



QReserve

Admin Handbook & Reference

Guide

Reference Guide Overview

Welcome to your QReserve Admin Handbook & Reference Guide.

This directory outlines the core configurations and components of your platform subscription. Follow these sections sequentially to transition your facility from manual tracking to an optimized, structured, and fully branded resource scheduling environment.

01 Site Settings & Customization	3	07 Live Maps	14
02 Resource Management	4	08 Kiosks	15
03 User Management	8	09 Workflows	16
04 Forms & Data Collection	11	10 Reporting & Insights	18
05 Reservations	12	11 History & Profile Settings	19
06 Maintenance & Support	13		

Site Settings & Customization

Q·RESERVE

Description, Logo, and Links

Personalize the user experience by adding guidelines, rules, or announcements to your site description. This field supports Markdown, allowing you to format and highlight critical information so it stays front and center for your users.

Modules

Your site should only be as complex as you need it to be. If certain modules don't apply to your workflow, you can disable them at any time to simplify your administrative menu and keep the interface clean.

Support Contact

Ensure your users know where to go for help. You can designate a specific support contact within QReserve, giving users a direct way to message you with questions regarding bookings, certifications, or general access.

Custom Properties

Tailor QReserve to your specific data needs. If there is unique information you need to track that isn't built-in, you can define custom properties for both resources and users to ensure your records are always complete.

Resource Management

Resources are the core pieces of information that drive activity on your QReserve site.

They represent the essential assets you manage - ranging from physical spaces and equipment to specialized services, consumable supplies, and even staff or personnel.

Learn more: [Resource Management Overview](#)

01. Reservable

Standard resources that include a calendar for time-based bookings.

02. Requestable

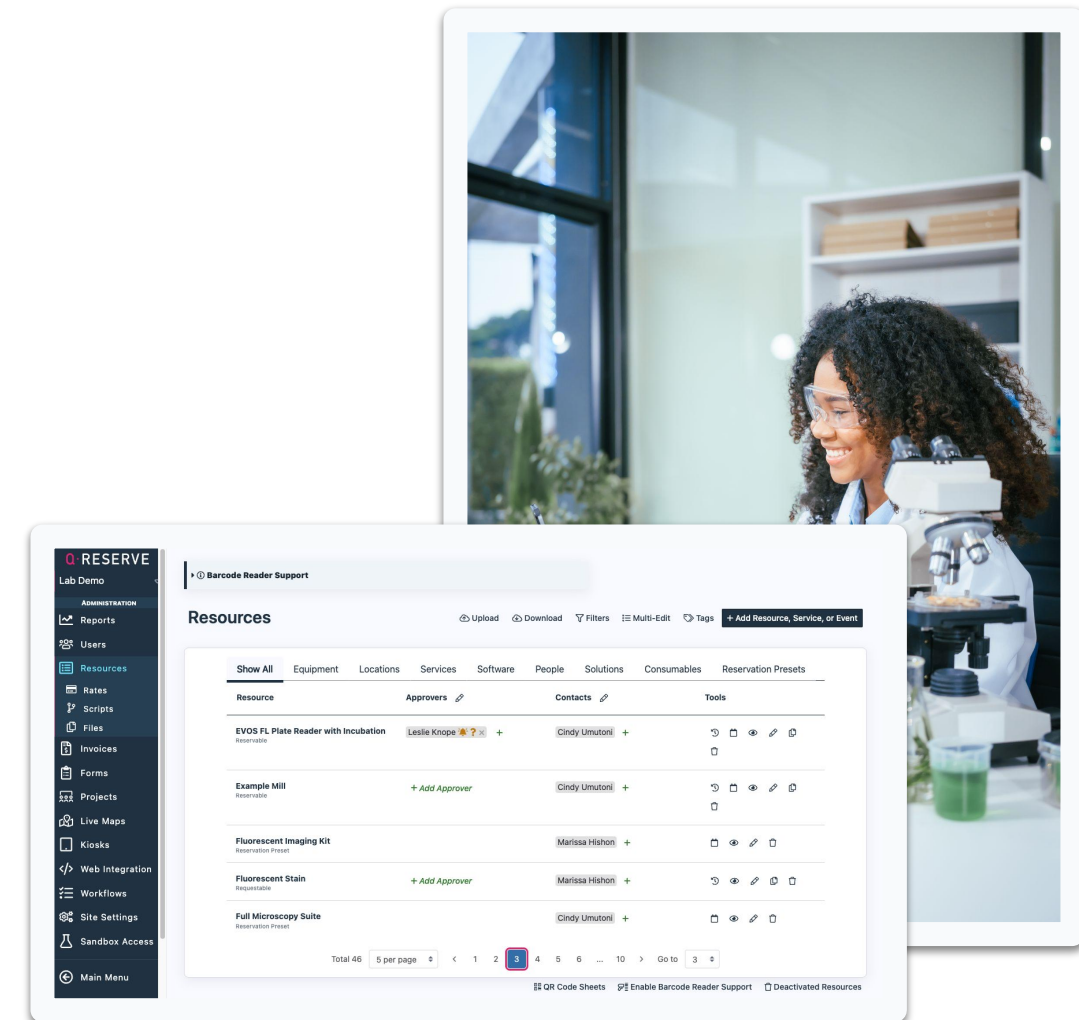
For items or services that require a request flow without a calendar.

03. Events

Best for managing activities with pre-defined schedules or dates.

04. Presets

Used to bundle multiple resources together into packages or suites. Group resources logically on the site page and calendar for easier navigation.



Resource Profiles & Customization

The Resource Profile tab defines the information users see when interacting with a resource. Use this area to provide essential context, such as descriptions, usage disclaimers, contact details, and technical specifications like make and model.

Organizational Tools

Display Categories

Group resources logically on the site page and calendar for easier navigation.

Tags

Internal labels used by administrators for advanced reporting, filtering, and integrations. These are not visible to standard users.

Documentation & Files

The Files tab allows you to centralize important documentation. Admins can upload files and designate them as Private (internal use only) or Public (user-facing). This is an ideal place for service contracts, user manuals, and SOPs.

Resource Rules & Logic

Rules are managed independently for each resource under the Reservations or Requests tabs. These settings allow you to automate your workflows and enforce your facility's policies.

Time Restrictions

Control the booking window by setting minimum/maximum durations, mandatory buffer periods between uses, and cancellation deadlines.

Dynamic Rates

Set specific pricing models based on the time of day or the user's assigned group.

Access & Approvals

Determine which user groups are permitted to book a resource and define your approval logic. You can require approval from a single person, any member of a group, or a specific number of designated approvers.

Custom Forms

Attach custom questionnaires that must be completed before a booking is finalized to ensure all necessary data is collected upfront.

The screenshot shows the 'Clean Room' resource settings page in the Q-RESERVE system. The 'Reservations' tab is selected, and the 'Approver Options' sub-tab is active. The left sidebar lists various settings categories: General, Units, Rates, Time Restrictions, Weekly Slots, Weekly Blocks, Approvers (selected), Blockers, Groups, Credentials, Visibility, Email, External, Capacity, and Fields. The main content area for 'Approver Options' includes a '+ Add Approver' button, a table of current approvers, and several toggle and input settings for approval logic.

Name	Verified	Receive Emails	Automatic Approval	Details
Staff	☒	☐	☐	User Group: Approvals Required: 1 Group Name Shown

Any or All Approvers Required ?
☒ All

Hide Approvals on Dashboard ?
☒ No

Auto Deny Stale Pending Reservations ?
☒ Enable Auto Denying Stale Pending Reservations
Reservations in a pending state will be changed to denied after the start of the reservation.

Managing Resources at Scale: Tips & Tricks

Bulk Uploading

Save time by adding or updating multiple resources at once using our CSV upload tool. QReserve uses Resource IDs to automatically distinguish between new entries and updates to existing ones. You can download a template directly from the Upload menu or download your current list to make bulk modifications.

Cloning Resources

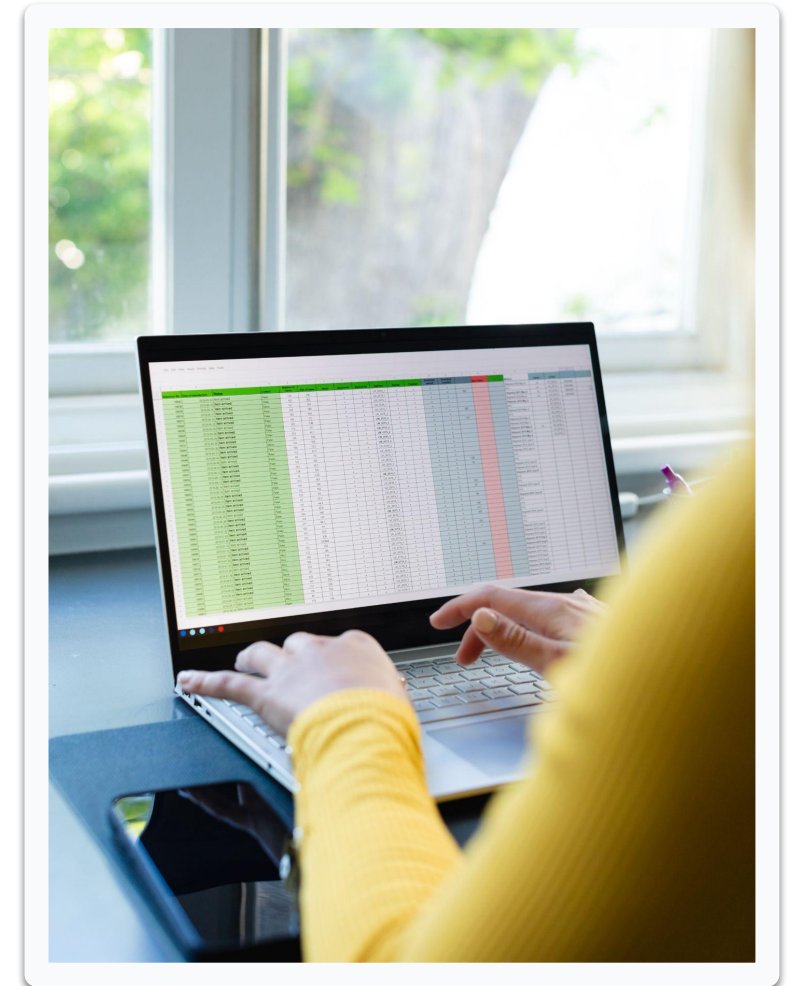
Instead of starting from scratch, you can clone an existing resource to replicate its configuration, rules, and settings. This is the most efficient way to expand your inventory when adding similar items or spaces.

Filtering & Multi-Edit

Refine your resource list using names, keywords, or tags. Once filtered, use the Multi-Edit tool to apply configuration changes to your entire selection simultaneously, ensuring consistency across your site.

Dynamic Columns

Customize your resource table to see exactly what you need at a glance. You can configure two dynamic columns to display high-priority fields - including your own Custom Properties - directly within the resource list view.



User Management

Building your user base is a flexible process. You can add individuals manually or use the bulk upload tool to import your entire organization at once via a CSV template.

User Roles

To ensure secure and organized site management, QReserve utilizes three primary roles:

Administrators: Full site privileges and configuration control.

Moderators: Comprehensive access to manage resources and users, with the exception of site settings.

Users: Standard access for making reservations and viewing resources.

The screenshot shows the 'Add User' form in the QReserve interface. The form is titled 'Add User' and has a close button (X) in the top right corner. It contains the following fields and options:

- Email:** A text input field labeled 'Email Address'.
- Role:** A dropdown menu with three options: 'User' (selected with a checkmark), 'Moderator', and 'Administrator'. To the right of the dropdown is a link that says 'or test user' and a link that says 'Read about bot and test users'.
- Send this user an email notification:** A toggle switch that is currently turned on.
- Include a message:** A toggle switch that is currently turned off.
- Set an account number:** A toggle switch that is currently turned off.
- Add to user groups:** A toggle switch that is currently turned on.
- User Groups:** A section with a list of checkboxes for selecting user groups:
 - ☐ All
 - ☒ Licence holder
 - ☐ Member: Internal
 - ☐ Rate: Licence - Regular
 - ☐ Staff
 - ☐ Type: Shared studio
 - ☐ Set other user properties
 - ☐ API Group Rate
 - ☐ Licenced by ABO (sub)
 - ☐ New Users
 - ☐ Research Group 1
 - ☐ Test Group
 - ☐ API Test Group
 - ☐ Member: External
 - ☐ Pre-QR licenced
 - ☐ Special Rate
 - ☐ Type: 1st term

An 'Add User' button is located at the bottom right of the form.

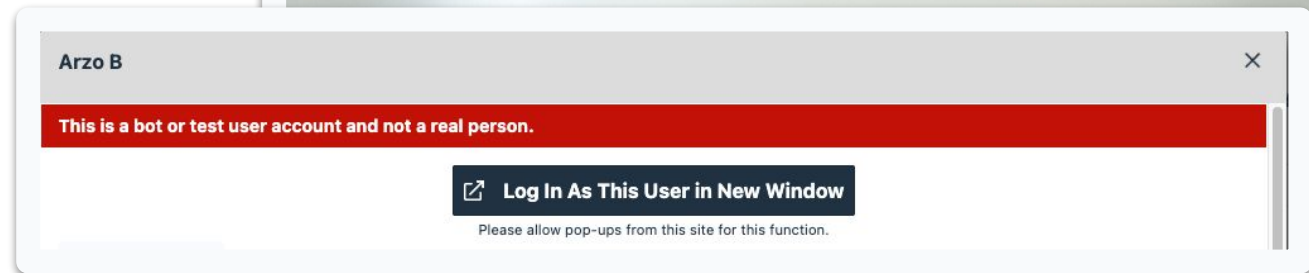
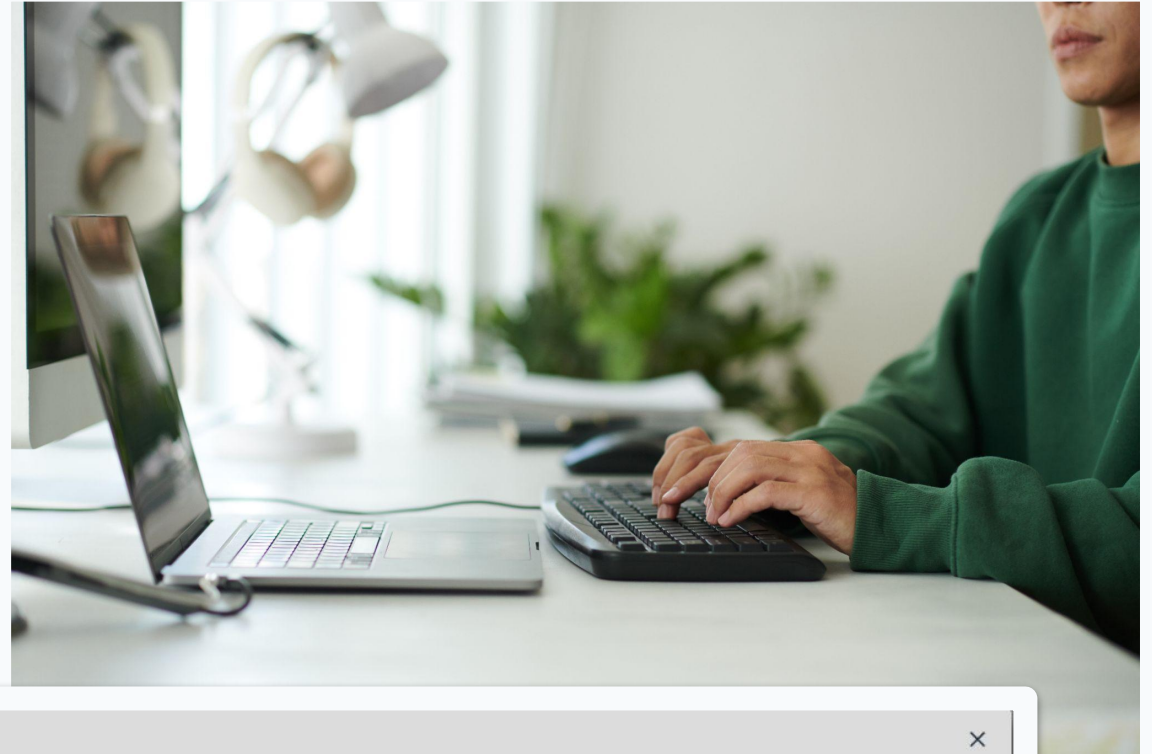
User Profiles & Permissions

User Profiles & Permissions

Profiles go beyond basic contact info. You can manage a user's entire lifecycle by tracking groups, custom properties, and training credentials. You can also grant granular permissions - such as Reservation Editor or Maintenance Viewer - to specific individuals without changing their overall site role.

Bot & Test Users

Experience your site exactly as your users do. Bot users allow administrators to "impersonate" different account types to verify that rules, forms, and restrictions are working as intended. This eliminates the need for creating fake email accounts for testing.



Other User Management Tools

Credentials

The Credentials tool is a powerful way to manage access based on training, certifications, or expiring records. It allows you to track exactly when a credential was granted and by whom, while monitoring its validity and duration. By gating specific resources behind these credentials, you can ensure that only qualified users are able to make bookings.

Messaging

Communicating with your users is streamlined through our messaging tool. You can send targeted notifications to specific individuals, entire user groups, or even users who hold certain credentials. Additionally, you can reach out to recent users of specific equipment to share maintenance updates or procedural changes, ensuring the right information reaches the right people instantly.



Forms & Data Collection

Forms allow you to capture the specific details required for resource usage, whether you're using that information for approvals, quoting, or long-term reporting. By creating custom questionnaires, you can extract precisely the data you need in the format that works best for your workflow.

- **Field Versatility:** Choose from a wide range of input types, including checkboxes, text fields, file uploads, dropdowns, and invoice items.
- **Admin-Only Fields:** Certain fields can be restricted so that only administrators have the authority to modify them. This is ideal for final result uploads, status updates, or backend administrative work.
- **Conditional Requirements:** You have full control over which fields are mandatory, ensuring that a booking cannot be finalized without the necessary information.
- **Visibility:** To ensure a seamless approval process, you can choose which form fields appear in confirmation emails or approval requests. This puts the most relevant information directly in front of your staff, allowing them to make informed decisions without having to log into the system.

Read more: [Custom Forms](#)

The screenshot displays the 'Edit Form' interface in Q·RESERVE. At the top, there's a header 'Edit Form' and a toggle for 'Enable Advanced Mode'. Below this, the 'Form Name' is set to 'Example Form'. A checkbox option is available: 'Allow site moderators, administrators, and users with the appropriate permission added to skip required fields and other checks.' Below this, there are buttons for 'Fields', 'Collapse All', 'Expand All', and 'Preview Form'. A section titled 'Add field to top' shows a grid of input field types: Checkbox, Checkbox List, Computed Text, Date Field, File Upload, Invoice Item, Invoice Items Total, Number Input, Reservation Color, Select (Dropdown/Radio) (highlighted with a red box), Static Text, Table Input, Text Input (Single-line), and Text Input (Multi-line). The main form area shows a '1. Dropdown Select' field. It has a 'Label' field with a red asterisk, a 'New Label' button, a 'Hint' field, a 'Default Value to Show When Nothing is Selected' field, and a 'Short Name' field. To the right of these fields are several configuration options: 'Options (comma separated)' with a value 'Option A, Option B', 'Value Options' with a 'Hide 'none' option' checkbox, 'Required Values (comma separated)' with a hint, 'Display as Radio Buttons ?' with a 'Radio select' checkbox, and 'Visibility' with several checkboxes: 'Show directly on reservations and requests', 'Show on calendar and request tables', 'Show in email body', 'Show in description of email ical invites and ICS feeds', 'Hide on new kiosk requests', 'Make responses visible to all site members', and 'Make available to all users through internal API'. At the bottom left, there are 'Options' for 'This field is required' and 'Only administrators can edit'.

Reservations

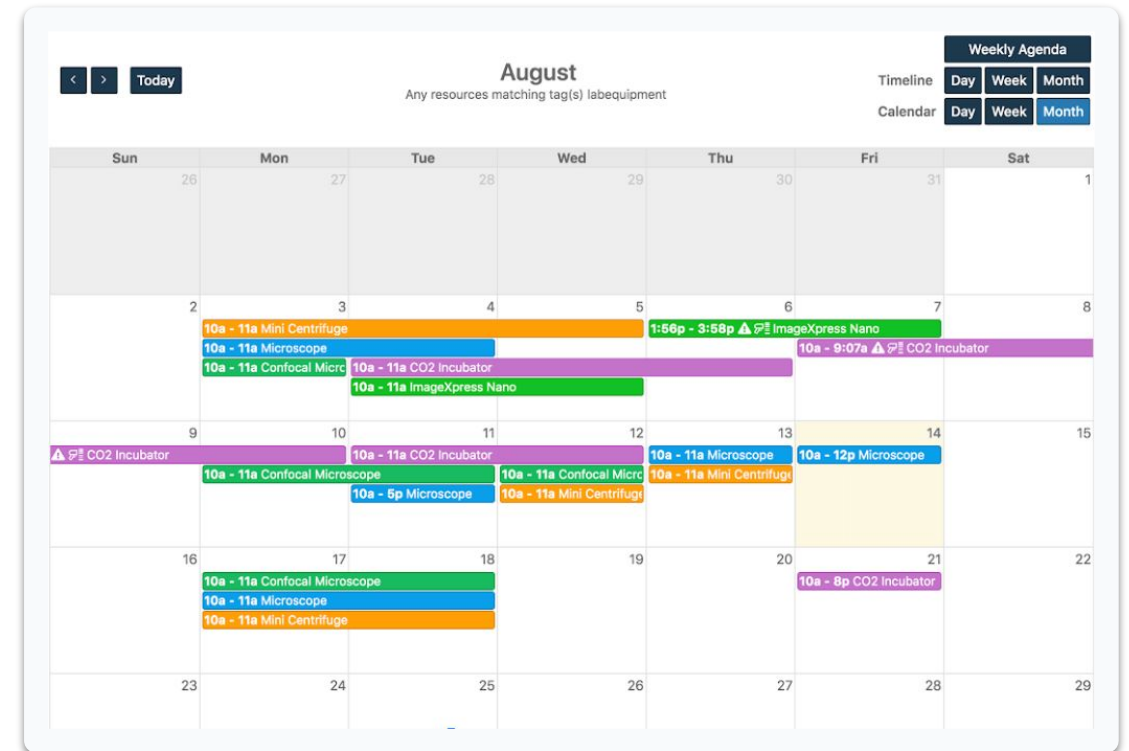
Users can view resource availability directly from the site page. To help them find exactly what they need, various filters can be applied to narrow down the selection based on specific criteria or resource attributes.

Calendar Views

Multiple calendar formats are available to suit different workflows. While standard Weekly Agenda and Monthly Calendar views provide a familiar experience, the Timeline Calendar is particularly effective for comparing availability across several resources simultaneously.

Recurring Reservations

Administrators have the authority to enable recurring bookings. Once active, reservations can be scheduled on a daily, weekly, monthly, or yearly basis, allowing for long-term planning with minimal manual entry.



Maintenance & Support

Maintenance Events

These are restricted to administrators or users with specialized privileges. They can be configured as Blocking to prevent concurrent use during service, or Non-Blocking to serve as a simple reminder for routine checks.

Issue Reporting

Users can report incidents or request assistance directly from a resource profile. By configuring Support Resources, you can attach specific forms to collect incident details, ensuring your team has all the necessary information to resolve the issue.

The image displays a user interface for Q·RESERVE, showing a 'Request Maintenance Service' form and a resource profile for the 'Microscopy Room'.

Request Maintenance Service Form:

- Enable administrator overrides:** ☐
- Urgency:** Important
- Maintenance Type:** Repair Required
- Issue Details:** Light at the end of the north hallway is flickering constantly and needs to be replaced.

Microscopy Room Resource Profile:

- Image:** A photograph of the microscopy room.
- Request support:** A button with a question mark icon.
- Details:**
 - Reservation Approvers: Approvals required: 10 Staff (1 required)
 - Available on Weekends: No
 - Blocked By: General Availability
 - Contact: Cindy Umotoni
 - Quantity: 1
 - Status: Operational
 - Technique: Special
 - Type: Locations
- Description:** A dedicated space equipped for various types of microscopy techniques, designed to support high-resolution imaging and analysis of biological and materials samples.
- Includes:**
 - Microscopes (Light, Confocal, Electron Microscopes)
 - Imaging Software: Advanced software for image acquisition, analysis, and visualization.
 - Computers equipped with relevant microscopy and data analysis software.
 - Space for preparing and handling samples, including clean benches.
 - Refrigerators: For the storage of temperature-sensitive samples.
 - Lighting Control: Adjustable lighting to enhance visibility and imaging quality.
 - Sample Storage: Cabinets or racks for organizing and storing prepared slides and samples.

Live Maps

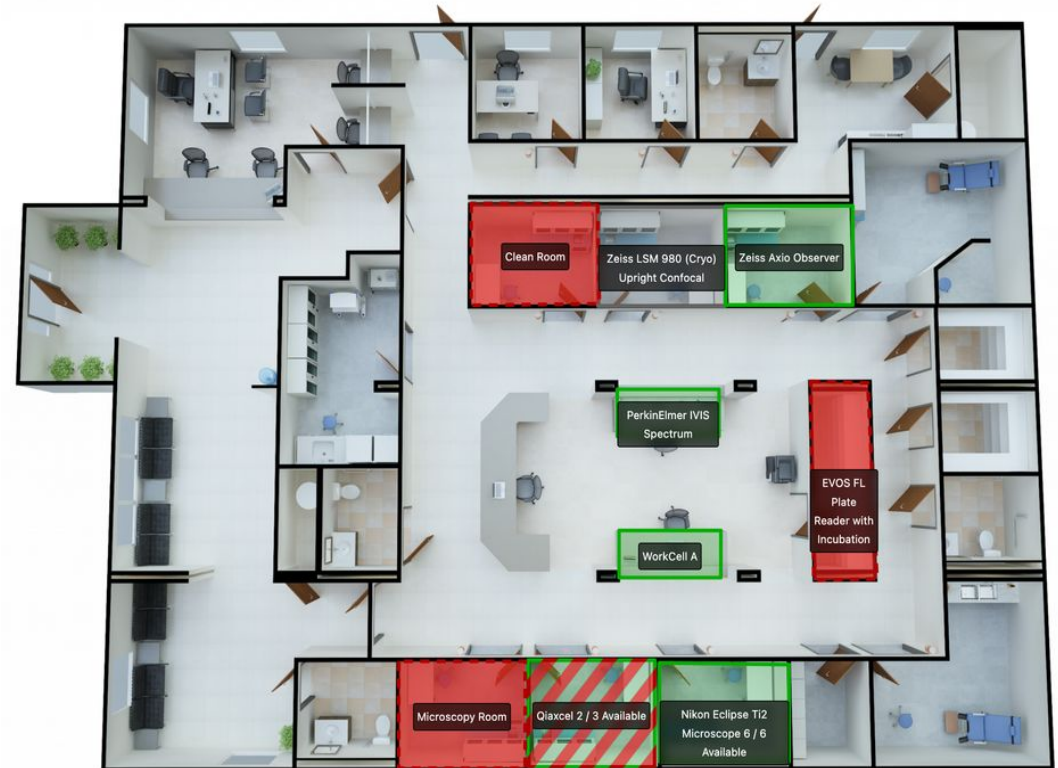
Live Maps transform a standard floor plan into an interactive experience. By uploading an image of your facility, you can provide users with a bird's-eye view of your site where they can see real-time availability at a glance. Instead of searching through a list, users can simply click on a desk, a room, or a piece of equipment directly on the map to start their booking.

MAPPING YOUR RESOURCES

Simply plot "regions" over your image and link them to your existing QReserve resources. This bridge between the physical layout and the digital schedule makes the booking process feel intuitive and grounded in the actual workspace.

NAVIGATING COMPLEX FACILITIES

For larger organizations, Live Maps can be layered for easy navigation. Regions aren't limited to just resources; they can also be linked to other maps. This allows users to "drill down" from a campus-wide overview to a specific building, and finally to an individual room or floor, all within a few clicks.



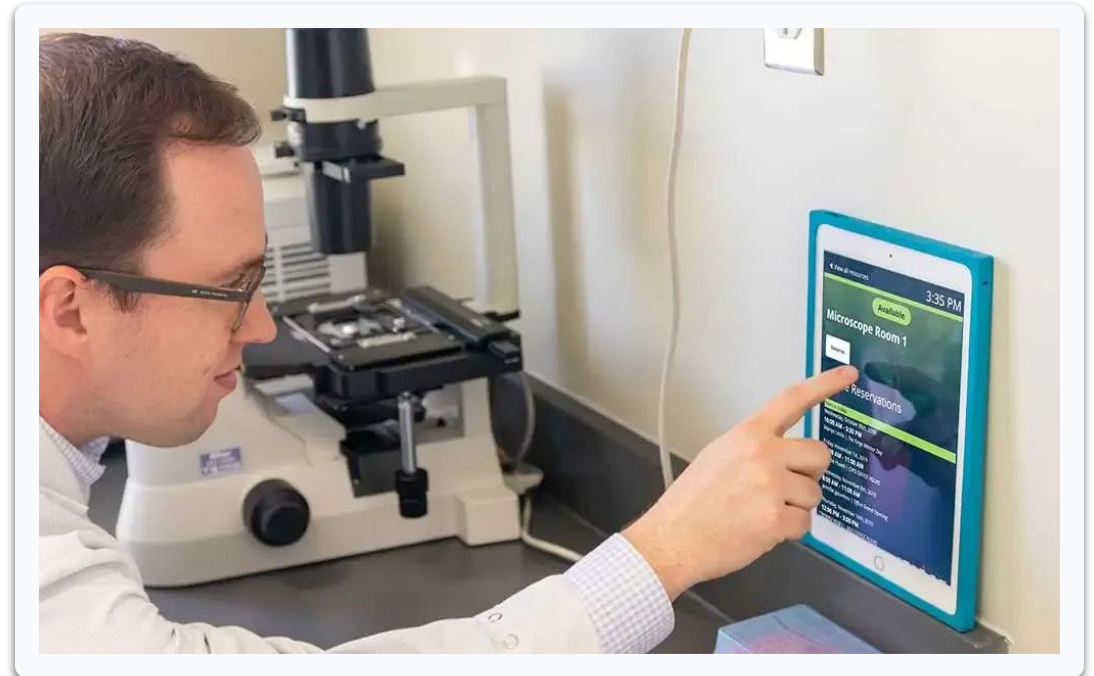
Kiosks

Kiosks bring QReserve directly to your physical resources, providing a real-time window into upcoming schedules and current availability. Whether it's a tablet mounted outside a conference room or a display in a lab, Kiosks allow users to see what's happening at a glance and even book a reservation on the spot.

Optimizing Capacity: Beyond just visibility, Kiosks act as a safeguard for your schedule. By enforcing mandatory check-in procedures, the system can automatically identify abandoned reservations and release that time back into the pool—ensuring your resources are never sitting idle while others are waiting to use them.

Simplified Access: Every Kiosk generates its own unique URL, making it easy to deploy on any hardware or embed within a QR code. By affixing these QR codes directly to your equipment, you give users an instant path to the booking page right from their own mobile devices.

Managing the Flow: Kiosks can be configured to suit the specific needs of your space. Set up **Resource Kiosks** focused on specific timelines, central **Check-in Desks** for arrival verification, or enable secure PIN **Authentication**.



Workflows

Workflows eliminate manual admin work by running automated tasks on a fixed schedule or in response to site events.

📅 1. Subscriptions (Schedule-Based)

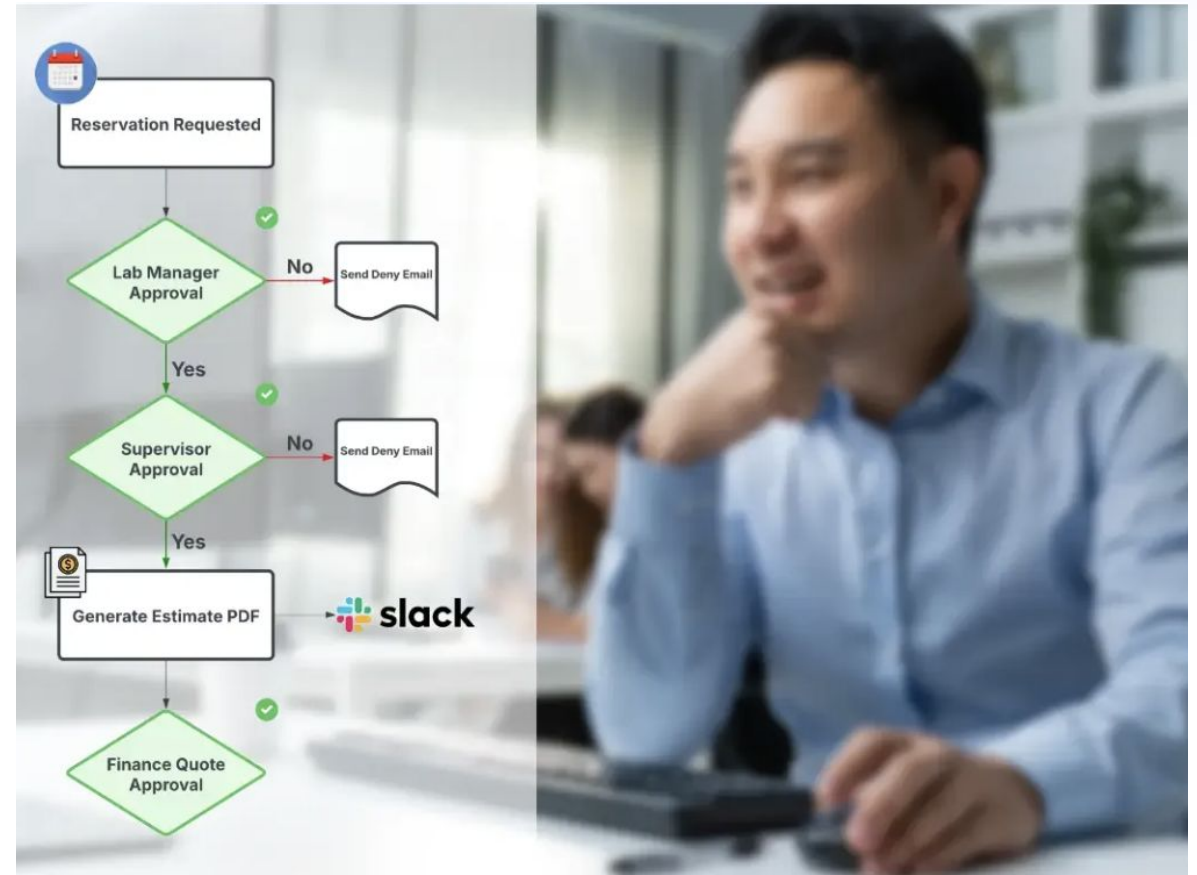
Run automatically on a fixed recurring calendar schedule (e.g., daily, weekly, or monthly) to perform routine administrative operations.

⚡ 2. Triggers (Event-Based)

Fire automatically when specific site events occur (e.g., reservation creation or cancellation) and at relative offsets (e.g., 5 mins before an event ends).

⚙️ 3. Tasks (Automated Actions)

The actual system actions executed once a Subscription or Trigger condition is met (e.g., sending emails, issuing credentials, generating invoices).



Workflows in Action

Common applications designed to eliminate manual admin work through event-triggered or scheduled automations.

Application & Purpose	Workflow Type & Timing	Exact System Task(s)
Training & Orientation Sessions Automatically assign a credential record to users upon completing training or orientation sessions.	Trigger 30 Minutes after a reservation ends	Create a credential record
Monthly Membership Billing Manage recurring membership payments invoiced directly to users.	Subscription Schedule: monthly	Create an invoice item, Generate an Invoice from Earlier Tasks
Team Maintenance Notifications Keeps teams informed about upcoming maintenance as soon as it is scheduled.	Trigger Immediately upon maintenance creation	Send a slack message / Send an email
Overdue Equipment Returns Sends reminders to users whose items are overdue in equipment loan management setups.	Trigger 1 hour, 1 day and 1 week after reservation ends	Send an email

Reporting & Insights

Translating Activity into Data

[QReserve's reporting tools](#) allow you to look back at your site's history and extract meaningful patterns. With a wide array of built-in filters—ranging from date ranges and user groups to specific reservation statuses—you can narrow your focus to exactly what matters, whether that's tracking equipment uptime or monitoring user participation.

Customized Data & Exports

To build a complete picture of your site's activity, you can include any information collected through your Custom Forms - such as project codes or specific usage details - directly in your reports. This pairs the "why" of a reservation with the "when." Once you have the view you need, you can export the data to a CSV for deeper analysis, choosing between a high-level Summary or a Detailed report that includes every individual form response.

Streamlined Invoicing

For many organizations, the reporting process naturally flows into billing. By running a report over a specific period, you can instantly transition into Batch Invoicing. QReserve allows you to group these invoices logically—by account numbers or supervisors—ensuring that the final billing period is clear, accurate, and ready for processing.

The screenshot shows the 'Activity Reports' page in the QReserve application. On the left is a dark sidebar with a navigation menu including Reports, Activity, Actual Usage, Heatmaps, Capacity, Custom, Audit Log, Users, Resources, Invoices, Forms, Projects, Live Maps, Kiosks, Web Integration, Workflows, Site Settings, Sandbox Access, and Main Menu. The main content area is titled 'Activity Reports' and features a 'Filters' section with various input fields: Date Range (Start: 2026-03-01, End: 2026-07-06), User (with dropdowns for Select user for filter, Supervisor (Billing), Select supervisor for filter, User Group, and Select user group for filter), Project (with dropdowns for Select project for filter and Status), and checkboxes for Approved, Pending, Denied, Cancelled, and Non-Blocking Maintenance. There are also sections for Paid Status, Reservation Check-In Status, Search Reservation Fields, and Actual Usage. On the right side, there are sections for Resources, Category, Barcode, Tags, Loan Status, and Search Form Responses. At the top right of the main area, there are buttons for 'Hide Filters', 'Create Invoices', and 'Download'. A small tooltip on the right says 'Apply any filter updates below prior to downloading CSV reports.' and lists export options: Summary CSV, Details CSV, Details CSV with Selected Form Columns, and Supervisor Summary CSV.

The screenshot shows the results of a report for the period '1 March 2026 - 6 July 2026'. At the top right, it says 'Any status(es) in approved, pending, cancelled'. Below the header, there are tabs for 'Reservations' and 'Vis. Visualizations'. The main content area shows '183 items for a total of \$13,994.84'. On the left, there is a 'Standard Columns' section with a list of columns: Custom Properties (0 / 2), Service Request Form (2 / 8), Type of Scanning Requested, Number of Slides, Slide Type, Desired Resolution, Special Handling Instructions, Please upload any other relevant files, Desired Completion Date, and Sample Results. A red box highlights the 'Service Request Form (2 / 8)' column, and a red arrow points to it from a box that says 'Add / Remove Columns here'. On the right side, there are buttons for 'Add Items', 'Consolidated view', and 'Print'.

History & Profile Settings

Your Activity at a Glance

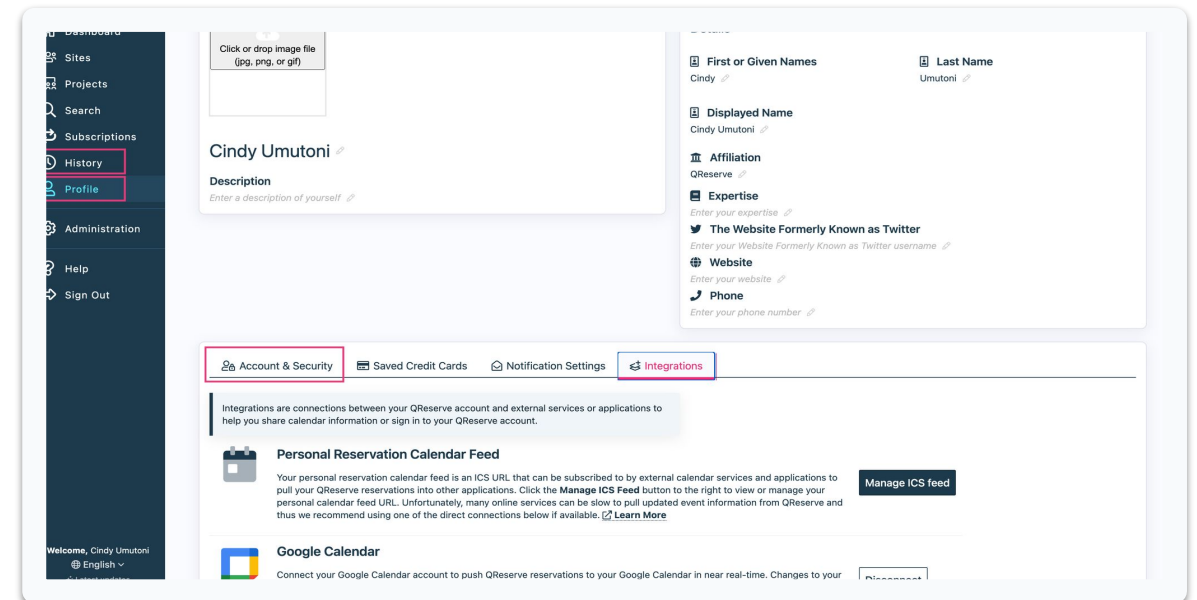
The [History](#) page serves as a comprehensive log for the user. From here, they can track their entire lifecycle on the site—reviewing past and upcoming reservations, monitoring the status of requests, viewing their credential records, and revisiting important messages. It's a single point of reference that keeps them organized and informed.

Calendar Integrations

To help keep track of appointments, users can set up a one-way sync to push their QReserve bookings to their own personal calendars. It's important to note that this is a user setting; because it involves a user's personal calendar, it has to be enabled by them directly rather than by an administrator.

Account & Security

The Profile page gives users control over how they interact with the system. This is where they can manage their own notification preferences, update their password, or add an extra layer of security by enabling multi-factor authentication.



More Questions?



More Resources

[Knowledge Centre](#)
[QUniversity Webinars](#)



Contact

hello@qreserve.com



Submit a ticket

<https://qreserve.freshdesk.com/support/tickets/new>

