next8n

PROJECT HANDOVER DOCUMENT

Workflow Automation Delivery Framework

ENTERPRISE EDITION

Version: 2.0

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Project Handover Document

Workflow Automation Delivery - Final Delivery Package

```
+=================================================================+
|                    PROJECT HANDOVER DOCUMENT                    |
+=================================================================+
|  Project:     [PROJECT NAME]                                    |
|  Client:      [CLIENT COMPANY]                                  |
|  Delivered:   [DELIVERY DATE]                                   |
|  Document:    Version 1.0                                       |
+=================================================================+
```

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11. Client Acceptance

1. Project Completion Summary

1.1 Executive Overview

ATTRIBUTE	DETAILS
Project Name	[PROJECT NAME]
Project Start Date	[START DATE]
Project Completion Date	[COMPLETION DATE]
Total Duration	[X weeks/days]
n8n Environment	[Cloud / Self-hosted - URL]

1.2 Project Objectives Achieved

#	OBJECTIVE	STATUS	NOTES
1	[Primary objective description]	Completed	[Any relevant notes]
2	[Secondary objective description]	Completed	[Any relevant notes]
3	[Additional objective]	Completed	[Any relevant notes]
4	[Additional objective]	Completed	[Any relevant notes]

1.3 Deliverables Checklist

DELIVERABLE	STATUS	LOCATION/LINK
Workflow(s) Built & Tested	Completed	n8n Dashboard
Technical Documentation	Completed	[Link]
Video Walkthrough(s)	Completed	[Link]
Workflow Exports (JSON)	Completed	[Link/Location]
Handover Call	Completed	[Date]
[Additional deliverable]	Completed	[Link]

1.4 Project Summary

[2-4 paragraphs summarizing what was built, the key features, and the business value delivered. This should be written in plain language for stakeholders.]

2. Delivered Workflows

2.1 Workflow Overview

#	WORKFLOW NAME	STATUS	TRIGGER TYPE	RUN FREQUENCY
1	[Workflow Name]	Active	[Webhook/Schedule/Manual]	[As needed/Hourly/Daily]
2	[Workflow Name]	Active	[Webhook/Schedule/Manual]	[Frequency]
3	[Workflow Name]	Active	[Webhook/Schedule/Manual]	[Frequency]

2.2 Workflow 1: [Workflow Name]

```
+-------------------------------------------------------------------+
|  WORKFLOW: [Workflow Name]                                        |
|  Status: ACTIVE | Created: [Date] | Last Modified: [Date]         |
+-------------------------------------------------------------------+
```

ATTRIBUTE	DESCRIPTION
Purpose	[What this workflow accomplishes - 1-2 sentences]
Trigger	[How/when it starts - webhook URL, schedule time, manual]
Input	[What data comes in - source, format, expected fields]
Process	[High-level description of what the workflow does]
Output	[What actions are taken, where data goes]
Integrations	[List of connected services/apps]
Average Run Time	[X seconds/minutes]
Error Handling	[How errors are handled - email notification, retry, etc.]

Key Nodes:

- [Node Name]: [Brief description of what it does]
- [Node Name]: [Brief description]
- [Node Name]: [Brief description]

Important Notes:

- [Any critical information about this workflow]
- [Rate limits, dependencies, timing considerations]

2.3 Workflow 2: [Workflow Name]

```
+----------------------------------------------------------------------------+
|  WORKFLOW: [Workflow Name]                                                 |
|  Status: ACTIVE | Created: [Date] | Last Modified: [Date]                  |
+----------------------------------------------------------------------------+
```

ATTRIBUTE	DESCRIPTION
Purpose	[What this workflow accomplishes]
Trigger	[How/when it starts]
Input	[What data comes in]
Process	[What happens to the data]
Output	[What actions are taken]
Integrations	[Connected services]
Average Run Time	[X seconds/minutes]
Error Handling	[Error handling approach]

Key Nodes:
- [Node Name]: [Brief description]
- [Node Name]: [Brief description]

Important Notes:
- [Critical information]

2.4 Workflow 3: [Workflow Name]

[Repeat the above structure for each additional workflow]

---

3. Documentation Library

3.1 Technical Documentation

DOCUMENT	DESCRIPTION	LOCATION	LAST UPDATED
Workflow Technical Docs	Detailed technical reference	[Link]	[Date]
Integration Setup Guide	How integrations were configured	[Link]	[Date]
Data Flow Diagrams	Visual representation of data flow	[Link]	[Date]
API Reference	Endpoints and webhook URLs	[Link]	[Date]

3.2 User Guides

DOCUMENT	DESCRIPTION	LOCATION	LAST UPDATED
User Quick Start Guide	How to use the workflows	[Link]	[Date]
FAQ Document	Common questions and answers	[Link]	[Date]
Workflow Trigger Guide	How to trigger each workflow	[Link]	[Date]

3.3 Administration Guides

DOCUMENT	DESCRIPTION	LOCATION	LAST UPDATED
Credential Management Guide	How to update credentials	[Link]	[Date]
Backup & Recovery Guide	How to backup and restore	[Link]	[Date]
Monitoring Setup Guide	How to monitor workflows	[Link]	[Date]

4. Video Walkthroughs

4.1 Training Videos

#	VIDEO TITLE	DURATION	DESCRIPTION	LINK
1	Complete System Overview	[X min]	Full walkthrough of all workflows	[Loom/ Drive Link]
2	[Workflow 1] Deep Dive	[X min]	Detailed explanation of [Workflow 1]	[Link]
3	[Workflow 2] Deep Dive	[X min]	Detailed explanation of [Workflow 2]	[Link]
4	How to Monitor & Troubleshoot	[X min]	Monitoring dashboard and error handling	[Link]
5	How to Update Credentials	[X min]	Step-by-step credential updates	[Link]

4.2 Handover Recording

SESSION	DATE	DURATION	ATTENDEES	RECORDING LINK
Handover Call	[Date]	[X min]	[Names]	[Link]

4.3 Quick Reference Clips

TOPIC	DURATION	LINK
Manually triggering [Workflow]	[X min]	[Link]
Checking execution history	[X min]	[Link]
Restarting a failed execution	[X min]	[Link]

5. Credential Inventory

5.1 Active Credentials

The following credentials are configured in your n8n environment. **Never share credential values. This list is for reference only.**

#	CREDENTIAL NAME	TYPE	ASSOCIATED SERVICE	USED BY WORKFLOW(S)	EXPIRY/ RENEWAL
1	[Credential Name]	API Key	[Service Name]	[Workflow 1, 2]	[Date/ Never]
2	[Credential Name]	OAuth2	[Service Name]	[Workflow 1]	[Date/ Refresh]
3	[Credential Name]	API Key	[Service Name]	[Workflow 3]	[Never]
4	[Credential Name]	OAuth2	[Service Name]	[Workflow 2]	[Annual Renewal]
5	[Credential Name]	Database	[Database Name]	[Workflow 1, 3]	[Never]

5.2 Credential Notes

CREDENTIAL	IMPORTANT NOTES
[Credential Name]	[Any special instructions, renewal process, or considerations]
[Credential Name]	[Notes about rate limits, permissions needed, etc.]
[Credential Name]	[Who to contact if issues arise]

5.3 Credential Owners

SERVICE	ACCOUNT OWNER	ADMIN CONTACT
[Service Name]	[Client Company]	[Contact Email]
[Service Name]	[Client Company]	[Contact Email]
[AI Service]	[Client Company]	[Contact Email]

6. Backup & Export Locations

6.1 Workflow Exports

All workflows have been exported as JSON files for backup and disaster recovery.

WORKFLOW	EXPORT FILE	LOCATION	EXPORT DATE
[Workflow 1]	[workflow-1-export.json]	[Google Drive/Folder Link]	[Date]
[Workflow 2]	[workflow-2-export.json]	[Google Drive/Folder Link]	[Date]
[Workflow 3]	[workflow-3-export.json]	[Google Drive/Folder Link]	[Date]
All Workflows	[all-workflows-backup.json]	[Link]	[Date]

6.2 Backup Schedule Recommendations

BACKUP TYPE	FREQUENCY	METHOD	STORAGE LOCATION
Workflow Exports	Weekly	Manual export from n8n	[Location]
Full n8n Backup	Monthly	[Method]	[Location]
Credential Backup	Per Change	Secure password manager	[Tool Name]

6.3 How to Export Workflows

1. Open n8n dashboard

2. Navigate to the workflow

3. Click the three dots menu (…)

4. Select "Download"

5. Save the JSON file to your backup location

6.4 How to Import/Restore Workflows

1. Open n8n dashboard

2. Click "Add Workflow" or go to Settings > Import

3. Select "Import from File"

4. Choose the JSON backup file

5. Update any credentials if prompted

6. Activate the workflow

7. Monitoring Guide

7.1 n8n Execution Dashboard

Location: [n8n URL]/executions

WHAT TO MONITOR	WHERE TO FIND IT	FREQUENCY
Execution History	Executions tab	Daily
Failed Executions	Executions > Filter by "Error"	Daily
Active Workflows	Workflows page (toggle status)	Weekly
Credential Status	Settings > Credentials	Monthly

7.2 Key Metrics to Track

METRIC	HEALTHY RANGE	WARNING SIGNS	ACTION REQUIRED
Success Rate	>95%	<90%	Review failed executions
Execution Time	[X seconds]	2x normal time	Check integrations
Daily Executions	[Expected range]	Sudden drop	Verify triggers working
Error Count	0-2 per day	>5 per day	Investigate root cause

7.3 Monitoring Checklist (Daily)

```
Daily Monitoring (2-3 minutes)

[ ] Check for failed executions
[ ] Review any error notifications
[ ] Verify expected workflows ran
[ ] Check connected service status
```

7.4 Monitoring Checklist (Weekly)

```
Weekly Review (10-15 minutes)

[ ] Review execution success rates
[ ] Check for any repeated errors
[ ] Verify all workflows are active
[ ] Review API usage/rate limits
[ ] Check credential expiration dates
```

7.5 Error Notifications

NOTIFICATION TYPE	DESTINATION	SETUP STATUS
Workflow Failure	[Email Address]	Configured
[Custom Alert]	[Slack/Email]	Configured

8. Troubleshooting Quick Guide

8.1 Common Issues & Solutions

Issue: Workflow Not Triggering

POSSIBLE CAUSE	SOLUTION
Workflow inactive	Check toggle is ON (green) in n8n
Webhook URL changed	Verify webhook URL in triggering system
Cron schedule wrong	Check schedule settings in trigger node
n8n server down	Check server status, restart if needed

Issue: Authentication/Credential Errors

POSSIBLE CAUSE	SOLUTION
Token expired	Re-authenticate the credential
Password changed	Update credential with new password
API key revoked	Generate new API key, update credential
Insufficient permissions	Check service account permissions

Issue: Workflow Errors/Failures

POSSIBLE CAUSE	SOLUTION
Rate limit exceeded	Wait and retry, or reduce frequency
Invalid data received	Check input data format
Service temporarily down	Wait and retry, check service status
Node configuration changed	Review node settings, compare to backup

Issue: Slow Performance

POSSIBLE CAUSE	SOLUTION
Large data processing	Consider batching or splitting
External API slow	Check service status
Too many executions	Review concurrent execution limits

8.2 Quick Fixes Reference

SYMPTOM	FIRST TRY	IF THAT FAILS
Workflow stopped	Toggle OFF then ON	Check execution log
Credential error	Re-authenticate	Check API key validity
Wrong output	Check input data	Review node logic
Timeout error	Increase timeout setting	Split into smaller workflows
Duplicate runs	Check trigger conditions	Add deduplication logic

8.3 When to Escalate

Contact support if you experience:

- [ ] Multiple workflows failing simultaneously

• [ ] Credential authentication loops

• [ ] Data corruption or missing data

• [ ] Issues persisting after basic troubleshooting

• [ ] Need to modify workflow logic

• [ ] Performance degradation over time

9. Support Period Details

9.1 Support Coverage

ATTRIBUTE	DETAILS
Support Period	[X days/weeks] from delivery date
Support Start Date	[DATE]
Support End Date	[DATE]
Support Hours	[9am - 5pm EST, Monday - Friday]
Response Time	Within [24/48] business hours

9.2 What's Included in Support Period

INCLUDED	DESCRIPTION
Bug Fixes	Fixing any bugs in delivered workflows
Clarification Questions	Answering questions about how workflows work
Minor Adjustments	Small tweaks based on testing in production
Troubleshooting	Help resolving issues with workflows
Re-authentication	Assistance with credential issues

9.3 What's NOT Included in Support Period

NOT INCLUDED	ALTERNATIVE
New workflow development	Requires new project/quote
Major modifications	Requires change request
New integrations	Requires new project/quote
Training additional team members	Hourly training rate available
Issues caused by client changes	Hourly support rate applies

9.4 After Support Period

OPTION	DESCRIPTION	PRICING
Maintenance Retainer	Ongoing monitoring & support	$[XXX]/month
Hourly Support	As-needed assistance	$[XXX]/hour
New Projects	Additional development	Custom quote

9.5 How to Request Support

1. **Email**: [support email]
2. **Subject Line Format**: "[Project Name] - Support Request - [Brief Issue]"
3. **Include in Request**:
   - Workflow name(s) affected
   - Description of issue
   - When the issue started
   - Screenshots of errors (if applicable)
   - Steps to reproduce

10. Contact Information

10.1 Primary Contacts

Developer/Provider

ATTRIBUTE	DETAILS
Name	[YOUR NAME]
Company	[YOUR COMPANY]
Email	[YOUR EMAIL]
Phone	[YOUR PHONE - if provided]
Response Time	Within [24/48] business hours
Preferred Contact	Email

Client Project Lead

ATTRIBUTE	DETAILS
Name	[CLIENT NAME]
Company	[CLIENT COMPANY]
Email	[CLIENT EMAIL]
Phone	[CLIENT PHONE]
Role	Primary decision maker

10.2 Emergency Contacts

For critical issues outside business hours (if included in agreement)

TYPE	CONTACT	WHEN TO USE
Emergency Support	[Contact method]	Complete system failure
Critical Issues	[Contact method]	Business-stopping problems

10.3 Third-Party Service Support

SERVICE	SUPPORT URL	NOTES
n8n	https://docs.n8n.io	For platform-specific issues
[Integration 1]	[Support URL]	[Notes]
[Integration 2]	[Support URL]	[Notes]
[AI Service]	[Support URL]	[Notes]

11. Client Acceptance

11.1 Delivery Confirmation

By signing below, the Client confirms:

- [ ] All workflows have been delivered and demonstrated
- [ ] Access to n8n environment has been verified
- [ ] All documentation has been received and reviewed
- [ ] Video walkthroughs have been provided
- [ ] Handover call has been completed
- [ ] Questions have been answered to satisfaction
- [ ] Workflow exports/backups have been provided
- [ ] Client understands how to monitor and troubleshoot
- [ ] Support period terms are understood

11.2 Acceptance of Deliverables

I confirm that the project deliverables have been completed as specified in the Scope of Work dated [DATE] and accept the handover of the project.

11.3 Client Signature

```
+--------------------------------------------------------------------+
|                        CLIENT ACCEPTANCE                           |
+--------------------------------------------------------------------+

Signature:      _____

Print Name:     _____

Title:          _____

Company:        _____

Date:           _____

+--------------------------------------------------------------------+
```

11.4 Provider Signature

```
+--------------------------------------------------------------------+
|                     PROVIDER CONFIRMATION                          |
+--------------------------------------------------------------------+

I confirm that all deliverables have been completed and handed over to the
Client as specified.

Signature:      _____

Print Name:     _____

Title:          _____

Company:        _____

Date:           _____

+--------------------------------------------------------------------+
```

Appendix A: Quick Reference Card

Key URLs

RESOURCE	URL
n8n Dashboard	[URL]
Documentation Folder	[URL]
Video Library	[URL]
Backup Location	[URL]

Key Contacts

WHO	CONTACT
Developer	[Email]
Support	[Email]
Emergency	[Contact]

Daily Checklist

```
[ ] Check n8n executions page for errors
[ ] Verify expected workflows ran
[ ] Review any notification emails
```

Appendix B: Workflow Quick Reference

WORKFLOW	TRIGGER	WHAT IT DOES	IF IT FAILS
[WF 1]	[Trigger]	[Brief description]	[First action]
[WF 2]	[Trigger]	[Brief description]	[First action]
[WF 3]	[Trigger]	[Brief description]	[First action]

Appendix C: Credential Expiration Calendar

MONTH	CREDENTIAL	ACTION REQUIRED
[Month Year]	[Credential Name]	Renew/Refresh
[Month Year]	[Credential Name]	Re-authenticate
[Month Year]	[Credential Name]	Review API key

Appendix D: Change Log

VERSION	DATE	CHANGES	AUTHOR
1.0	[Date]	Initial delivery	[Name]

This handover document confirms the completion and delivery of the project as specified. Please retain this document for your records.

Document Version: 1.0
Last Updated: [DATE]
Generated By: [YOUR NAME/COMPANY]

```
+=========================================================================+
|                      Thank you for your business!                       |
|                                                                         |
|  [YOUR COMPANY NAME]                                                    |
|  [Your Website] | [Your Email]                                          |
+=========================================================================+
```

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