

SOP Template			
Company Name	Process Name	Date Created	Revision Number
One Touch Automation	Finalize Project Docs	5/14/24	V1
Process Frequency (Daily/Weekly/Monthly/Project Based)			
Project Based			
Process Description			
To outline the process for final system documents that reflect as built from the field			
Who's Involved		What are the inputs?	
Name	Department or Function	Documents, SOW, Approval, Labor, Software, Etc.	
Josh	Designer	Final Punchlist Completed	
Project Manager	Project Manager	Final Invoice Requested	
Donna	Office Manager		
What are the sequential steps?			
Step Description		Who is Responsible?	
***General Items***			
Request As-Built markups from the project manager		Designer	
Review any questions from markups with project manager to get clarification		Designer	
***Google***			
Update Google documentation sheets		Designer	
Review Google documentation sheets file and clean all notes that aren't relevant		Designer	
Review Google Drive folder and archive/delete any unnecessary files		Designer	
Create folder in Google Drive called "Final Project Documentation"		Designer	
Print all Google documentation sheets to PDF, Save in Google "Final Project Documentation" folder		Designer	
Update Google Field site moving project from Active to Archived		Designer	
***AutoCAD***			
Update AutoCAD drawings to reflect field changes		Designer	
Print all AutoCAD drawings to PDF - Add FINAL to the name, Save in Google "Final Project Documentation" folder		Designer	
***Visio***			
Update Visio drawings to reflect field changes		Designer	
Print all Visio drawings to PDF - Add FINAL to the name, Save in Google "Final Project Documentation" folder		Designer	
***Lutron Designer***			
Print final Lutron wiring report, Save in Google "Final Project Documentation" folder		Designer	
What are the outputs [Defined Standards of Completion or Deliverables]			
Files posted to Final Project Documentation folder			
Update <a href="#">Monday.com</a> board			
Update D-Tools cloud			
Who does the process transfer to next?			
Name	Department or Function	Milestone	
Brandon	Service Manager	Turn over to Service Dept	
Project Manager	Project Manager	Turn over to Service Dept	