

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Develop Design Package - 4 Phase Project	5/10/24	V1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
This comprises elements that outline and determine how the Type 4 project type design package is to be completed.			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Ryan/Jeff	Sales	Provide CAD RCP (DWG) files to OTA	
Client/Builder/Architect	Client/Builder	Initial Google documents created by Sales Engineer	
Josh	Designer		
What are the sequential steps?			
Step Description		Who is Responsible?	
D-Tools		Designer	
Review D-Tools project for equipment and cabling packages sold and compare to the Google System Overview to determine if items missed requiring a changeorder		Designer	
Google			
Review Google "System Overivew" tab for outline of sold system		Designer	
Audit existing documentation created by the sales engineer		Designer	
Fill out Google sheets documentation and update "Documentation Checklist" tab as completed*		Designer	
Export wire checklist, rack layout, DEB48 layout, Switch layout to PDF in Field Documentation folder in Google Drive		Designer	
*NOTE: Follow the Google design checklist to ensure all forms are properly filled out for the project			
AutoCAD			
Prepare RCP CAD files received**		Designer	
Create RCP plan in CAD**		Designer	
Create LV Floor Plan**		Designer	
Create TV Elevations**		Designer	
Save all CADs to appropriate title blocks and save to field documentation folder in Google Drive			
**Note: Follow AutoCAD design checklists			
Visio			
Create system schematic using Visio template***		Designer	
Create room equipment overviews using Visio templates***		Designer	
Export schematic to PDF and save in Field Documenation folder in Google Drive		Designer	
***Note: Follow Visio design checklists			
Lutron Designer			
Create Lutron designer file and save to Dropbox		Designer	
Print wiring report and save to Field documentation folder in Google Drive		Designer	
Provide wiring report to PM to provide to electrician		Designer	
General Items			
Add client project to Google Field Site		Designer	
Document any discrepancies and present to PM to determine if C&H or CO required		Designer	
Notify Sales if any significant design limitations are realized		Designer	
Update Monday.com project board status		Designer	
Update D-Tools cloud to next phase		Designer	
Post all documentation to Google Drive and confirm access in Slack Canvas		Designer	
What are the outputs [Defined Standards of Completion or Deliverables]			
Documentation checklist is fully filled out for all phases, files posted to slack and google drive			
Update Monday.com board			
Update D-Tools cloud			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Project Manager	Project Manager	Request Rough-In Materials	