Q·RESERVE

QReserve Implementation Checklist for Project Managers

Overview: Welcome to your QReserve implementation! This step-by-step checklist is designed for Project Managers and Leads to ensure a smooth, organized setup. For complete instructions and detailed walkthroughs, please use this guide alongside our online Implementation Guide.

🗓️ Phase 1: Plan & Prepare

Step	Done	Action Item	Date Completed	Notes & Guidance
1.1	☐	**Complete Onboarding Form**		Submit organization details, key contacts, and goals. Refer to Getting Started and Phase 1: Plan & Prepare for baseline requirements.
1.2	☐	**Gather Resource Inventory**		Compile details for rooms, equipment, and services including availability, user access rules, and rates.
1.3	☐	**Schedule & Attend Kickoff Call**		Align on implementation timeline, scope, key roles, and success criteria with your Project Team.

🛠️ Phase 2: Build & Configure

Step	Done	Action Item	Date Completed	Notes & Guidance
2.1	☐	**Document Current Workflows**		Map current booking, approval, and user permission workflows to identify configuration needs in QReserve.

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2.2	☐	**Review & Finalize Resource Inventory**		Validate resource properties, custom fields, rates, and schedule permissions with site administrators.
2.3	☐	**Configure QReserve Site**		Build sites, resources, forms, and rules. Step-by-step instructions: Phase 2: Build & Configure Documentation.

🤖 Phase 3: Test & Train

Step	Done	Action Item	Date Completed	Notes & Guidance
3.1	☐	**Conduct System Testing**		Run test bookings for each user role to verify access restrictions, approval steps, and notifications.
3.2	☐	**Refine & Adjust Configuration**		Fine-tune resource settings, form fields, and approval rules based on system testing results.
3.3	☐	**Finalize Workflow Documentation**		Document operational procedures using QReserve Workflow Templates. Refer to the Phase 3 Documentation.
3.4	☐	**Admin & Staff Training**		Complete Admin Training 101, perform hands-on practice exercises (e.g., booking approvals and reporting), and explore the QUniversity Webinar Library.

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🚀 Phase 4: Launch & Onboard

Step	Done	Action Item	Date Completed	Notes & Guidance
4.1	☐	**Prepare & Upload User Data**		Determine onboarding strategy: Use **Bulk Upload** for pre-defining accounts and roles in advance, or **Self-Registration / SSO** for automated on-demand user access. Refer to Phase 4: Launch & Onboard Documentation.
4.2	☐	**Share Training Resources & Launch**		Distribute training videos, user guides, and FAQ links—either custom-prepared internal materials or relevant resources from the QReserve documentation library—to end-users prior to launch.
4.3	☐	**Execute Go-Live & Launch Day Checklist**		Verify SSO/login access, publish live schedules, send welcome announcements, and establish internal support channels for end users to reach your team with any issues on launch day.