Initial Pre-Rough In (Contract Signing or 4-6 weeks before start of Rough-In)

- Send intro email to establish communication for all key members of project
- Verify Wire chart matches D-Tools / Drawings
- Print out all documentation for field staff
- Create link on Projects current site and load all documentation
- Schedule Field manager to mark jobsite device locations
- Go through D-Tools project and confirm all materials are in the correct phase
- Have Melissa order all Rough-In materials, then audit all materials have been ordered

Products to be ordered (if applicable):
- ☐ Speaker Brackets/Backboxes
- ☐ James Loudspeakers
- ☐ Sonance Invisible speakers
- ☐ In-Wall subwoofers
- ☐ Cable
- ☐ Carlon Tube
- ☐ TV Back Boxes
- ☐ Attic Heat Detectors
- ☐ Carlon device boxes
- ☐ Doorstation back boxes
- ☐ DEB panels
- ☐ Lutron panels (Lighting and shades)
- ☐ Mud-in trim kits (TruFig, Linear Lighting, etc)
- ☐ Shade Pockets / Side Channels

Topics/Questions for Rough-In:

Lighting:
- ☐ Linear Driver Locations
- ☐ Lutron panel locations (verify with electrician)
- ☐ Lighting RCP (provide to electrician prior to electrical walkthrough)

Shades:
- ☐ Determine if shades are inside or outside mount.
- ☐ Locate wire placement for technicians

☐ If full blackout - Make sure a plan is in place for side channels otherwise solution will be "*Room Darkening*"

A/V:
☐ One-Connect TV boxes & TV outlets (provide to electrician)
☐ In-wall subwoofers
☐ In-wall speakers / Small aperture speakers (verify not interfering with other contractors space)
☐ Confirm OHD motor locations
☐ Locate exterior stub locations for A/V
☐ DEB48 & rack location determined
☐ Mech Room power requirements provided to electrician (typically 2 x 20A and 1 x 15A)
☐ Exterior conduit requirements (if applicable)

Firecaulk (Pre-Drywall Inspection)
- Perform cable audit against wire checklist
- Verify speaker placements are accurate
- Verify shade wires are landed
- Confirm TV back boxes are installed at correct height
- Confirm Carlon tubes installed
- Confirm pre-drywall speakers are installed
  - In-wall subwoofers
  - Small aperture speakers
  - Invisible speakers
- Verify studguarding has been done
- Confirm wires are tacked correctly
- Confirm security door wires are drilled
- Take Phase 1 photos, label and load to Google
- DEB panel wire audit by Phase Lead

Drywall Hung
- Verify wall devices are cut out and not buried
- Verify ceiling devices are cut out and not buried
- Install mud-in trims
  - James Loudspeaker
  - TruFig

- ○ Linear Lighting

  Products to be ordered:
  - ☐ CAT6 RJ45 female ends
  - ☐ Patch panels
  - ☐ Lutron LQSE Modules
  - ☐ Lutron Dimmers / switches
  - ☐ Plate work

Drywall Tape & Mudding /
- ● Confirm mud-in rings are correctly done
- ● Take rough shade measurements (if not millwork)
- ● Verify mud thickness on Invisible speakers
- ● Start mechanical room trim out
  - ○ DEB48
  - ○ Shade panels
  - ○ Security enclosures
  - ○ Lutron LV21
- ● Provide Lutron HV equipment to electrician

  Products to be ordered:
  - ☐ Lutron LQSE Modules
  - ☐ Lutron Dimmers/Switches
  - ☐ Security and access control devices
  - ☐ Wireless access points
  - ☐ Security cameras
  - ☐ OHD enclosure for mech room

- ● Security trim-out in mech room
  - ○ Mount security panel
  - ○ Mount expansion boards
  - ○ Trim wire to length and land on expansion boards

  Products to be ordered:
  - ☐ Security panel
  - ☐ Sensors
  - ☐ Expansion boards

Millwork (T&G, Cabinetry, Wall Paneling)
- Verify LED Linear Lighting
    - Provide channels to confirm fitment
    - Test fitment after channels are in place so there is time to remedy
    - Verify LED wires are protruding out at the very ends.
    - Take rough measurements at this time to confirm we have enough channels, diffusers and extrusions in D-Tools or ordered

        Products to be ordered:
        - ☐ Extrusions
        - ☐ LED tape light
        - ☐ Diffusers
        - ☐ Mounting clips
        - ☐ End caps
        - ☐ Power supplies (would like to start mounting these earlier and terminating on the plywood)

- Verify James Loudspeakers are cutout (T&G ceiling)
    - Confirm openings appear sized correctly, are (if) square and positioned correctly on T&G
    - Verify depth of T&G to get correct spacers

        Products to be ordered:
        - ☐ Spacers
        - ☐ Tweeters
        - ☐ Trim kits

- Trim lighting keypad locations drywall and millwork
    - Terminate Lutron connectors
    - Confirm keypads are cut out that go in millwork
    - Determine if we need extra-long 8-32 screws to mount

        Note: If keypads are Lutron Palladiom, start the keypad programming and engraving process w/ Sales and Client. Keypads have a lead time of 30 business days and **HAVE** to be ordered engraved.

        Products to be ordered:
        - ☐ Keypads
        - ☐ 8-32 screws (if needed)

☐ Faceplates

Prime/Initial Paint
- Configure network equipment and begin trim
  - Install ceiling mounted wireless access points (if ceiling is painted/finished)
  - Install switch in DEB panel w/ jumpers

    Products to be ordered:
      ☐ Router (UDM)
      ☐ Switches
      ☐ Wireless access points
      ☐ DEB48 internal jumpers
- Trim TV backboxes
  - Terminate RJ45 female
  - Cover after termination to protect

- Shade measurement
  - Determine roll orientation
  - Determine drive side
  - Determine fascia type and color
  - Get fabric selection from designer/homeowner
  - Take measurements and update google docs for ordering
  - Create myLutron quote for final review

    Note: Shades typically take 30-45 days from ordering to arrive.

- Start Rack building process
  - Confirm rack layout is complete
  - Verify I/O schedule is available
  - Coordinate space in garage for building
  - Provide technician with deadline for rack build
  - Update Brandon on timeline and make sure he is scheduled for Rack QC.
  - Schedule UX meeting with client prior to rack delivery

    Products to be ordered:
      ☐ Equipment racks
      ☐ Rack mounted equipment
      ☐ Savant VIM/VOMs

- ☐ Jumpers
- ☐ Blank panels
- ☐ Patch panels
- ☐ Brush panels
- ☐ Rack shelves

<u>Flooring Install / Final Paint</u>

- Security camera installation
  - ○ Have programming pre-configure the cameras 1 week prior to installation
  - ○ Make sure someone is available to aim cameras as they are being installed

- Install VOMs at TV locations
  - ○ Need self taper metal screws

- Mount TV brackets (if final paint is done)

  Products to be ordered:
  - ☐ TV brackets
  - ☐ TVs

- Shade Installation
  - ○ Verify final selections as noted above
  - ○ Create updated quote and place order on myLutron

  Products to be ordered:
  - ☐ Shades

- Deliver equipment rack(s) to job site for installation

  Products to be ordered:
  - ☐ Cable ladder
  - ☐ Cable ladder 90 deg
  - ☐ Wall brackets
  - ☐ J hooks
  - ☐ SJO extension cable
  - ☐ Extension cord ends (20A and 15A)

<u>Finish</u>

- Confirm temporary lighting tags are on keypads
- Balance audio levels between rooms
  - Document adjustments in google documentation
- Balance audio levels between sources
  - Document adjustments in google documentation
- Set startup volumes for Rooms
  - Document adjustments in google documentation
- Final on-site AV Testing
- Verify network Wi-Fi coverage
- Perform final QC before client handover
- Schedule turnover to client and service
  - Project Manager
  - Sales
  - Programmer
  - Service Manager

Post Contract 5%
- Need to schedule theater audio calibration
  - Furniture needs to be fully finalized prior to this.
  - Need an absolutely quiet house for 4 hours during this period
- Order final Lutron engravings
  - Get final sign off by client before ordering
  - Final verification of finishes

    Products to be ordered:
    ☐ Lutron Engravings

- Install final engravings upon arrival
- EQ Audio rooms
  - Furniture needs to be fully finalized prior to this.
  - Need a quiet home for 1 day
  - Document adjustments in google documentation
- Take and load Savant room images
  - These need to be saved to Google drive in client folder
- Client requested programming changes
- Google site has been created and issued to the client