Workflow Documentation Template

💡 Why and When to Document Your Workflows

If you completed the onboarding form in Phase 1 of the QReserve Implementation Steps, you likely identified your legacy core workflows—such as user onboarding, resource reservation and scheduling, and billing processes. While those earlier records captured how things were done prior to QReserve, **this document captures how your workflows are executed today within the system.**

Once you have completed Build and Configuration (Phase 2) and System Testing (Phase 3), documenting your finalized operational processes creates a single, sustainable source of truth for your organization. Completing this step immediately after System Testing ensures your operational knowledge is locked in while it is fresh.

- **Accelerated Onboarding:** Seamlessly train new system admins or staff using standardized, repeatable steps.
- **Version Control:** Track operational rule changes and system updates as your facility grows and evolves.
- **Operational Continuity:** Prevent knowledge loss when team members transition or roles change.

Below is an example of how we recommend documenting your solidified workflows. In our experience, including a short screen recording video of the process in action serves as an excellent supplemental resource alongside the written steps.

At the bottom of this document, you will find a blank template to begin recording your own workflows.

EXAMPLE - Workflow Overview & Step-By-Step Instructions

Workflow Title	**Onboarding a New User to Our QReserve Site**
Purpose	Outlines the complete end-to-end process for receiving a new user request, adding the user in QReserve with correct user groups, rates and custom properties, and initiating account activation.
Target Audience	Lab Administrators
Video Recording Link	Link to Screen Recording *(Optional / Recommended)*

Step 1: User Request Submission

- The prospective user submits an onboarding request form via the lab website. This form is created and hosted in QReserve, configured to be public-facing for easy access.
- Submitting the form automatically generates and dispatches an email notification to the designated Admin Approver.

Step 2: Approver Review & Decision

- The Approver reviews the submitted information (e.g., department, funding source, and internal vs. external status).
- **If Approved:** The approver confirms the request (via email or directly within the QReserve application), which automatically sends an approval notification email to the user.
- **If Denied:** The approver can deny the request and include comments to request additional details prior to account setup.

Step 3: Navigate to User Administration

- The Administrator logs into QReserve.
- Navigate to the top administrative menu: **Administration > Users > Add New User**.

Step 4: Account Configuration, User Groups & Rates

- Enter the user's primary business/institutional email address.
- **CRITICAL STEP:** Assign the user to the appropriate **User Group** (e.g., *Internal Academic* vs. *External Industry*).
  - *Note: Proper group assignment is vital to ensure the system automatically applies the correct billing rates and access privileges.*
- Fill out all account number fields with the user's Supervisor or Principal Investigator's name for billing purposes, along with any relevant user credentials.

Step 5: Account Activation & Resource Booking

- Click **Add User**. An automated invitation email will be sent to the user prompting them to create their password and finalize their account.
- Once logged in, the user can immediately view, request, or book equipment and resources aligned with their permissions.

TEMPLATE - Workflow Overview & Step-By-Step Instructions

Please duplicate and fill out this template section for each unique workflow you manage in QReserve (e.g., Equipment Maintenance, Reservation Cancellation Policies, Invoicing and Billing Workflows).

Workflow Title	[Insert Title Here]
Purpose	[Describe what this workflow accomplishes and why it is executed]
Target Audience	[e.g., Lab Administrators, Staff, Users]
Video Recording Link	[Paste Video Link Here] *(Optional / Recommended)*
Current Version	[e.g., v1.0]
Last Updated	[Date / Author]

Revision History

Version	Date	Author / Editor	Summary of Changes Made
1.0	[YYYY-MM-DD]	[Author Name]	Initial creation of this workflow process

Step 1: [Action Name]
[Detailed description of actions, menu navigation, or clicks required]

Step 2: [Action Name]
[Detailed description of actions, menu navigation, or clicks required]

Step 3: [Action Name]
[Detailed description of actions, menu navigation, or clicks required]