Checklist Template

Company Name	Checklist Name	Date Created	Revision Number
One Touch Automation	Develop Initial Program	6/11/24	V1

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

Project Based

Checklist Description

Steps for intial programming based on system type

Who's Involved		When is the checklist needed?	
Name	**Department or Function**	**Example: Phase completion, proposal created, etc.**	
Project Manager	Project Manager	Onset of equipment configuration	
Sales Engineer	Sales		
Programmer	Programming		
Designer	Design		

What are the items?

Item	Completed By	Date
GENERAL GUIDELINES	**Completed By**	**Date**
Review google documentation for IP schema, switch layouts		
Review schematic drawings for interconnects on the rack equipment		
Review contract for all equipment models to be programmed		
Review floor plans drawings for placement of equipment		
SAVANT	**Completed By**	**Date**
Create file and save to client dropbox folder		
Create the floors to be used in the config		
Create Shared Rooms (Audio Distribution, Video Distribution, Security, Lighting, Access Control, Core Equipment)		
Create Local Rooms - Add to the appropriate floors		
Create "Actions" as a room, do not show		
Add all equipment from contract that needs to be in the programming		
Drag equipment into layout with Core equipment on left, and following signal flow right (Sources, Distribution, Displays, Speakers)		
Add connections based on schematic to config, add UIDs, add IP addresses		
Adjust Savant app preferences, Service tables, Add local login, set branding icons		
LUTRON	**Completed By**	**Date**
Create a new file and save to client Dropbox folder		
Start layout by adding Floors for Lower Level, First, Second and Exterior (adjust as needed)		
Add rooms to the floors (naming Room # Room name, ie 101 - Foyer)		
Add equipment to mechanical room (panels, modules, enclosures, processors, repeaters)		
Add controls to rooms (keypads, dimmers, switches, occupancy sensors). Naming: Box # should be the KP # noted on the print. Device name should be room name and a short description to locate at a glance		
Keypad layouts should be the HQWD-W4S-SW by default		
Add intial engravings when setting up the device properties (if able)		
Add loads to the room from the lighting layout prints. (Zone Name and Zone description are the load name as you want the client to see, Fill out all information you can, Load # needs to be as reflected on Print THIS IS CRITICAL)		
Add shades to the rooms (get shade groups from sales person)		
Link assignment - Change Link 1 to QS wired, Change Link 2 to QS Wireless (if needed)		
Assign devices to links		
Save the file dropbox for future loading		

UBIQUITI NETWORK	Completed By	Date
Unbox equipment and install accessories		
Install any hard drives specified for the project		
Add Ubiquiti consoles to OTA Unifi Account (brandon@one-touchautomation.com)		
Add a local login to console (otatech / (keeper generated password)		
Generate passwords using Keeper (20 characters, no symbols) for SSH, Device auth, PSK, radius secret		
Add generated password information to client keeper file		
Adopt Wireless access points and network switches into dashboard (Naming convention should be AP # - Location Description; Switch # - Description)		
Set device IP addresses and device names		
Go to Settings -> Networks -> Add VLANs based on IP schema (Naming should be the following: Default, VLAN20 - OTA_Devices, VLAN30 - Savant/Client Devices, VLAN40 - Surveillance Devices, VLAN50 - Guest Devices)		
When setting up VLAN50, enable the "Isolation" setting to set as a guest network		
Add client SSIDs, OTA-Service SSID		
Enable additional options -- Go to Settings -> System -> Advanced -> Enable Debug Tools, Enable Professional Installer		
Enable VPN access -- Go to Settings -> VPN -> Teleport (Enable teleport VPN, setup L2TP VPN from Keeper information)		
Add DDNS address -- Go to Settings -> Internet (click on WAN1) -> Add DDNS information to Dynamic DNS area (we use EasyDNS for our solution, see EasyDNS SOP for additional details)		
Update firmware of equipment		
Once firmware fully up to date, log into the console and update the network application		
Disable automatic firmware updates. Unifi Application Updates are OK		
Take backup of configuration and save to client's dropbox folder		
UBIQUITI SURVEILLANCE	**Completed By**	**Date**
Unbox equipment and install accessories		
Install any hard drives specified for the project		
Add Ubiquiti consoles to OTA Unifi Account (brandon@one-touchautomation.com)		
Generate passwords using Keeper (20 characters, no symbols) for SSH, Device auth		
Add generated password information to client keeper file		
Add a local login to console (otatech / (keeper generated password)		
Connect the devices and adopt in the dashboard		
Set device IP addresses and device names		
Log into each camera with the ubnt / (device auth password) and disable microphone and enable anonymous snapshot.		
Update firmware of equipment (might take multiple steps)		
Once firmware fully up to date, log into the console and update the protect application		
Take backup of configuration and save to client's dropbox folder		
Repackage cameras and label boxes for in-field deployment		

Who does the process transfer to next?		
Name	**Department or Function**	**Milestone**
Field Technician	Field Technician	Rack QC
Programmer	Programmer	Test Racks