspaces").
2. Use the search field to filter the list by organization name if you support many organizations. The count updates to reflect the filtered results.
3. Click a row to select it. The row is highlighted with a blue border and check indicator, and the Continue button updates to read "Continue to [Organization Name]."
4. Click Continue to enter that workspace's Main Screen.

Column	Shows
Organization	The organization name, labeled "CMMC Policy Workspace" beneath it. Rows are sorted alphabetically by default.
Progress	A mini progress bar showing how many of the 14 domains are complete for that workspace.
Role	Your role in that workspace -- Admin, Editor, or Viewer.
Users	The total number of users in that workspace.

Switching Workspaces Without Signing Out

Once you're working in a workspace, a workspace switcher pill is available wherever you're likely to need it: in the My Policies header, the Policy Screen header, and the Manage Users screen header. The switcher is hidden entirely if you belong to only one workspace.

1. Click the workspace switcher pill, which displays your current workspace name.
2. A dropdown opens listing every workspace you belong to, each with your role and domain-completion progress.
3. Select a workspace to switch immediately. PolicyPro™ reloads My Policies for the new workspace.
4. Use "View all workspaces" in the dropdown to return to the full Workspace Selector screen instead.

Clicking outside an open dropdown closes it without changing your workspace.

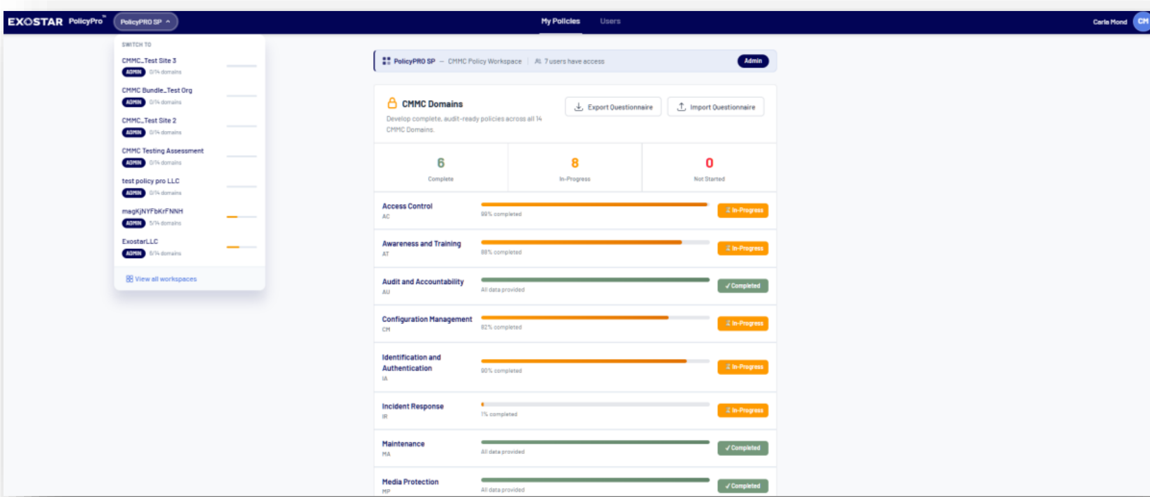

Figure 2 — The in-header workspace switcher, opens, showing the dropdown list of workspaces with Admin role pill per row and the View all workspaces link.

4. Main Screen

The Main Screen shows all 14 CMMC domains assigned to your organization, their completion progress, and access to questionnaire export and import.

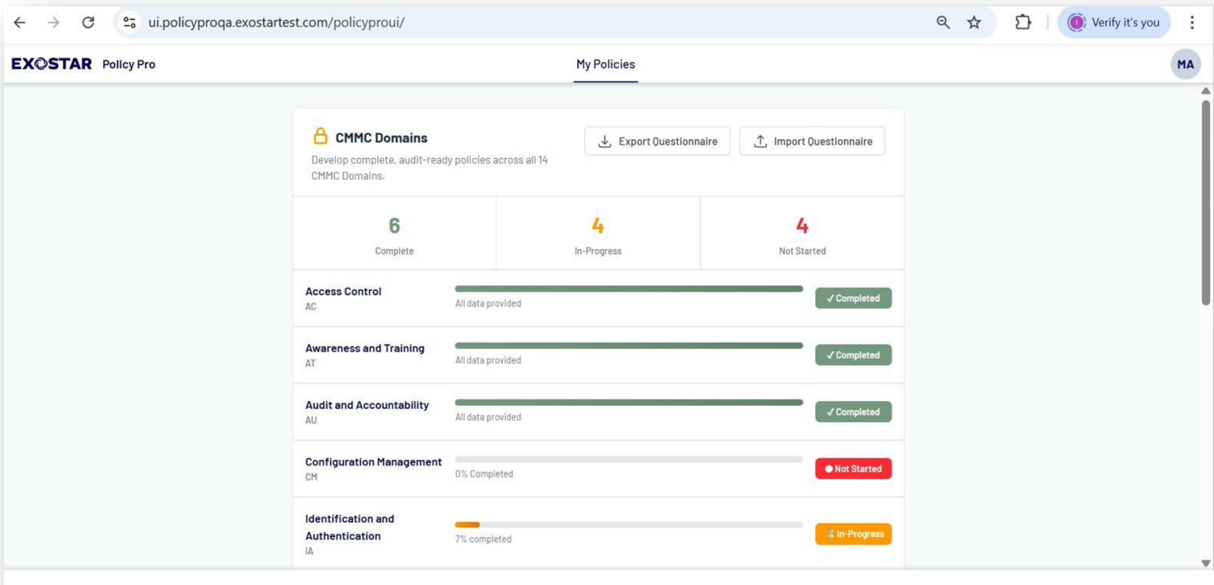

Figure 3 — The PolicyPro™ Main Screen showing CMMC Domains with completion statistics, Export and Import buttons, and the domain list with progress bars and status badges.

CMMC Domains

The CMMC Domains section shows all 14 CMMC domains. It contains the Export and Import buttons, a three-way completion summary, and the full domain list below.

Completion Summary

Statistic	Colour	Meaning
Complete	Green	All questions for this domain have been answered.
In-Progress	Orange	Some questions have been answered but the domain is not yet complete.
Not Started	Red	No questions have been answered for this domain.

Domain List

Each row shows the domain name, its two-letter CMMC domain code, a horizontal progress bar showing percentage completion or "All data provided," and a coloured status badge. Click any domain row to open the Policy Screen for that domain.

Export and Import Buttons

The Export and Import buttons are located in the upper-right area of the CMMC Domains section. These buttons operate on the full questionnaire across all 14 domains. For domain-specific export and import, use the equivalent buttons at the bottom of the Policy Screen. Both are documented in Sections 10 and 11.

5. Policy Screen

The Policy Screen opens when you click a domain on the Main Screen. It is a two-panel interface: a chat window on the left where you interact with PolicyPro™ to answer questions, and a policy document panel on the right.

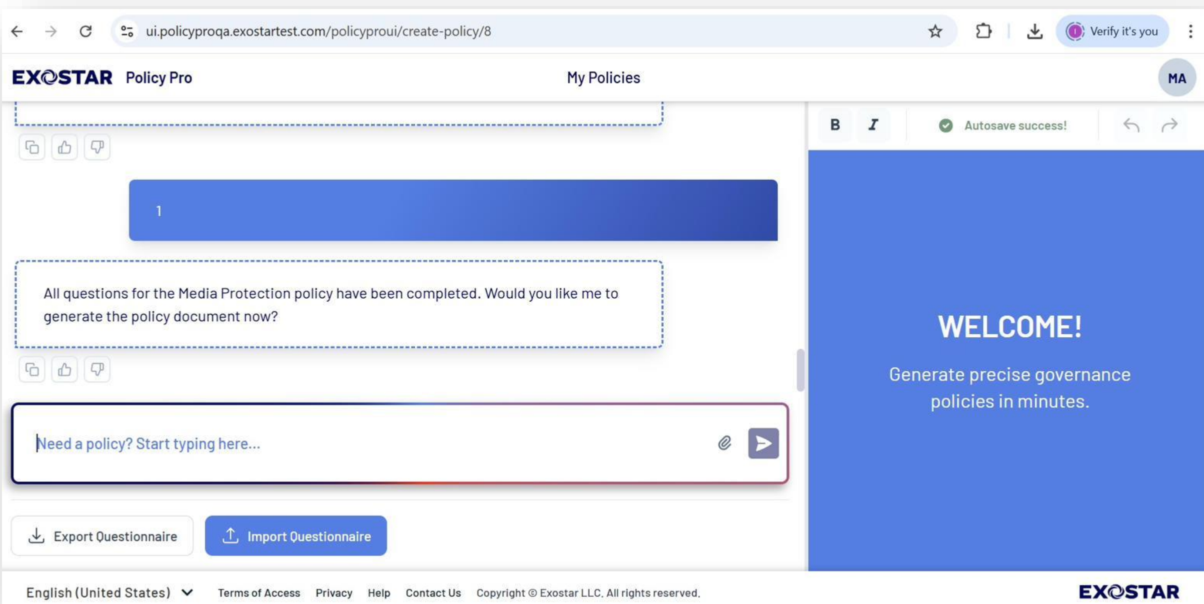

Figure 4 — The Policy Screen showing the chat panel (left) with Export and Import buttons at the bottom, and the policy document panel (right) in its welcome state.

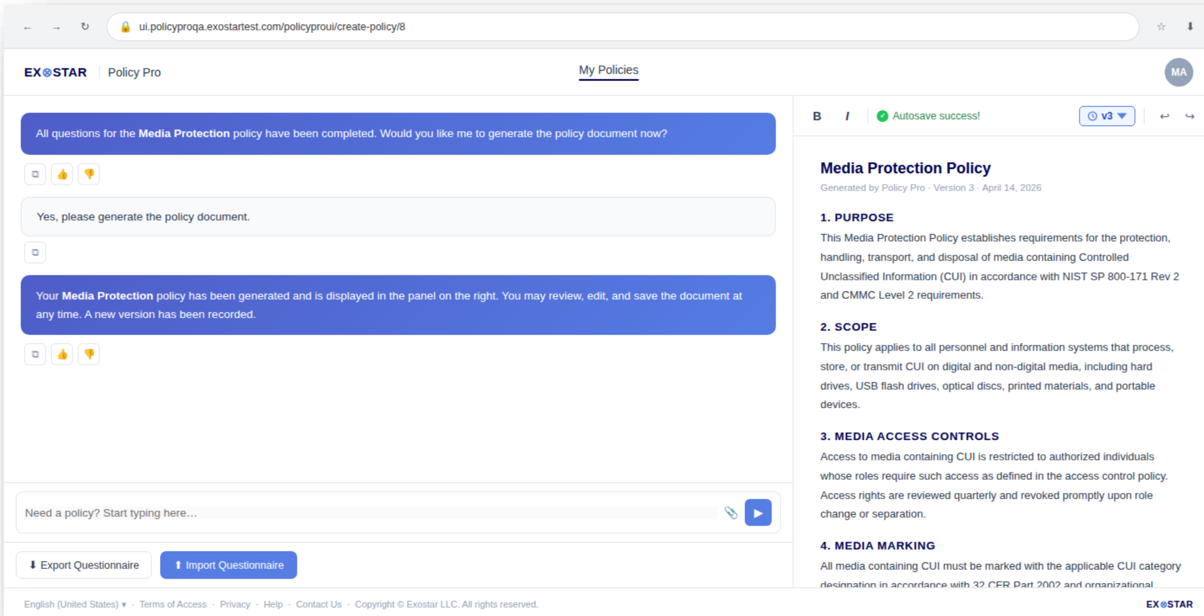

Figure 5 – The policy document panel after policy generation, showing the v3 version badge in the toolbar.

Policy Screen Layout

Area	Description
Chat panel (left)	The main working area for the Chat interface. PolicyPro™ presents questions as a conversation and you type answers into the input field at the bottom. Previous messages appear above as a scrollable history.
Policy document panel (right)	Initially shows a blue welcome screen reading "WELCOME! Generate precise governance policies in minutes." Once you ask PolicyPro™ to generate your policy, the completed document appears here. You can edit text directly and apply Bold or Italic formatting using the toolbar at the top of this panel.
Version badge (toolbar)	Displays the current version number (for example, v3) in the policy document panel toolbar. Click it to open the Version History panel. Only appears after a policy has been generated at least once. See Section 8.
Export (bottom of chat)	Downloads a CSV file of all questions and current answers for this domain only.

Import (bottom of chat)	Opens the upload dialog to import a CSV file with answers for this domain.

Autosave

PolicyPro™ saves your work automatically. When active, a green "Autosave success!" indicator appears in the top-right of the policy document panel.

6. Using the Chat Interface

The chat interface is one method for providing answers to the questionnaire. PolicyPro™ guides you through questions one at a time as a conversation.

How It Works

When you open a domain on the Policy Screen, PolicyPro™ presents the first unanswered question in the chat area. Each question appears as a numbered message. Read the question, type your answer in the text input at the bottom of the chat panel, then click the send button or press Enter to submit. PolicyPro™ acknowledges your answer, records it, and presents the next question. This continues until all questions for the domain are answered.

Answering a Question Step by Step

1. From the Main Screen, click the name of the domain. The Policy Screen opens.
2. Read the question displayed in the chat panel. A numbered header marks each question in sequence.
3. Click the text input field. The placeholder reads "Need a policy? Start typing here..."
4. Type your answer and click the blue send button or press Enter.
5. PolicyPro™ confirms the answer and presents the next question.
6. Continue until PolicyPro™ notifies you that all questions are complete.

Attach a file for context

Click the paperclip icon or drag and drop files onto the chat input area to attach supporting documents. A maximum of 5 files can be attached per message. PolicyPro™ can use the contents of attachments to help answer questions about your organization.

Getting Help Mid-Questionnaire NEW

If you're unsure how to answer a question, type a help request instead of an answer -- for example "help," "show example," "give an example," "what does this mean?", or just "?". PolicyPro™ recognizes the request and responds with guidance for that specific question, including at least one example of a valid answer, then re-presents the original question so you can answer without losing your place. Asking for help never overwrites an answer you've already given, and the help response is visually distinguished from a question prompt.

Chat Message Controls

Button	Function
Copy	Copies the message text to your clipboard.
Thumbs up	Marks the response as helpful.
Thumbs down	Marks the response as not helpful.

7. Generating a Policy

Ask PolicyPro™ to generate the policy document for a domain at any point in the questionnaire. A persistent banner at the top of the chat panel shows whether the domain is ready or still incomplete.

Generate at any completeness level (New in Release 1.3)

Starting in Release 1.3, PolicyPro™ no longer requires every question to be answered before generating a policy. Generate a working draft at any time, then return to the questionnaire later to fill remaining gaps and regenerate.

The Generate Now Banner

A Generate Now banner is always visible at the top of the Policy Screen chat panel for the open domain. Its state reflects the domain's current completeness:

Banner State	When It Appears	What Happens on Generate Now
Ready	All questions in the domain are answered (100% complete).	Generation starts immediately -- no confirmation step.
Warning	One or more questions are still unanswered.	A confirmation prompt states the policy will be generated as incomplete; confirm to continue.

How to Generate a Policy Document

1. Open the Policy Screen for the domain you want to generate.
2. Check the Generate Now banner at the top of the chat panel. If it shows a warning state, you can still proceed, or return to the questionnaire to answer more questions first.
3. Click Generate Now. If any questions are unanswered, confirm the prompt warning that the policy will be generated as incomplete.
4. PolicyPro™ generates the policy document and displays it in the right-hand panel, replacing the welcome screen. A document generated below 100% completeness displays "Incomplete" prominently at the top.

5. Review and edit the document directly in the right panel. Use the Bold and Italic toolbar buttons for formatting.

Regenerate after importing new answers

If you import a CSV after a policy document has already been generated, you must ask PolicyPro™ in the chat to regenerate the document, or click Generate Now again. The existing document does not update automatically.

8. Policy Version History

Every time a policy document is generated or regenerated, PolicyPro™ captures a new version. You can view the complete history of a policy and restore any prior version if needed.

How Versioning Works

When you generate a policy document for a domain, PolicyPro™ records a timestamped snapshot of that document. Each subsequent generation creates an additional version, so you always have a full audit trail of how your policies have evolved over time.

Versions are stored per domain. The most recent version is always displayed in the policy document panel when you open a domain on the Policy Screen.

Viewing Version History

1. Open the Policy Screen for the domain whose version history you want to review.
2. In the policy document panel toolbar, click the version indicator (for example, v3) or the history icon.
3. A version history panel opens, listing all previously generated versions with their date, time, and version number.
4. Click any version in the list to preview its content in the panel.

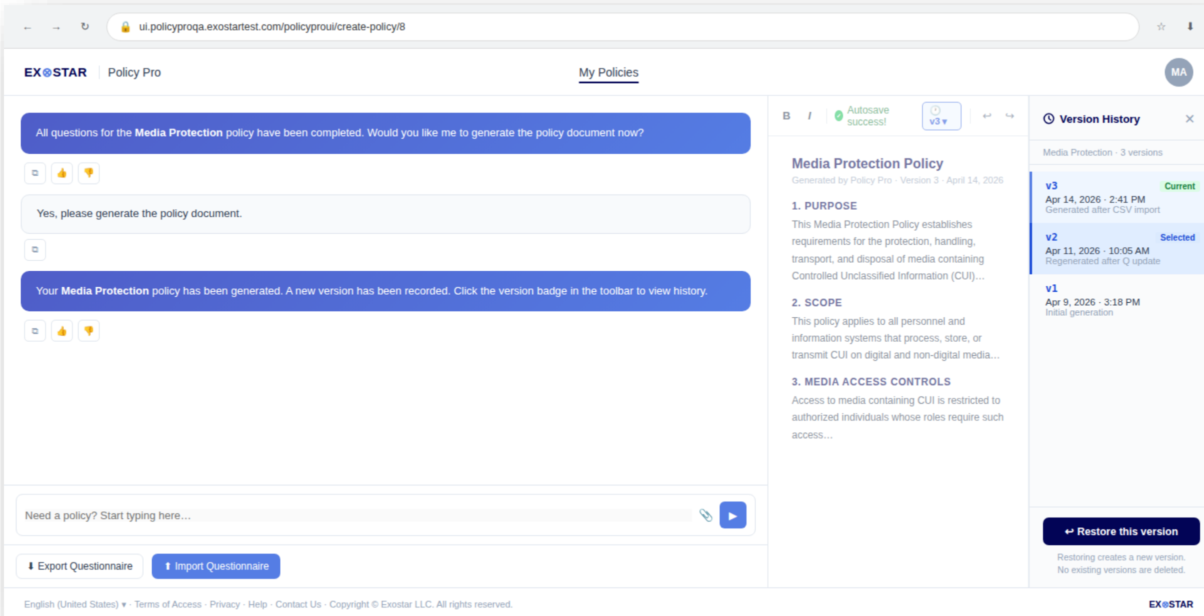

Figure 6 — The Version History panel with v2 selected for restore.

Restoring a Previous Version

1. Open the version history panel (see above).
2. Click the version you want to restore.
3. Click Restore this version. PolicyPro™ replaces the current policy document with the selected version and records the restoration as a new version entry.

Restoring creates a new version

Restoring a previous version does not delete the current version. The restored content becomes the latest version, and all prior versions remain accessible in the history.

Use versioning after updating answers

If you update answers via Import and regenerate the policy, the original generated document is preserved as a prior version. You can compare old and new versions and restore the original if the regenerated document requires further refinement.

9. Export and Import -- Overview

Export and Import provide another way to provide answers. Both the chat interface and Import can be used on the same domain -- your answers are combined regardless of how they were entered. This section explains how to use Export or Import and where to find the buttons.

When to Use CSV

The CSV approach is useful when:

You need to collect answers from colleagues or subject matter experts who do not have PolicyPro™ access.
You already have answers documented elsewhere and want to upload them in bulk.
You want an offline snapshot of your questionnaire state.
You are updating a large number of answers at once.

Button Locations and Scope

Location	Buttons	Scope
Main Screen -- CMMC Domains section (top right)	Export and Import	All 14 domains -- single file covers the entire questionnaire.
Policy Screen -- bottom of chat panel	Export and Import	Current domain only.

Changes are never applied automatically

Uploading a CSV does not immediately overwrite your data. PolicyPro™ always shows a Review Extracted Answers dialog first so you can inspect every proposed change and decide which to apply.

10. Exporting Data

Export your questionnaire as a CSV file to review offline, share with colleagues, or give to a subject matter expert to complete.

Export the Full Questionnaire (All Domains)

1. On the Main Screen, locate the Export button in the upper-right of the CMMC Domains section.
2. Click Export. PolicyPro™ downloads a CSV file containing all questions across all 14 domains. The Valid Response column is auto-populated with format guidance (e.g. TRUE/FALSE, NUMBER, TEXT ENTRY). The file is named PolicyPro_AllQuestions_YYYYMMDD_HHMMSS.csv.
3. Open the file in Microsoft Excel or a similar application from your browser's downloads folder.

Export a Single Domain

1. From the Main Screen, click the domain you want to export. The Policy Screen opens.
2. At the bottom of the chat panel, click Export.
3. PolicyPro™ downloads a CSV file containing only the questions and current answers for this domain. The file is named PolicyPro_{DomainName}_Questions_YYYYMMDD_HHMMSS.csv (e.g. PolicyPro_AccessControl_Questions_20260327_143000.csv).

After downloading, your file will contain four columns: Category/Domain, Question, Valid Response, and Answer.

Row ordering matches the Main Screen

Rows in the exported file follow the same domain sequence shown on the Main Screen (Access Control first, then Awareness and Training, and so on). Within each domain, questions appear in the same order they are asked in the chat interface.

Consistent format across all export locations

Whether you export from the Main Screen or from the Policy Screen, the file format is identical: the same four columns in the same order, with rows sorted by domain sequence.

11. Importing Data

Import a completed CSV file to update answers in bulk -- for all domains at once from the Main Screen, or for a single domain from the Policy Screen.

Import from the Main Screen (All Domains)

1. On the Main Screen, click Import in the upper-right of the CMMC Domains section.
2. The Import dialog opens. Drag your CSV file into the upload area or click Browse files to select it.
3. PolicyPro™ validates the file. If it cannot be read or the format is incorrect, an error message is displayed. Correct the file and try again.
4. If valid, PolicyPro™ opens the Review Extracted Answers dialog. Proceed to Section 12.

Import into a Single Domain

1. From the Main Screen, click the domain you want to update. The Policy Screen opens.
2. At the bottom of the chat panel, click the blue Import button.
3. The Import dialog opens. Drag your CSV file into the upload area or click Browse files.
4. PolicyPro™ validates the file and, if valid, opens the Review Extracted Answers dialog. Proceed to Section 12.

File Requirements

Requirement	Detail
File format	CSV (.csv) or Excel (.xlsx) -- no conversion required.
Column headers	Row 1 must contain exactly: Category/Domain, Question, Valid Response, Answer -- in that order.
Question text	Must exactly match the questions in PolicyPro™. Do not edit this column.

Answer column	The only column you should modify. Leave blank if no answer is available.

Unrecognized Questions

If the CSV contains a question that PolicyPro™ does not recognize -- for example because the question text was accidentally edited -- that row is skipped and a warning is shown on the Review Extracted Answers dialog. Only rows that exactly match a known question are processed.

12. Reviewing and Applying Changes

After uploading a CSV or Excel file, PolicyPro™ displays the Review Extracted Answers dialog. This screen shows every answer found in the file alongside the current value so you can decide which changes to apply before committing them.

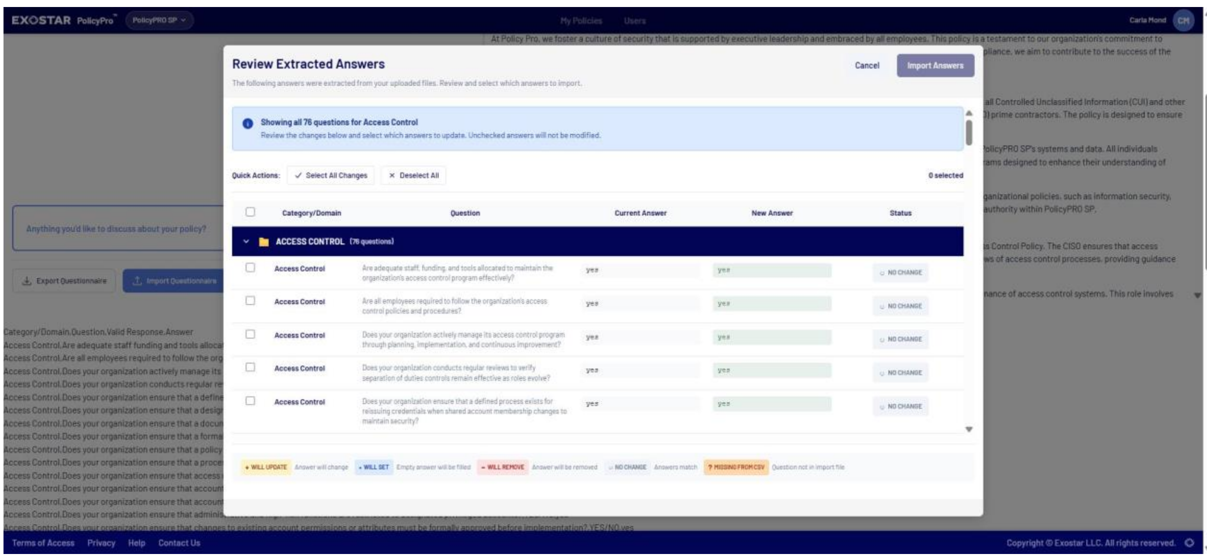

Figure 7 — Review Extracted Answers — review and select which answers to import before applying.

Reading the Table

The dialog contains five columns:

Column	What it shows
Category/Domain	The CMMC domain the question belongs to (e.g., Access Control).
Question	The full questionnaire question text.
Current Answer	The answer already stored in PolicyPro™ before the import. This value comes directly from your saved answers -- it is not taken from the import file.
New Answer	The answer found in the uploaded file.

Status	What will happen if the row is selected: WILL UPDATE (existing answer changes), WILL SET (blank answer filled in), or NO CHANGE (answers identical -- cannot be selected).

Selecting Changes to Apply

Only checked rows are applied when you click Import (#) Answers. The number in parentheses reflects your current selection count (e.g., Import (3) Answers).

Individual checkbox -- check or uncheck each row independently.
Select All Changes (Quick Actions) -- checks all rows with WILL UPDATE or WILL SET status.
Deselect All (Quick Actions) -- unchecks all rows.
Rows showing NO CHANGE cannot be selected -- their current and new answers are identical.

Applying Changes

1. Review the table and check the rows you want to apply.
2. Use Select All Changes to quickly select every pending update, then uncheck any rows you want to skip.
3. Click Import (#) Answers to apply the selected answers.

Canceling Without Applying

Click Cancel (top right of the dialog) to close without making any changes.

Unchecked rows are never modified

Only checked rows will be updated when you click Import. You can safely review the full list and apply only the answers you want.

13. Manage Users Screen NEW

The Manage Users screen lists everyone with access to the current workspace and lets Admins invite new users, change roles, and remove access. This screen is available to Admins only.

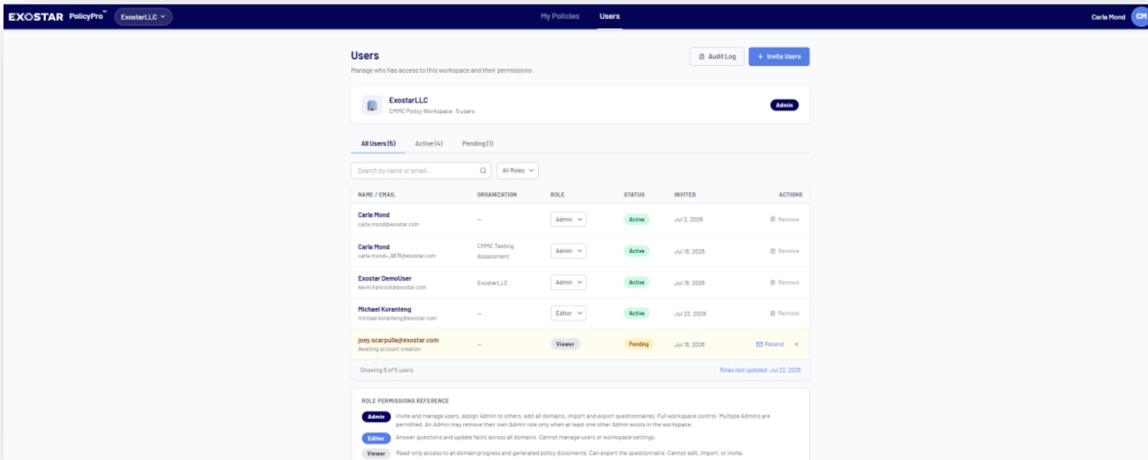

Figure 8 — The Manage Users screen: workspace context strip, Invite Users button, All Users / Active / Pending tabs with counts, search field, Role filter, and the user table with inline role dropdowns.

Opening Manage Users

Click Users in the application header to open the Manage Users screen for the current workspace. The Users tab is visible only to Admins -- see Section 15 for how the header adapts to your role.

Workspace Context Strip

At the top of the screen, a context strip shows the workspace name, the total number of users in the workspace, and your role in that workspace as a coloured pill.

All Users, Active, and Pending Tabs

Tab	Shows
All Users	Every user in the workspace, active and pending. Selected by default.
Active	Users whose account is confirmed and who have workspace access.
Pending	Invited users who have not yet completed account setup. See Section 14.

Cancelled and expired invitations are not shown in any tab. Review that history in the Audit Log (Section 16).

Searching and Filtering the User Table

Control	Function

Search field	Filters the table live by name or email as you type.
Role filter	Narrows the table to All Roles, Admin, Editor, or Viewer.
Organization filter	Narrows the table to All Organizations or a specific organization represented in the current member list.

Reading the User Table

Column	Description
Name / Email	The user's name and email address.
Organization	The user's organization.
Role	Admin, Editor, or Viewer. See Section 15 to change a role.
Status	Active or Pending, shown as a text-only pill.
Invited	The date the user was invited.
Actions	Role change, remove, or resend-invitation controls for that row.

Your own row is labeled You with an Owner label in Actions, and has no destructive actions available. The table footer shows a count of displayed users (for example, Showing 5 of 5 users).

Inviting new users

Click Invite Users at the top of the screen to start the invitation flow. See Section 14.

14. Inviting Users NEW

Admins invite new users to the workspace by email address. PolicyPro™ looks up each address against your organization's Exostar accounts before you send invitations, so you can see who's eligible before anything is sent.

Starting an Invitation

1. On the Manage Users screen, click Invite Users.
2. Enter up to 10 email addresses in the email field, one at a time (press Enter after each) or as a semicolon-separated list. Each address appears as a removable tag; click the x to remove one, or Clear all to start over. A running count shows how many addresses remain (for example, "7 remaining (10 max)").

3. Click Lookup. PolicyPro™ checks each address against Exostar's identity system and shows a loading state while the check is in progress.

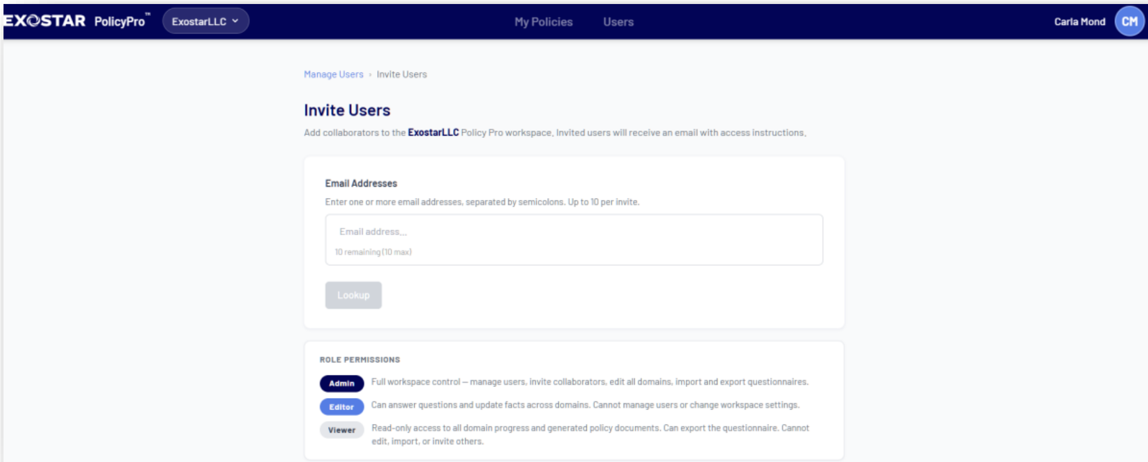

Figure9– The Invite Users screen: email address field, remaining-count helper text, and the Lookup button.

Reading the Lookup Results

Result	What You See	Can You Invite?
Eligible, single account	Checkbox checked by default, organization from the identity lookup, and a role dropdown defaulting to Editor.	Yes
No Exostar account found	A warning explains the invitee will receive an account-creation email and be added automatically once their account is active. Row has a checkbox (checked by default) and a role dropdown.	Yes, status is Pending until the invitee registers
Multiple accounts found	A dropdown lets you select the specific account by ID and display name. Rows without a selection are highlighted amber with "Select an account to continue," and Submit is disabled until every multi-account row has a selection.	Yes, once an account is selected
Ineligible, all accounts suspended	Row is greyed out with a disabled checkbox and the reason "All Exostar accounts	No

	associated with this email are suspended."	
Ineligible, already a workspace member	Row is greyed out with the reason "Already an active user in this workspace."	No

A footer count shows how many looked-up addresses are eligible to invite (for example, "2 of 3 users eligible to invite").

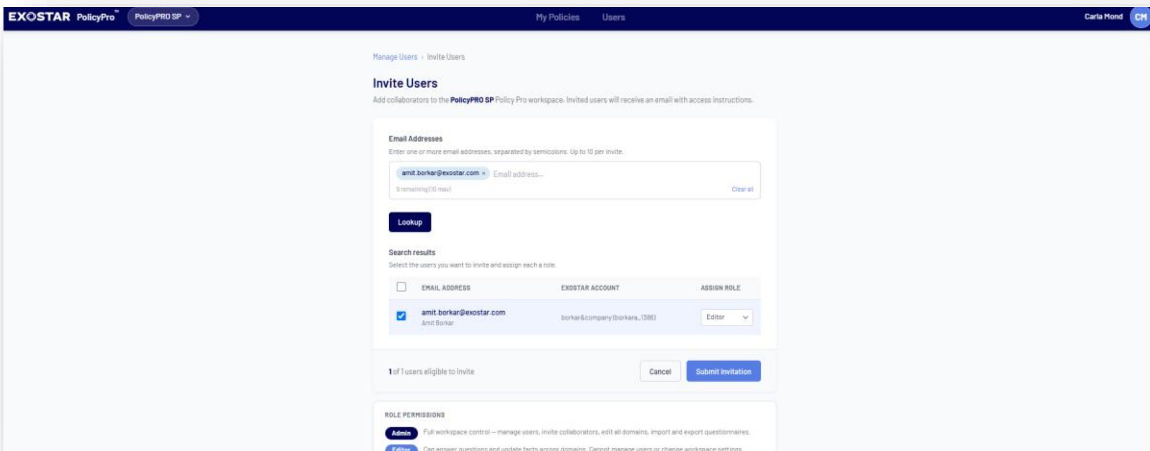

Figure 10 – Lookup results showing the "no Exostar account yet" state with its eligibility warning banner and role dropdowns.

Submitting Invitations

1. Set the role for each eligible invitee using the row's role dropdown (Admin, Editor, or Viewer).
2. Deselect any row you don't want to invite yet -- every eligible row is checked by default.
3. Click Submit Invitation.
4. If every invitation succeeds, a success banner reads "Invitations submitted," followed by a table of email, organization, assigned role, and status ("Email invitation sent") for each.
5. If some addresses were ineligible, an error banner lists them with their reasons, and a separate "Successfully invited" section confirms the rest went through.
6. Click Done to return to Manage Users, or Invite More Users to start another batch.

What the Invited User Receives

PolicyPro™ sends a PolicyPro™ branded invitation email through the Exostar email service. The email states the workspace name, the role assigned, a link to accept the invitation, and instructions to create an Exostar account first if the invitee doesn't already have one. The email never includes workspace content, policy data, or CUI.

Accepting an Invitation

Invitee's Situation	What Happens
Already has an Exostar account with PolicyPro™ access	Signs in to Exostar; PolicyPro™ activates their workspace membership and takes them directly to that workspace.
Has an Exostar account, but no prior PolicyPro™ access	Signs in to Exostar; PolicyPro™ creates their user record and activates workspace membership at that point.
Has no Exostar account	Completes Exostar self-registration; once the account is approved, PolicyPro™ creates their user record, activates workspace membership, and sends a confirmation email.

An invitation link that has expired or was already used shows a clear error message directing the invitee to contact the inviting organization. Invitation links expire after 7 days by default.

Pending Users and Resending an Invitation

An invited user with no Exostar account yet appears in Manage Users with a Pending status immediately after the invitation is sent (see Section 13). PolicyPro™ periodically checks for account activation in the background -- no manual follow-up is required. If the invitation expires before the account is created, the row shows an Expired status.

To send a fresh invitation, use Resend Invitation on a Pending row in Manage Users.

Every invitation event is logged

Invitations sent, accepted, cancelled, and expired are all recorded in the audit log. See Section 16.

15. Roles and Permissions NEW

Every workspace member has one role: Admin, Editor, or Viewer. Your role determines which actions and navigation items you see.

The Three Roles

Role	What They Can Do
Admin	Full access: answer questionnaires, generate policies, manage users and roles, view the audit log.
Editor	Answer questionnaires, generate policies, use Export and Import. Cannot access Manage Users.

Viewer	Read-only access to all domain cards and policy content. Can use Export, but not Import.

How Your Role Changes What You See

On My Policies:

The Users tab is visible only to Admins.
The Import Questionnaire button is hidden for Viewers.
The Export Questionnaire button remains visible to every role, including Viewer.
A read-only notice appears beneath the context strip for Viewer-role users.

A context strip beneath the My Policies header always shows the workspace name, the total number of users in the workspace, and your current role as a coloured pill, so you always know your permissions without navigating elsewhere.

Changing a User's Role

Admins change a role from the inline dropdown in the Actions column of Manage Users (see Section 13).

1. Open Manage Users and locate the user's row.
2. Select a new role (Admin, Editor, or Viewer) from the dropdown.
3. A confirmation dialog opens showing the user's name and email, and the change from their old role to the new role.
4. Confirm to apply the change, or cancel to reset the dropdown -- no change is made.

Changing your own role

If you change your own role away from Admin, the dialog title reads "Remove your Admin role" and the confirm button reads "Remove My Admin Role," with an additional warning that you will lose Admin access immediately. If you are the only Admin in the workspace, your own role dropdown is disabled, with a tooltip explaining that you must assign Admin to another user first.

Removing a User or Cancelling an Invitation

Destructive actions always require confirmation so access is never changed by accident.

Action	Confirmation Dialog Shows	Confirm Button
Remove an active user	User name, email, and a warning that access is revoked immediately and re-invitation is required to restore it.	Remove User
Cancel a pending invitation	Invitee email, invite date, and a warning that the invitation link stops working	Cancel Invitation

	immediately and the invitee is not notified.	

Confirming either action takes effect immediately and removes the row from the Manage Users table. Both actions are recorded in the audit log, see Section 16.

16. Audit Log NEW

Every change to workspace membership and roles is recorded in an audit log, giving Admins a defensible record of who had access and when.

What Gets Logged

PolicyPro™ records the following events, each with a timestamp, the acting user, and the affected user:

Invitation sent
Invitation accepted
Invitation cancelled
Invitation expired
Role changed
User removed

Log entries are immutable -- once written, an entry cannot be edited or deleted.

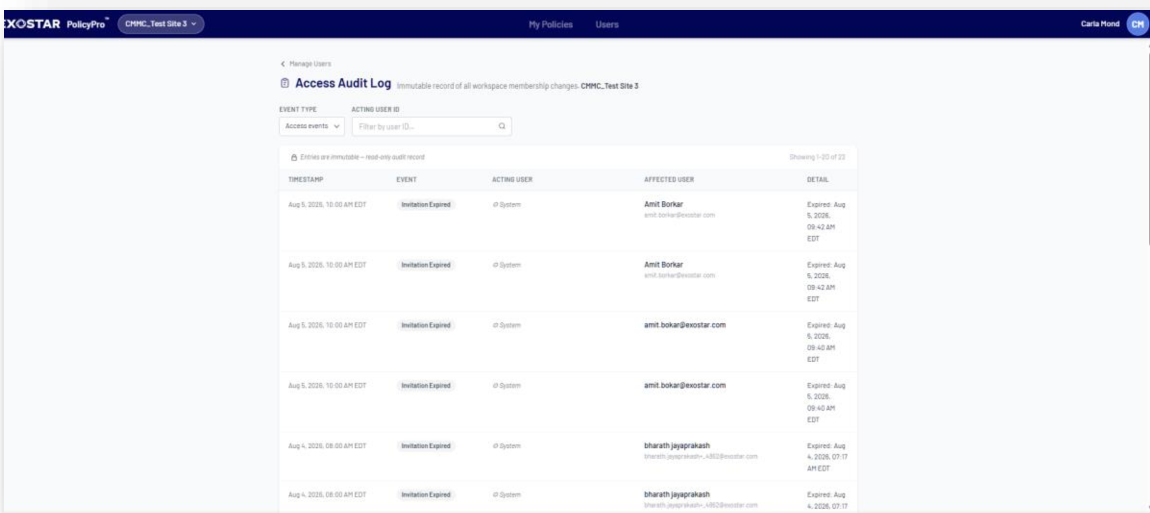

Figure 11– The Access Audit Log, showing Role Changed, Invitation Sent, Invitation Expired, and User Removed events with timestamp, acting user, and affected user.

Reviewing the Log

The audit log is queryable by workspace, so Admins can review the complete membership history for the workspace they administer.

17.CSV File Format

Every file exported by PolicyPro™, and every file accepted for import, uses exactly four columns. In a full-questionnaire export, rows are ordered by domain sequence as shown on the Main Screen, with questions in interview order within each domain.

Column	Description	Edit on Import?
Category/Domain	The CMMC domain the question belongs to (e.g., Access Control, Audit and Accountability). Do not edit.	No
Question	The full text of the question as it appears in PolicyPro™. Used to match rows to your questionnaire -- must not be changed.	No
Valid Response	Describes the expected format for the answer. PolicyPro™ populates this column automatically based on question type: Boolean (TRUE/FALSE or YES/NO); Numeric (NUMBER with a unit hint, e.g. Ex: 15 minutes); Duration/frequency (e.g. Ex: Quarterly or Ex: Every 90 days); Free text (TEXT ENTRY); Pick list (pipe-separated options, e.g. Daily | Weekly | Monthly); Date (e.g. Ex: 2025-03-15). Do not edit this column.	No
Answer	Your answer to the question. This is the only column you should modify. Leave blank if no answer is available. Should conform to the Valid Response guidance.	Yes, only this column

EXOSTAR

Working with the File in Excel

Column A = Category/Domain. Do not edit.
Column B = Question. Do not edit.
Column C = Valid Response. Do not edit.
Column D = Answer. Edit only this column.
Save in any format -- PolicyPro™ accepts both CSV (.csv) and Excel (.xlsx).

CSV and Excel both accepted

You can import a .csv or .xlsx file directly -- no conversion needed.

18. Status Indicators

PolicyPro™ uses status badges throughout the application to communicate state at a glance.

Domain Status Badges (Main Screen)

Badge	Meaning
Completed	All questions answered. Progress bar is fully green showing "All data provided."
In-Progress	Some questions answered. Progress bar is partially orange showing a percentage.
Not Started	No questions answered. Progress bar is empty showing "0% Completed."

Import Change Status Chips (Review Extracted Answers Dialog)

Chip	Meaning	Pre-selected?
Will Update	The CSV contains a different answer from what is currently stored. Applying this replaces the current answer.	Yes
Will Set	The question is currently unanswered. Applying this fills it in for the first time.	Yes
No Change	The CSV answer matches what is currently in PolicyPro™. No update needed.	No

Roles (Manage Users, My Policies) NEW

Chip	Meaning
Admin	Full workspace access, including Manage Users and the audit log. See Section 15.
Editor	Can answer questionnaires, generate policies, and use Export/Import. No access to Manage Users.
Viewer	Read-only access to domain cards and policy content. Export only, no Import.

User Status (Manage Users) NEW

Pill	Meaning
Active	The user's account is confirmed and they have workspace access.
Pending	The user was invited but has not yet completed account setup. See Section 14.
Expired	The invitation expired before the invitee completed account setup. Resend the invitation from Manage Users.