Checklist Template

Company Name	Checklist Name	Date Created	Revision Number
One Touch Automation	Execute Final Install	6/12/24	V1

Checklist Frequency (Daily/Weekly/Monthly/Project or Phase Based)

Project Based

Checklist Description

Outline the the aspects that determine when a project is complete.

Who's Involved		When is the checklist needed?
Name	**Department or Function**	**Example: Phase completion, proposal created, etc.**
Technician	Technician	Equipment delivery (Rack, TVs)

What are the items?

General	Completed By	Date
All equipment and wiring is appropriately labeled [with correct Wire tag (ex. WAP-101-1) or layman's terms]		
Any repair items reported to homeowner		
Auto-updates are disabled for equipment (TVs, AVRs, Projectors, Network, etc)		
Messes cleaned up (vacuumed, wiped down, dusted, etc)		
All equipment has been checked on in Tracknicity and delivered to the job site		
Any returned product is removed and brought back to office in return area (Notify PM of any product that is returned)		
Equipment extras are stored in a bankers box in the equipment room (Go through and toss anything not worth saving) AVOID THE CLUTTER		

Equipment Rooms	Completed By	Date
Rooms have been thoroughly cleaned (swept, vacuumed, wiped down)		
Equipment racks have been dusted, wiped down and vacuumed the bottoms for all trimmings		
DEB panel dusted, wiped down and vacuumed as needed		
All enclosure covers installed and tightened		
OTA Logo plate installed in rack		
Devices are labeled with BLACK or WHITE label tape to match the device (Avoid using white labels on black components)		
IR emitters are either glued or have IR shield installed		
Trash has been removed		

Video	Completed By	Date
TVs - Brackets are locked in place		
TVs - VOM/Balun is mounted in back box, labeled		
TVs - All cables are nicely ziptied along the bracket with extra cable stored in the backbox or in-wall above back box		
TVs - Mounted, verified level with at least a 2ft level (confirm bubble is in MIDDLE of lines)		
TVs - Wires are neatly managed (no visible wiring)		
TVs - Wiped down to remote smudges and fingerprints		
TVs - Tested control of TVs (IR, RS232 or IP)		
TVs - Fully configured (Updates disabled, Samsung TV disabled, etc) [REVIEW SAMSUNG TV SOP]		
Sources - Fully configured (Updates performed, auto-update disabled, apps installed and credentialed)		
Sources - Set correct HDMI format		
Sources - Verify power supply is clearly labeled for troubleshooting purposes		
Projector - Installed with wire loom for wires - No visible cable, if possible		
Projector - Lens calibrated, zoomed, focused for screen (1/4" overspray is the goal)		
Projector - Take configuration backup or note any unique settings in slack		
Distributed Video - Fully tested (confirm correct sources available in each room)		
Distributed Video - Set EDID settings in video distribution equipment		
Distributed Video - Clearly label all components and power supplies for easy troubleshooting		
All remote display/source controls are labeled and stored (either in equipment room if on system, or behind TV inside backbox if TV on service pullout bracket)		
Report any field changes so documentation is updated		

Audio	Completed By	Date
Verify all speaker grilles are installed and painted (if dark ceilings)		
All speakers are tested for left / right operation		
Set system to mono-sum for zones (if applicable)		
Adjust gains on sources to ensure all sources are balanced when switching between		
Adjust gain on outputs so level rooms when turning on system		
Set startup volumes for rooms		
Set startup volume for AIS to correct level per room (if applicable)		
Perform audio EQ (if sold) for each room [See Room EQ SOP]		
Update Google sheets with gain settings, EQ settings, etc		
Calibrate surround zones (set distances, EQ with microphones)		
Ensure DEB48 connections are labeled on panel		
Verify DEB48 speaker connections are labeled on cables and panel		
Report any field changes so documentation is updated		
Exterior speakers - add levelling gravel for in-ground bollards to site on top of, confirm speaker is level after install		
Exterior speakers - verify all waterproof wire nuts are securely installed, pull test		
Network	Completed By	Date
Modem configured in bridge mode (if applicable)		
WAPs - Installed where designated on documentation and numbered correctly		
WAPs - Static IPs set according to Google documentation		
Switches - Installed and labeled according to Google documentation		
Switches - Configured to match VLAN configuration on Google		
Switches - IP addresses assigned or reserved per documentation		
Perform Wifi survey to confirm coverage in key areas are excellent		
All devices and clients are identified and named in the Unifi dashboard per the Google IP Data		
All DHCP reservations are set matching Google IP data		
Network configurations backed up to Dropbox		
Report any field changes so documentation gets updated		
Power	Completed By	Date
All power plugs are labeled for easy troubleshooting		
Wattboxes outlets physically labeled		
OvrC is updated with correct IPs and outlet label information		
OvrC auto reboots configured		
Report any layout changes so documentation gets updated		
UPS has label showing when installed and when battery pack was last replaced		
UPS configured for email notifications (if SNMP web card installed) [if applicable]		
Lighting/Shades	Completed By	Date
Keypad - Install and level any remaining keypads		
Keypad - Engravings installed and buttons tested for accuracy		
Keypad - Confirm correct color faceplate and engraving for the space		
Lighting - Confirm all Lutron zones turn on at lowest level and have smooth dimming range		
Lighting - Confirm all zones are correctly named and controlled		
Lighting - Confirm all timed events work as intended		
Lighting - Confirm all enclosures are clean and covers installed		
Lighting - Test all occupancy sensors to function, determine if placement is ideal by operation		
Lighting - Lutron repeater, install blank 1G cover with grommit for wire exiting		
Shades - Power panels are terminated and labeled neatly; Cover needs labels stating which shades are controlled by which output of the power supply		
Shades - Install shades and level as needed		
Shades - Set open and close limits		
Shades - Test keypad, touch panel control of shades for operation		

Security	Completed By	Date
All resistors are installed at the panel in series of the wire		
All cabling is labeled and easily identifiable		
Transformers are mounted to the outlet with screw to prevent easy disconnect		
Transformers are mounted to the outlet with screw to prevent easy disconnect		
Test all Door Contacts via the KP and confirm they are labeled as the correct zone.		
Test all Glass Breaks via the KP with a GB tester per the manufacturer's instructions and confirm they are labeled as t		
Test all Motion Detectors via the KP and confirm they are labeled as the correct zone.		
Test any other Burglary devices via the KP and confirm they are labeled as the correct zone.		
Test any water protection devices via the KP by shorting out with a screwdriver. Confirm they are labeled as the correc		
Test each CO detector via the KP in whatever fashion the manufacturer specifies. Confirm they are labeled as the cor		
Confirm the Smoke Loop shows idling (green light flashing every 5 seconds) and no trouble conditions at the KP.		
Test the Smoke Loop by pressing a test button on one of the smokes. All should sound in sync after a few seconds.		
Test that the Smoke Loop can then be disarmed and reset at the KP.		
Test the System Sensor EOL-1 function by removing any smoke detector. A trouble condition should appear immediat		
Test the CO loop by following the System Sensor CO manual. The individual CO should sound as well as the siren(s).		
Test all non-loop CO detector per the manufacturer's instructions. Confirm they are labeled as the correct zone. The in		
Confirm all heat detectors are labeled as the correct zone by temporarily disconnecting the resistor (at the heat detect		
Test the siren by triggering any alarm.		
Test battery backup by disconnecting all AC power transformers. Reconnect AC when done.		
Violate all zones except the Heat detectors. Verify signals for all zones go to Rapid's pending account for the client.		
Disconnect ethernet and spot check signals to Rapid via cellular backup if equipped. After successfully testing, plug e		
Verify cellular signal itself is satisfactory (done via software).		
Put system in alarm, disarm with Duress code. Verify it reports to Rapid as Hold-Up.		
Test Fire, Medical and Panic emergency buttons signals to Rapid.		
Confirm Installer Code allows access to Installer functions.		
Confirm correct time and date.		
Test client's desired Master Code for arming and disarming.		
Confirm system is ready to arm with no trouble conditions (with all doors closed).		
Confirm system works properly via Savant if integrated.		
Surveillance	**Completed By**	**Date**
Cameras are installed, aimed, zoomed as requested		
Cameras are caulked cleanly except the bottom to allow drainage		
Doorbell cameras are installed with wedges if needed for better viewing areas		
PTZ cameras are configured with presets		
Motion zones and Smart detections are setup and refined		
Microphones are disabled on cameras		
Anonymous snapshots are enabled on the cameras for Savant viewing		
Cameras are named correctly in Protect		
Overlays are configured to show camera name and time, remove logo		
Doorbell chimes are installed and paired to doorbells, tested		
Protect configuration taken and saved to the client dropbox folder		
Control & Integration	**Completed By**	**Date**
Remotes - Test all sources, buttons on remote and screen		
Remote - Remove plastic from remote and charging base		
Remote - clean fingerprints from remote before leaving		
Integration - Test all lighting operates from Savant, load names control what they say they should control, Note any missing items		
Integration - Test all shade groups for operation, Note any missing items		
Integration - Test security feedback and triggers operate as expected		
Integration - Test pool equipment feedback works, controls the correct relays on the pool controller		
Integration - Verify all cameras are viewable through the Savant		

Who does the process transfer to next?		
Name	**Department or Function**	**Milestone**
Project Manager	Project Manager	Final QC