

The logo features the letters 'PSA' in a large, bold, blue font with a white outline. To the right of 'PSA', the word 'committee' is written in a smaller, blue, sans-serif font. Below 'PSA committee', the words 'PROJECT MGMT' are written in a large, bold, black, sans-serif font.

PSA *committee* PROJECT MGMT

Regardless of the size or complexity, all projects require a standard set of information. The PSA Project Management committee has compiled and streamlined this information into standardized checklists that PSA integrators can utilize to gain efficiency in project preparation without overextending resources.

The checklists are categorized by system and cover the sales-to-engineering walk-through, sales-to-operations turnover, and service turnover workflow processes.

These checklists are also available in Excel format for easy modification.

If you have any questions, please contact the Project Management Committee at PMCommittee@passecurity.com or visit <http://www.buypsa.com/Education/Committees>.

Sales to Operations Project Turnover

Access Control

Job Number _____ Job Name _____

Sales Representative _____ Engineer _____

Project Manager _____

Client _____

Client Project Contact _____ Phone _____

Client Billing Contact _____ Phone _____

Client IT Contact _____ Phone _____

Signed Contract Reviewed On hand Returned Counter Signed Contract

Estimate & Contract Values Match Yes

Terms and Conditions From _____

Purchase Order Reviewed On hand

Special Billing Requirements Yes

Scope of Work Reviewed

Specifications Reviewed

Change Orders (if needed) Reviewed List by number _____

Addendum Reviewed List by number _____

Permits Required Applied Approved

Client Training requirements Reviewed

Client Provisions

120VAC connections Reviewed

LAN drops Reviewed

IP Addresses Reviewed Furnished

FA Connections Reviewed

Project Drawings/Schematics Available Reviewed

Hardware schedule Available Reviewed

Control Riser Available Reviewed

Floor Plans with Cullout Available Reviewed

Door Detail Available Reviewed

Panel Wiring Detail Available Reviewed

Wall Elevation Available Reviewed

Panel Termination Chart Available Reviewed

Door Details Available Reviewed

Special Safety Requirements Required Reviewed

Bill of Materials Reviewed

Ceiling Type Drop-tile Hard ceiling Bar Joist Cement Deck Plenum

Conduit Stub-ups Required By us?

System Manufacturer _____ New Existing

Number of new panels _____

Number of new readers _____

ADA/Handicapped Door Operators Sequence reviewed

Installer _____

Lock Hardware Maglock Installed by us Fail Safe Fail Secure

Strikes Installed by us Fail Safe Fail Secure

EML Installed by us Fail Safe Fail Secure

Gate Operators Installed by us

Connections by us

Project/Special pricing Reviewed Documented Expirations _____

Subcontractors Reviewed Quotes

Project Schedule Reviewed Start Date _____ Deadlines _____ Liquidated damages

Labor Estimates Reviewed

Final Cost Estimate Reviewed Agreed Sales _____ PM _____

All paperwork turned over to PM Sales _____ PM _____

Any remaining Sales to Ops tasks not completed during the turnover:

Sales to Operations Turnover completed Date: _____

Sales Representative _____ Signed _____

Operations Representative _____ Signed _____

Sales to Operations Project Turnover

Fire System

Job Number _____ Job Name _____

Sales Representative _____ Engineer _____

Project Manager _____

Client _____

Client Project Contact _____ Phone _____

Client Billing Contact _____ Phone _____

Client IT Contact _____ Phone _____

Signed Contract Reviewed On hand Returned Counter Signed Contract

Estimate & Contract Values Match Yes

Terms and Conditions From _____

Purchase Order Reviewed On hand

Special Billing Requirements Yes

Scope of Work Reviewed

Specifications Reviewed

Change Orders (if needed) Reviewed List by number _____

Addendum Reviewed List by number _____

Permits Required Applied Approved

Client Training requirements Reviewed

Client Provisions

120VAC connections Reviewed

LAN drops Reviewed

Project Drawings/Schematics Available Reviewed

Hardware schedule Available Reviewed

Control Riser Available Reviewed

Floor Plans with Cullout Available Reviewed

Panel Wiring Detail Available Reviewed

Wall Elevation Available Reviewed

Panel Termination Chart Available Reviewed

Special Safety Requirements Required Reviewed

Bill of Materials Reviewed

Ceiling Type Drop-tile Hard ceiling Bar Joist Cement Deck Plenum

Conduit Stub-ups Required By us?

System Manufacturer New Existing

Panel Location _____

Number of new Pull Stations _____ Number of new Pull Stations _____

Number of new Smokes _____ Number of new Elevator Recall _____

Number of new Heat Detectors _____ Number of new Door Release _____

Number of new Horns _____ Number of new Tamper _____

Number of new Strobes _____ Number of new Waterflow _____

Number of new Duct _____ MISC _____

Installer _____

Project/Special pricing Reviewed Documented Expirations _____

Subcontractors Reviewed

Project Schedule Reviewed Start Date _____ Deadlines _____ Liquidated damages

Labor Estimates Reviewed

Final Cost Estimate Reviewed Agreed Sales _____ PM _____

All paperwork turned over to PM Sales _____ PM _____

Any remaining Sales to Ops tasks not completed during the turnover:

Sales to Operations Turnover completed Date: _____

Sales Representative _____ Signed _____

Operations Representative _____ Signed _____

Sales to Operations Project Turnover

Intercom

Job Number _____ Job Name _____

Sales Representative _____ Engineer _____

Project Manager _____

Client _____

Client Project Contact _____ Phone _____

Client Billing Contact _____ Phone _____

Client IT Contact _____ Phone _____

Signed Contract Reviewed On hand Returned Counter Signed Contract

Estimate & Contract Values Match Yes

Terms and Conditions From _____

Purchase Order Reviewed On hand

Special Billing Requirements Yes

Scope of Work Reviewed

Specifications Reviewed

Change Orders (if needed) Reviewed List by number _____

Addendum Reviewed List by number _____

Permits Required Applied Approved

Client Training requirements Reviewed

Client Provisions

120VAC connections Reviewed

LAN drops Reviewed

IP Addresses Reviewed Furnished

POTS lines Reviewed Furnished

Project Drawings/Schematics Available Reviewed

Hardware schedule Available Reviewed

I/C Riser Available Reviewed

Floor Plans with Callout Available Reviewed

Door Detail Available Reviewed

Panel Wiring Detail Available Reviewed

Wall Elevation Available Reviewed

Special Safety Requirements Required Reviewed

Bill of Materials Reviewed

Ceiling Type Drop-tile Hard ceiling Bar Joist Cement Deck Plenum

Conduit Stub-ups Required Existing By us?

System Manufacturer _____ New Existing IP Analog

Number of new exchanges _____ Client software? _____

of new master stations _____ Model(s) _____ Special Backbox? _____

of new indoor substations _____ Model(s) _____ Special Backbox? _____

Door release needed? _____ Locations _____

of new outdoor substations _____ Model(s) _____ Special Backbox? _____

of new elevator substations _____ Model(s) _____ Special Backbox? _____

of Emergency phones, wall mount _____ Model(s) _____

of Emergency phones, pole mount _____ Model(s) _____ Strapping Tool? _____

Project/Special pricing Reviewed Documented Expirations _____

Subcontractors Reviewed Quotes

Project Schedule Reviewed Start Date _____ Deadlines _____ Liquidated damages

Labor Estimates Reviewed

Final Cost Estimate Reviewed Agreed Sales _____ PM _____

All paperwork turned over to PM Sales _____ PM _____

Any remaining Sales to Ops tasks not completed during the turnover:

Sales to Operations Turnover completed Date: _____

Sales Representative _____ Signed _____

Operations Representative _____ Signed _____

Sales to Operations Project Turnover

Intrusion

Job Number _____ Job Name _____

Sales Representative _____ Engineer _____

Project Manager _____

Client _____

Client Project Contact _____ Phone _____

Client Billing Contact _____ Phone _____

Client IT Contact _____ Phone _____

Signed Contract Reviewed On hand Returned Counter Signed Contract

Estimate & Contract Values Match Yes

Terms and Conditions From _____

Purchase Order Reviewed On hand

Special Billing Requirements Yes

Scope of Work Reviewed

Specifications Reviewed

Change Orders (if needed) Reviewed List by number _____

Addendum Reviewed List by number _____

Permits Required Applied Approved

Circuit Box Number / Zone _____ Activation Number _____

Circuit Box Number / Zone _____ Activation Number _____

Circuit Box Number / Zone _____ Activation Number _____

Circuit Box Number / Zone _____ Activation Number _____

Communication Phone _____

Radio _____ System Programmer _____

Internet _____

AMP size of Battery used in Panel 7 12 _____ Firmware Version # of Panel _____

Panel Type _____

Panel Location _____

Transformer Location(s) _____ New System Yes No

Brand of Radio on site Intellitap module used _____ Existing System Yes No

AES 7450-XL Yes No _____ Adds to Existing System Yes No

AES 7750 F8 Yes No _____

Uplink Radio _____

Alarmnet Radio _____ Any part of system Addressable Yes No

Pet Motion supports 40 lbs. 80 lbs. 100 lbs. _____ Addressable loops on the system _____

Warranty Start Date _____

Details:

Guidelines for calling in zone description and defining zones in the computer.

The following document is a guide on how to call in your zone information from the job site. The goal of calling in the zone information or sending it via email from the job site is so that the zone information can be entered timely. We want to give our customers the best experience possible from the start and not an unpleasant experience.

The guide sheet is in order of our zone sheet, so please provide the information in that order so that the person taking the voice mail is not all over the form.

Additionally, below are examples on defining the different zones. The more information we are able to enter into the customer's account the better the experience will be in the event we need to dispatch or provide phone support.

When defining zones if the device is wireless. I would like it to show in the following formats or change it so that all are the same.

- a. wls-smoke brm hall Remember all fire devices **require RESTORE reporting**
- b. wls-heat kitchen The max temperature for wireless heat detector is 135 degree.
- c. wls-motion mstr brm
- d. wls-gbd dinning room
- e. wls-window bug
- f. wls-water flow switch (note: only approved wireless equipment is Ademco 5817CB transmitter).
 Remember all fire devices **require RESTORE reporting**

wls = wireless

Anything that does not start like the above example will be considered hard wired. This will aid any technician trying to provide support over the phone.

2. Defining interior motions weight limit for pets. When you install a hardwire or wireless type motion include the weight limit of the motion if it will accommodate pets, **(i.e. 40lbs, 80lbs or 100lbs)**. If non pet motion use NP. This will help us help customers over the phone when they have questions about what their pet motion will support.

RESIDENTIAL/COMM SERVICE NOTES AND ZONE LIST

CUSTOMER NAME: _____ JOB #: _____
DIALER #: _____ ADDRESS: _____
TAKE OVER DATE: _____ TECHNICIAN: _____
PANEL TYPE: _____ INSTALL CODE: _____
PANEL LOCATION: _____ DURESS CODE: _____
TELCO LOCATION & PHONE # : _____ PANEL AC LOCATION: _____
RADIO LOCATION: _____ RADIO: YES OR NO _____
KNOX BOX LOCATION: _____ RADIO AC LOCATION: _____
PATROL CODE: _____ RADIO DB STRENGTH: _____
ACTIVATION NUMBER: _____ GSM MODEL (2G,3G,4G): _____
IMEI #: _____ GSM Primary / Backup: _____
IP ADDRESS: _____ MAC ADDRESS: _____

*Refrigerator, freezer, & computer room TEMP SENSORS need to be programmed in SOC or Customer Support as environmental before leaving the site to verify how these signals are reporting.

* H2O sensors must be programmed as AUX and then zone description provided.

ZONE LIST

1	21
2	22
3	23
4	24
5	25
6	26
7	27
8	28
9	29
10	30
11	31
12	32
13	33
14	34
15	35
16	36
17	37
18	38
19	39
20	40