Q·RESERVE

Implementation Onboarding Form

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Part 1: Implementation Journey

This onboarding form is designed to help align organizational needs and processes to kickstart a successful implementation, whether you are managing the process independently or utilizing QReserve's professional services. For QReserve-led implementations, we follow a structured 5-stage journey to ensure your team is fully prepared for launch.

The following steps outline your journey to a successful QReserve launch.

01 Onboarding Form
Completed by the client, this structured intake form outlines specific workflow, scheduling, reporting, and role requirements.

02 Kick-Off Call
Hosted by our team, this collaborative session aligns key stakeholders on strategy and immediate action items.

03 Site Configuration
Executed by our team, this tailored setup aligns the platform with your specific operational rules and workflows.

04 User Acceptance
Led by our team, this interactive sandbox testing simulates booking flows to capture your crucial system feedback.

05 Admin Training
Led by our team, this focused system walkthrough prepares your administrators to run and operate QReserve independently.

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Part 2: Client Intake Form

Date: Jul 16, 2026 Version: Signed off by:

Organization/Business Unit Name:

Primary Project Contact(s):

Site Administrators:

Name	Title	Department	Email Address	Phone Number

Note: Individuals identified here will initially have full administrative access to the QReserve site and will be in the first group of Users added to the site. It is recommended that all QReserve Site Administrators receive training on the software platform and are aware of any site specific rules prior to accessing the Administration panel in the application.

Number of users (rounded to the nearest 100):

Number of resources (approx):

Types of resources (check all that apply):

- ☐ Equipment
- ☐ Services (Service Requests)
- ☐ Consumables
- ☐ Spaces (Rooms, Desks)
- ☐ People
- ☐ Events
- ☐ Other:

Desired Go-Live Date:

Could you describe how your resources are structured within your business unit, department, or organization? Specifically, who is responsible for administering these resources? For example, are your resources distributed across multiple business units or buildings?

Current scheduling tools/processes/software used:

What are the primary objectives or intended outcomes after implementing QReserve?

Please provide the number of administrators you would like to have trained.

If you would like our team to get in touch before your fiscal year ends, please let us know the date your fiscal year concludes.

Part 3: Feature Sheet
*Please fill out this chart to help us gain a clearer understanding of the features and functionality required. If any sections are not relevant to your situation, please write "**Does Not Apply.**"*

Features	**Please describe how you are currently handling this (if applicable).**	**This is a priority to address (first 3 months)**	**This is something to review in the first year**
Scheduling Rules Please describe any unique scheduling rules you follow. Consider access restrictions, buffer times between bookings, mandatory lead times, cancellation policies, and interactions between specific resources.		☐	☐
Credentials Management How do you track user qualifications? Specify if users require certifications, safety sign-offs, or professional licenses before being granted access to specific assets.		☐	☐
Forms What information must you gather from users before or after they use a resource? Mention any intake questionnaires, safety checklists, or post-usage surveys currently in use.		☐	☐
Rates Do your resources have rates? Please describe your rate scheme. Do these rates differ based on the type of user, day of the week, or time of day? (e.g. internal and		☐	☐

external rates or weekday and weekend rates).			
Billing, Invoicing, and Quotes Will you need to generate invoices or quotes? How do you handle billing—by user, account numbers, or supervisors? Would you like an integrated payment processing solution?		☐	☐
Maintenance Management Will you be tracking maintenance events for your resources? Please describe.		☐	☐
Actual Usage Tracking Will you be tracking the precise duration of resource use? This can include mobile or QR code-based check-ins/outs or automated tracking via connected hardware. How will you utilize this data for reporting or billing?		☐	☐
Website Integration Do you want to showcase your assets to the public or your internal community? A public-facing directory or catalog can help users discover and learn about your available resources before booking. Do you have specific brand guidelines (such as logo files or Hex codes) you would like the portal to match?		☐	☐
Kiosks Are you considering incorporating any hardware solutions in your space to		☐	☐

facilitate reservation management?			
Live Maps Do you have floor plans for your space? Would you like to integrate floor plans of your space into a live map to allow users to view availability and make reservations directly?		☐	☐
Other If you have any other requirements, please list them in the blank cells below.		☐	☐
		☐	☐
		☐	☐
		☐	☐

Part 4: User Roles

1. Please describe the duties and responsibilities of your site administrators (e.g. responsible for approving reservations, responsible for invoicing, responsible for training users, etc).

2. Please describe your end users and their access levels. If you categorize your users into specific groups, please list them here (e.g., internal staff, departmental teams, external clients, contractors, or temporary guests).

3. Please describe how you envision your end users interacting with the platform. Consider modern workflows such as QR code-based check-ins, walk-up kiosk bookings, mobile-first scheduling, or staff-mediated reservations on behalf of others.

4. Please identify any specific data points important to track regarding your users (e.g., certifications, supervisors, cost centers). Additionally, clarify how this data will be utilized, such as for automated access restrictions or custom reporting needs.

Part 5: Workflows

Please identify the primary workflows central to your daily operations. Outlining the specific steps and existing friction points within these processes allows us to optimize the software configuration to meet your unique organizational needs.

To ensure operational consistency, every critical process within your organization should follow a documented workflow. The diagnostics and examples below are designed to help you identify manual bottlenecks and streamline your administrative transitions.

Note: Please feel free to skip or mark "N/A" for any areas that do not apply to your organization. You are encouraged to add new workflows that are not listed here, as the following sections are provided as suggested examples.

Workflow Example 1: New User Onboarding & Registration

Step	***Action Details***	***Current Process / Bottlenecks***
Step 1 (The Registration)	*How does a new user register? What information or administrative approvals are required for account activation?*	
Step 2 (Credential Verification)	*How are required certifications or prerequisites verified before granting system or physical access to resources?*	
Step 3 (System Provisioning)	*How are account identifiers or project codes established and linked to the user profile for financial tracking?*	

Workflow Example 2: Training Requests & Resource Authorization

Step	***Action Details***	***Current Process / Bottlenecks***
Step 1 (The Request)	*How does a user request training? Is it via email, or a sign-up sheet?*	
Step 2 (Scheduling & Booking)	*How is the trainer's time booked against instrument availability?*	
Step 3 (Completion & Tracking)	*How do you record completion and update the user's status to "Authorized" for specific resources?*	

Workflow Example 3: Resource Reservation & Scheduling

Step	***Action Details***	***Current Process / Bottlenecks***
Step 1 (Availability Check)	*How does a user search for a resource and verify its availability?*	
Step 2 (The Reservation)	*How is the booking officially submitted and recorded?*	
Step 3 (Confirmation & Access)	*How is the reservation confirmed, and how does the user obtain physical or digital access to the resource?*	

Workflow Example 4: Consumables & Service Requests

Step	***Action Details***	***Current Process / Bottlenecks***
Step 1 (The Intake)	*How are requests for materials or services submitted (e.g., procurement, specialized labor)?*	
Step 2 (Approval/Quote)	*Is a formal quote or supervisor sign-off required before fulfillment?*	
Step 3 (Fulfillment & Billing)	*How are materials/labor tracked and tied back to the project for invoicing?*	

Workflow Example 5: Billing & Financial Reconciliation

Step	***Action Details***	***Current Process / Bottlenecks***
Step 1 (Data Collection)	*How do you gather usage logs and associated grant codes at month-end?*	
Step 2 (Invoicing)	*How are invoices generated and sent to PIs or financial departments?*	
Step 3 (Reporting)	*How do you reconcile discrepancies or handle rejected chargebacks?*	

Part 6: Reporting Requirements

1. What specific information do you need to track or analyze regularly to support your operations? *(e.g., total usage hours, number of unique users, inventory stock levels, or maintenance costs.)*

2. Can you identify any key performance indicators (KPIs) or metrics that are crucial for monitoring your success? *(e.g., resource utilization rates, average response time for service requests, or cost-recovery targets.)*

3. Are there any specific filters or criteria that you frequently apply when generating reports? *(e.g., filtering by department, funding source, resource type, or specific date ranges such as fiscal year or quarterly.)*

4. Do you require any automated or scheduled reporting capabilities? *(e.g., monthly usage summaries sent to department heads, weekly inventory alerts, or daily check-in logs.)*

5. Are there any additional or specialized reporting needs that you anticipate for your organization? *(e.g., custom data exports for external accounting software, public-facing availability dashboards, or year-over-year growth comparisons.)*

Part 7: Documents and Data Checklist

To facilitate a smoother implementation, we've prepared a checklist of essential data. If you already have any of these documents, please provide them when you submit this implementation onboarding form.

- ☐ Resource data *(Should include resource information such as make and model, reservation rules, rates, associated approval processes, etc. Recommended format: .csv or .xlsx; templates available upon request)*
- ☐ User data *(Recommended format: .csv or .xlsx; templates available upon request)*
- ☐ Forms or questionnaires (if applicable)
- ☐ Floor plans of your space
- ☐ Example reports
- ☐ Logo and branding guidelines