inventaris

# Manual

Setup and daily work: from the first sign-in through loans and returns to reports and device management.

| | |
|---|---|
| Software | Inventaris, inventory and loan management |
| Provider | Swyron GmbH, Switzerland |
| Website | inventaris.ch |
| Version | October 2026 |

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PART 1

# How Inventaris thinks

Five pages that make the rest of the manual shorter. Anyone who knows the three terms and the six roles will find everything else on their own.

## 1.1 What Inventaris is for

Inventaris answers two questions, at any time and without asking anyone:

- **What do we have?** Every device individually, with its own inventory number, location, acquisition value and current value.
- **Who has it right now?** With name, date and due date. Plus a reminder before the due date runs out.

Everything else hangs on these two questions. The reservation answers them for next week. The damage report says why a device is not available right now, and the report says what the stock is worth.

> **The difference from a spreadsheet**
>
> A spreadsheet doesn't know that a projector can't be on loan twice at once. Inventaris knows it and prevents it, even when two people book at the same time. That's the real reason this application exists.

## 1.2 Product, unit, loan: the three terms

Separating these three words is the only mental hurdle. After that, most of it explains itself.

| TERM | WHAT IS MEANT | EXAMPLE |
|---|---|---|
| Product | The **model**. What is written on the packaging. A product exists once, even if you own fifty of them. | «iPad 10th generation» |
| Unit | The **individual device** that you can pick up. It carries a unique inventory number and usually a sticker. | «TAB-0101» |
| Loan | A **case**: one person takes one or more units and brings them back by a date. | «Mara Lindt, TAB-0101 and BEA-0001, until 24.09.» |

Why the separation pays off: you maintain manuals, purchase price, warranty period and useful life **once on the product** and not fifty times on every iPad. The unit only holds what differs from device to device: location, serial number, condition.

### Three kinds of product

- **Single device.** The normal case. A projector, a notebook.
- **Set.** Several units that are handed out together and share a common **set code**. A class set of tablets in a case: one scan, twenty devices.
- **Consumables.** What doesn't come back. Batteries, markers, cables. Here the stock counts, not the individual number.

## 1.3 Who may do what: the seven roles

Each account carries exactly one role. It decides what appears in the menu at all. What someone isn't allowed to do, they don't even see — and where something is hidden, it is checked again on submission. A button that isn't shown is never the only lock in Inventaris.

### The seven roles at a glance

| ROLE | MAY | TYPICAL FOR |
|---|---|---|
| Owner | Everything, including the subscription, invoices and the management of other accounts. There is always at least one, and they cannot be downgraded. | School management, management |
| Administrator | Everything except the subscription: settings, accounts, inventory, cases. | IT managers |
| Manager | Runs operations: maintain inventory, lend, take back, approve requests, check invoices, work on tickets. Does not create accounts and does not change settings. | Media library, material management |
| Staff member | Books loans, returns and reservations, sees the inventory and handles consumables, inventory check and damage reports. Changes neither products nor units nor master data and does not decide on requests, invoices or tickets. | Caretaker, secretariat |
| Borrower | Only your own things: your own loans, your own reservations, your own reports. Sees no other people's data. See Part 6. | Teachers, staff |
| Student | Pupils: search the library, place holds on books and, if switched on, borrow them themselves; plus their own loans. Only with the Library add-on; with Microsoft 365 from the group `SiGR-Inventaris-SuS`. Does not count as a subscription user. | Pupils |
| Kiosk | An account for the computer in the store room: borrow and take back, nothing else. Never signs out. | The computer at the issue counter |

> **The first four form a ladder**
>
> Owner, Administrator, Manager and Staff member build on each other: each level can do everything the level below can, and more. Borrower, Student and Kiosk stand deliberately apart — they are not weaker staff members, but something different. When in doubt, assign the smaller role; it can be raised at any time.

### What each role is allowed to do in detail

Because the first four roles build on one another, one detail per task is enough: **from which role** it is allowed. Whoever is higher up may do it too. The table is built from top to bottom — what is needed daily at the counter is at the top; what changes the whole organisation is at the bottom.

| TASK | LEAVING |
|---|---|
| At the counter | |
| Book loan, return and reservation | Staff member<br>the Kiosk account too |
| In operation | |
| View inventory: products, units, documentation, values, reports | Staff member |
| Edit consumables | Staff member |
| Carry out inventory control | Staff member |
| Work on damage reports and lock a device | Staff member |
| Decide on cases | |
| Approve or reject requests | Manager |
| Check and release invoices | Manager |
| Take over and close tickets | Manager |
| Manage | |
| Change inventory: products, units, master data, importing and exporting data | Manager |
| Manage and invite user accounts | Administrator |
| Change settings | Administrator |
| Subscription and invoices, delete organisation | Owner |

Borrowers and students are in none of these rows – they have none of them. Borrowers see their own loans, reserve devices and report what they notice; students see the library and their own loans. More on this in Part 6. The kiosk account may only use the first row and nothing else.

> **Why an employee only views the inventory**
>
> They work at the counter and need to be able to check what a device is, where it is and what depends on it. They shouldn't change it: an accidentally renamed product or a deleted unit drags loans, reports and requests along with it. Consumables, inventory control and damage reports, on the other hand, they may work on – that's the job they're there for.

### What each role sees in the menu

The same permissions build the menu. A group from which everything drops out doesn't appear at all – which is why a kiosk account sees only Operations.

| MENU ITEM | OWNER | ADMINISTRATOR | MANAGER | STAFF MEMBER | KIOSK |
|---|---|---|---|---|---|
| **Operations** | | | | | |
| Overview | yes | yes | yes | yes | yes |
| Loans | yes | yes | yes | yes | yes |
| Return | yes | yes | yes | yes | yes |
| Reservations | yes | yes | yes | yes | yes |
| **Personal** | | | | | |
| My loans | yes | yes | yes | yes | – |
| My reservations | yes | yes | yes | yes | – |
| **Inventory** | | | | | |
| Products | yes | yes | yes | yes | – |
| Units | yes | yes | yes | yes | – |
| Consumables | yes | yes | yes | yes | – |
| Inventory control | yes | yes | yes | yes | – |
| Documentation | yes | yes | yes | yes | – |
| Software | yes | yes | yes | yes | – |
| Contracts | yes | yes | yes | – | – |
| Device management | yes | yes | yes | – | – |
| Values | yes | yes | yes | yes | – |
| Reports | yes | yes | yes | yes | – |
| **Cases** | | | | | |
| Projects | yes | yes | yes | – | – |
| Damage reports | yes | yes | yes | yes | – |
| Requests | yes | yes | yes | yes | – |
| Tickets | yes | yes | yes | yes | – |
| Archive | yes | yes | yes | yes | – |
| **Add-ons** | | | | | |
| Library | yes | yes | yes | yes | – |
| Teaching materials | yes | yes | yes | yes | – |
| **Swyron AI** | yes | yes | yes | yes | – |

| MENU ITEM | OWNER | ADMINISTRATOR | MANAGER | STAFF MEMBER | KIOSK |
|---|---|---|---|---|---|
| Administration | | | | | |
| Master data | yes | yes | yes | – | – |
| Importing data | yes | yes | yes | – | – |
| Exporting data | yes | yes | yes | – | – |
| Settings | yes | yes | – | – | – |

The **borrower** has their own menu with the same headings: under **Operations** are **Overview**, **My loans**, **My reservations** and – if your organisation has switched on self-service – **Borrow device** and **Withdraw material**. Under **Cases** are **Damage reports**, **Requests**, **Tickets** and **Archive**, and under **Add-ons** whatever has been booked: **Library**, **Teaching materials**, **Swyron AI**. **Students** only see **Overview**, **My loans** and the **Library**, plus **Swyron AI** if it is switched on for them. More on this in 6.1.

**A menu item can be missing for three reasons**

**The role** isn't allowed it – then it doesn't appear for anyone with that role. **The subscription** doesn't include it: requests, tickets, projects, IT documentation with software and contracts, device management and signing in via Microsoft 365 require **Pro**. Library, teaching materials and **Swyron AI** are add-ons and only appear once booked. **The module is switched off** in the settings (see 2.3). **Device management** additionally appears only if a connection to Intune, Jamf or Mosyle is set up.

### Three extra permissions without changing role

Sometimes someone should take on a single task without becoming an administrator straight away. For that there are three ticks on the account, under **Additional permissions**. They act **in addition** to the role and never take anything away. They are set when editing an existing account, not when inviting – see 2.8.

| ADDITIONAL PERMISSION | ALLOWED | TYPICAL FOR |
|---|---|---|
| Approve requests | Decide on requests, even as an employee or borrower. If an approval chain is set up on a request, the person named there decides – the chain takes precedence over the permission. | School management without IT duties |
| Invoice control | Check and release invoices, without access to accounts or settings. | Facilities management, accounting |
| Edit tickets | Take over and close tickets. | Caretaker, external IT |

**Staff is not the same as an account**

Anyone who borrows needs **no account**, only a staff record with a staff number. At a school that is the normal case: the teacher comes to the counter, their number is scanned, done. An account is only needed by someone who wants to sign in themselves.

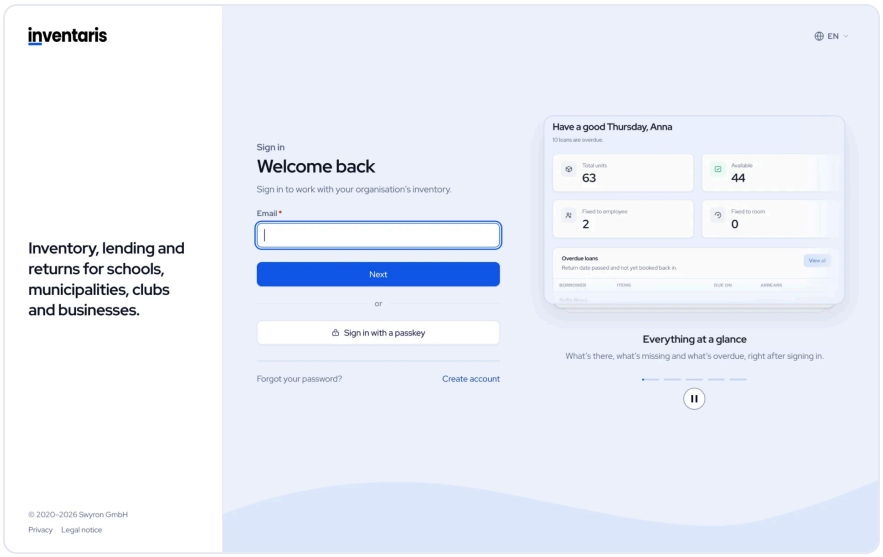
Password and second step with Microsoft 365

If an account comes from your directory, the fields **Change password** and **Two-step sign-in** disappear from the settings: Microsoft handles both, and offering a field that does nothing would be worse than none.

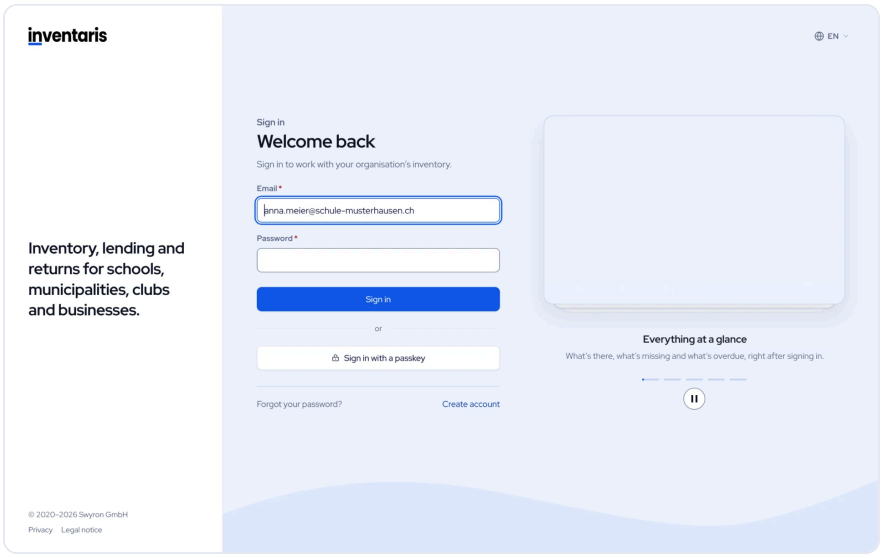
**The owner is exempt**, and that's intentional. They need a way in when the connection is stuck — an expired secret, withdrawn consent, an outage at Microsoft. Without a local password, the organisation would be locked out at exactly the moment when someone needs to repair the connection. A **kiosk account** is likewise never asked for a second step: there's no one at the terminal in the corridor who could type in a code.

## 1.4 Signing in and signing out

Signing in happens in two steps. First there's only the question for the email address; as soon as you've entered it, the password field appears.




**Step 1.** If Microsoft 365 is set up for your organisation, the button **Sign in with Microsoft** also appears at the top. Then you don't need to type anything in here at all.




**Step 2.** The password field appears as soon as the address is entered. The button now reads **Sign in** instead of **Next**.

> **What happens after the click**
>
> You land on the **overview**. If two-step sign-in is set up for your account, the prompt for the six-digit code from your Authenticator app comes first.

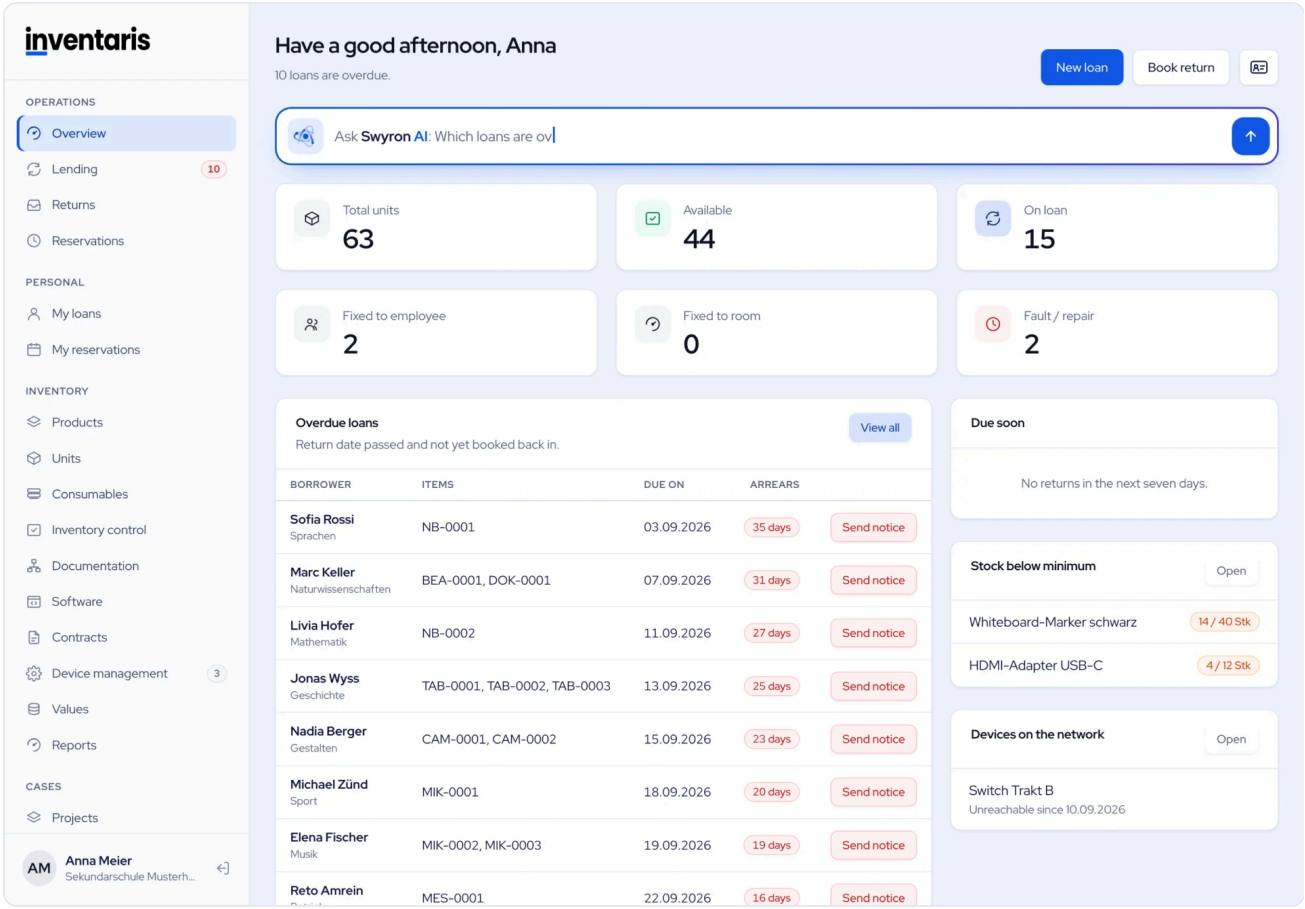
### Sign out

Your name is at the bottom left. Next to it on the right is a small symbol with an arrow pointing out of a door. That is the sign-out. After **15 minutes without activity** the application signs you out by itself; on your next click you land back on the sign-in screen.

### Forgotten password

The sign-in screen shows **Forgotten your password?**. You enter your address and get an email with a link through which you set a new password. The link is valid for one hour and can only be used once.

## 1.5 The layout of the screen




The overview is the home page after signing in. The menu on the left, the figures and urgent cases in the middle, and on the right what's coming up this week. Borrowers and students have their own, shorter overview with their own things (6.1).

The menu on the left is divided into six groups, and the order is deliberate:

1. **Operations**
   What is needed daily: overview, loans, return, reservations.

2 **Personal**

What concerns you yourself, even if you manage the whole organisation: My loans, My reservations.

3 **Inventory**

Everything concerning stock: products, units, consumables, inventory control, documentation, software, contracts, device management, values, reports.

4 **Cases**

What comes up alongside loans: projects, damage reports, requests, tickets, archive.

5 **Add-ons**

What your organisation has booked on top: library, teaching materials, **Swyron AI**. Without a booking the group is missing.

6 **Administration**

What you rarely need: master data, import data, export data, settings.

### The numbers next to the menu items

A number in the menu always means the same thing: there's work here. Next to Loans it shows how many are overdue; next to Reservations, what needs to be ready today; next to Damage reports, what no one has looked at yet. If there's no number, nothing is open. Then you don't even need to click through.

### Light or dark

The application follows your device's setting: if it is set to dark, Inventaris is dark too, without you setting anything. In the Teams app, the Teams theme decides, contrast mode included. Always light are the website, this manual and everything that is printed: labels, cards, invoices, reports. QR codes and barcodes stay on a white background in dark mode too, so that every scanner can read them.

PART 2

# Set up

For owners and administrators. From the empty application to the first loan. In this order there are the fewest setbacks.

## 2.1 The first day: nine steps

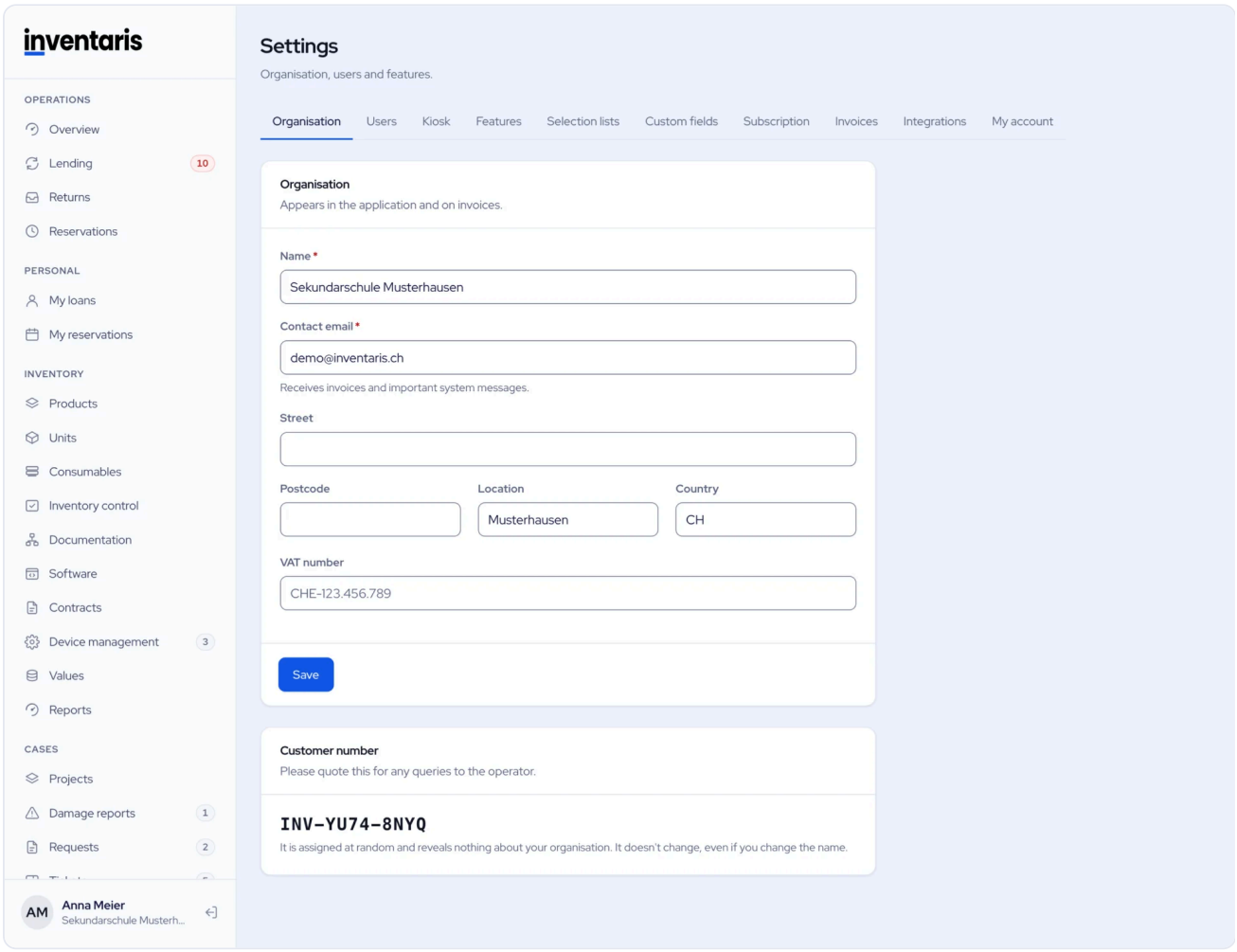
Stick to this order. It is not arbitrary: each step needs what the previous one created. Anyone who starts with the units has to open each one again afterwards to add the room.

1. **Organisation details**
   Name, address, contact. Appears on every email the application sends. → 2.2
2. **Choose features**
   Switch off whatever your organisation doesn't need. Then it appears in no menu. → 2.3
3. **Create rooms**
   Room, workshop, store. Without rooms no location can be set later. → 2.4
4. **Fill the selection lists**
   Categories, suppliers, storage locations. Saves a few seconds each time when recording and prevents four spellings of the same word. → 2.5
5. **Record staff**
   Everyone allowed to borrow something. With an employee number for scanning. → 2.7
6. **Invite accounts**
   Only for those who should sign in themselves. → 2.8
7. **Create products**
   One entry per model, not per device. → 2.9
8. **Create units**
   Now the individual devices, with an inventory number. → 2.10
   Already have an Excel list? Then import it instead of typing it out. → 2.17
9. **Book the first loan**
   As a test, with any device, and take it straight back. → 3.1

> **How long that takes**
>
> Steps 1 to 6 are done in half an hour. The time is in steps 7 and 8. How much depends on the number of your devices. Reckon with about a minute per device if you record by hand. If you have an Excel list, import it (2.17); if your devices are in Intune, Jamf or Mosyle, it's even quicker (2.14).

## 2.2 Organisation details

Where: Settings → Organisation




These details appear in the header of every email the application sends to borrowers, and on every printout.

| FIELD | WHAT FOR |
|---|---|
| Name | Appears under the logo on the left in the menu and in every email. |
| Address | Appears on printouts and in the footer of emails. |
| Contact email | The address borrowers reply to when they get a reminder. Use one that someone reads, not a single person's personal address. |
| Phone | Optional. Appears in the footer of the reminders. |

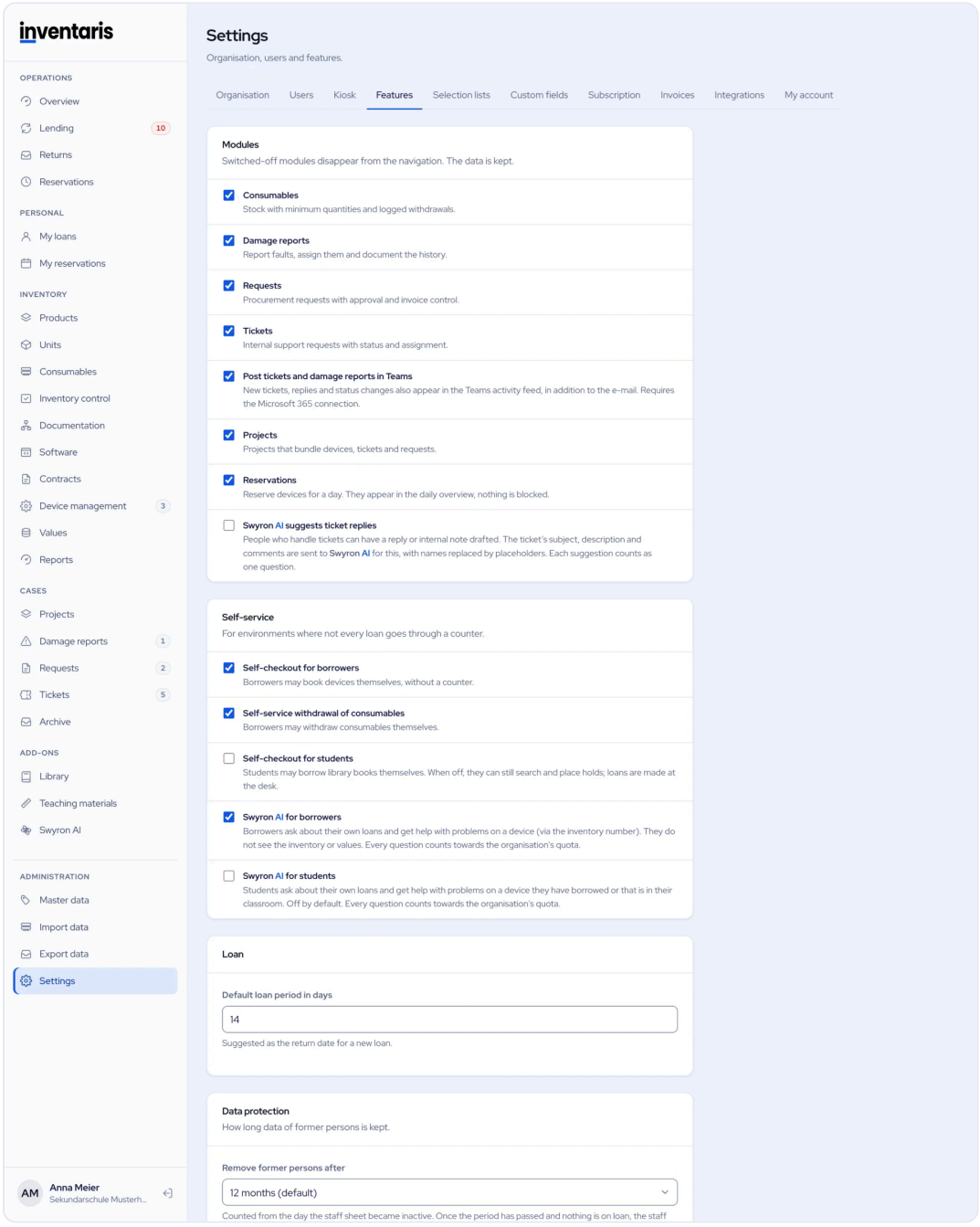
### What happens when you save

At the top a green strip briefly appears with the confirmation. The change takes effect immediately, including on emails that go out a minute later.

## 2.3 Switching features on and off

Where: Settings → Features

Not every organisation needs everything. A club with thirty trestle benches doesn't need requests with an approval chain. What you switch off here disappears from the menu. For everyone, including the borrowers.



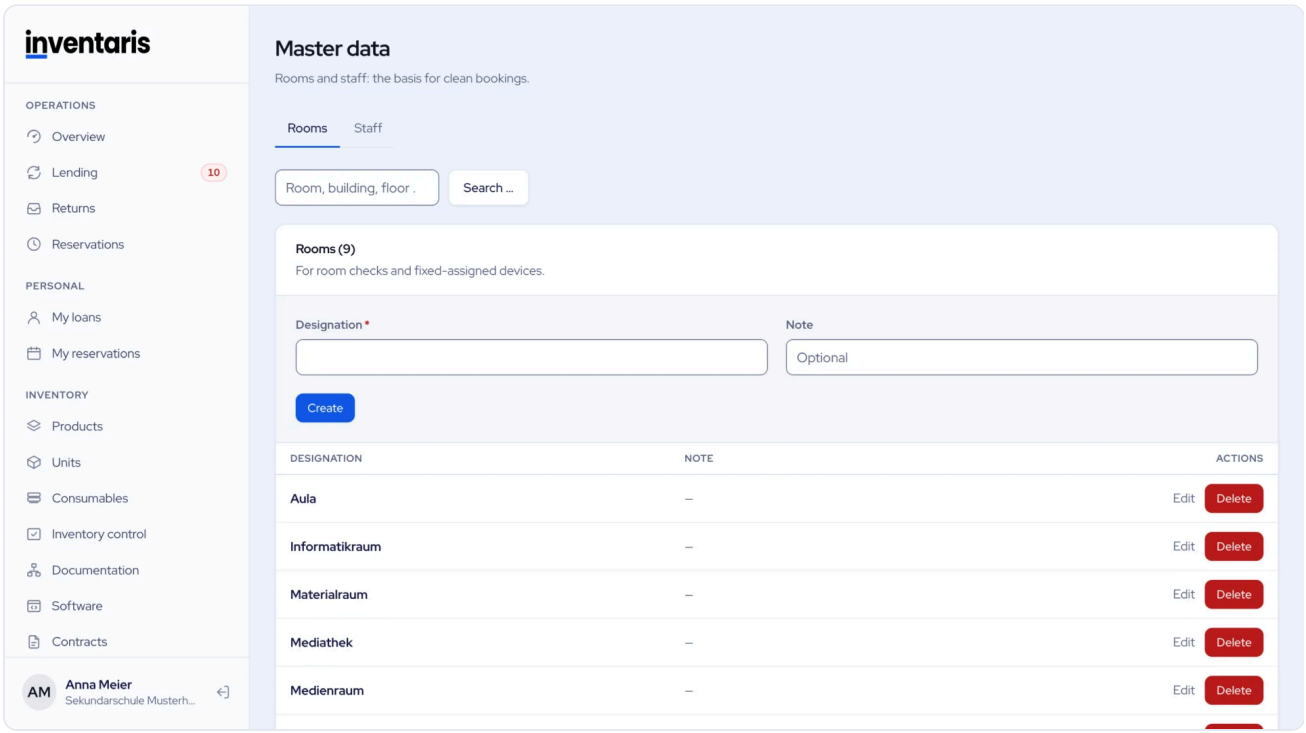

Each tick means one menu item more or less. Switching off deletes nothing: switch it back on and everything is there again.

| FUNCTION | WHEN SWITCHED ON |
|---|---|
| Return reminders | The application sends an email before the due date passes, and after that at a fixed interval. **Off by default**: an application that sends emails to third parties of its own accord would be an unpleasant surprise. Below that you set how many days beforehand and how often afterwards. |
| Also notify in Teams | Reminders and notices also appear, in addition to the email, under "Activity" in Microsoft Teams, for everyone with a Microsoft account. **On by default**, but only takes effect once Microsoft 365 is connected and the permission granted (see 2.13). |
| Consumables | A dedicated area for everything that doesn't come back. |
| Damage reports | Borrowers can report that something is broken. |
| Requests | Acquisition requests with justification, approval and invoice check. |
| Tickets | Anything that is neither damage nor a request: 'Beamer flickering', 'Network outlet dead'. |
| Reservations | Borrowers put a hold on devices for a day or a few days. Alongside, set how many days at a stretch are possible at most (default: 7). |
| Post tickets and damage reports in Teams | News on tickets and the status of a damage report appear under "Activity" in Teams in addition to the e-mail. **On by default**, but only takes effect once Microsoft 365 is connected (see 2.13). |
| Projects | Undertakings that bundle devices, tickets, requests and damage (see 4.5). |
| Self-checkout | Borrowers book themselves, without a counter. Can be set separately for devices and for consumables. When switched on, the items **Borrow device** and **Withdraw material** appear in the borrower portal. Which devices are released for this you decide on the product or on the individual unit. |
| Self-checkout for students | Only with the library: students borrow books themselves. When off, they can still search and place holds; lending happens at the counter. **Off by default**. |
| Swyron AI for borrowers | Only with the **Swyron AI** add-on: borrowers ask about their own loans and get help with a device. **On by default**. Each question counts towards the organisation's quota (see 5.11). |
| Swyron AI for students | Only with **Swyron AI** and the library: the same for students, in a simple form and without reports. **Off by default**. |
| Swyron AI suggests ticket replies | Only with **Swyron AI**: the ticket shows the buttons for revising and suggesting a reply. For this, the subject, description and comments go to **Swyron AI**, with names replaced by placeholders. **Off by default**. |
| Default loan period | How many days are suggested in the «Return by» form (default: 14). |

The switches for students and for **Swyron AI** only appear when the library or **Swyron AI** respectively has been booked.

## 2.4 Creating rooms

Where: Master data → Rooms




Rooms are the rough location. The storage location («cabinet 3, shelf B») is set later on the unit itself.

1. **Enter the name**
   Just as it appears on the door: «B12», «Aula», «Werkhalle Nord».

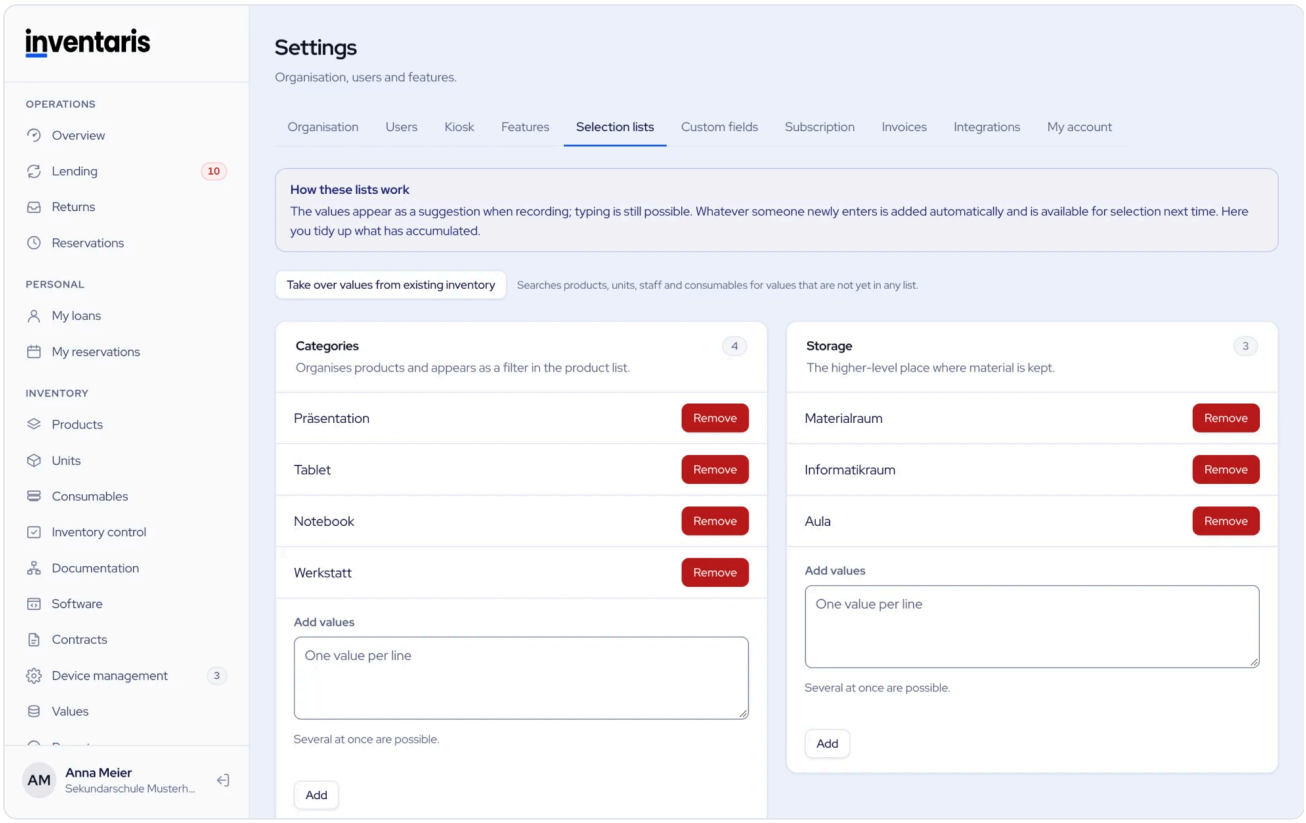
2. **Press Add**
   The room appears immediately in the list above and is available from then on in every selection list.

> **Deleting a room**
> This only works as long as no unit is in it. Otherwise you would first have to move the devices. That is exactly the intention: a deleted room would otherwise quietly remove a location entry from fifty devices.

## 2.5 Filling the selection lists

Where: Settings → Selection lists

These are the suggestions that appear under a field when recording: categories, suppliers, warehouses, storage locations, conditions, cost centres, departments. They are **suggestions**, not constraints. You can also write something in each of these fields that is not in the list.



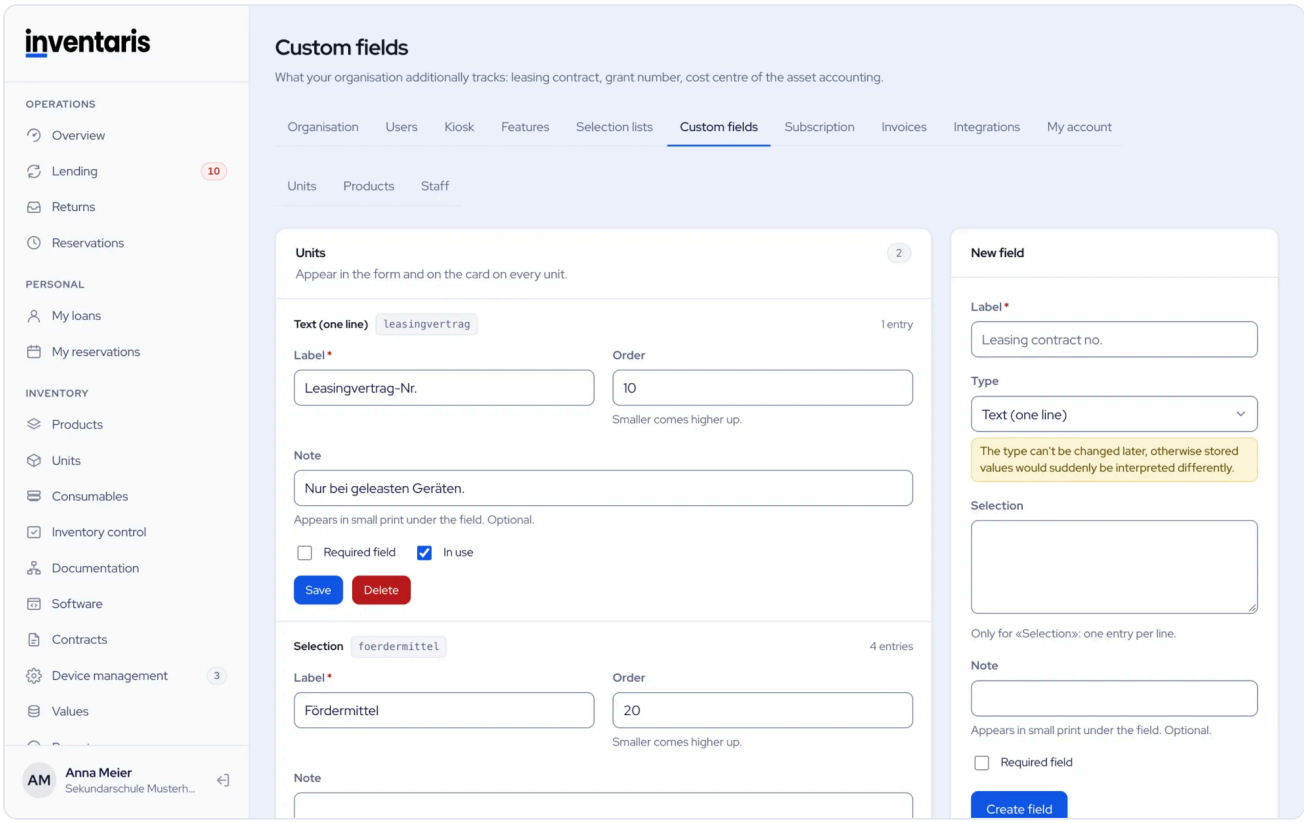
Several values at once: enter one per line and save.

> **The button that saves you work**
>
> At the very top is **Take values from existing inventory**. If you have already recorded your devices, for example imported from an old spreadsheet, then the application reads all the categories, suppliers and storage locations that occur in the stock and creates them as suggestions. It doesn't get faster than that, and you type nothing twice.

## 2.6 Custom fields

**Where:** Settings → Custom fields

What your organisation additionally keeps track of and what no one else has: leasing contract, funding number, fixed-asset accounting account, inspection sticker. You can create up to twenty fields per area, separately for units, products and people.




The tabs at the top separate the three areas. A field for units doesn't appear on the staff sheet and vice versa.

### The six field types

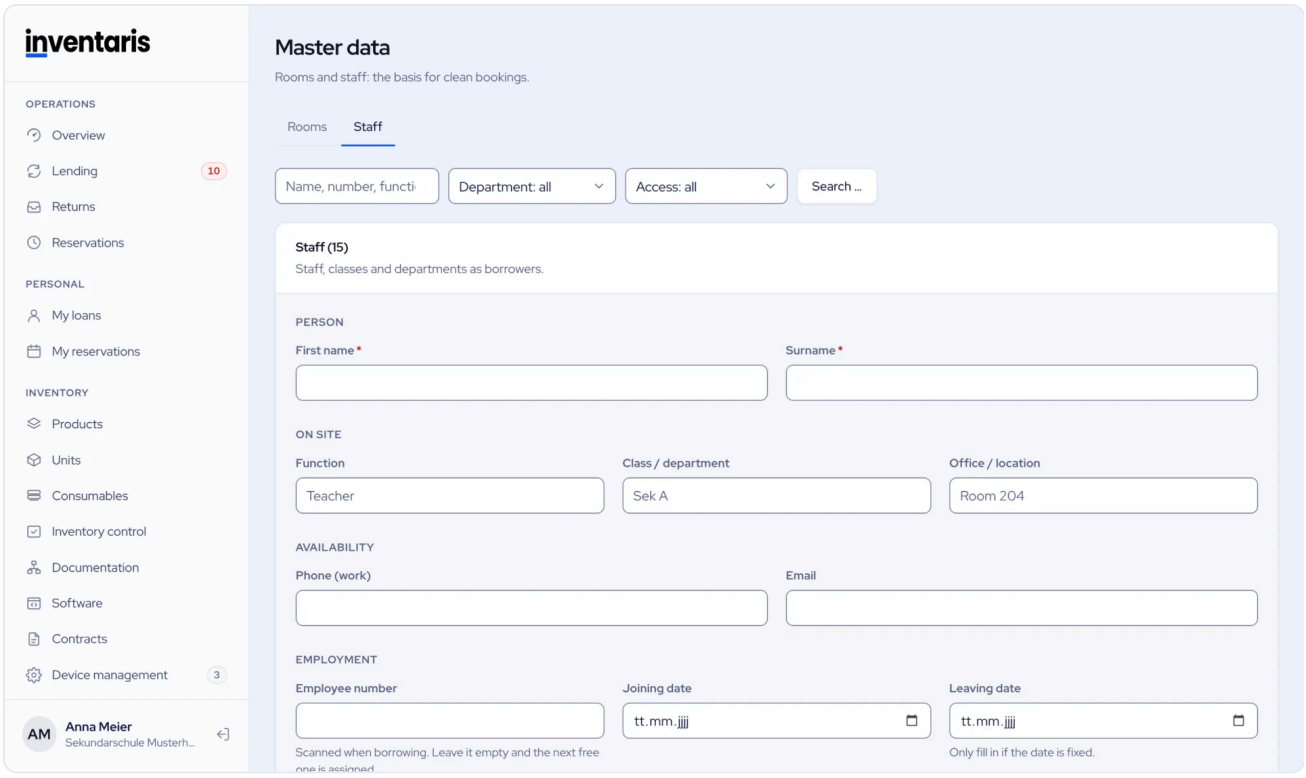
| TYPE | SHOWS UP AS |
|---|---|
| Text | One row. |
| Text field | Several lines, for longer notes. |
| Number | Digits only, without thousands separators: a contract number is not a sum of money. |
| Date | With a calendar. |
| Selection | A list you fill yourself (one entry per line). |
| Yes/No | A tick. |

> **Switch off instead of delete**
>
> Next to each field is an **active** switch. A switched-off field disappears from the forms but **keeps all its values**. Deleting also removes the values. The prompt tells you beforehand how many there are.

## 2.7 Recording staff

**Where:** Master data → Staff

Here are all those who are allowed to borrow something, whether they have an account or not. That is the most important difference from user management: **staff borrow, an account signs in.**




The employee number on the left is the one scanned at the counter. The application assigns them sequentially (MA-0001, MA-0002 ...) if you don't enter your own.

| FIELD | WHAT FOR |
|---|---|
| First name, surname | Appears on every loan and in every reminder. |
| Employee number | Scanned or typed in at the counter. If you already have cards with numbers, enter these. Then the existing cards continue to work. |
| Email | The return reminders go to this address. If it is missing, the person gets none. |
| Function, department | Appears as a small line under the name. Helps with people who share a name. |
| Joining and leaving | Optional. Leaving hides the person from the drop-down lists without deleting their past. |

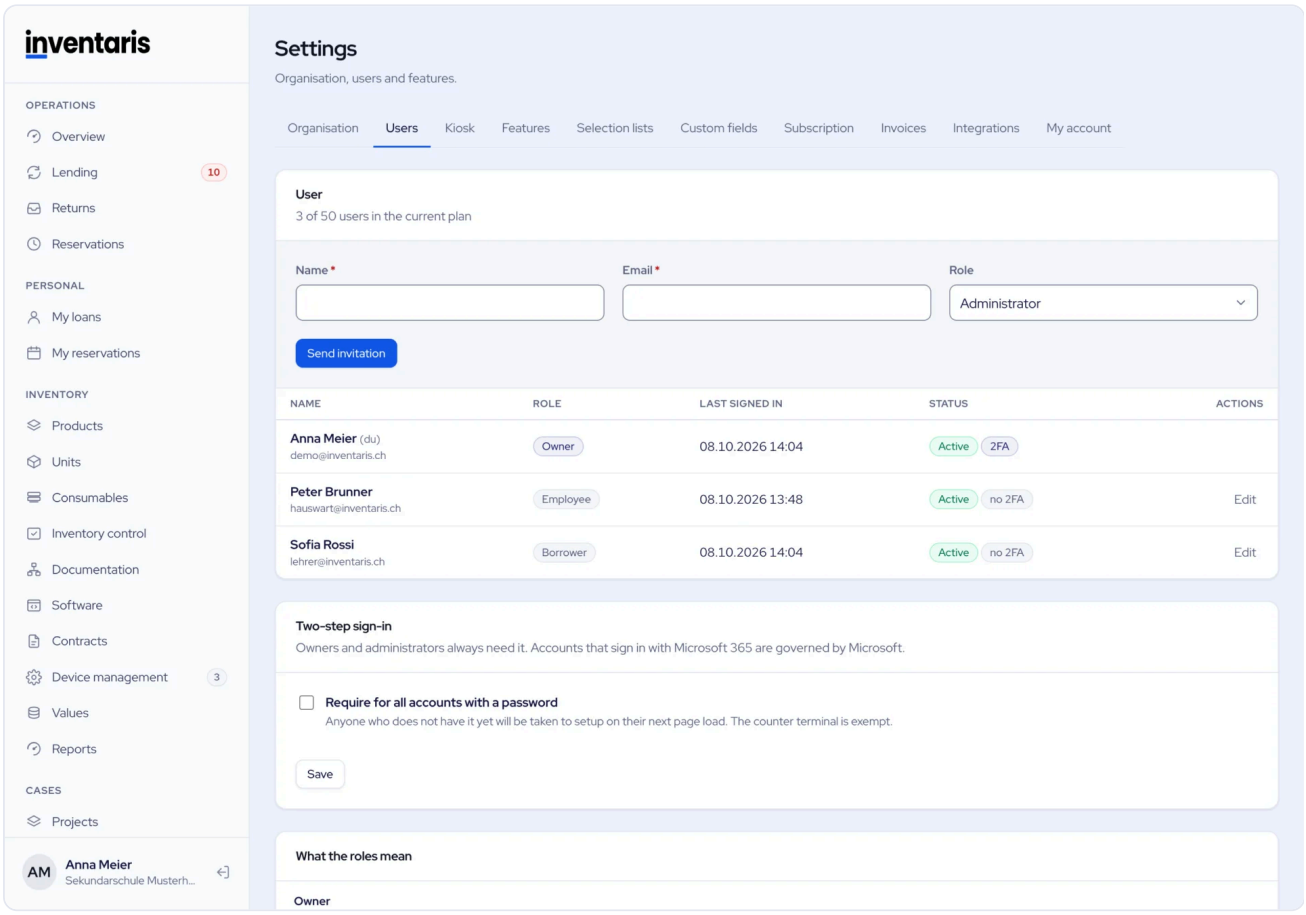
### What happens when a card is printed

There is a button to print on the staff sheet. Your browser's print window opens with a card in credit-card format: name, function and a QR code with the employee number. You scan this code later at the counter. The menu and buttons are not printed with it.

The same number is on the **virtual card** that everyone with an account opens in the application. If the staff sheet has no number yet, the application assigns one the first time the card is opened. What the card looks like and how it gets into the wallet is described in 6.10.

## 2.8 User accounts and roles

Where: Settings → Users




At the top the existing accounts with their role, at the bottom the form for inviting.

1. **Enter address and role**
   The roles are set out in 1.3. When in doubt, the smaller one: you can always raise it later.
2. **Press Invite**
   The person gets an email with a link. The link is valid for seven days.
3. **The person sets their own password**
   You never see it and never have to pass it on. The list shows **invited** until they've done so.

### Set additional permissions

When editing an existing account, the **Additional permissions** block with three checkboxes appears at the bottom: **Approve requests**, **Invoice check** and **Handle tickets**. This lets someone take on a single task without their role changing – what that means in detail is set out in 1.3.

### Withdrawing an invitation

Next to an open invitation is **Withdraw**. The link in the email already sent no longer works afterwards.

### Blocking an account

Blocking is not deleting. A blocked account can no longer get in, but its loans and reports all remain and can still be attributed. Only delete an account if it was created by mistake.

### When you set a password

If you set a new password for someone, that person gets an e-mail with the time and your name. That way they notice if it wasn't agreed. Only the owner can change the role and password of an administrator account.

In the change log, Inventaris also records who changed a role, a block or additional permissions, set a password for someone or invited someone, who changed the organisation's details or the features (with what applied before and after) and who exported data as a CSV file.

**With Microsoft 365 the role is assigned in the directory**

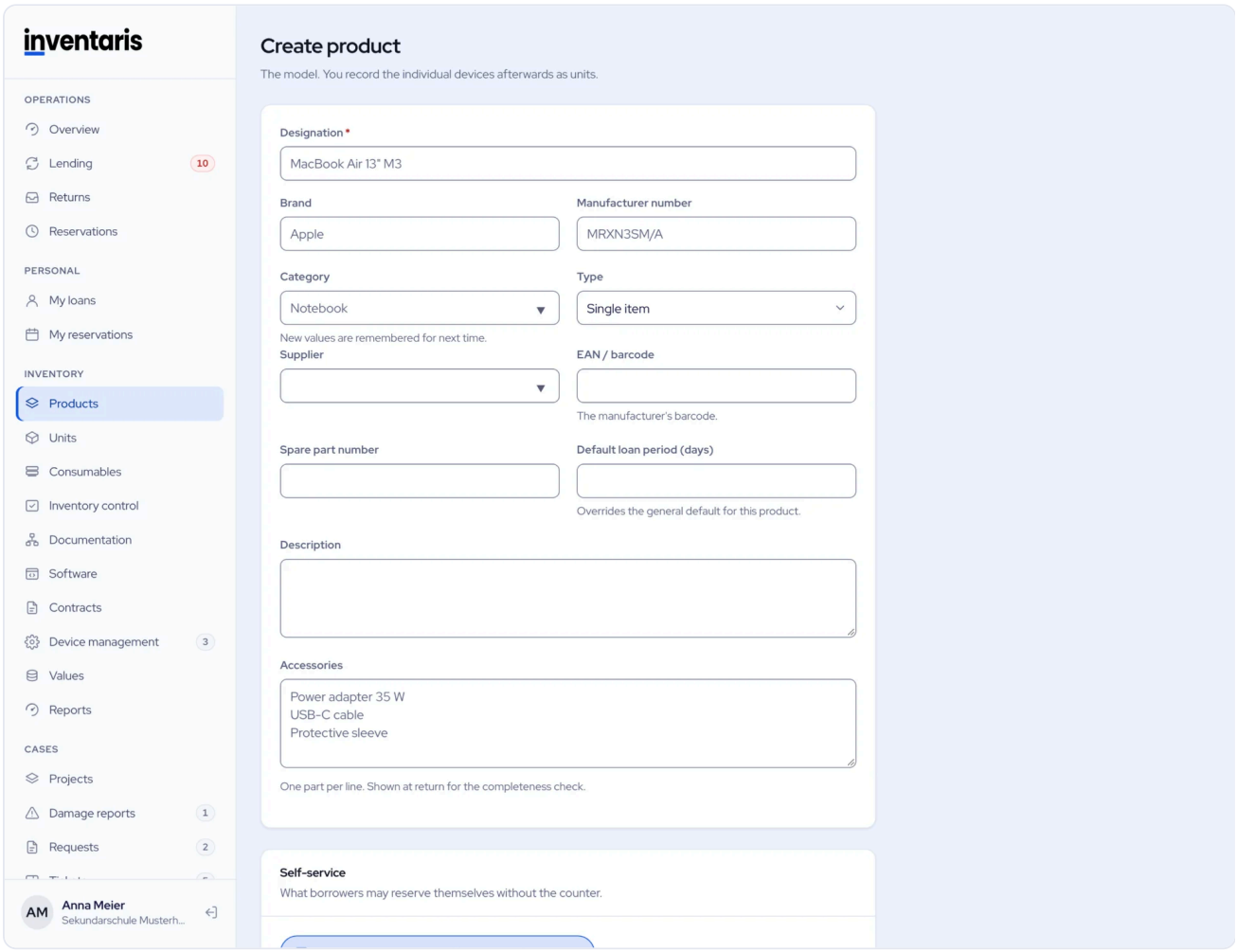
If the connection to Microsoft 365 is set up, the invitation form disappears and the role can no longer be changed here: it follows from the group the person is in. Two sources for the same truth always end with no one knowing which one applies. **Owner** and **Kiosk** are exempt from this and remain local — otherwise a wrongly set group could lock the organisation out.

**Setting up a kiosk account**

For the computer at the issuing counter: create an account with the **Kiosk** role and leave it permanently signed in there. It sees only lending and returns, and cannot reach the master data. Unlike all other accounts, it is **not signed out after 15 minutes**. That is exactly what the role is for.

## 2.9 Creating products

Where: Products → Add product




A product is the model. Create it once, even if you have fifty of them.

| FIELD | WHAT BELONGS IN IT |
|---|---|
| Name | The model designation: "iPad 10. Generation", "Beamer EB-685W". |
| Brand | Apple, Epson, Bosch. |
| Manufacturer number | The manufacturer's part number. Helps with reordering. |
| Category | Your own classification: 'Presentation', 'Tool', 'IT'. Reports are then run on it later. |
| Type | Single device, set or consumables, see 1.2. |
| Description | What no one else knows: «with ceiling mount», «only with adapter». |

### Acquisition details on the product

Further down there is a block with price, purchase date, warranty, supplier, cost centre and useful life. If you tick Keep acquisition data on the product here, these details apply to all units of this product.

### What happens when you first switch on

On the first save, all units take on these values, even those that already had something. This is intentional: whoever enters a price expects it everywhere afterwards. From the second save on, whatever explicitly differs on a unit is left untouched (checkbox **Do not take acquisition details from the product**).

## Who is allowed to collect it themselves

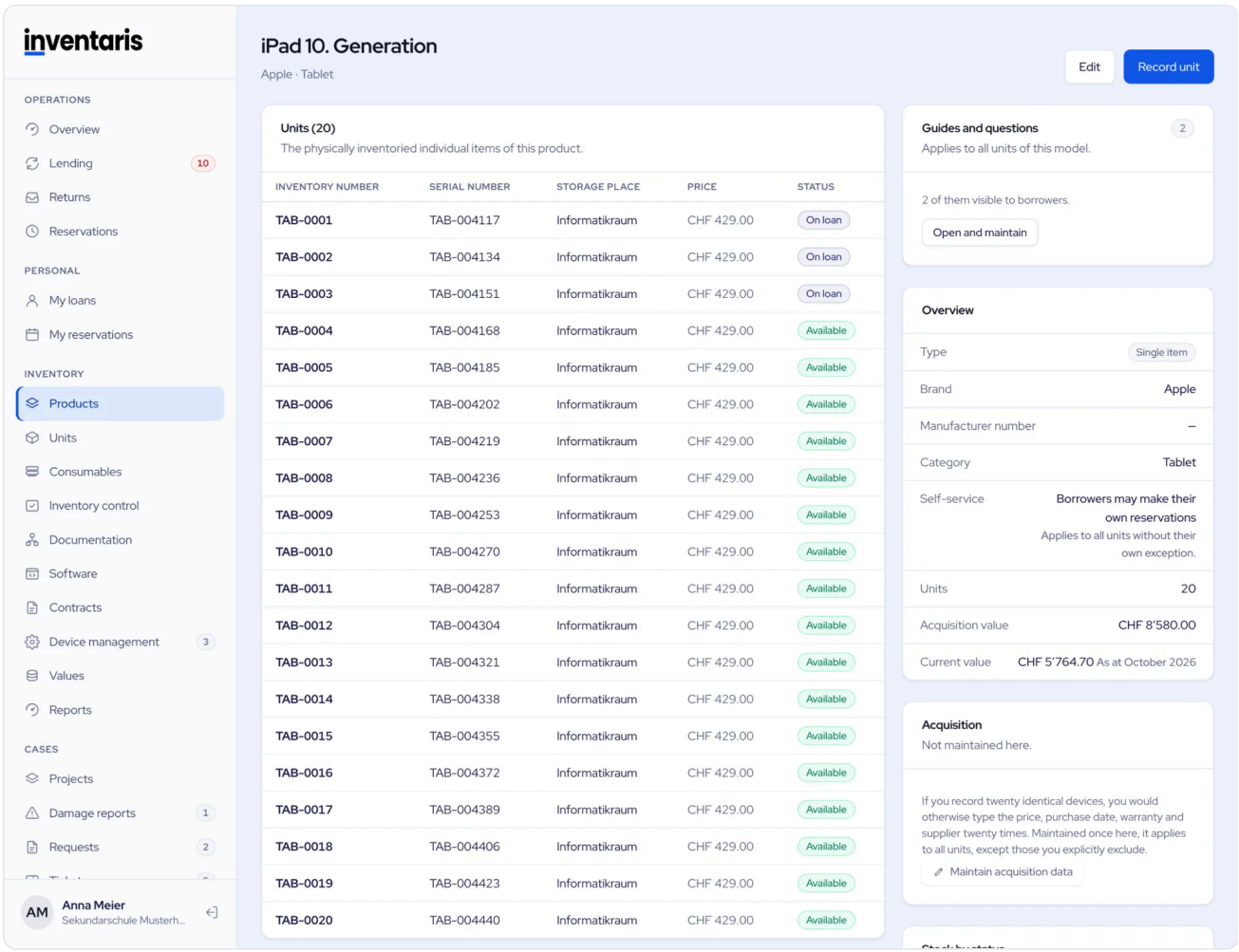
At the very bottom is the tick **Borrowers may reserve this product themselves**. It is set when you create the product, because that is the usual case: projectors, cables, charging trolleys.

Take it away and the product disappears from the selection a borrower sees when reserving. They can't reserve it even if they know the inventory number; they get the note to report at the counter. **Nothing changes at the counter**: whoever is allowed to book still books every device. The tick governs self-service, not the inventory.

### What it is taken away for

For the things someone should hand out knowing who is standing in front of them: the camera worth three thousand francs, the measuring case, the head teacher's spare device. Not for everything that is expensive, but for the things where a brief question at the counter is worth something.

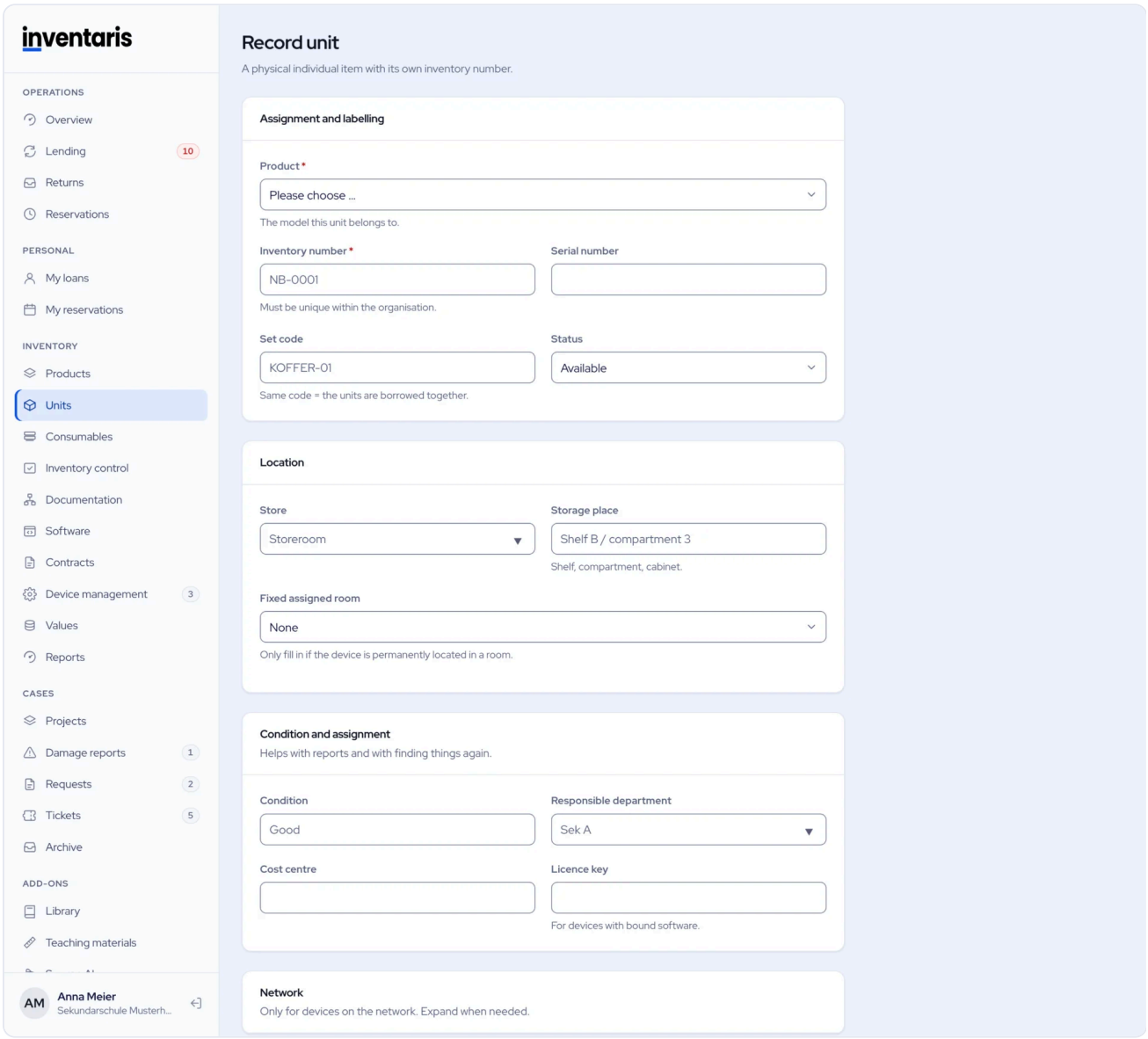
Individual devices can be exempted from this. How is described in 2.10.




The product sheet: on the left the units of this model, on the right the master data. From here the way leads to the manuals.

## 2.10 Creating units

Where: Units → Add unit



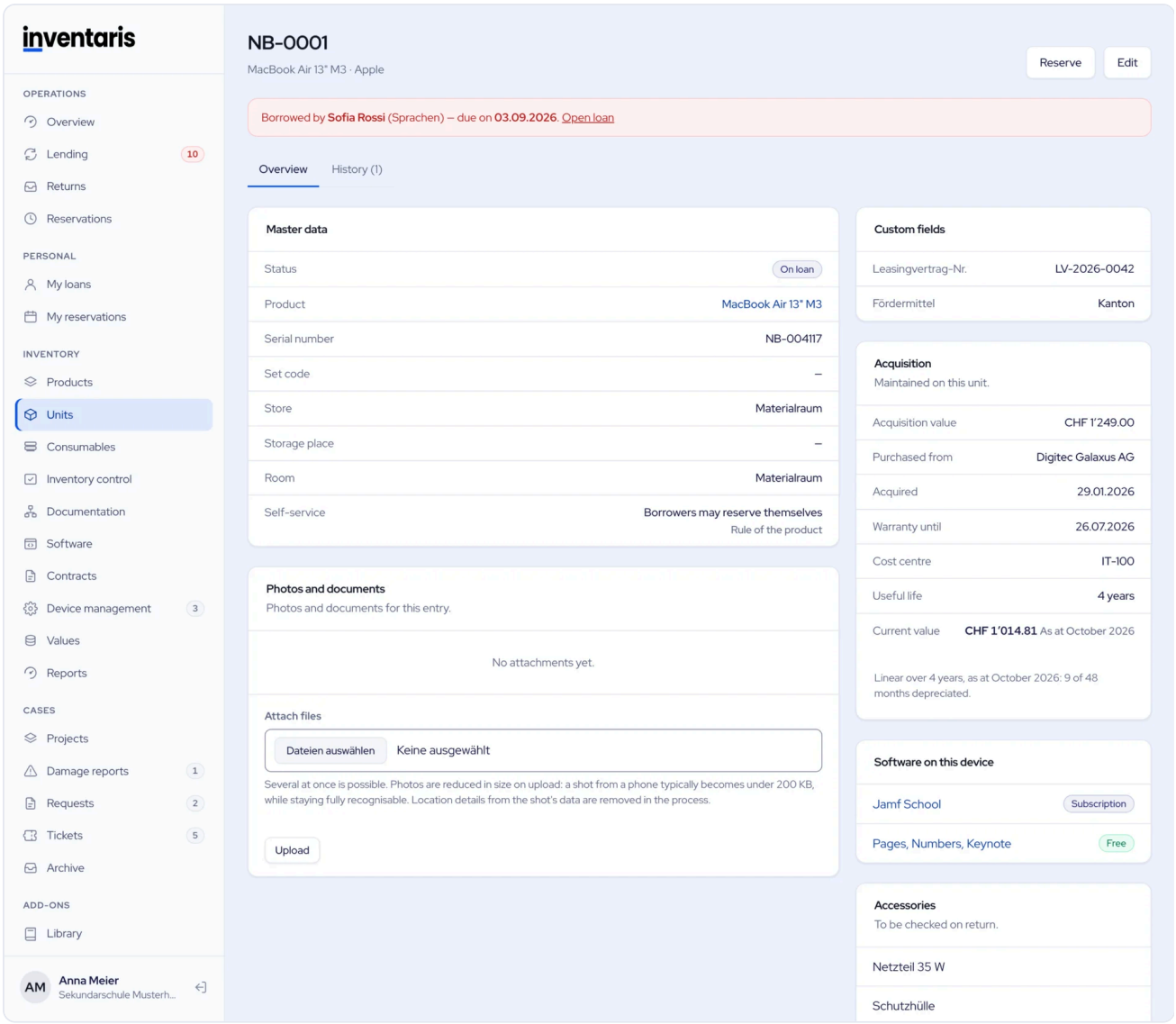

The longest form in the application. Most fields are optional. Only product and inventory number are mandatory.

## The fields that count

| FIELD | WHAT BELONGS IN IT |
|---|---|
| Product Required | The model you created in 2.9. |
| Inventory number Required | Your own number, the one on the sticker. It must be unique within your organisation. A prefix plus a running number has proven itself: TAB-0101, BEA-0001. |
| Serial number | The manufacturer's number. Important for insurance and warranty. And for device management (2.14), which matches on exactly this. |
| Set code | Sets only. All units with the same set code are borrowed together with a single scan. |
| Status | When recording, almost always Available. |
| Room, store, storage location | Where the device is when no one has it. The storage spot is the fine detail: «Cabinet 3, compartment B». |

### A suggestion for your inventory numbers

Three letters for the type, a dash, four digits: `BEA-0001`, `NB-0001`, `TAB-0101`. The letters make the number readable aloud over the phone, the four digits are enough for 9,999 devices per type, and the sorting is correct. Do not start at 1: TAB-1 and TAB-10 otherwise sort wrongly.




**The inventory sheet.** At the top it says whether the device is currently out or on hold. On the left the loan history, on the right master data, acquisition with current value and, where available, the details from device management.

## An exception to the product's rule

Whether borrowers may reserve themselves is set on the product (2.9) and applies to all its units. That is almost always right: thirty iPads, one rule.

Almost always, not always. One of the five cameras is the old one that may be borrowed; a single notebook is the spare device and shouldn't be right now. That's what the **Self-service** box on the unit's sheet is for. Without a tick the unit follows the product, and that's the default. With a tick, choose for this one unit **Borrowers may reserve it themselves** or **Only via the counter**.

### Without the tick means: comes along

A unit without its own rule follows the product even when something is changed there later. Whoever sets the exception decouples it – from then on it stays put, whatever happens to the product. On the inventory sheet, under **Self-service**, it shows what currently applies and where it comes from.

### Print labels

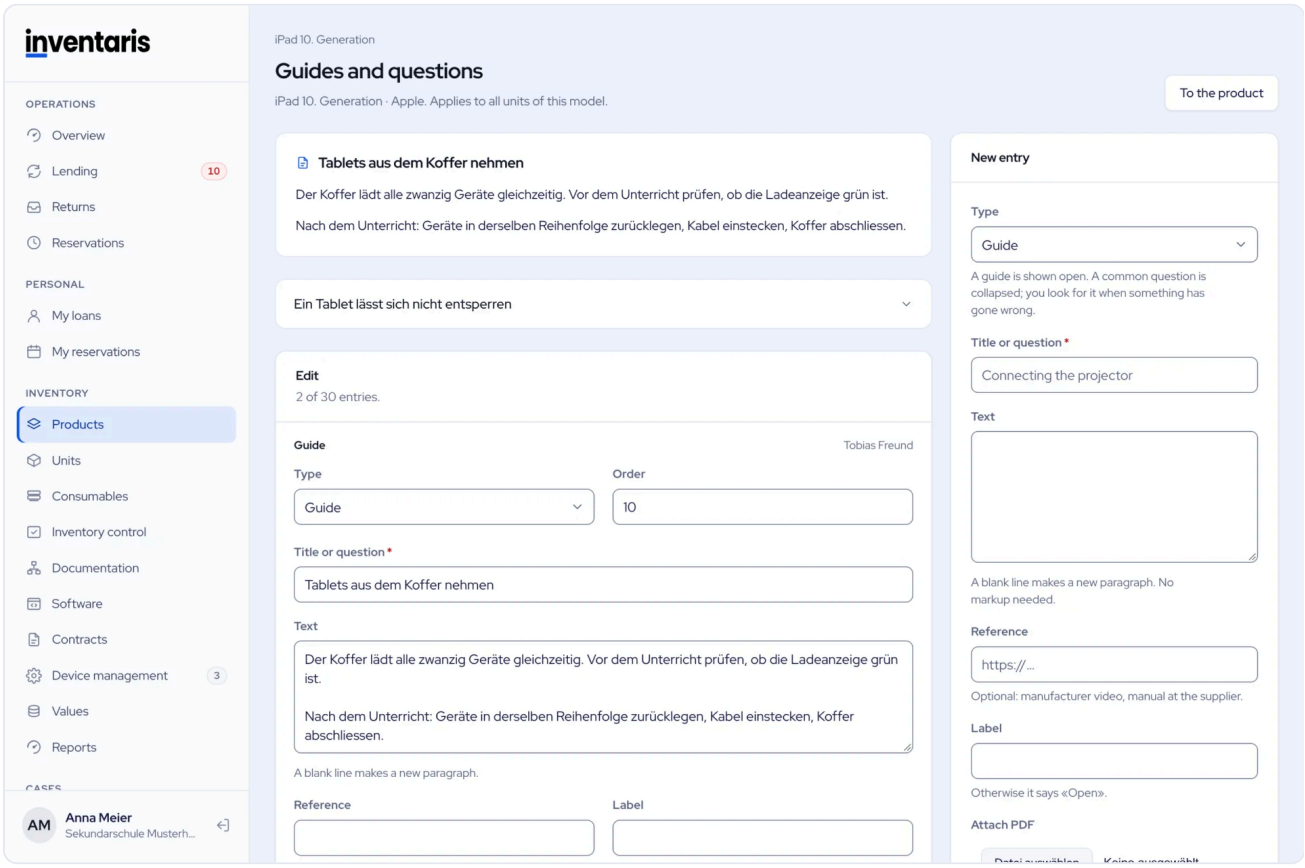
In the list of units you select the desired lines on the left (the tick at the very top selects all on the page) and then press **Print labels**.

> **What happens when you print**
>
> A new window opens with a sheet of labels: one QR code per device, the inventory number and the product name. Over it lies your browser's print dialogue. **Important:** in the print dialogue set the margin to **none** and the scaling to 100 %. Otherwise the QR code shrinks, and the scanner at the counter takes longer. After printing, close the window; nothing has changed in the application.

## 2.11 Manuals and questions on the device

**Where:** Products → open a product → Manuals

The place for the answer to "How does this work again?". What you store here appears on the sheet of **every** unit of this model. So exactly where someone is standing with the device in hand.




Two kinds: **Manual** (a procedure, step by step) and **Question** (a short answer to something that is often asked).

1. **Choose the type**
   **Manual** for 'How to connect the beamer', **Question** for 'Why is the picture blue?'.

2. **Write the title and text**
   Blank lines separate paragraphs. Short sentences, one step per paragraph.

3 **Attach a link**

optional

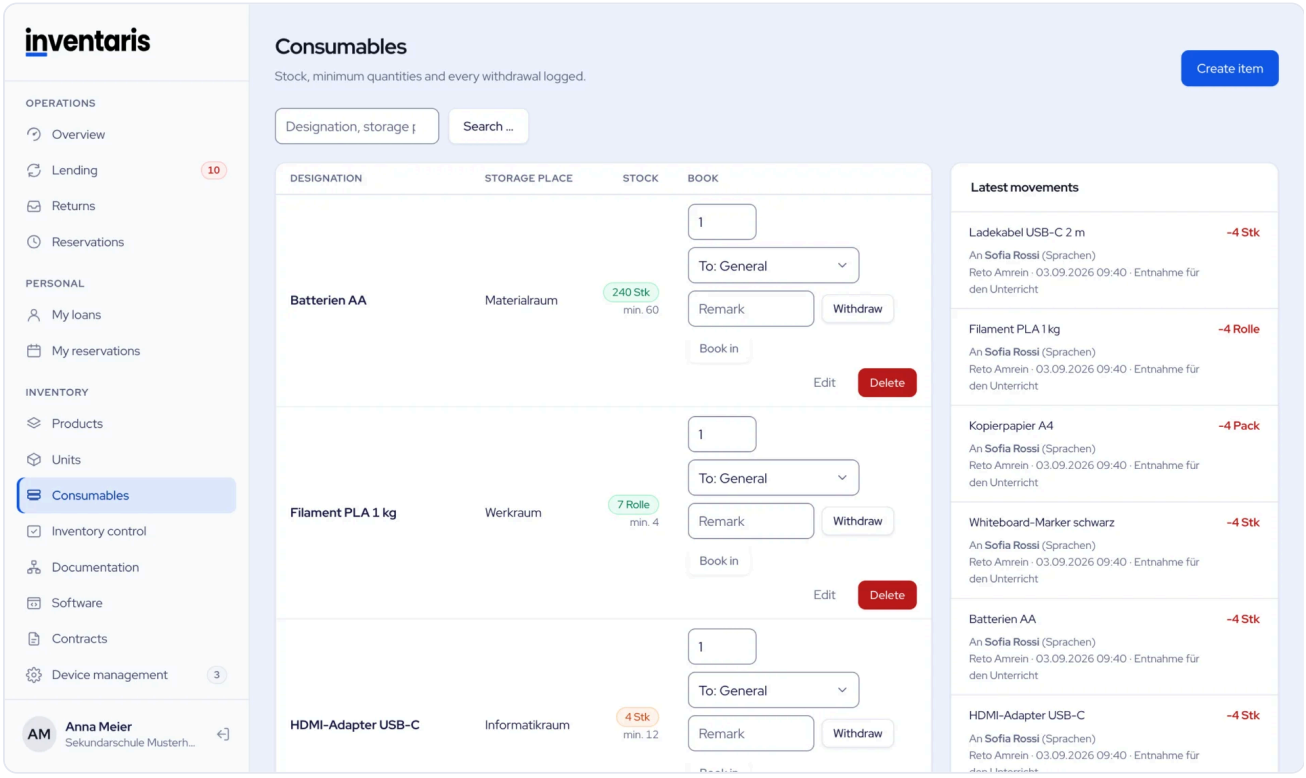
For example to the manufacturer's manual. Only `http` and `https` are accepted.

4 **Visible to borrowers?**

The tick decides whether borrowers can see the entry too. Without the tick, only staff can see it. For tasks that not everyone should carry out.

## 2.12 Consumables

Where: Consumables




Here the stock counts, not the individual number. If it falls below the minimum stock, the line appears orange, and on the overview in its own tile.

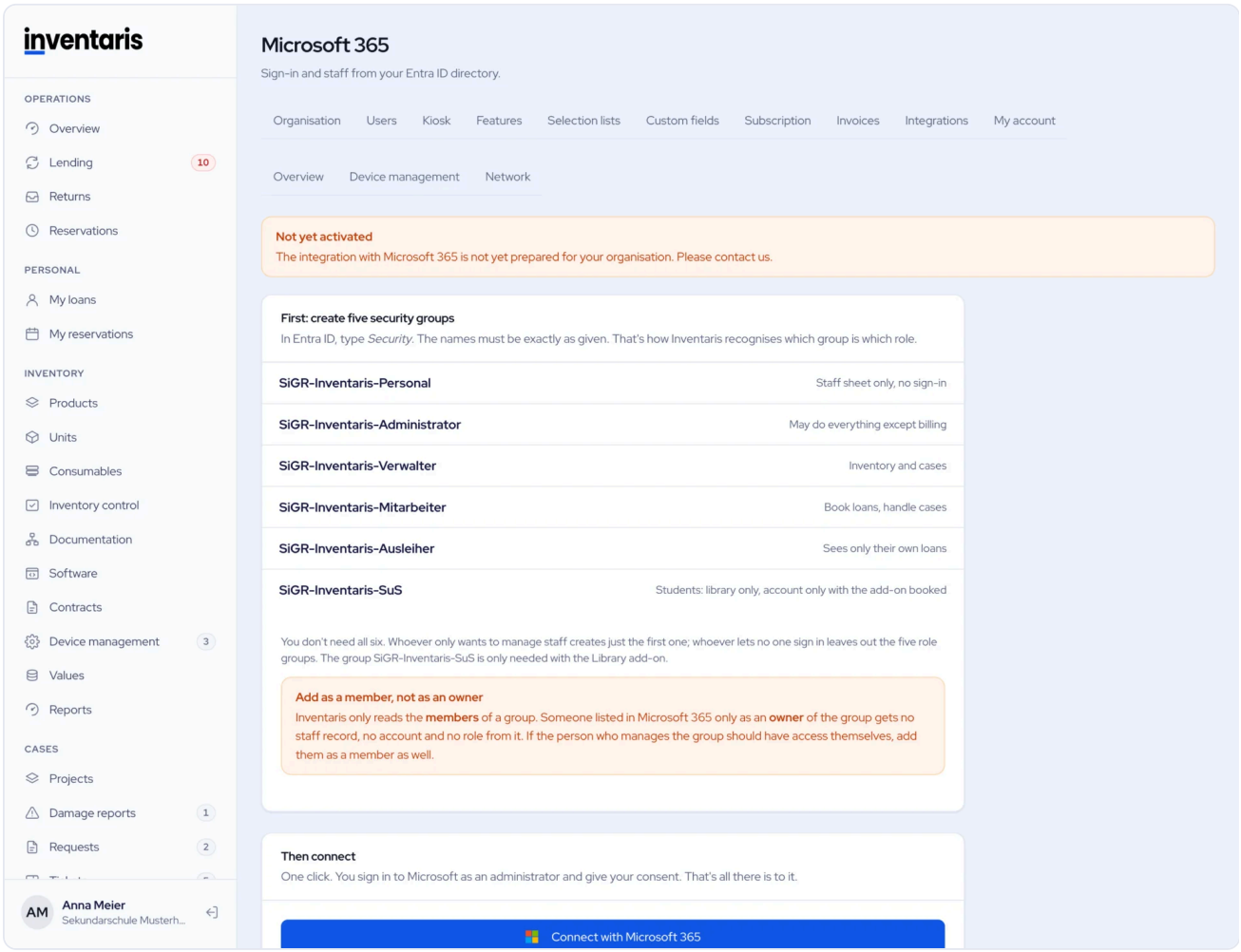
- **Stock:** how much is there right now.
- **Minimum stock:** from when a warning is given. Set it to what you need until the reorder arrives.
- **Unit:** piece, pack, metre.

You book issue and receipt via **Withdrawal** and **Receipt** directly in the list. Every booking is recorded with person and time, so that at the end of the year it can be traced where the forty markers have gone.

## 2.13 Signing in via Microsoft 365

Where: Settings → Integrations → Microsoft 365 optional

If your organisation uses Microsoft 365, no one has to learn a second password. Signing in runs through the same accounts as everywhere else. Anyone who leaves the organisation loses access, without anyone having to think about it.




Connecting is done with one click: you sign in to Microsoft as an administrator and give your consent. You don't have to look up the directory ID.

**Create these groups first.** In Microsoft 365 under Entra ID → Groups → New group, group type Security, then add the people as members. The names must end as shown here so the application finds them by itself when connecting.

| GROUP IN MICROSOFT 365 | WHAT IT DOES |
|---|---|
| SiGR-Inventaris-Personal | Staff sheet only, no sign-in |
| SiGR-Inventaris-Administrator | May do everything except billing |
| SiGR-Inventaris-Verwalter | Inventory and cases |
| SiGR-Inventaris-Mitarbeiter | Book loans, handle cases |
| SiGR-Inventaris-Ausleiher | Sees only their own loans |
| SiGR-Inventaris-SuS | Students: library only, account only with the add-on booked |

You don't need all six. Whoever only wants to manage staff creates just the first one; whoever lets no one sign in leaves out the five role groups. The group SiGR-Inventaris-SuS is only needed with the Library add-on.

**Add as a member, not as an owner**

Inventaris only reads the **members** of a group. Someone listed in Microsoft 365 only as an **owner** of the group gets no staff record, no account and no role from it. If the person who manages the group should have access themselves, add them as a member as well.

1. **Press Connect**
   You land at Microsoft. Sign in with an account that is administrator in the directory.
2. **Give consent**
   Microsoft shows what the application would like to read. After you consent you land back in Inventaris.
3. **Assign security groups**
   Six groups, six roles. The sixth, SiGR-Inventaris-SuS, is only needed with the Library add-on. If your groups are named as suggested, the application assigns them by itself and you only have to confirm.
4. **Switch on**
   From now on the **Sign in with Microsoft** button appears on the sign-in screen.

**The one rule you should know**

**Staff is the union of all six groups, sign-in only the five role groups.** Anyone who is only in the staff group gets a staff record with an employee number and can borrow at the counter. They don't get an account. At a school this is the most common case.

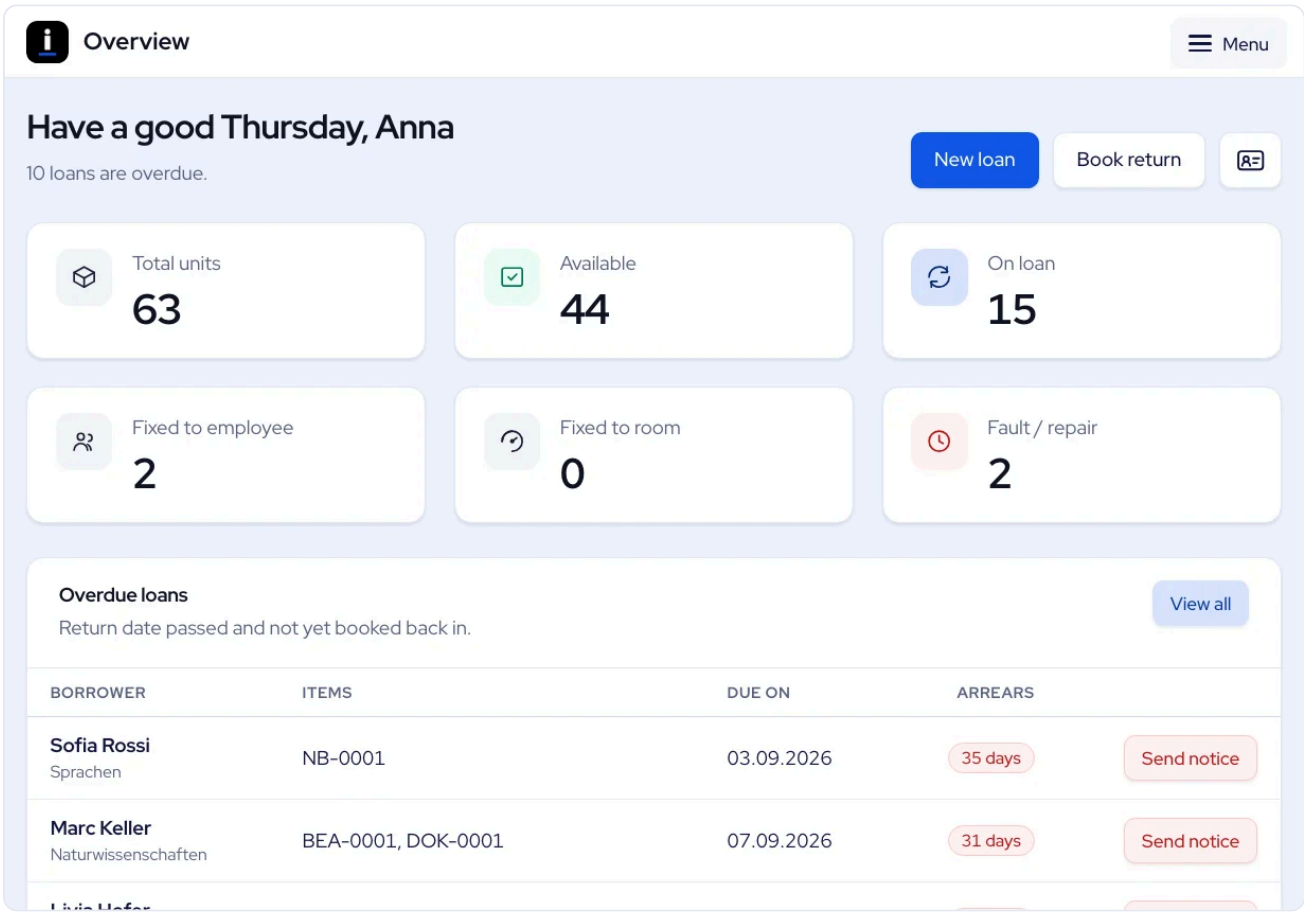
**When a new permission is added**

The “Connection” card has **Request permissions again**. One click leads straight to Microsoft’s consent for your tenant; connection, groups and assignments stay as they are. This is how, for example, the permission for Teams notifications is added without disconnecting. **Check** shows whether everything is granted, with its own “Teams notifications” line.

> **Owner and Kiosk stay local**
>
> These two roles are never assigned via Microsoft. That's the emergency brake: if something goes wrong in the directory, someone must be left who can repair it.

### The app in Microsoft Teams

Once Microsoft 365 is connected, the **Microsoft Teams** card with the app package appears on the same settings page. Uploaded once, Inventaris appears on the left in Teams for everyone, and the whole application runs inside it: every page opens in the tab, with the same rights as in the browser. On phones and tablets, a camera icon appears next to every number field; scanning uses the Teams scanner. It can take a while for the app to appear for everyone: Microsoft rolls out apps and setup policies with a delay, up to 72 hours in larger tenants.




Inventaris in the Teams tab: the same application as in the browser.

The app has one tab, **Inventaris**: the whole application, with “My loans” and “My reservations” in the menu under “Personal”. On phones and tablets the camera scans directly in Teams. Under “Activity”, in addition to the e-mail, you get reminders and notices, news on tickets (received, assigned, reply, done) and the new status of your own damage report. Tapping a notification opens exactly that loan, ticket or report, without the menu around it; every link in it leads into the “Inventaris” tab. A case appears only once in the feed: the new notification replaces the previous one. This needs the “TeamsActivity.Send” permission, added via **Request permissions again**.

1. In the Teams admin center, under **Teams apps** → **Manage apps**, click **Upload** and choose the file.

2. Under **Teams apps → Setup policies**, pin the app so it appears on the left for everyone. Or each person adds it under **Apps**. It can take a while for the app to appear for everyone: Microsoft rolls out apps and setup policies with a delay, up to 72 hours in larger tenants.
3. Sign-in uses the Microsoft 365 account. The tab is available to anyone with an Inventaris account.

> **The tab does not create accounts**
>
> Anyone who doesn't have an Inventaris account yet signs in once via the website. After that the tab is open.

### Error codes for sign-in with Microsoft 365

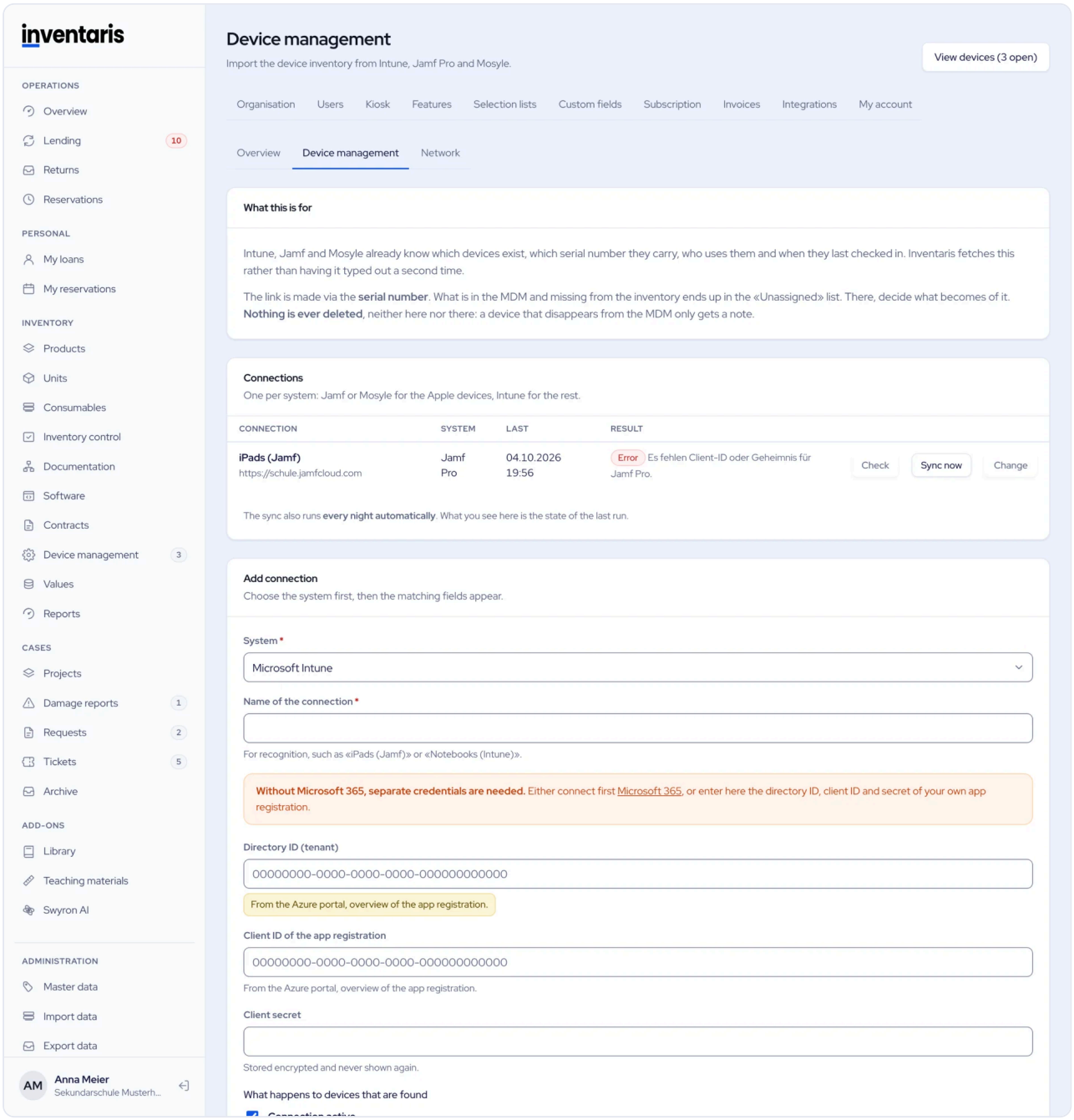
If sign-in fails, the sign-in page shows a short sentence with an error code. Here is what it means and what helps. Microsoft's technical text is in the back office, under the organisation's last error.

| CODE | MESSAGE | WHAT HELPS |
|---|---|---|
| M365-01 | Sign-in with Microsoft 365 is currently unavailable. Sign in with email and password. | Sign in with email and password. If it persists, contact Swyron: the platform connection is disrupted. |
| M365-02 | The sign-in attempt has expired. Please click “Sign in with Microsoft 365” again. | Sign in again. Sign-in must be completed within 15 minutes. |
| M365-03 | Sign-in was cancelled at Microsoft. | Sign in again and confirm at Microsoft. |
| M365-04 | Microsoft declined the sign-in. Please try again. | Try again. If it persists, contact Swyron; Microsoft’s text is in the error log. |
| M365-05 | The sign-in could not be verified. Please start again from the beginning. | Allow cookies for inventaris.ch and start again in a single window. |
| M365-06 | Microsoft did not complete the sign-in. Please try again. | Try again. |
| M365-07 | Sign-in at Microsoft failed. Please try again. | Administrator: Settings → Microsoft 365 → Check; grant consent again if needed. |
| M365-08 | Your organisation is no longer set up for sign-in with Microsoft 365. | Administrator: reconnect Microsoft 365 under Settings → Microsoft 365. |
| M365-09 | Your Microsoft 365 account belongs to no organisation that uses Inventaris. | Administrator: under Settings → Microsoft 365, click Connect and enable sign-in. |
| M365-10 | Sign-in with Microsoft 365 is not fully set up for Musterhausen School yet. | Administrator: under Settings → Microsoft 365, assign at least one role group and enable sign-in. |
| M365-11 | Microsoft returned no details about your account. Please try again. | Try again. If it persists: the administrator grants consent again. |
| M365-12 | Your groups in Microsoft 365 could not be read. | Administrator: grant consent again under Settings → Microsoft 365 (permission GroupMember.Read.All). |
| M365-13 | Anna Smith is not permitted to sign in to Inventaris: only in the Staff group. Loans are handled at the counter. | Intended if the person only borrows at the counter. To let them sign in, also add them to a role group (Administrator, Verwalter, Mitarbeiter, Ausleiher or SuS). |
| M365-14 | Anna Smith is not permitted to sign in to Inventaris: in none of the enabled groups. | Add the person as a member (not only as an owner) to a SiGR group. Under Settings → Microsoft 365 → Check, verify that the groups are assigned correctly. |
| M365-15 | This account is blocked. | Unblock under Settings → Users if the block no longer applies. |
| M365-16 | Your account does not have access to Inventaris yet. | New accounts via Microsoft 365 are available from the Pro plan. Otherwise invite the person under Settings → Users. |
| M365-17 | Your organisation has no free user accounts left. | Book more users in the plan or block accounts no longer in use. |
| M365-18 | Your account could not be created. Please try again. | Try again. If it persists, contact Swyron; the reason is in the error log. |

## 2.14 Device management: Intune, Jamf, Mosyle

Where: Settings → Integrations → Device management optional

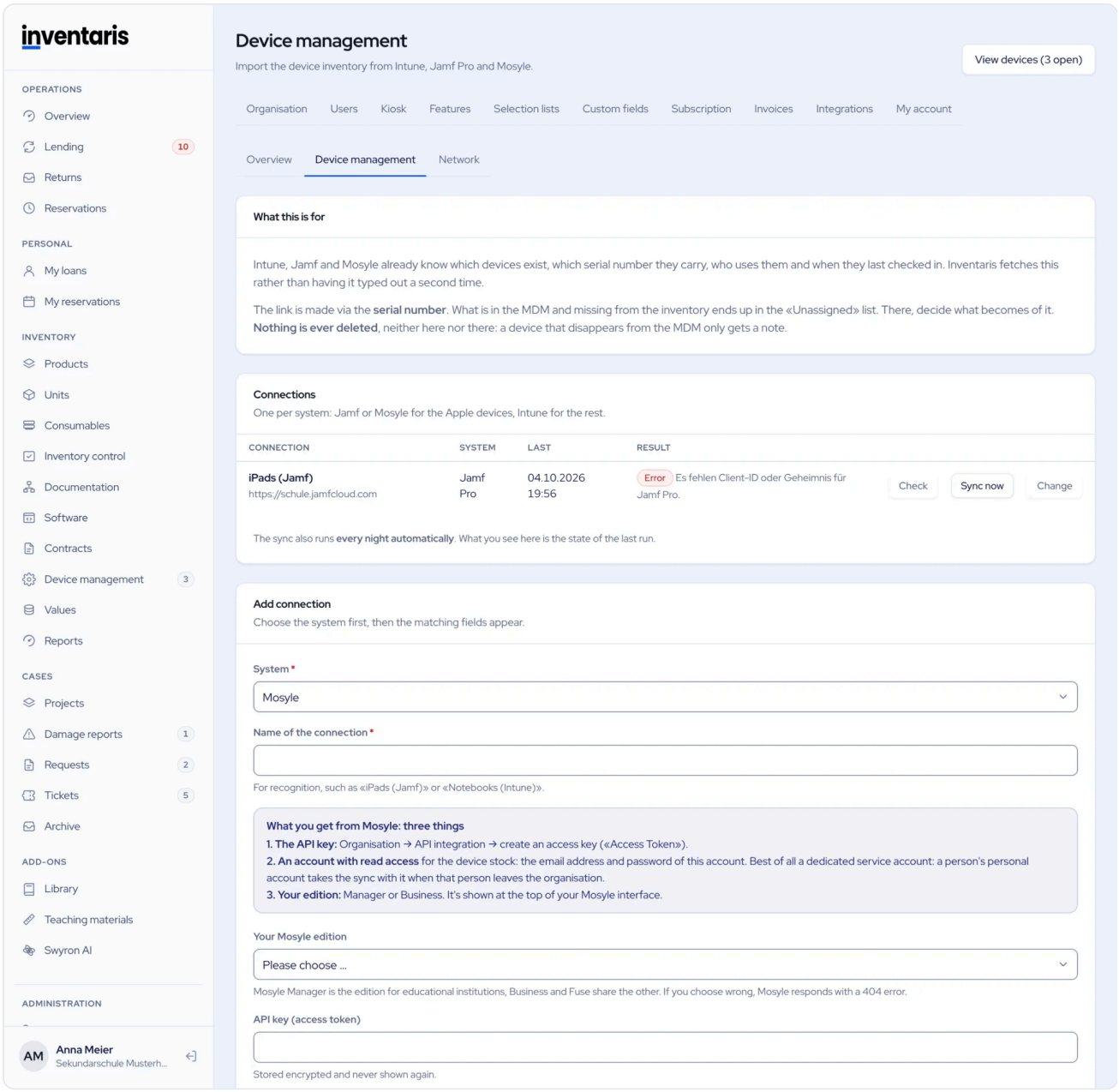
If you already manage your devices with Microsoft Intune, Jamf Pro or Mosyle, then that system has long known which devices exist and what serial number they carry. Also who uses them and when they last checked in. Inventaris fetches that instead of having it typed in a second time.




At the top the existing connections with the result of the last sync, at the bottom the form for the next one. Several connections side by side are the normal case: Jamf or Mosyle for the Apple devices, Intune for the Windows notebooks.

## What you have to prepare in the respective system

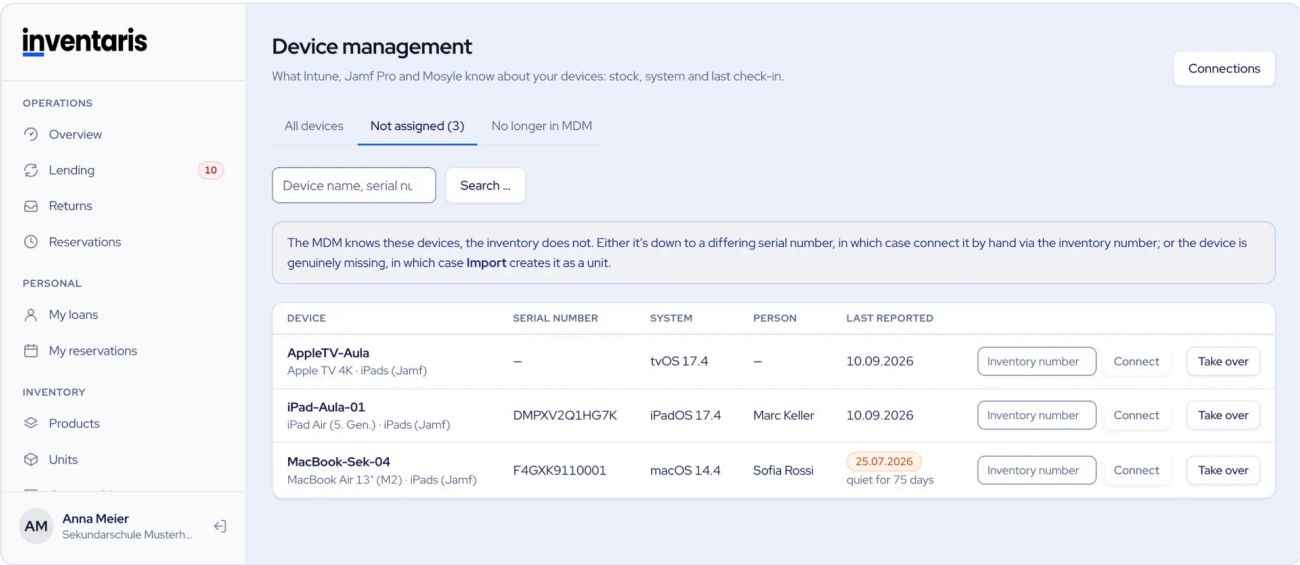
| SYSTEM | PREPARATION |
|---|---|
| Microsoft Intune | If Microsoft 365 is already connected (2.13), **one step** is enough: give the existing app registration the **application** permission `DeviceManagementManagedDevices.Read.All` and grant admin consent. A **delegated** permission looks the same in the portal and is not enough here. |
| Jamf Pro | Settings → API roles and clients: a role with **Read Computers** and **Read Mobile Devices**, connect an API client to it, and enter the client ID and secret here. |
| Mosyle | Organisation → API integration: generate an access key. Plus a Mosyle account with read access, ideally a dedicated one and not a person's personal account. |




For Mosyle, choose the edition from two fixed options: **Manager** for educational institutions, **Business/Fuse** for the rest. Which one you have is shown at the top of your Mosyle interface.

1. **Create a connection**
   Choose the system, give it a name («iPads (Jamf)»), enter the credentials, save.
2. **Press Check**
   The application only fetches a token, nothing else. If a green message appears, the credentials are correct. If a red one appears, it says what is missing.
3. **Press Sync now**
   The stock is now fetched. Depending on the number, that takes a few seconds to two minutes.
4. **View the list**
   Inventory → Device management. The **Unassigned** tab is the important one.

> **What the sync does, and what it doesn't**
>
> It connects every device found to the matching unit in the inventory via the **serial number**. If there's exactly one unit with this number, it's connected; if there are two, it's reported instead of guessed.
>
> **It creates nothing** as long as you don't explicitly switch it on. A first run that creates four hundred units would be a night of tidying up. **And it never deletes**, neither here nor there: if a device disappears from the MDM, it just gets a note.




**The real benefit.** The MDM knows these devices and your inventory doesn't. Two ways: enter the inventory number and Connect. Or Adopt, which creates a new unit with the next free number.

### Overnight on its own

The sync also runs every night, as soon as your administrator has set up the corresponding job. You can tell from the date in the Last column whether it's running.

### What is recorded on an individual device

Open a unit that comes from the MDM, find the **Device management** tab at the top with four sub-tabs:

- **Taken over.** What the nightly sync has saved: device name, model, system, signed-in person, last report. Appears immediately.

- **Device.** Hardware in detail: storage used and free, encryption, supervision, IP and MAC address, battery level, enrolment date.
- **Apps.** What is installed on the device, with the version.
- **Profiles.** Which configuration profiles apply *and whether they take effect*. A red «error» or «conflict» is the answer to the question of why this one iPad behaves differently from the rest.

> **These three are fetched live**
>
> Unlike 'Taken over', they query Intune, Jamf or Mosyle when opened. That takes one to two seconds, and a waiting window shows during that time. In return the state is always the current one and not last night's. Nothing is stored in the process.
>
> What a system doesn't release is stated. Mosyle, for example, doesn't supply the app list via the interface depending on the edition; then that is shown, instead of an empty list that would look like a device without apps.

## 2.15 Two-step sign-in

**Where:** Settings → My account → Two-step sign-in

In addition to the password, a six-digit code from an app on your phone. **For owner accounts this is mandatory**, for everyone else it is optional.

1. **Open an authenticator app**
   Microsoft Authenticator, Google Authenticator, 1Password, Bitwarden: any app that generates time-based codes will do.
2. **Scan the displayed code**
   There is a QR code on the page. Anyone who cannot scan types the string beneath it into the app by hand.
3. **Enter and confirm the first code**
   Only then is setup complete. If the code doesn't match, check the time on your phone.
4. **Print out the ten backup codes**
   They're shown exactly once. Print them out and keep them somewhere you can reach without a phone. They're the way back if the phone is lost.

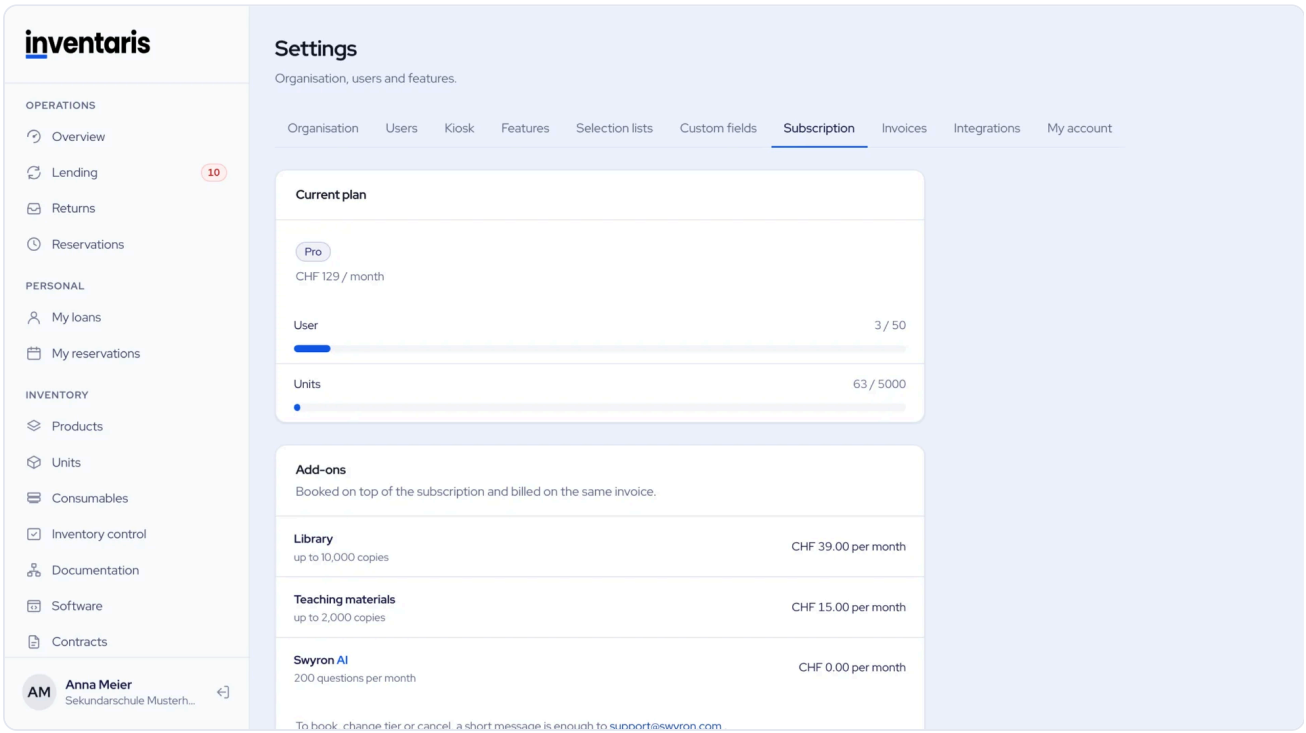
> **Before you change your phone**
>
> Switch off two-step sign-in **beforehand** and switch it back on afterwards on the new phone. Otherwise you'll need one of the backup codes. If those are gone too, your administrator has to help.

### Keeping an eye on your sign-ins

**Where:** Settings → My account → **Security**. It lists the devices you are currently signed in on — sign out an unknown one with **Sign out** — and your sign-ins over the last 90 days, successful and failed. A wrong current password when changing your password or switching off two-step sign-in also counts as a failed attempt; after too many, entry is blocked for a while. Owners and administrators also see the sign-ins of the whole organisation: if failed attempts pile up on one account, someone may be trying to guess the password.

## 2.16 Subscription and invoices

Where: Settings → Subscription · Settings → Invoices




Here you can see which scope applies, until when it is paid for, and how many users and units it covers.

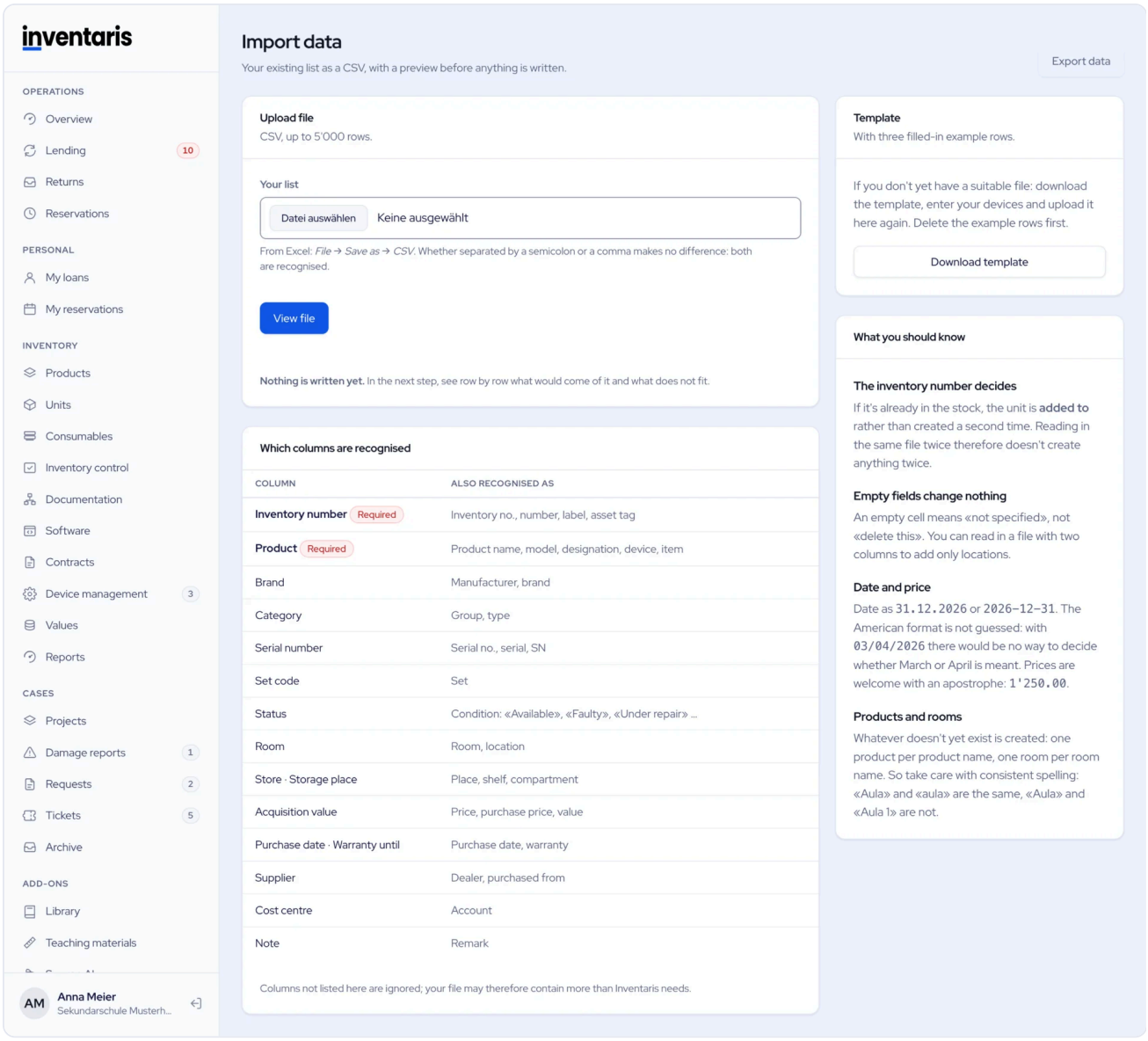
Under **Invoices** you'll find all previous invoices. A click opens the invoice as an A4 sheet.

> **What happens when you print an invoice**
>
> The browser's print window opens with the sheet at original size. **Set the scaling to 100% and the margin to none**. The payment part at the bottom must measure exactly 210 × 105 mm, otherwise no bank can read it. If the text reaches to the bottom, the payment part automatically gets its own second sheet.

## 2.17 Importing existing lists

Where: Administration → Import data

Every organisation that introduces Inventaris already has a list. Usually in Excel, grown over the years, with its own column names. Typing it out again is the most common reason why a rollout is postponed to the summer holidays and then to the next ones.




On the left the upload field, on the right the template. Below it, which column names are recognised. Your list may be called whatever it's called.

1. ### Download the template

   if you don't have a file yet

   It contains three filled-in example rows. That way it answers the questions that would otherwise come up on the first attempt: how do I write the date, how the price. You delete the examples before uploading it again.

2. ### Save your file as CSV

   In Excel: File → Save As → CSV. Whether separated by semicolon, comma or tab makes no difference. All three are recognised. An `.xlsx` is not accepted; the message tells you so and names the step to take.

3. ### Upload and view

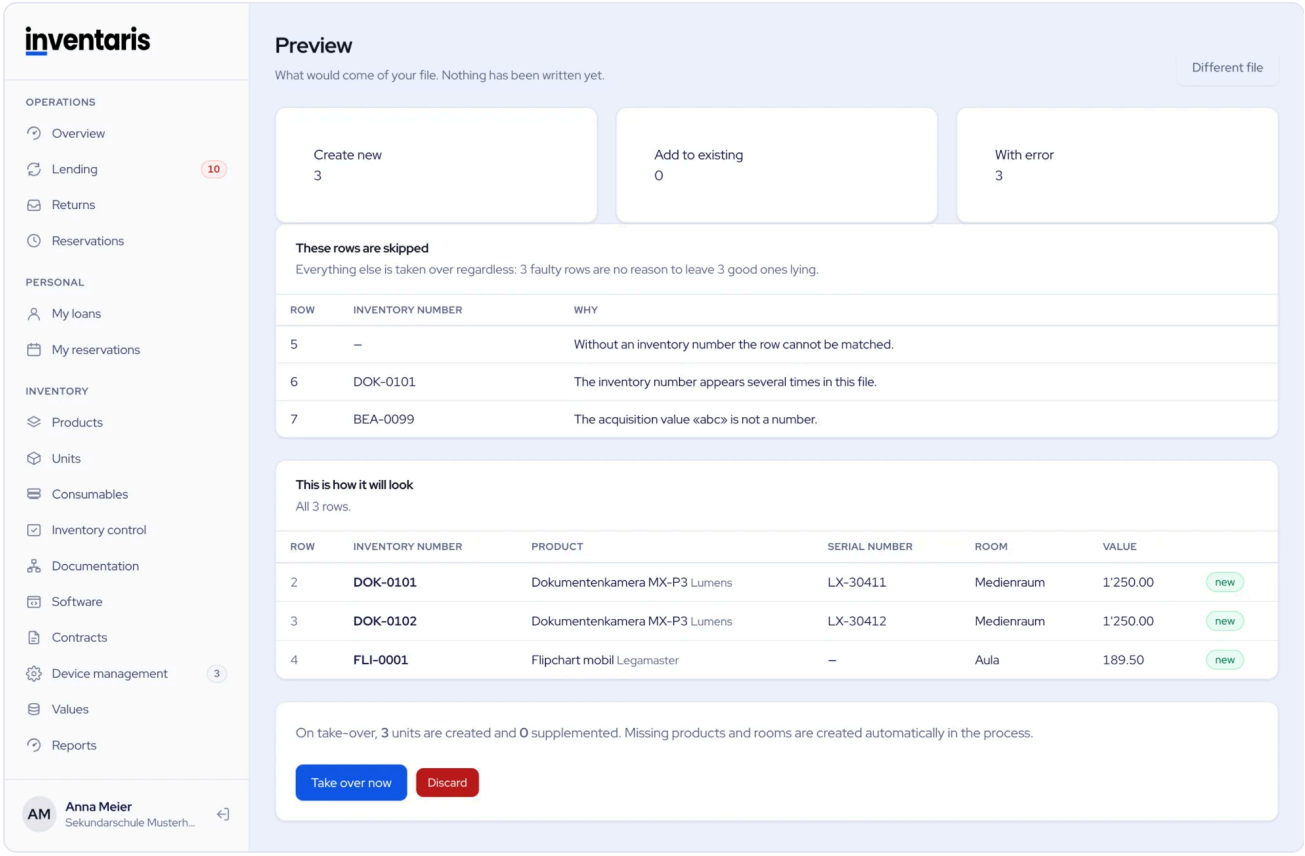
   Nothing is written yet. You get a preview.

4 **Reading the preview**

Three figures at the top: how many units will be newly created, how many existing ones will be supplemented, how many rows have an error.

5 **Take over**

Only here is anything written.




The errors are at the top, with the line number from your file and the reason. That way you can find the spot in Excel again without searching.

### What happens when you take over

- Missing **products** are created automatically, one per product name.
- Missing **rooms** likewise, one per room name.
- Faulty rows are **skipped**, not the whole run aborted: 400 good rows are no reason to stall over three broken ones. How many were skipped is shown in the message.
- It all happens in one go. If something breaks off, nothing is half imported.

## The three rules you should know

| RULE | WHY |
|---|---|
| The inventory number is the anchor | If it is already in stock, the unit is **updated** rather than created a second time. So reading the same file in twice doesn't create anything twice. And that does happen, because something is always missing the first time. |
| Empty cells change nothing | An empty cell means "no entry", not "delete this". You can import a file with two columns to add only locations; the prices stay put. |
| The condition is not overwritten | If there is no status in your file, the existing one remains. An import that sets a device that has just been loaned out to «Available» does damage. |

## Spellings

- Date: `31.12.2026` or `2026-12-31`. The American notation is deliberately **not** guessed. With `03/04/2026` there would be no way to decide whether March or April is meant, and a wrong warranty date only comes to light when it is too late.
- Price: `1'250.00`, `1250,50`, `CHF 980.–`. All the same.
- Status: «Available», «Faulty», «Under repair» or also «free», «broken», «workshop».

> **With more than 5000 rows**
>
> Then the application does not accept the file, and you send it to us. We look it through, come back with queries and import it, even with several tens of thousands of rows. This is a service charged by effort; we tell you the price beforehand. In the Enterprise subscription it is included.

PART 3

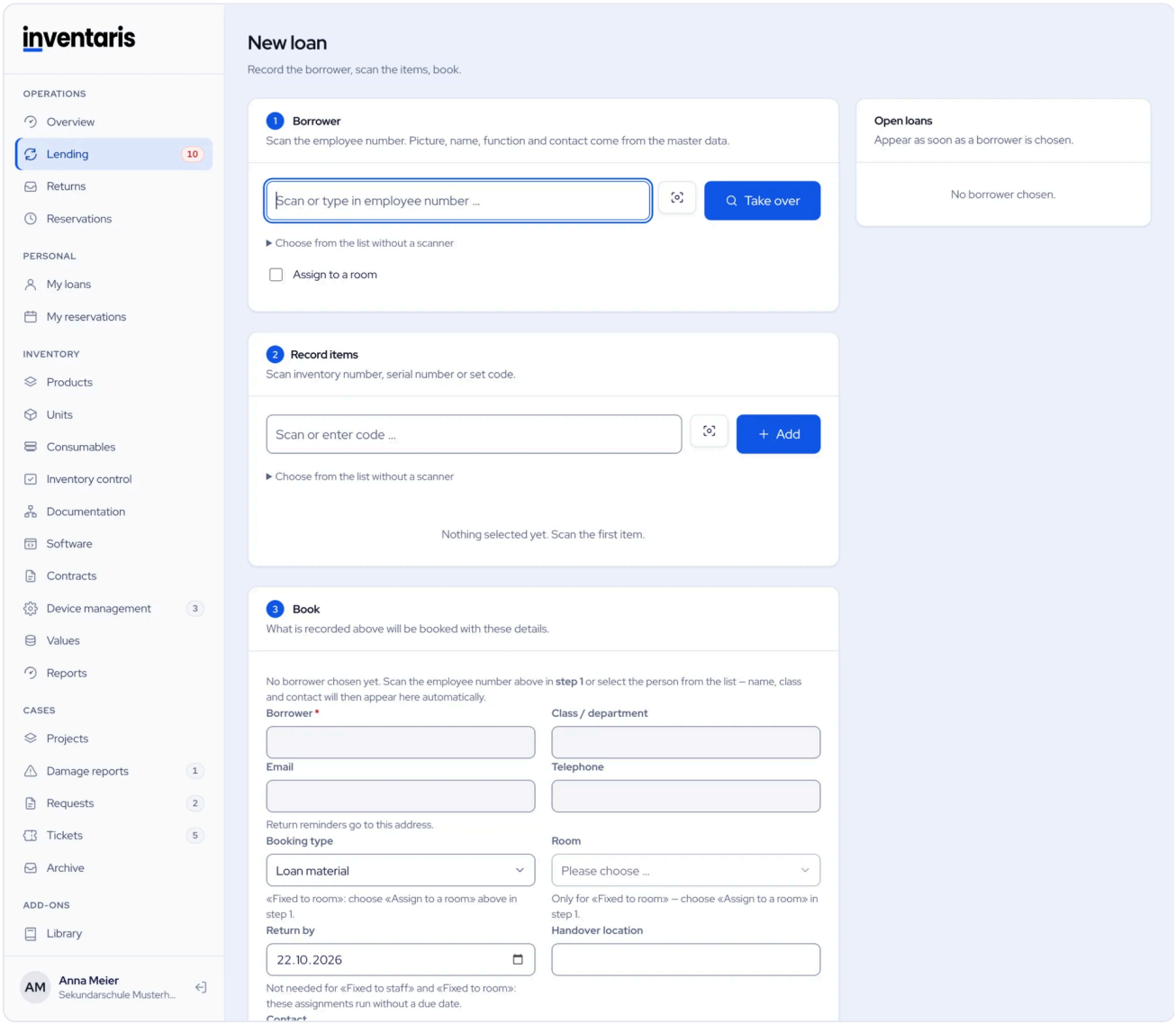
# Day-to-day work at the counter

The part you really need every day. If you read only one chapter, read this one. Print it out for the computer at the issue point.

## 3.1 Lending out a device

Where: Loans → New loan

The form is divided into three numbered blocks, and you work through them from top to bottom. With a scanner, a loan takes about ten seconds.




**1 Borrower · 2 Items · 3 Book.** On the right it shows what the selected person already has out. You see that before you hand out the next device.

1 **Scan the employee number**

The cursor is already in the right field. Scan the badge or type in the number and press **Apply**.

**What happens:** photo, name, function, class or department, email and phone are taken from the master data. On the right, the list of devices this person already has appears. In block 3 these details are then locked: they belong on the staff record and not in an individual loan.

**Without a scanner:** below the field is **Choose from the list without a scanner**. A click opens the list of staff. The result is the same as after a scan.

**Without any staff record at all:** leave the field empty and enter the name by hand further down in block 3. Then the fields there are open.

2 **Scan the items**

Inventory number, serial number or set code: the application recognises on its own what is meant. After each scan the line appears in the list below.

**For a set:** One scan of the set code takes up all units of that set at once.

**Without a scanner:** Below the field is **Choose from the list without a scanner**. A click opens a selection list in which the devices are grouped: first those permanently assigned to this person, then their own loans, then all the rest.

**Scanned the wrong thing:** On the right of each line is a remove button.

3 **Book**

Check the return date, booking type and, if necessary, the room. Then press **Book loan**.

**What happens when you book**

- Each selected unit switches to On loan and is thereby locked for others.
- The loan appears in the **Loans** list and on the sheet of each unit.
- If reminders are switched on, the first email goes out as many days before the due date as you have set.
- You land back on an empty form, ready for the next person.

**When a device is already out**

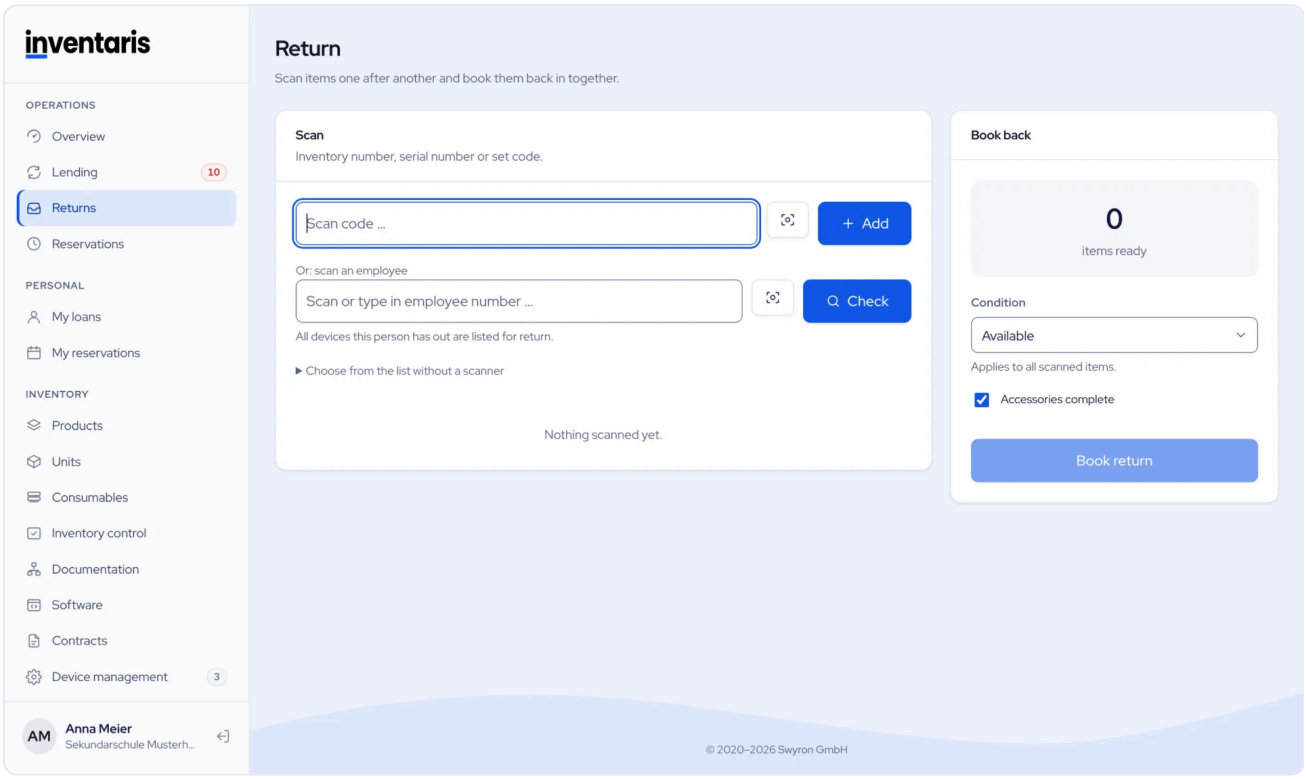
Then the application does not accept it and tells you who has it. This also applies when two counters book at the same time: the unit is briefly locked during booking, and only one of the two bookings goes through.

## The booking types

| TYPE | MEANS |
|---|---|
| Loan material | The normal case: goes out, comes back on a date. |
| Fixed to employee | Permanently assigned: the company phone, the notebook. No return date, no reminder. |
| Fixed to room | Permanently in a room: the fixed-mounted beamer. Here the **Room** field is mandatory. |

## 3.2 Taking a device back

Where: Return




Scan the items one after another and book them back together. You don't have to look up either the person or the loan.

1. **Scan the item**
   Inventory number or serial number. The cursor is already in the field.
2. **Check the condition**
   If the product has accessories on file, a checklist appears: remote control, cable, bag.
3. **Press Take back**

### What happens on return

- The unit switches to Available and can be borrowed again immediately.
- The loan is closed and written into the history with a return date.
- No further reminders are sent.
- If the loan was overdue, it disappears from the red list on the overview.

One list, one type

A return only holds devices of the same booking type: loan material, **Fixed to employee** or **Fixed to room**. The type of the first device applies to the whole list and is shown on the booking card. If you then scan a device of another type, the list rejects it and tells you why: book this list back first, then the other device separately. If you scan a card under **Or: scan an employee**, the list only fetches devices of that type and names what stays out; with an empty list, loan material comes first. That way a fixed assignment never slips unnoticed into the pile of a class return.

### Something came back broken

Take the device back in the normal way and then report a damage (4.1). That keeps the history clean: the loan is closed, the damage is its own case with its own story.

## 3.3 Fixed assignments

A work phone, a personal notebook, the permanently mounted projector in room B12: devices no one brings back, because they stay permanently where you are.

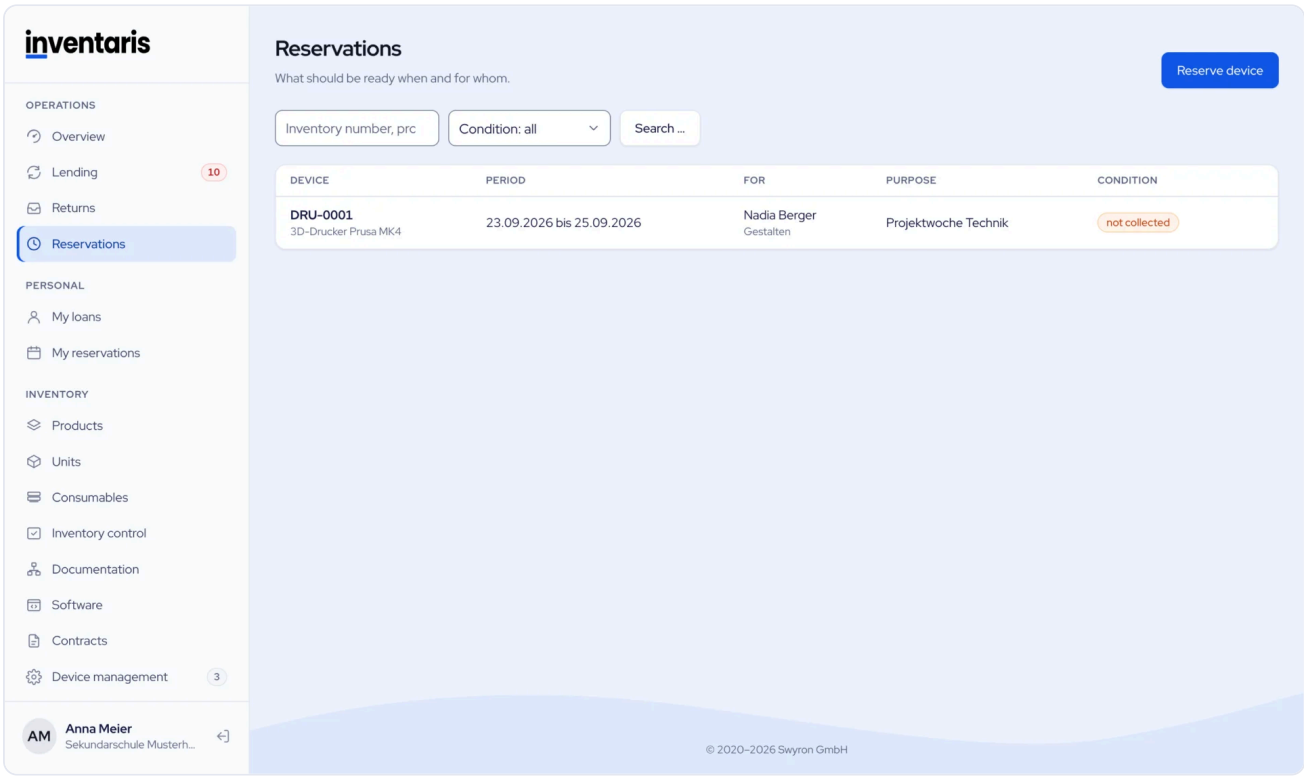
You book it like an ordinary loan. For a person, choose the booking type **Fixed to employee** in step 3. For a room, tick **Assign to a room** in step 1; the booking type then becomes **Fixed to room**, and you choose the room in step 3. Then:

- There's **no due date**: the loan never becomes overdue.
- **No reminder** goes out.
- In the overview these devices count in their own tile ('Fixed to employee', 'Fixed to room') and not among the ordinary loans.

Returning is still possible at any time via the ordinary return, for example when someone leaves the organisation.

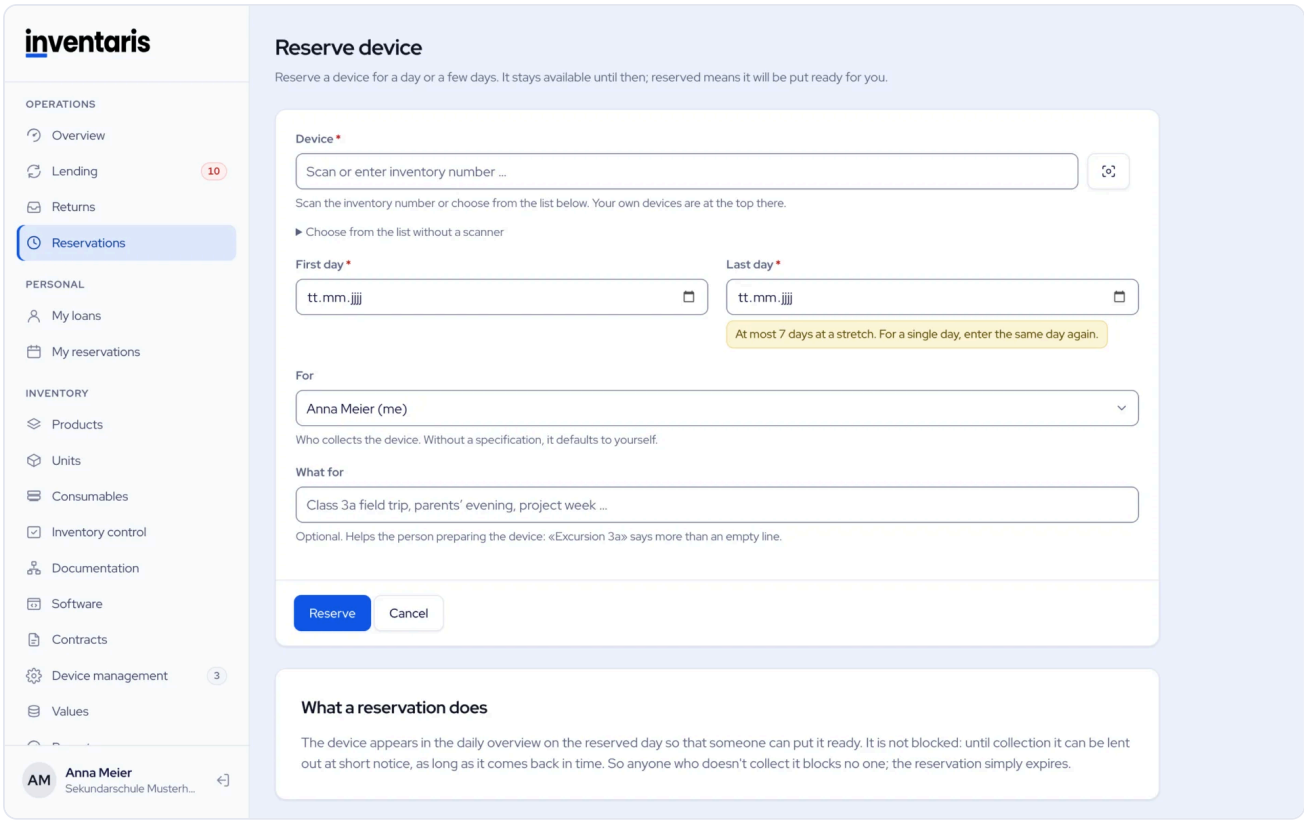
## 3.4 Reservations

Where: Reservations




What is reserved, and for whom. What has to be ready today also appears on the overview.

A reservation is a claim on a device for a day or a few days. Not yet a loan. It prevents anyone else from reserving the same device for the same period.




For a single day the first date is enough. The second sets itself.

### The three states of a reservation

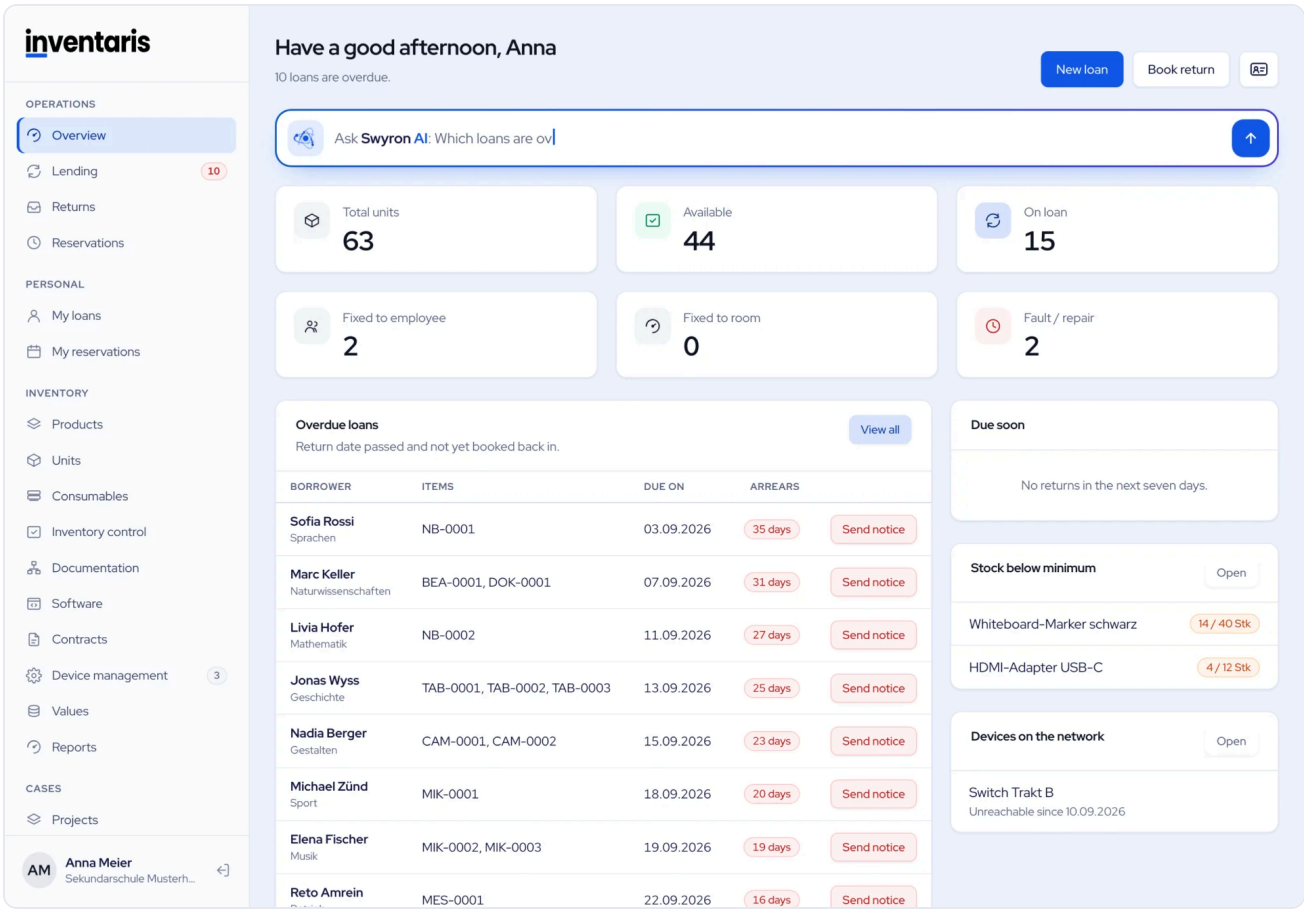
| | |
|---|---|
| Reserved | Applies. The device is locked for this period. |
| Redeemed | The device was collected; that has turned into a loan. |
| Expired | The period is over and no one has collected it. |

**Withdrawn reservations disappear**

If someone withdraws a reservation, it is **deleted** and doesn't appear as «withdrawn» in the list. That is intentional: the overview should show what still needs doing, not what was once planned.

## 3.5 The daily overview

The overview is built so that in the morning you can read from top to bottom and afterwards know what's coming up.



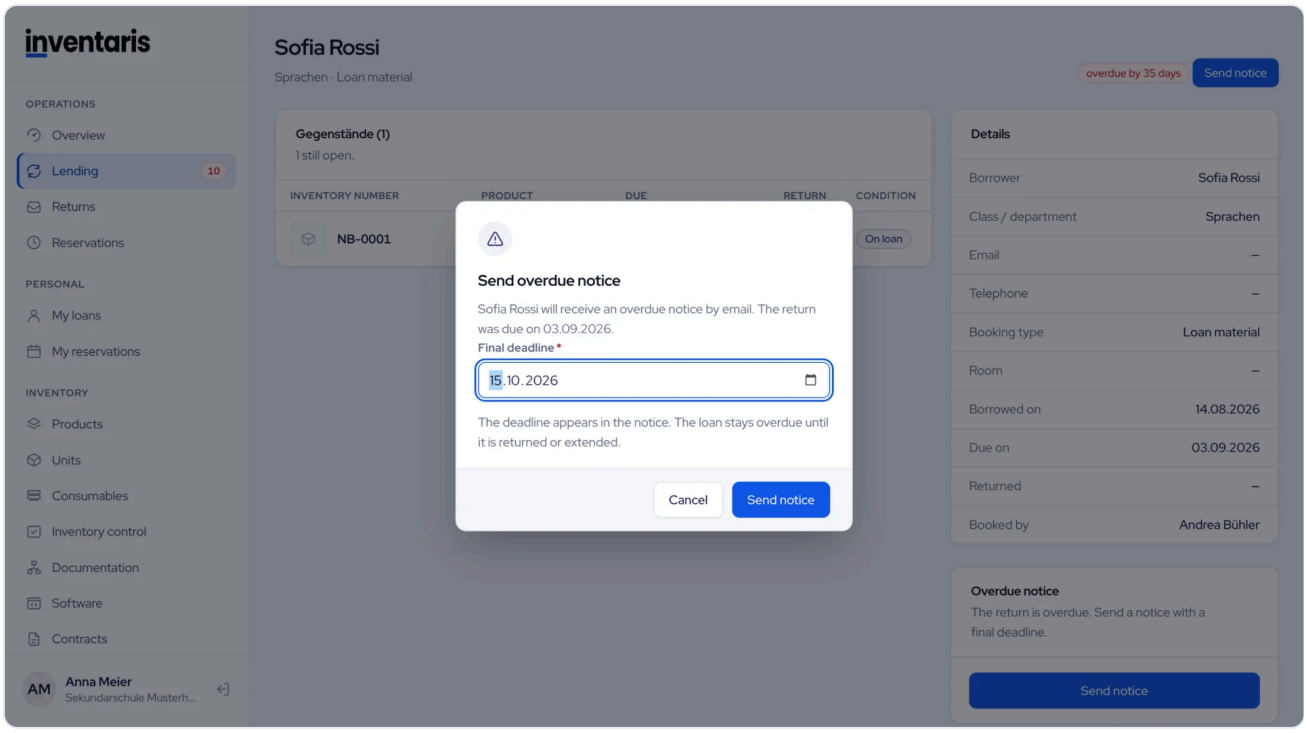

Top left the figures on stock, below that the urgent cases, on the right what's coming this week.

| BLOCK | TELLS YOU |
|---|---|
| The buttons at the top | New loan and Book return for everyone who books at the counter; far right, your card (6.10). On the phone, the fold-out card sits at the very top. |
| The question field | Only with the **Swyron AI** add-on: a question about your stock, straight from here (5.11). |
| Left, devices still out | People who have left the organisation and still have something. Sits at the very top as long as there are any. |
| The six tiles | How many units there are, how many are free, how many are out, how many are permanently assigned and how many are faulty or under repair. |
| Overdue loans | Due date exceeded, not yet back, with the number of days overdue. The most important block on the page. |
| Reserved today | What someone wants to collect today. It's best to lay out these devices first thing in the morning. |
| Due soon | What should come back over the next few days. |
| Stock below minimum | Consumables that are running low. |
| Most recently added units | What has just been newly added to the inventory. |
| Devices on the network | Only with UniFi: network devices that no longer respond. Missing as long as everything is running. |

The overview and the counters in the menu **update by themselves** as long as the tab is open: if a new request, a reservation or a booking comes in, or a ticket changes, it appears here without you reloading the page.

### Sending a notice manually

Every overdue loan has **Send notice**: on the loan itself and in the "Overdue loans" list on the overview and under Loans. In the window you set a **final deadline** (one week by default, tomorrow at the earliest) and send the notice. It goes by email in the borrower's language, and also in Teams for Microsoft accounts. The loan stays overdue until it is returned or extended.




The "Send overdue notice" window with the final deadline.

> **What is recorded**
>
> On the loan, **Reminders and notices** lists everything that was sent, automatically and manually. A manual notice carries "Triggered manually by …" and the final deadline. At most one manual notice per loan per day.

## 3.6 What the coloured markers mean

The colours are the same throughout the application. Once you know them, you read every list in passing.

| SYMBOL | MEANS | WHAT TO DO |
|---|---|---|
| Green | All fine: available, returned, done, approved. | Nothing. |
| Blue | Ongoing: on loan, reserved, in progress. | Nothing. Keep an eye on it. |
| Orange | Attention: due date approaching, stock below minimum, in repair, device not reported for a long time. | View soon. |
| Red | Overdue, faulty, rejected, lost. | View today. |
| Grey | Over or without assessment: expired, retired, open. | Nothing. |

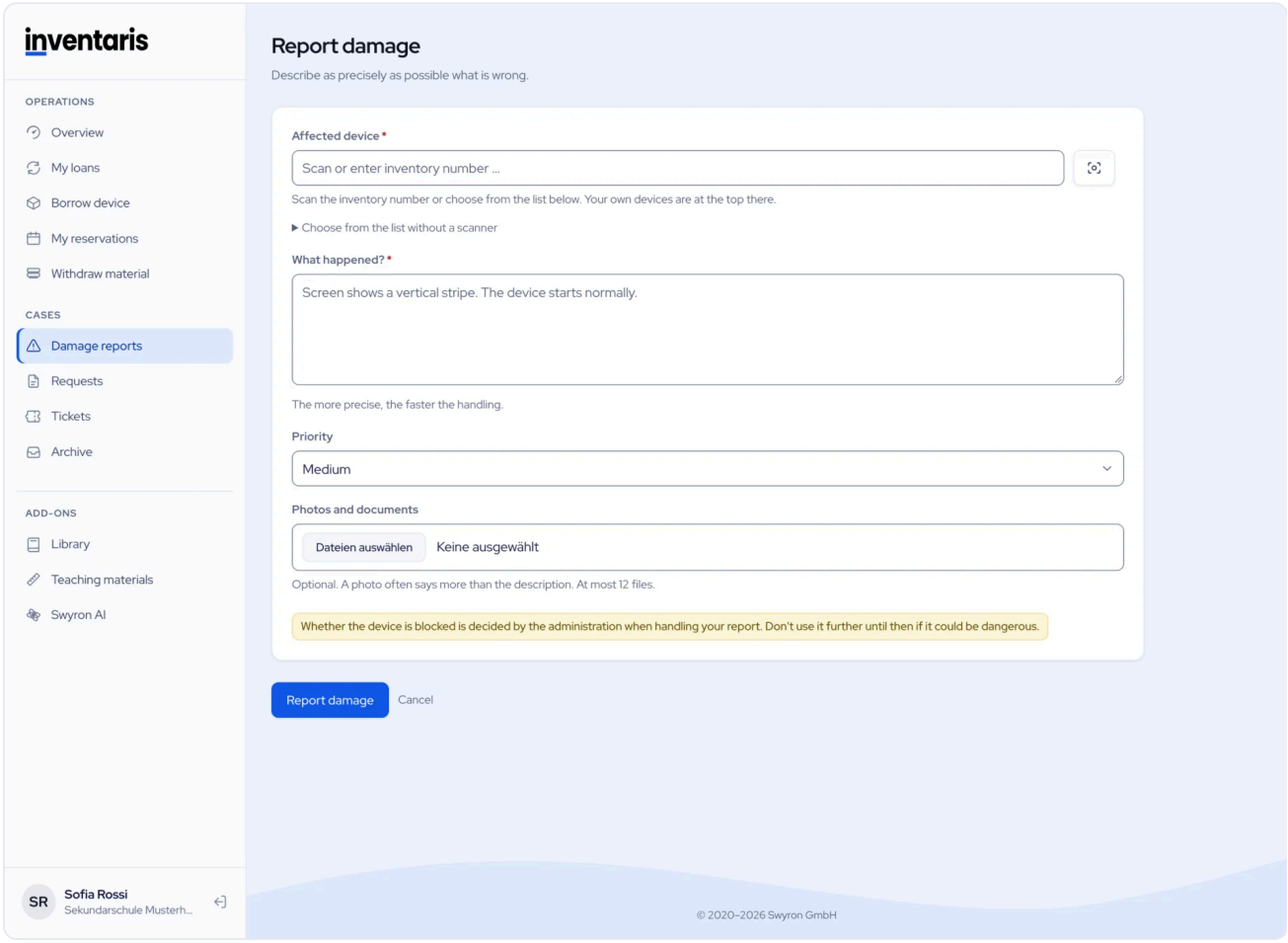
PART 4

# When something comes up

Three kinds of case, all built to the same pattern: what it's about, which device, what's wrong, how urgent, what happens next.

## 4.1 Reporting damage

Where: Damage reports → Report damage




The form as seen by a borrower. The photo can be attached right here, not only after saving.

1. **Subject**
   A sentence that is recognisable in a list: 'Beamer B12 shows blue stripes', not 'Problem'.
2. **Choose the device**
   Scan or choose from the list. The list is sorted so that your own devices are at the top.
3. **Description**
   What exactly is happening, since when, and what you have already tried.

4 **Attach a photo**

recommended

A picture saves half the follow-up questions. Photos from the phone are reduced in size on upload. You don't have to prepare anything.

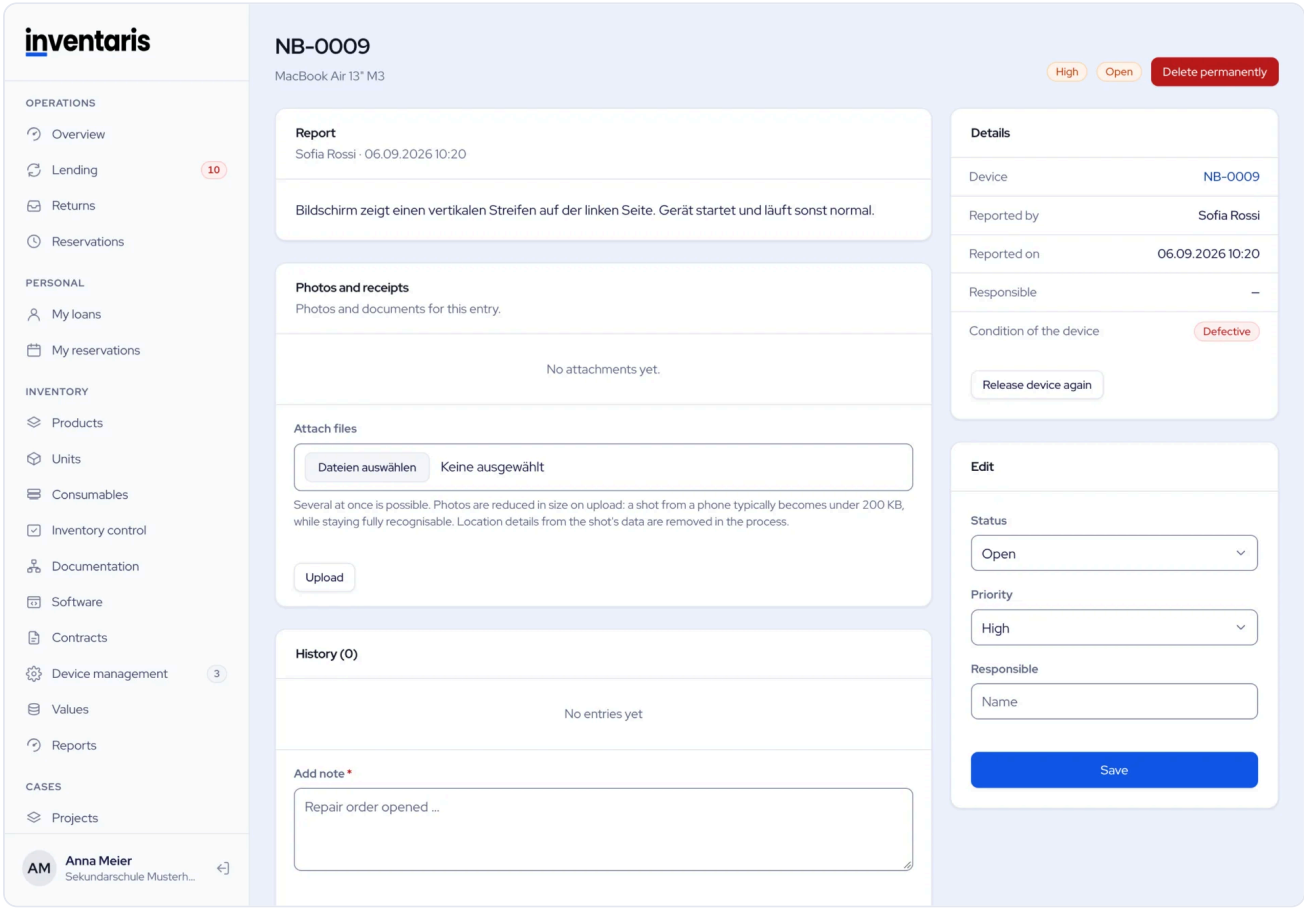
5 **Submit**

**What happens after you submit**

- The report appears with the status Open in the list.
- In the administration menu a number appears next to **Damage reports**.
- The device remains **available for loan** at first. Whether it is blocked is decided by the administration: a scratch should not put a beamer out of service.

## 4.2 Handling a damage report

Where: Damage reports → open a report




On the left the report with attachments and history, on the right the buttons with which you change the status.

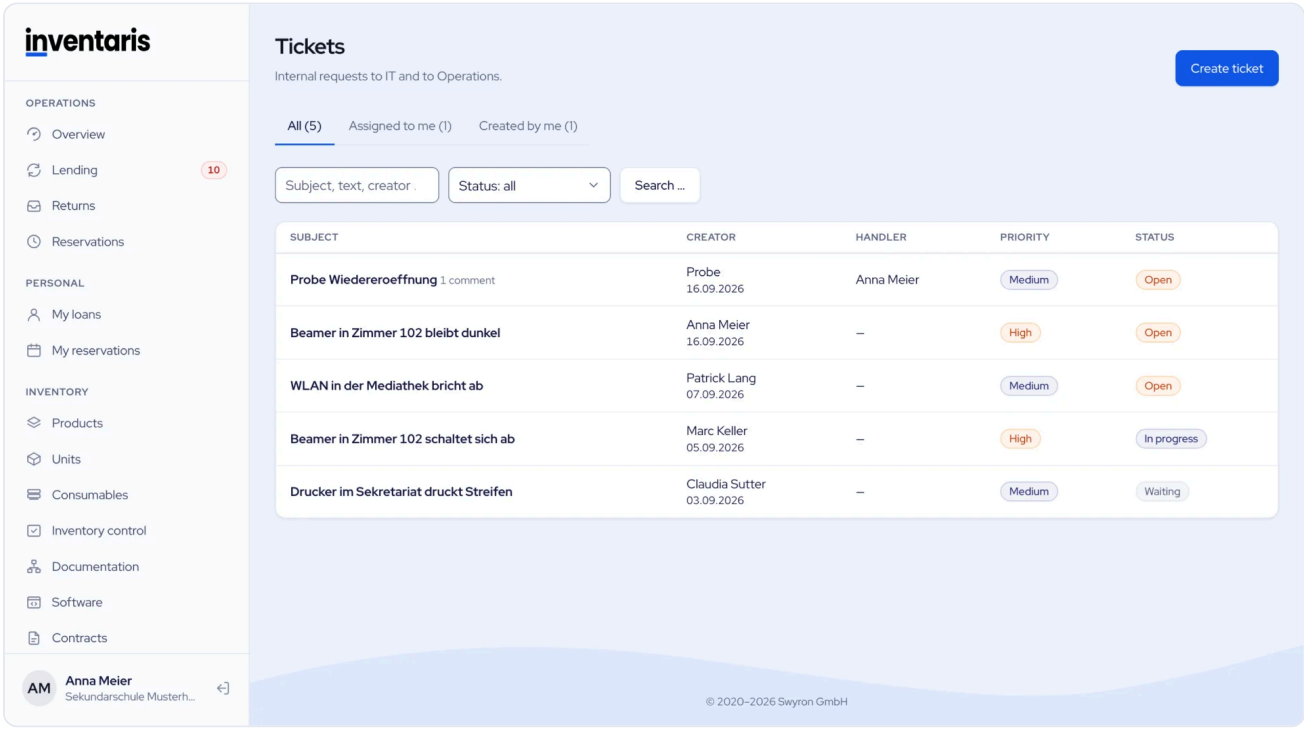
| CONDITION | MEANS |
|---|---|
| Open | Received, no one has looked at it yet. |
| In progress | Someone is taking care of it. For the person who reported it, the sign that they no longer need to follow up. |
| In repair | The device is off site or in the workshop. |
| Done | Resolved. After seven days the report moves to the archive. |

> **Locking a device: the one decision that counts**
>
> On the right is the **Lock device** button. It sets the unit to Defective, so it can no longer be borrowed, not even by accident. **Administration** decides this, not the person who reported it: otherwise a projector would sit idle because of a scratch.
>
> The same button lifts the block again; the device is then immediately Available once more.

## 4.3 Tickets

Where: Tickets

For anything that is neither a damage report nor a request: «network outlet in B14 dead», «order projector lamp», «mount wall bracket». The structure is the same as for a damage report, plus a **priority** (low, normal, high, urgent) and a **category**.




The list can be filtered by condition and priority.

### Every ticket has a number

When it is submitted, a ticket gets a number like `TIC-2026-0042`. It appears on the ticket and in the subject line of every message about it – so you can sort by it in your inbox, and on the phone you give a number instead of a heading. The counter runs per organisation and per year.

### Reply or internal note

You can write under every ticket. Anyone allowed to work on it has a tick **Internal note**: with it the text goes only to those working on it. The person who reported it does not see it – neither on the page nor by email.

That is the difference a ticketing system makes. «The lamp has already been faulty twice, this time replace it instead of repairing it» belongs in the ticket – but not in the reply to the teacher who reported the projector.

### Whoever answers takes over

If a ticket belongs to no one yet and someone with edit rights writes into it, it is thereby assigned to them. This way no case that is already being worked on is left lying around. A ticket that already belongs to someone does not switch: a query doesn't take a colleague's work away from her.

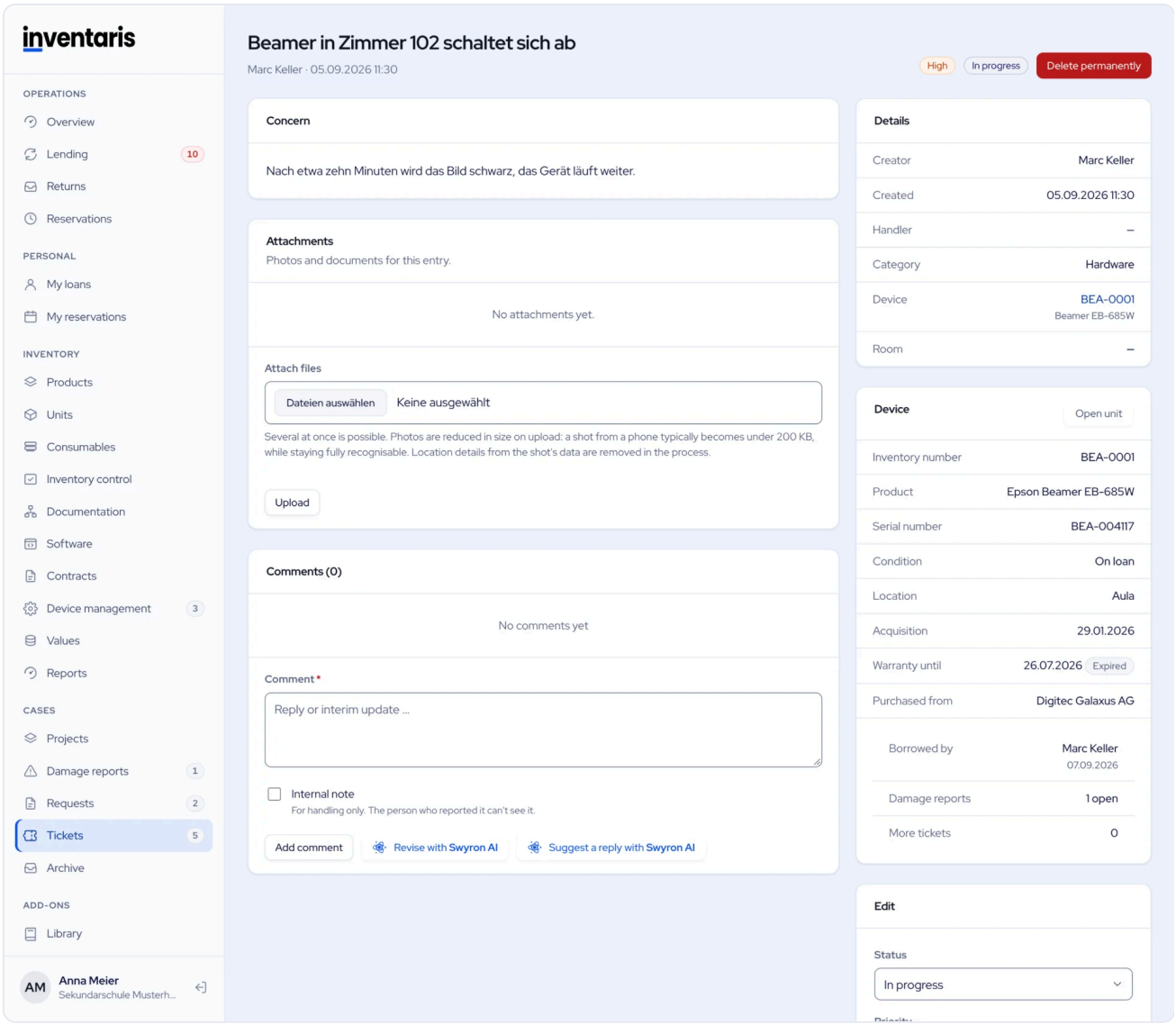
A reply to a resolved ticket reopens it. This only applies to public replies – an internal note is work on the case and not a response. How often a ticket was reopened is counted along: three times reopened is a different problem than three tickets.

### The device is right next to it

If a ticket is attached to a device, its details appear to the right: inventory number, model, serial number, condition, location, acquisition, warranty and dealer. Below that, three figures that often decide the answer – who currently has the device on loan, how many damage reports are open and how many other tickets there are for this device. Repairing a device four times when it is worth almost nothing any more isn't worth it.

### Replying with Swyron AI

If the **Swyron AI** add-on is booked and the switch **Swyron AI suggests ticket replies** is on (off by default), **Revise with Swyron AI** and **Suggest a reply with Swyron AI** appear below the comment field. The text goes into the field, not into the ticket: you check it and send it yourself. More in 5.11.




A ticket with the device next to it. Below the comment field, the two **Swyron AI** buttons.

## Who gets a message

Inventaris sends emails for every ticket – to the person who reported it and to those working on it, depending on what happens:

| WHAT HAPPENS | WHO FINDS OUT ABOUT IT |
|---|---|
| Ticket submitted | The reporting person as an acknowledgement of receipt. Plus everyone authorised, as long as the ticket belongs to no one. |
| Assigned | Only the assigned person. This message can't be switched off: an assignment is a job. |
| Public reply | The reporting person and the assigned one, unless they wrote it themselves. |
| Internal note | Only the assigned person. Never the reporting person. |
| Done | The reporting person, with a note that a reply reopens the ticket. |
| Reopened | The assigned person, or everyone authorised if the ticket belongs to no one. |

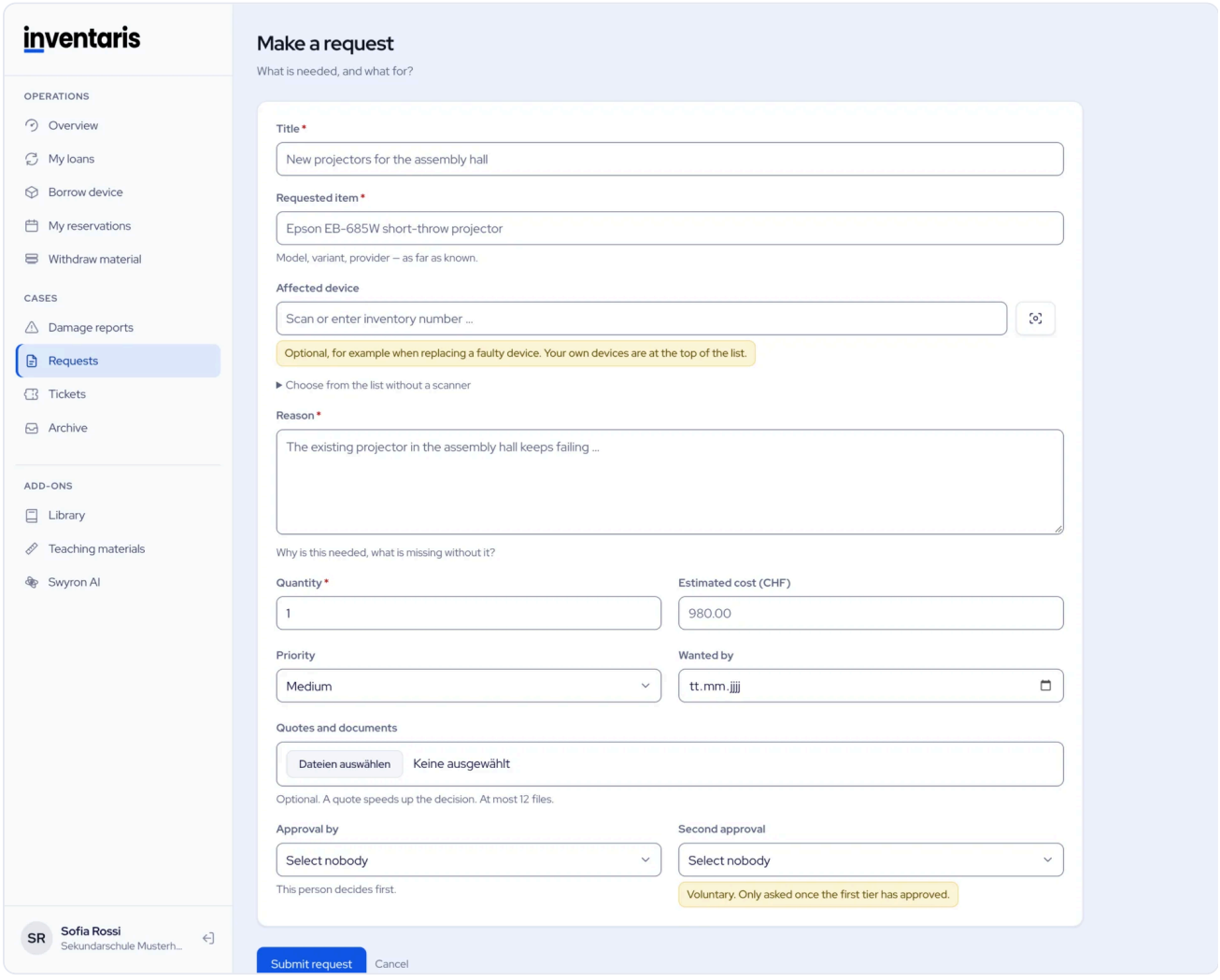
This is set up by management, not by each person individually: under Settings → Users, each person shows which of these messages they receive. Anyone who works on tickets should not be able to quietly switch off being reached by new reports – then they sit there and no one knows about them. Messages about your own ticket always come through.

With Microsoft 365 and the Teams app, the same messages also arrive under "Activity" in Teams, as long as the switch Post tickets and damage reports in Teams is on (on by default). A ticket appears there only once: the new notification replaces the previous one.

## 4.4 Requests and approval

Where: Requests → Submit request

A request is a wish to acquire something, with a justification: "We need a second document-camera trolley." It runs through a chain from submission to invoice check.




Quantity, estimated price and preferred date help the person who decides. The approver is optional.

### The path of a request

| CONDITION | WHAT CURRENTLY APPLIES |
|---|---|
| Submitted | Awaiting a decision. |
| Approved | May be procured. |
| Rejected | With a reason. The chain ends here. |
| Ordered | Is with the supplier. |
| Delivered | It's here. Now record it as a unit. |
| Completed | Invoice checked, case closed. |

#### The approval chain

When recording, you can name one or two people who should decide. They are asked in turn: the second stage only sees the request once the first has agreed.

If a chain is running, the named person decides, no longer the role. A rejection ends the chain; the remaining steps are marked as dropped and not deleted, so that the history is still correct later. Without a named approver, everything runs through the roles as usual.

## 4.5 Projects

Where: in the menu under 'Cases', item 'Projects'. Only in the Pro subscription and only for owner, administrator and manager.

A project bundles what is already there: devices, tickets, requests and damage. A device rollout, the summer maintenance, the move of a specialist room — undertakings that run over weeks and connect several cases.

Every project has six tabs: the overview with progress and budget, the plan with phases and tasks, the schedule as a bar chart, the budget with cost items, the links to devices and cases, and the communication with those involved and the history.

#### Critical tasks lock the next phase

A task in the plan can be marked as critical. As long as a critical task in an earlier phase is still open, the next phase stays locked — its tasks cannot be worked on. That way a rollout does not carry on before the decisive steps are really done. Once the critical task is ticked off, it releases the next phase.

#### Who sees a project

Owner, administrator and manager may create and edit. Anyone assigned to a project as a participant — including a borrower — sees it in the menu and can open it, but read-only.

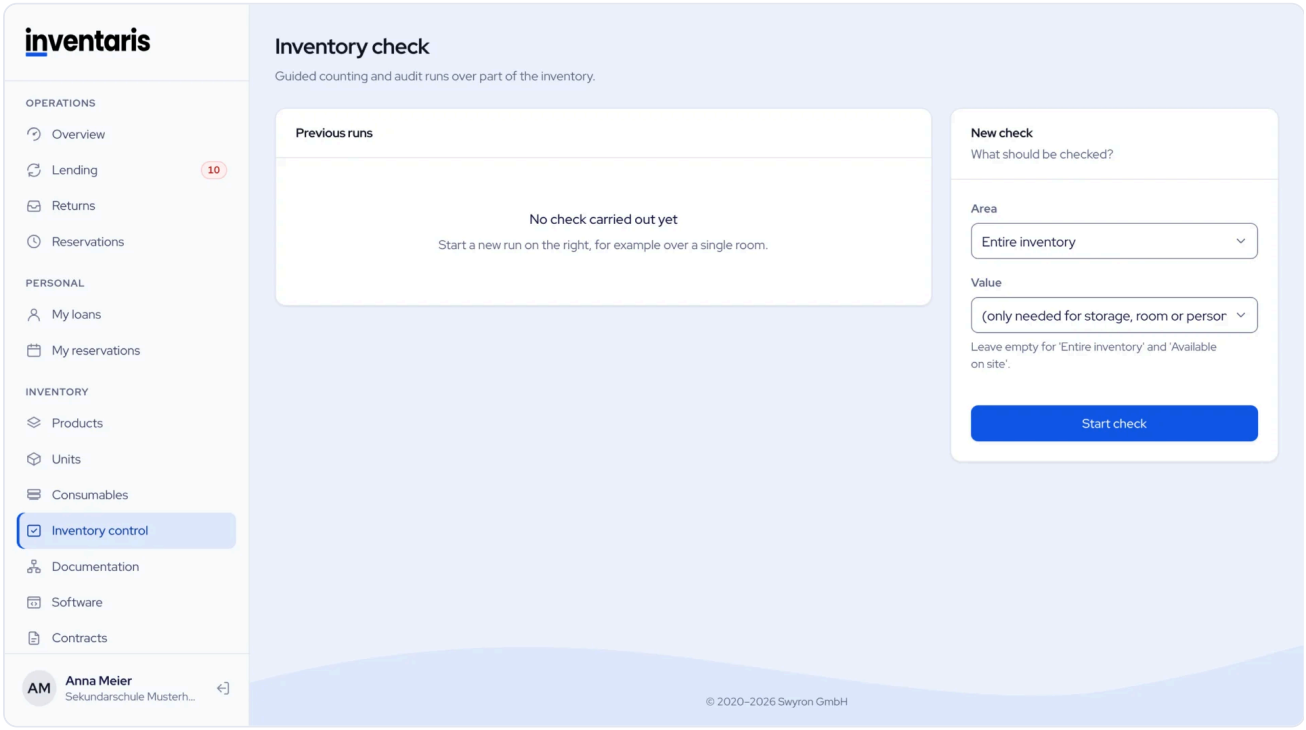
PART 5

# Control and reporting

What you need once a year. And what you need when someone wants a figure from you.

## 5.1 Inventory check

Where: Inventory control




A check is a pass with a date. You can have several open at once, one per room or per location.

1. **Create a control**
   A name and optionally the restriction to a room or a category.

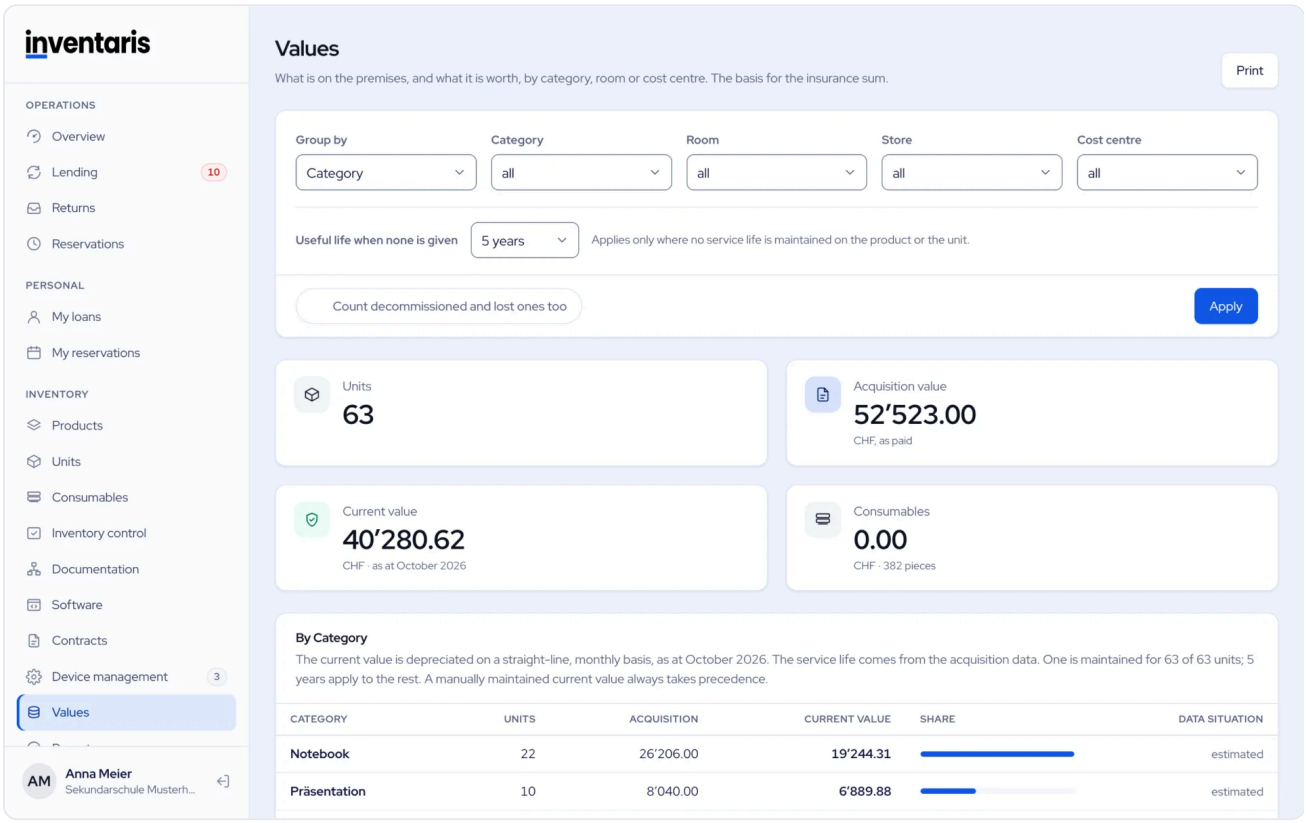
2. **Walk through the premises with the phone**
   Scan every device. It is immediately ticked off as seen.

3. **Review the miss list**
   At the end is what wasn't scanned. Not all of it is lost. Much is simply out on loan right now; that's shown alongside.

4. **Finish**
   The check is recorded with a date and can be called up again later.

## 5.2 Values and current value

Where: Values




Acquisition value and current value, broken down by category. The figure the insurer wants.

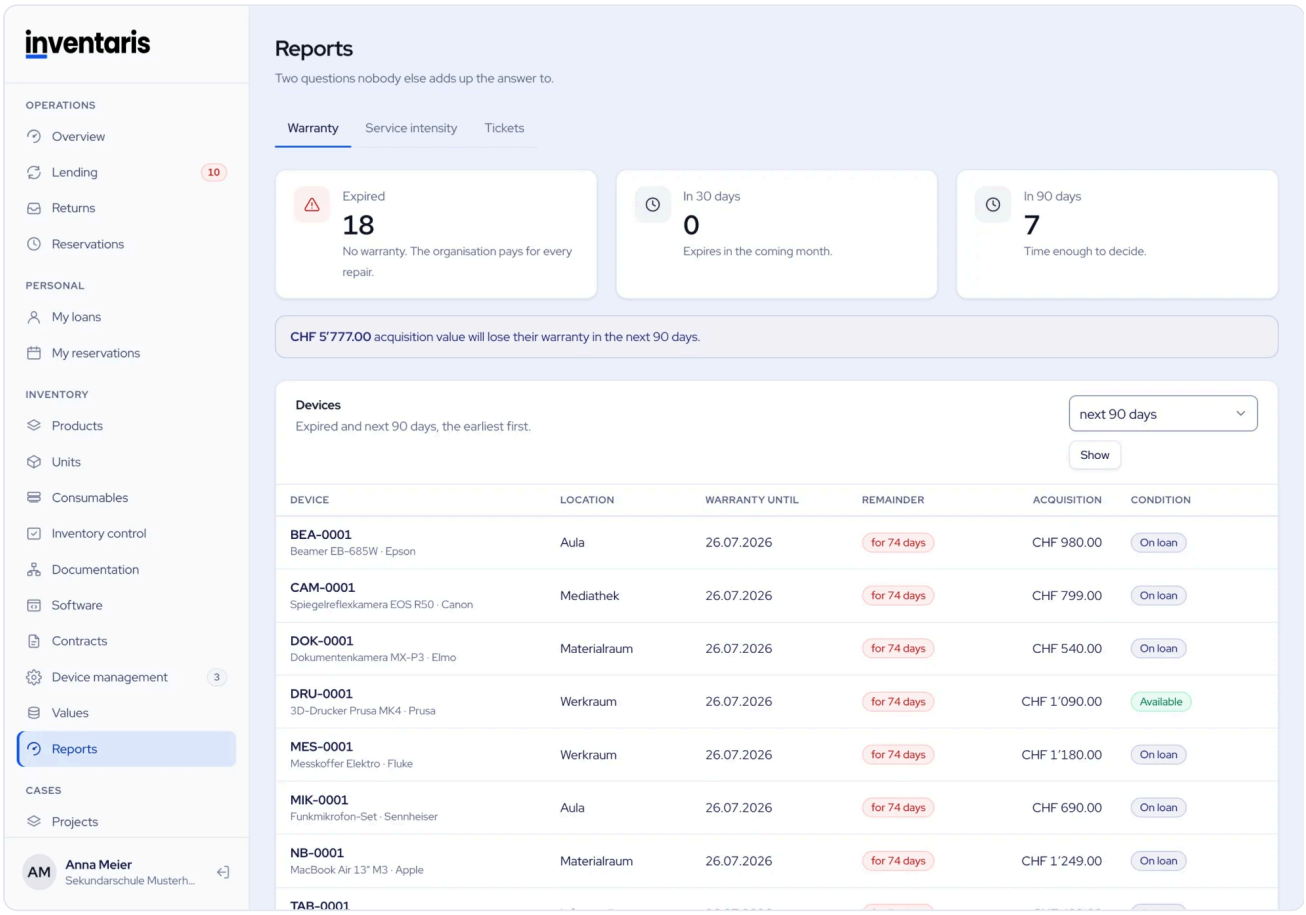
### How the current value is calculated

Linear and monthly from the acquisition month, over the useful life set on the product or the unit. A notebook for 1 200 francs with a four-year useful life thus loses 25 francs per month.

The current value is **never stored**, but recalculated on every call. A stored value would be wrong on the next first of the month. If you've entered a current value by hand on a unit, that one always takes precedence.

## 5.3 Reports

Where: Reports




Questions about the stock, not work on the stock. Whoever looks here is planning.

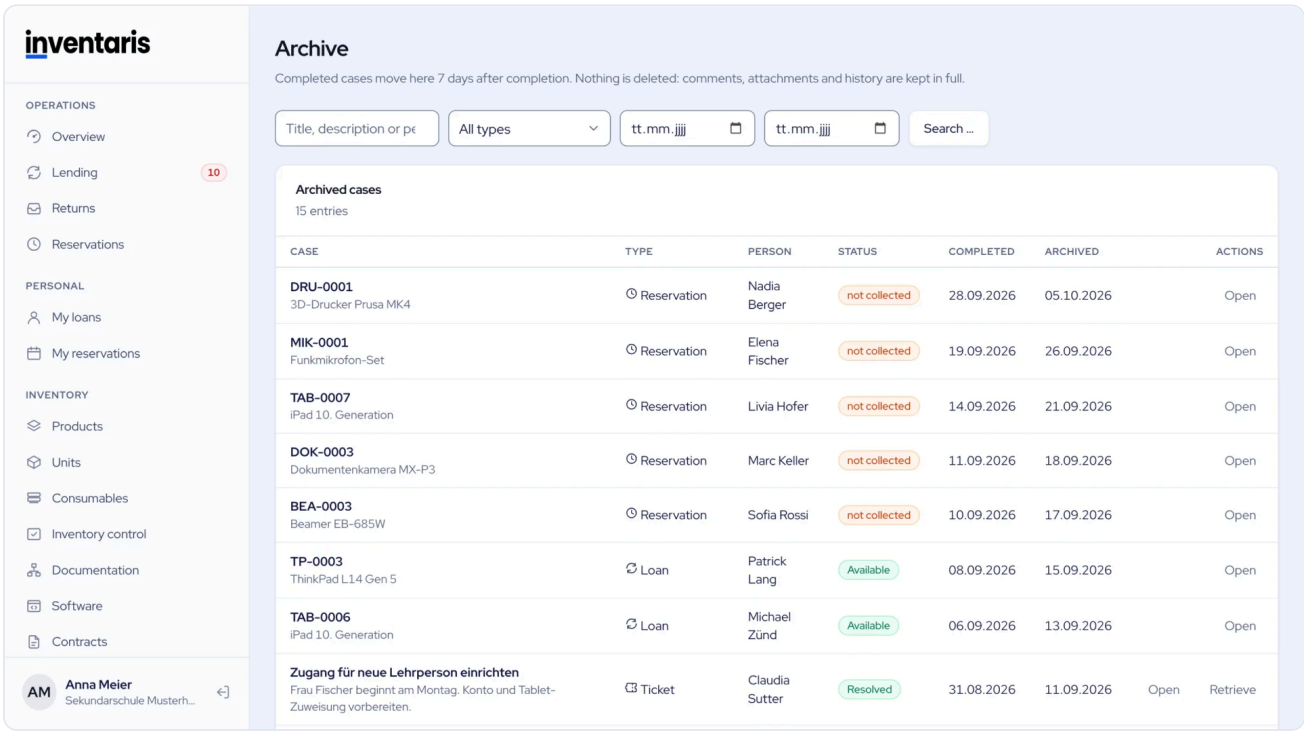
| REPORT | ANSWERED |
|---|---|
| Warranty expiry | Which devices' warranty ends soon. The period is adjustable (30, 60, 90, 180 days). |
| Service intensity | Which device was under repair most often. The fifth time is usually more expensive than a new device. |
| Utilisation | What is constantly out and what has been sitting in the cupboard for a year. |
| By category | Stock and value per category, for the asset accounting. |

### What happens when you print a report

The **Print** button opens the browser's print dialogue. Only the heading and table appear on paper. The menu, filters and buttons drop away. Choose **Save as PDF** instead of a printer, and you have the record as a file.

## 5.4 Archive

Where: Archive




Everything that is done in one place, separated by type.

What is completed moves here by itself **after seven days**: returned loans, resolved damage reports, closed tickets, completed requests and expired reservations. The seven days are the buffer during which something is reopened after all.

Nothing is deleted. Via **Restore** a case comes back into the active list, should it turn out that it wasn't finished after all.

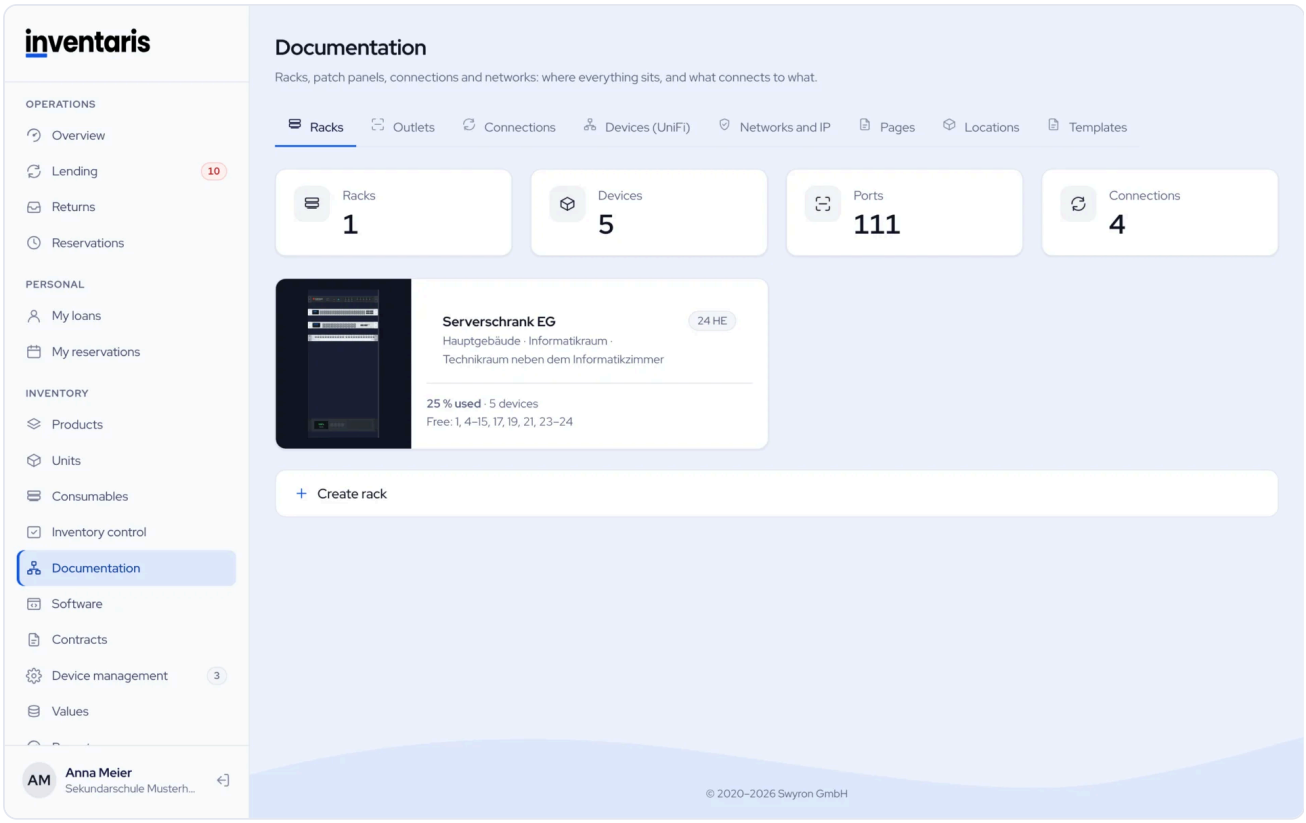
> **Delete permanently – owner only**
>
> For test entries and mistakes there is an exception. The **owner** can **permanently delete** a ticket, a damage report, a request or a project at the very bottom of the entry. That removes it along with its attachments irreversibly – and, unlike archiving, also from the log and the reports. Because it cannot be undone, it requires a double confirmation, and only the owner sees this option.

## 5.5 IT documentation

Where: Documentation

A dedicated area for the question of **what depends on what**:

```
Outlet in the room  ⟶  patch panel port  ⟶  switch port
```



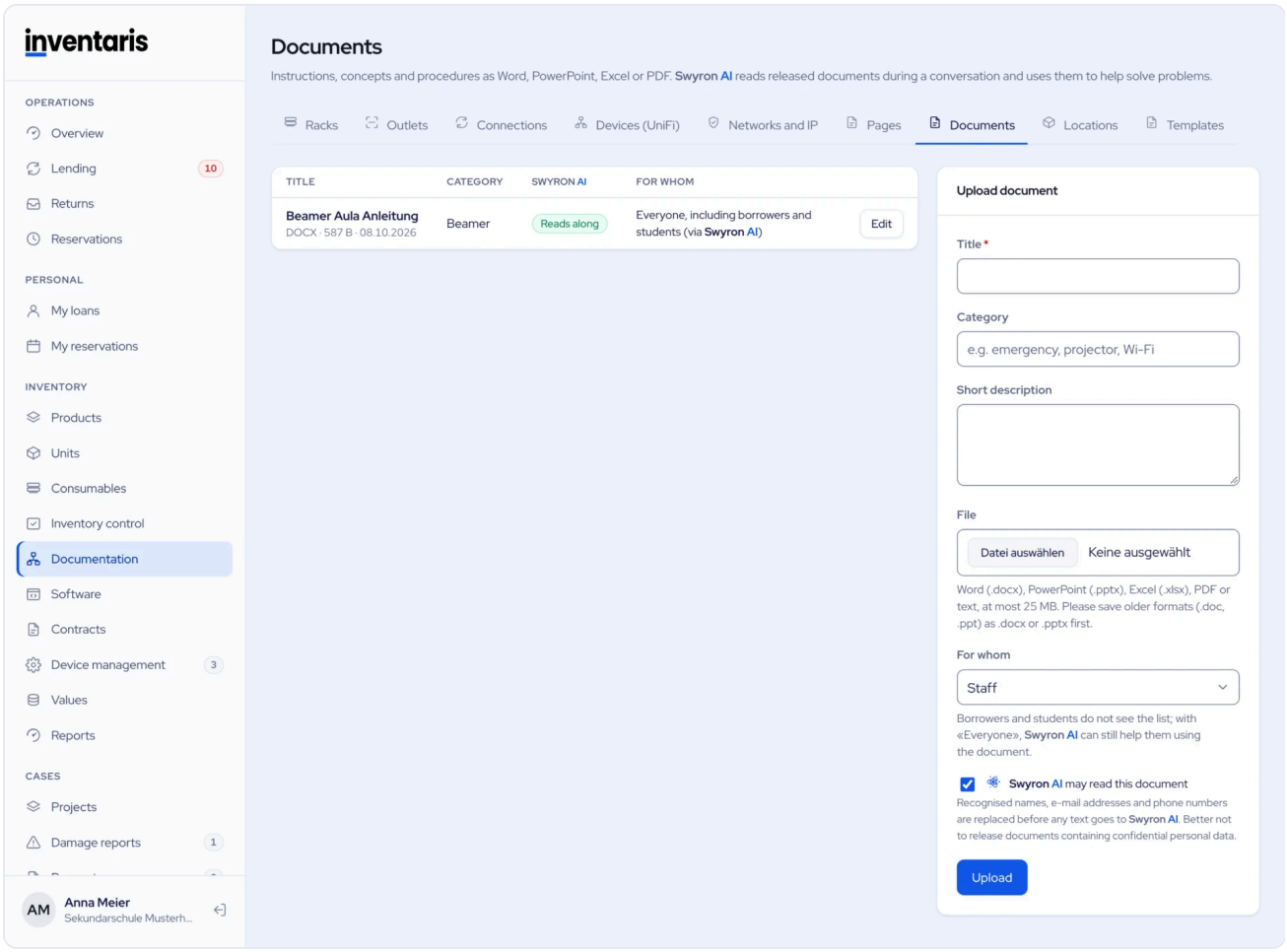

Cabinets, devices, ports, outlets, connections and networks, with drawn front panels that look like the real device.

- **Locations and cabinets:** with rack units and counting direction.
- **Devices in the cabinet.** When they are installed, the ports are created automatically from the form factor. Existing ports are never overwritten: connections hang on them.
- **Outlets:** per room, with labelling.
- **Connections.** A cable has two ends, and each end can only be assigned once.
- **Networks:** VLANs with address range and purpose.
- **Documents:** instructions, procedures and training slides as files that **Swyron AI** may read during the conversation (just below).

## Documents

**Where:** Documentation → Documents

This is the place for what doesn't fit into fields and already exists as a file: operating instructions, emergency procedures, concepts, training slides. With the **Swyron AI** add-on (5.11) they are more than an archive: **Swyron AI** searches them during the conversation and uses them to help solve problems. Anyone who may manage the inventory can upload, change and delete; anyone who sees the documentation sees the list. Like all of the IT documentation, this needs Pro.




On the left the list with the status of each document, on the right the upload form with For whom and the tick box for **Swyron AI**.

- Upload: title, optionally category and short description, plus the file: Word (.docx), PowerPoint (.pptx), Excel (.xlsx), PDF or text, at most 25 MB. Save older formats (.doc, .ppt) as .docx or .pptx first. Inventaris reads the text from the file; the file itself can be downloaded via its title.
- For whom: Staff (default) or Everyone. Borrowers and students never see the list; with Everyone, **Swyron AI** can still help them from the document, for example with the instructions for the projector in the hall.
- Swyron AI may read this document: on by default. Without the tick, the document remains an ordinary file and the list shows Not released.

The **Swyron AI** column shows whether the text could be read:

- Reads along: the text has been read, **Swyron AI** finds things in it.
- No text found: the file contains no readable text, usually a scanned PDF. **Swyron AI** finds nothing in it; a version with text (for example saved as PDF from Word) helps.
- Being read …: the text will be read in the background within the next few minutes.
- Not readable: the file could not be opened. Save it again (for example as .docx or PDF) and upload it once more. When editing, Read text again reads a file once more.

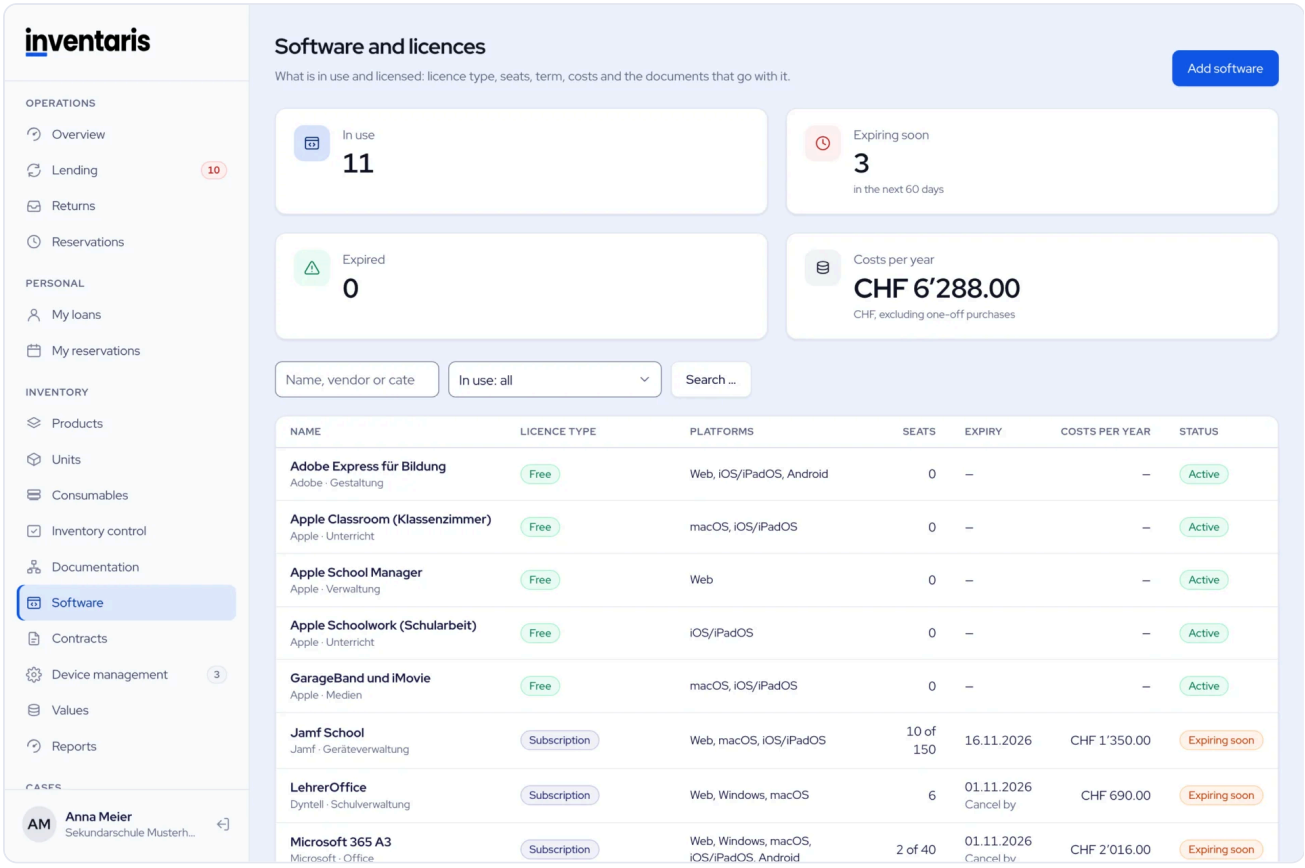
### What Swyron AI gets from documents

**Swyron AI** searches released documents, reads the matching passages and names the title of the document it relied on in its answer. Before any text goes out, Inventaris replaces recognised names, email addresses and phone numbers with placeholders. A name in an unusual form can slip through, though: so better not release documents with confidential personal data, such as class lists with contact details.

## 5.6 Software and licences

Where: Inventory → Software

Not a loan, but the overview of what is in use and licensed: Microsoft 365, the school administration software, the learning program. With licence type, seats, term, costs and the documents that go with it. Anyone who sees the inventory can view it; only managers, administrators and owners can change it, assign seats and see the licence key. Software is part of the IT documentation and requires Pro.




At the top, what is in use, what is expiring soon or has expired and what it costs per year; below, the list with seats and expiry.

- **Add software.** Name, vendor, category, version and platforms, the licence type, the number of seats (empty means no limit), term and costs.
- **Licence keys** are stored encrypted and shown only to the administration, with **Show**. Inventaris does not store passwords: **Password is kept in** only says where it is, for example in the IT department's password manager.
- **Assign a seat** to a person or a device (inventory or serial number, typed or scanned). Assigning more seats than purchased is possible, but the software then shows **More assigned than licensed**.

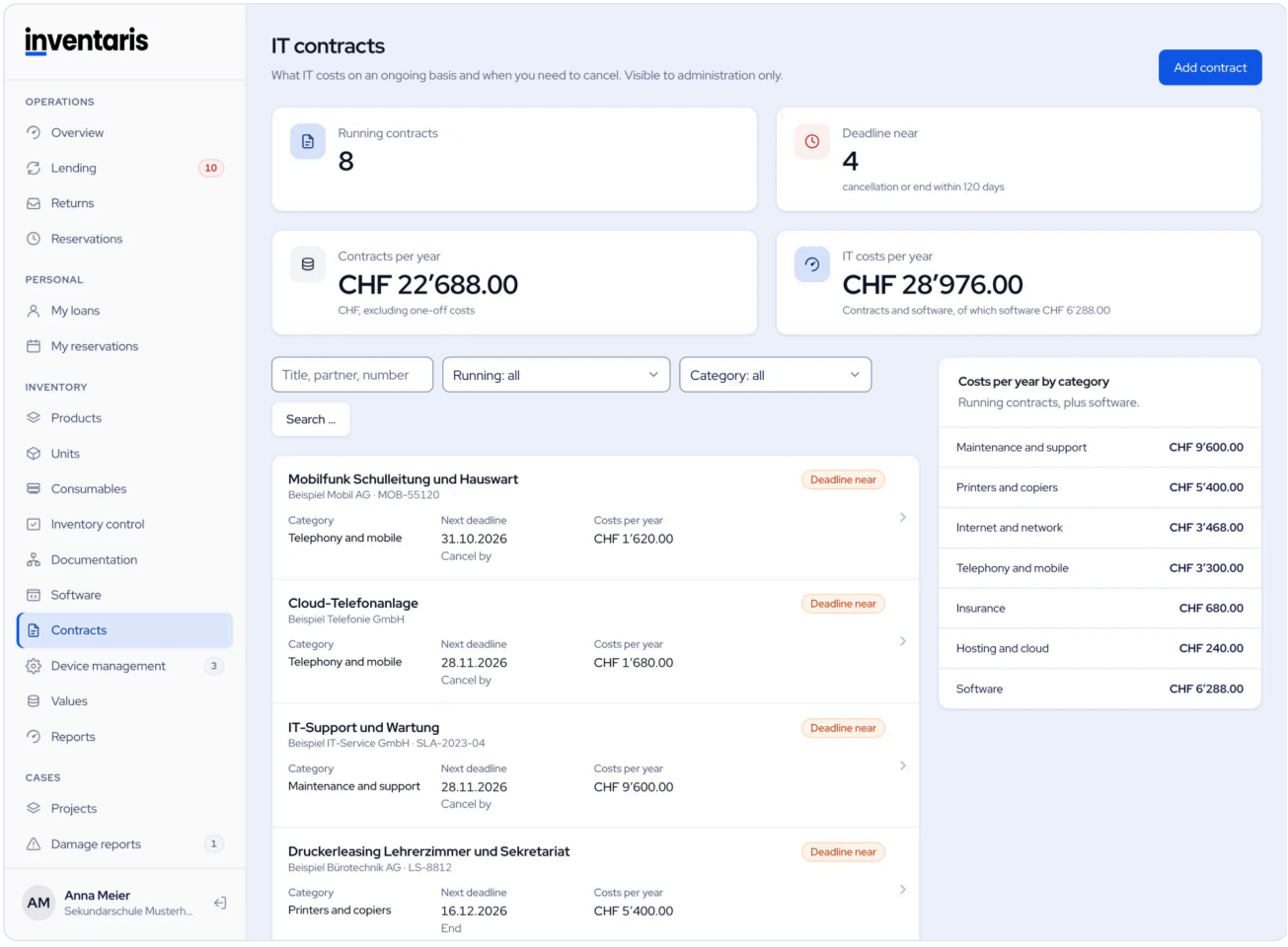
- **Expiry and reminder.** If a subscription renews automatically and has a notice period, Inventaris reminds you of the last day to cancel, otherwise of the expiry — by e-mail to the person responsible, or if nobody is chosen, to owners and administrators. The nightly run moves expired auto-renewing subscriptions on by a month or a year.
- **Documents** are short instructions and links, such as "Sign-in for teachers". Each one says whether **Swyron AI** may read it (**Read by Swyron AI**, on by default) or whether it stays **Internal only**. On top come files such as the licence certificate or invoice.
- **No longer in use** takes software out of the list and out of the costs; documents, files and seats are kept.

> **What Swyron AI reads from a software entry**
>
> Staff ask **Swyron AI** about software and get help using it, from the released documents. Account and notes only go along with their own release (off by default). The licence key and the password location never go out.

## 5.7 IT contracts

Where: Inventory → Contracts

What IT costs on an ongoing basis and by when you have to cancel: internet connection, telephony, printer leasing, maintenance, hosting, licence agreements, insurance. Only owners, administrators and managers see this area; staff members, borrowers and students never do. Like software, it is part of the IT documentation and requires Pro.




At the top, the running contracts, their costs, total IT costs and what has a deadline soon; below, the list.

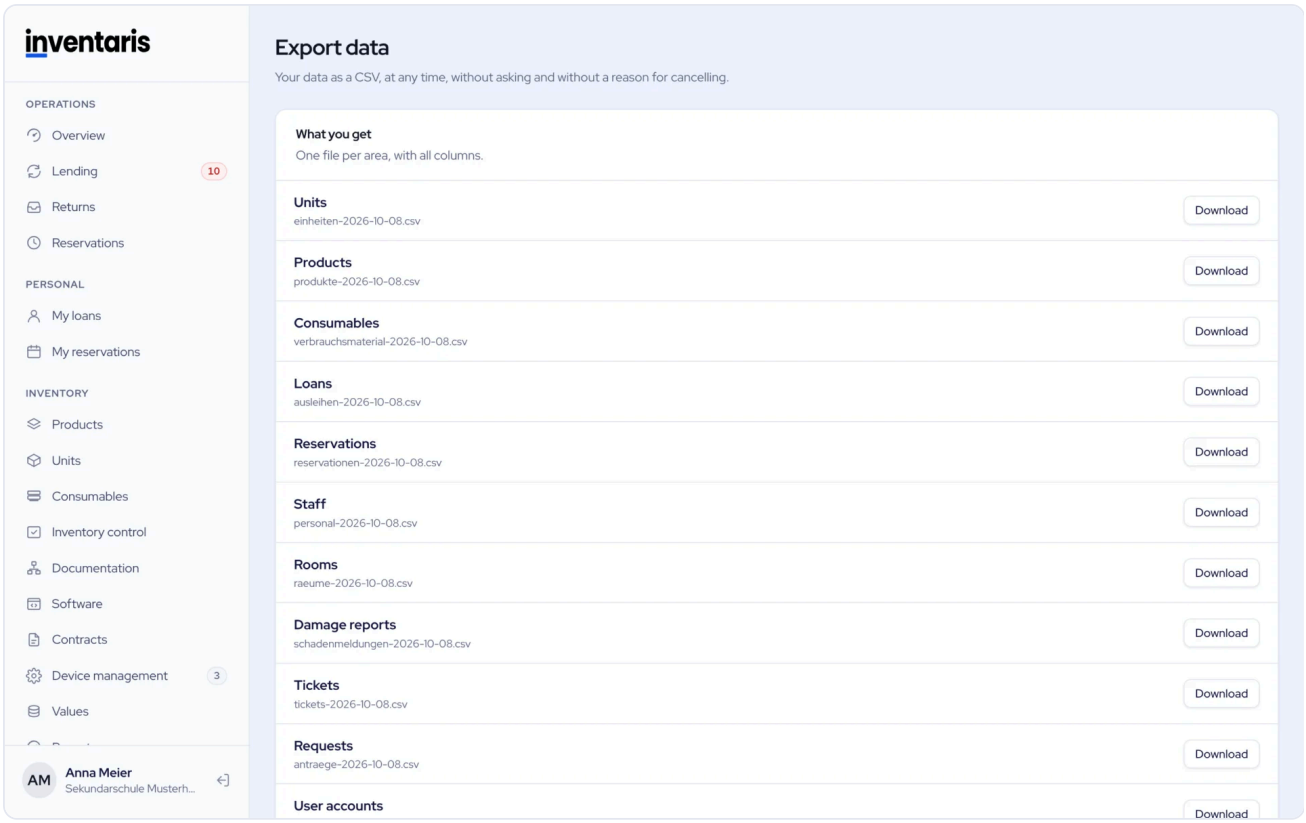
- **Add contract.** Title, contract partner, contract number, category and service, then start, end, notice period and whether the contract renews automatically, and by how many months. Plus amount and payment.
- **Next deadline.** If a contract renews automatically and has a notice period, Inventaris works out the last day to cancel; otherwise the end applies. If the deadline is missed, the one for the next term applies. An e-mail reminds you as many days ahead as you set — to the person responsible, or if nobody is chosen, to owners and administrators.
- **Record cancellation** once you have cancelled: the contract no longer renews, and no reminder comes. **End contract** once it has run out: it no longer counts towards costs. Both can be undone.
- **Costs. IT costs per year** adds up contracts and software. A licence agreement that you link to a software entry under **Belongs to software** isn't counted twice: its costs are shown with the software.
- **Files and contact person.** Attach the contract, quotes and invoices directly. Only the administration sees the contact person at the partner.

> **Swyron AI sees contracts only when released**
>
> Every contract has the box **Swyron AI may read this contract**, off by default; the notes need a second box. The contact person never goes along. Contracts that are not released are only counted by **Swyron AI**, so that it can say a total is incomplete.

## 5.8 Exporting data

**Where:** Administration → Export data

Your data belongs to you. You can get to it at any time, without asking and without anyone having to unlock anything.




One file per area. The file name carries the date. Otherwise, anyone who exports three times ends up with three copies of `einheiten.csv` in the folder.

### What you get

Eleven areas: units, products, consumables, loans, reservations, staff, rooms, damage reports, tickets, requests and user accounts. Each with all columns, statuses in words rather than as a code.

> **What happens when you open it in Excel**
>
> Nothing you'd have to do. The separator and character set are in the file; umlauts stay umlauts, and the columns end up in columns. That isn't a given. The most common disappointment with CSV is a table in which everything is in the first column.

> **Why the identifier is in the first column**
>
> So that the rows can be matched up again later, when importing into another system or when playing them back to us. For daily work, you hide the column.

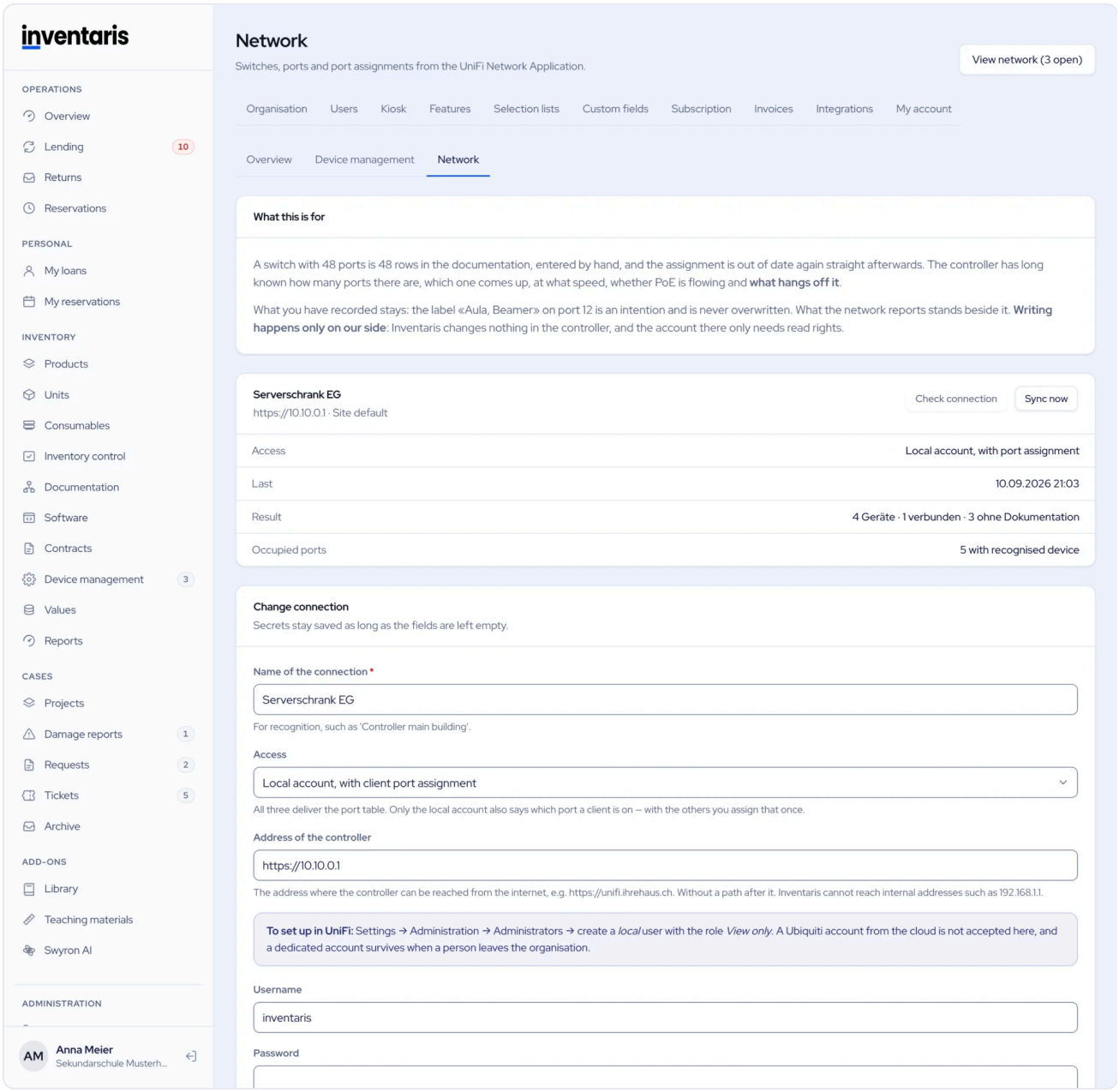
### What isn't included

- **Uploaded files.** Photos and receipts are attached to the respective entries and can be downloaded there individually. If you need everything at once, write to us.
- **Passwords.** They are never stored in plain text and would have no business in a downloads folder. For a migration, what's in the file is enough: name, address and role.

## 5.9 The network from UniFi

Where: Documentation → Devices (UniFi) optional

If you use **Ubiquiti UniFi**, the cabling doesn't have to be recorded by hand. A switch with 48 ports would otherwise be 48 rows. And the port assignment is out of date again straight away. The controller has long known how many ports there are, which one is up, at what speed, whether PoE is flowing and **what is connected to it**.




Settings → Integrations → Network. One connection per organisation; multiple locations are "Sites" in UniFi within the same controller.

1. **Create a local account in UniFi**
   Settings → Administration → Administrators, role **View only**. A Ubiquiti cloud account is not accepted. A dedicated account also survives when a person leaves the organisation.

2. **Enter the address and account**
   The address at which you open the interface, for example `https://192.168.1.1`, with no path after it.

3 Check the connection

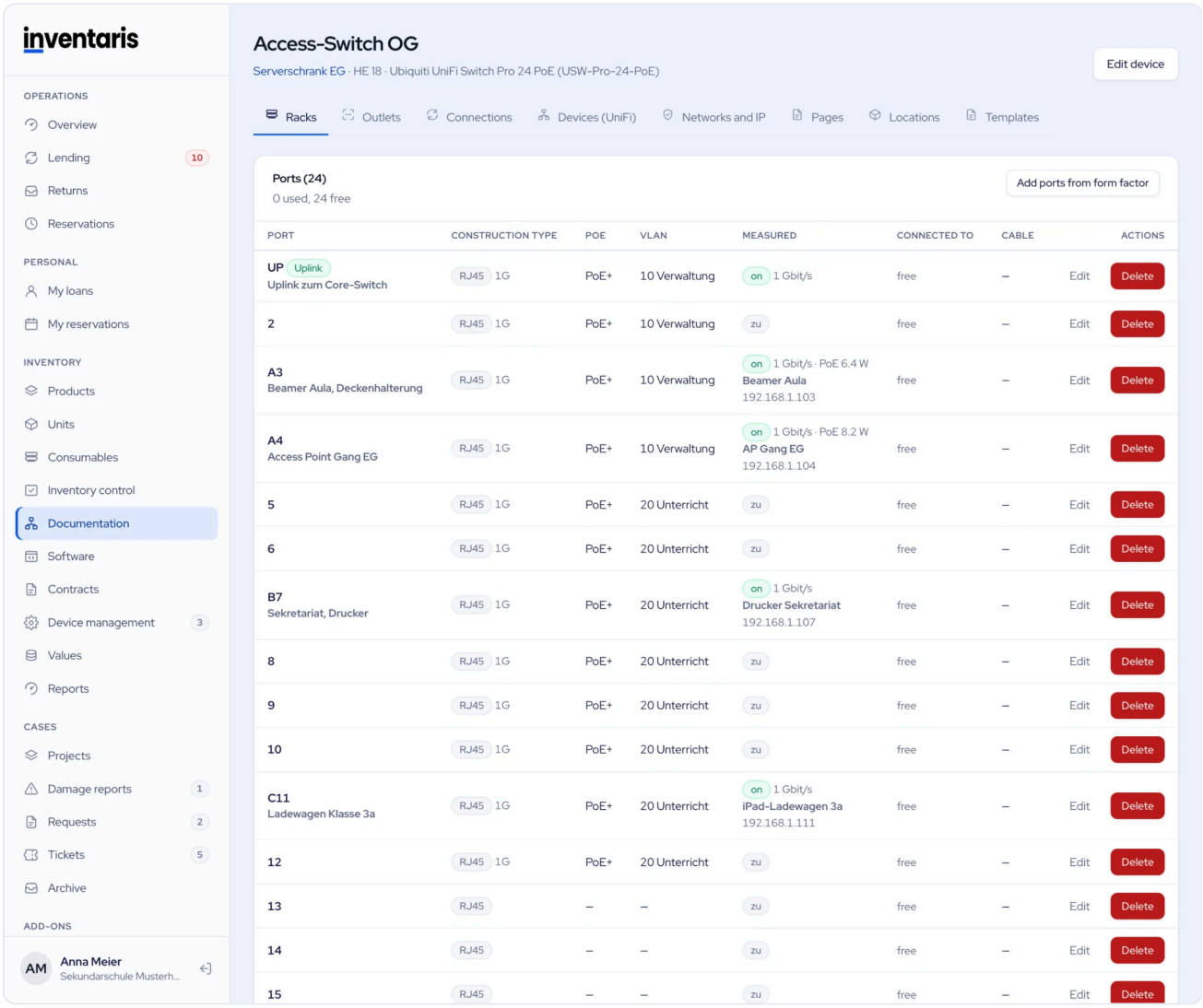
Only a token is fetched. Afterwards it shows which sites the controller knows.

4 Sync now

> **Account or API key: not a matter of taste**
>
> The API key is more convenient to set up, but delivers **no port assignment**, which is exactly what this connection is for. For a mere device list it's enough; for documenting the cabling you need the local account.

## The rule that holds everything together

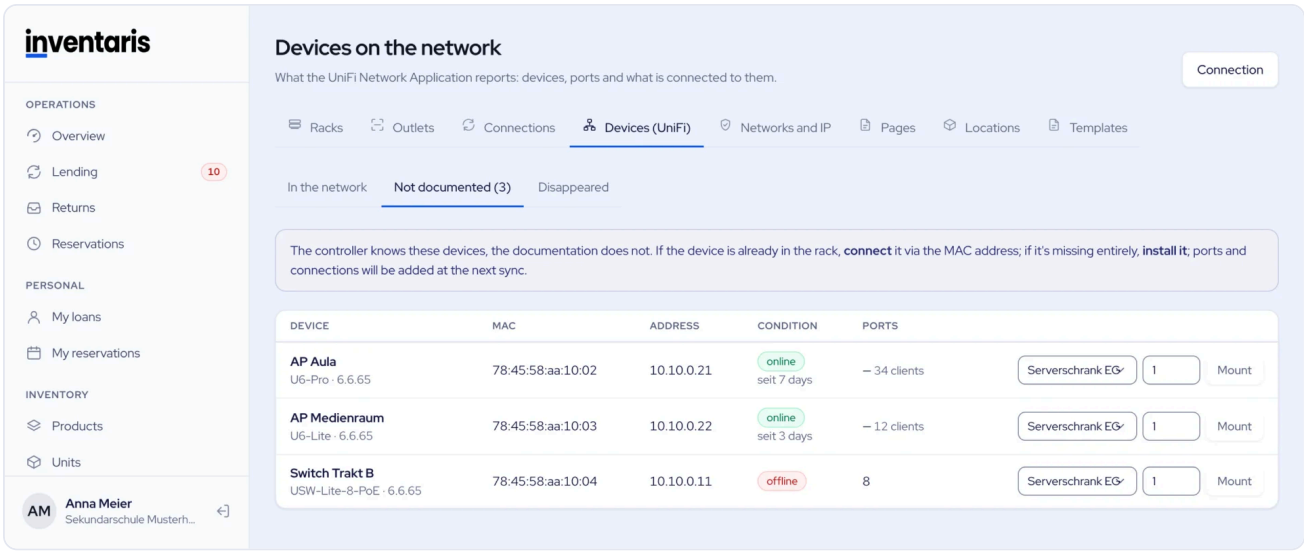
> **The network says what is; the documentation, what is meant**
>
> 'Aula, beamer, ceiling mount' on port 12 is an **intention**. 'Up, 1 Gbit/s, PoE 6.4 W, Beamer Aula, 192.168.1.103' is an **observation**. Both stand side by side and are never mixed: **Your labelling is never overwritten.**




On the left your label, in the column **Measured** the condition from the network, with speed, PoE power and the device currently connected to it.

What the sync does

- It connects network devices to what's in the documentation via the MAC address.
- It creates missing ports. 48 rows by hand are an imposition, and the controller knows the number. Existing ports are never overwritten: connections depend on them.
- It updates the measured condition.
- It creates no devices. Where a device belongs is something only a person knows: rack, rack unit, form factor.
- It writes nothing to the controller. No port is switched, no device restarted.



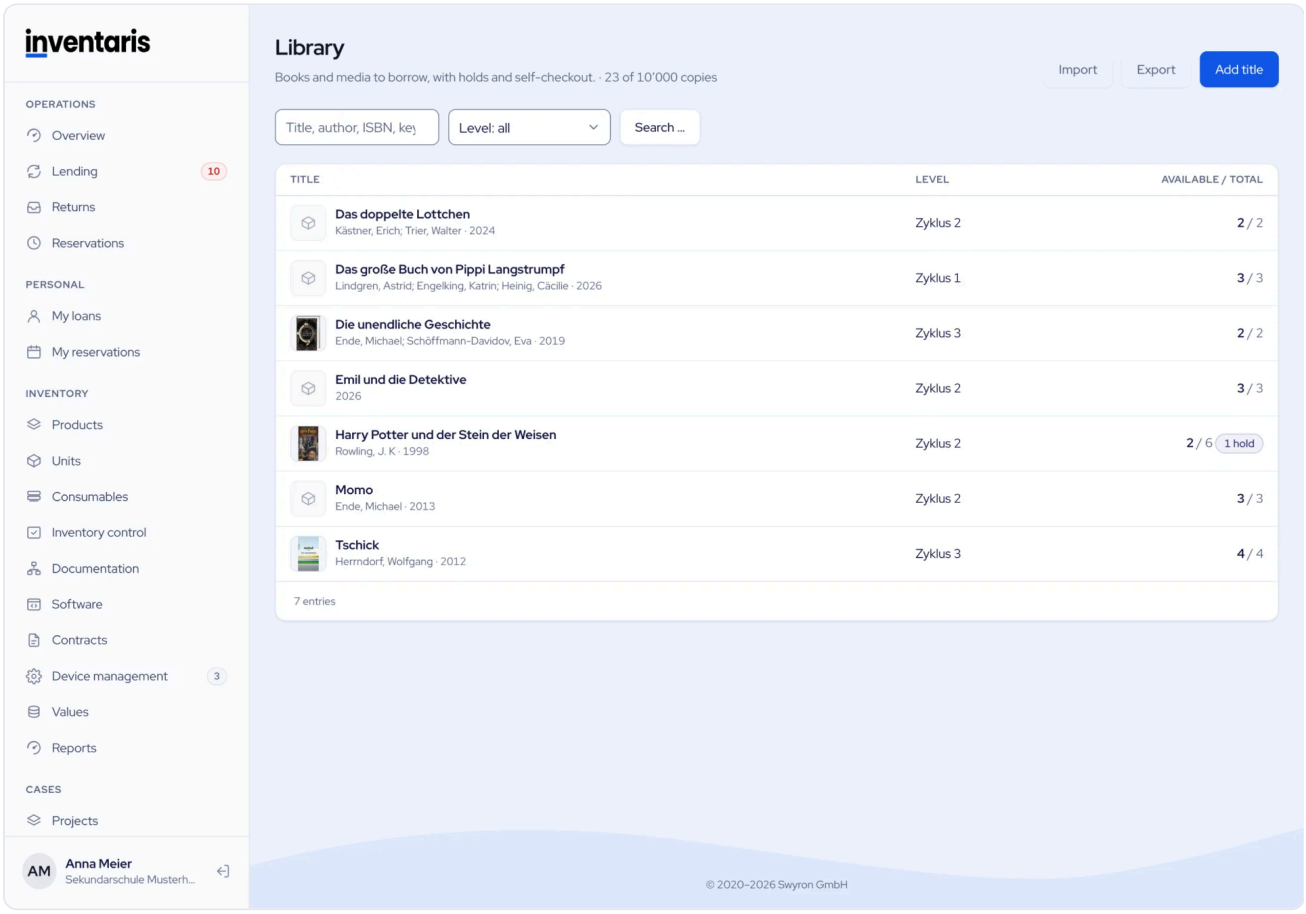

The gap. The controller knows these devices, the documentation doesn't. If the device is already in the rack, connect it; if it's missing entirely, install it.

## Overnight on its own

The sync runs every night at 05:40, device management (2.14) at 05:20. When it last ran and what came of it is shown on the settings page.

## 5.10 Library and teaching materials

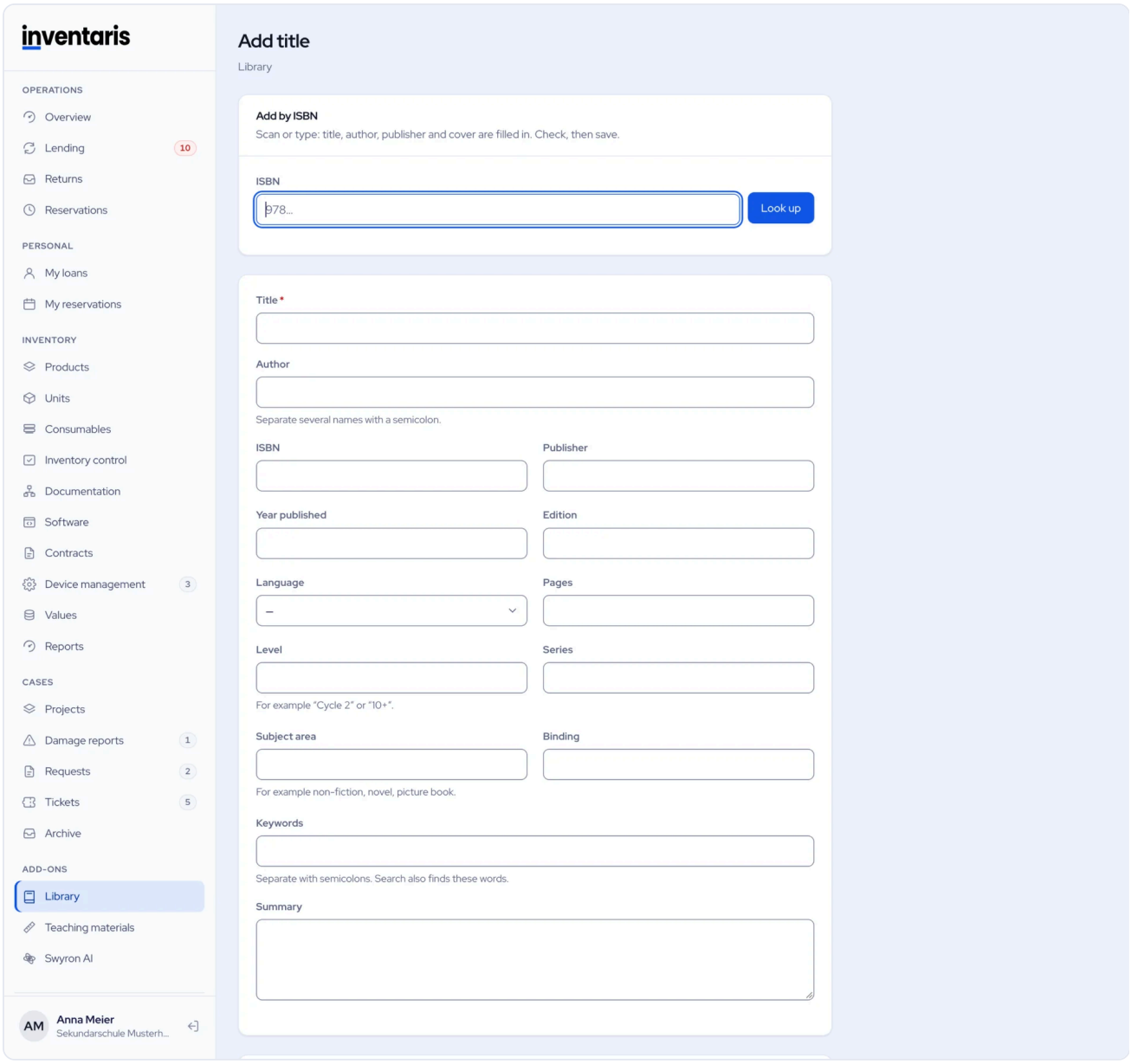
The **library** and **teaching materials** are two add-ons. Both work the same way: a **title** with its details and, below it, the **copies**, each with its own number for the label. Titles and copies are not part of the device inventory and do not count towards the subscription's units; the booked tier limits the copies.




The catalogue: search by title, author, ISBN or keyword, filter by level; on the right available and total copies.

### Adding a title

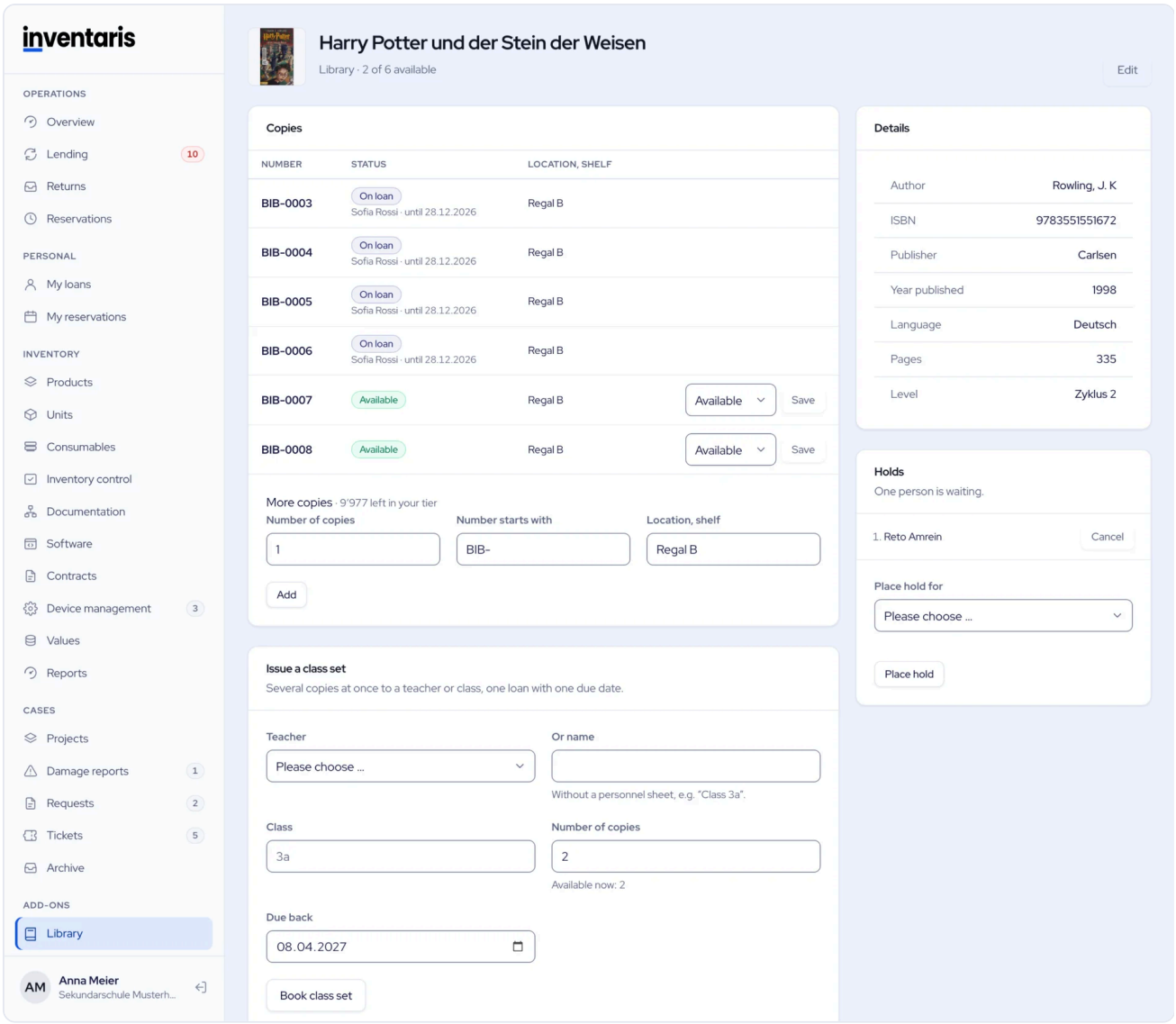
Under **Add title**, scan the ISBN and press **Look up**: title, author, publisher and cover are filled in, from ISBNdb first, otherwise from the German National Library or Open Library. Check the details, add level and location, choose the number of copies and save. Without an ISBN you enter it by hand. If the title already exists, the lookup takes you straight to it and you add copies there.




Scan the ISBN at the top and Look up, check and complete below; at the bottom the number of copies, number prefix and location.

## Loans, class sets, returns

At the desk, books are scanned like devices and can be on the same loan. For a class set, choose the teacher or class, the number and the due date on the title page: one loan with all copies. Returns work as usual. You set a copy's condition (damaged, retired, lost) on the title page.




The title page: copies with condition and loan, add copies, issue a class set; on the right details and holds.

## Holds

When all copies are on loan, you can place a hold on a title. First come, first served. When a copy comes back, the return says "Set aside for …" and the person gets an email. The copy waits for them for seven days; otherwise the next person moves up.

## Importing an existing list

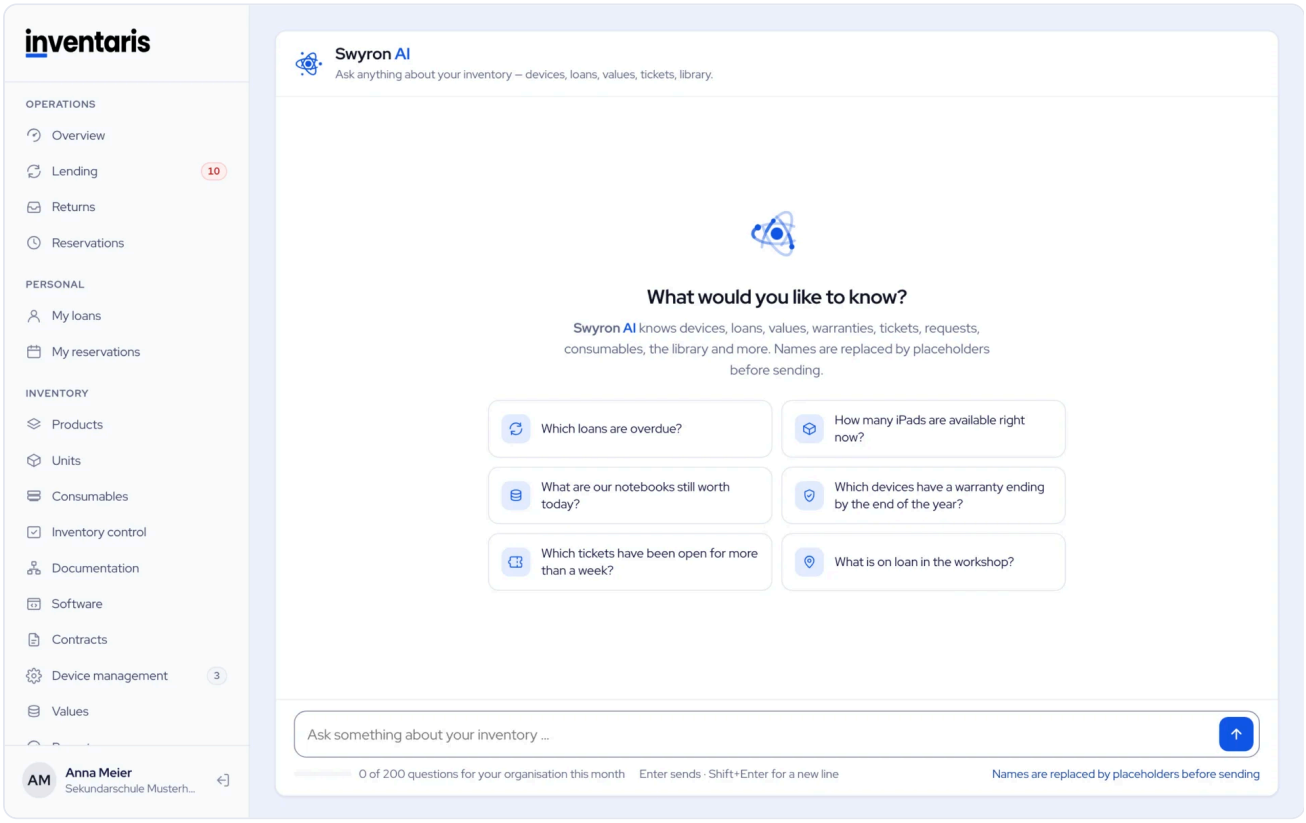
Under **Import**, upload a CSV file. A Title or ISBN column is required; number, author, level, location and quantity are optional. Barcodes already stuck on the books are kept as numbers. You see a preview first; nothing is written until **Apply**. **Export** delivers the whole holdings in the same format.

> **Students (role Student)** see only their overview, the library, their own loans and their card. They search for books and place holds; they may borrow books themselves if **Self-checkout for students** is switched on (2.3), otherwise books are lent at the counter. They get neither devices nor teaching materials, not even at the kiosk. With Microsoft 365 they come from the group `SiGR-Inventaris-SuS`; otherwise you assign the role by hand. Students do not count as subscription users.

## 5.11 Swyron AI

Where: Add-ons → **Swyron AI**, or the question field on the overview

Swyron AI is an add-on: questions about your stock in everyday language, answered from your own data. “Which loans are overdue?”, “What are our notebooks worth today?”, “Which devices go out of warranty by the end of the year?”. Depending on the tier booked, your organisation has a fixed number of questions per month.




**Swyron AI** before the first question. Below the field it says that names are replaced before sending.

### Asking questions

Type the question into the field and press **Enter**; Shift+Enter starts a new line. Follow-up questions go in the same conversation: “and of those, only the ones in the workshop?”. If **Swyron AI** offers several answers to choose from, tap one of them. **Clear chat history** starts over. **Swyron AI** only answers questions about Inventaris: it is not there for writing texts, research or general knowledge, and such questions don’t count against the quota. What your organisation hasn’t booked, it tells you openly instead of guessing.

### Help with a device

If a device isn’t working, give its inventory number: “NB-0012 won’t start”. **Swyron AI** then knows the model, accessories and the instructions on the product (2.11) and guides you step by step; without a number it asks for one first. Numbered steps can be ticked off as tried, and that goes along with the next message. Staff get help with a software in the same way, from its released documents (5.6).

### Answers from your organisation’s documents

For questions about operation, procedures or problems, **Swyron AI** first looks in the documents your organisation has released under Documentation → Documents (5.5), for example “How do I switch on the projector in the hall?”. In the answer it names the title of the document it relied on; if nothing there fits, it says so. Borrowers and students only get help from documents for **Everyone**.

### Ticket or damage report from the conversation

If the help wasn't enough, **Swyron AI** suggests a ticket – or a damage report if something is broken, cracked or dangerous. The button opens the usual form, pre-filled with subject, description, what has already been tried and an estimated priority. Check every field and tick **I have checked the details and they are correct.** Without it nothing is reported: **Swyron AI** never creates anything itself.

### Replies in the ticket

Whoever handles tickets finds two buttons below the comment field: **Revise with Swyron AI** takes your draft in the field and polishes it, **Suggest a reply with Swyron AI** writes a suggestion from the ticket, its history and the instructions. The text lands in the field; it is only sent once you have checked it and send it yourself. Each suggestion counts as one question. The buttons only appear with the switch **Swyron AI suggests ticket replies** (2.3), off by default: for it, the ticket texts go to **Swyron AI**.

### Who may use Swyron AI

- **Owners, administrators, managers and staff members** query the stock as far as their role can see it. **Swyron AI** sees IT contracts only for the administration, and only those released one by one (5.7).
- **Borrowers** ask about their own loans, reservations and reports and get help with the devices they have or that are fixed in a room. They see neither stock nor values. Switch **Swyron AI for borrowers**, on by default.
- **Students** get the same in a simple form, without reservations and without reports. Switch **Swyron AI for students**, off by default.
- The **kiosk account** never.

Only owners and administrators see how many questions have been asked this month: the quota belongs to the organisation. Once it is used up, **Swyron AI** is available again from the next month, or you book a larger tier under Settings → Subscription.

#### What happens to your information

Before a question goes out, Inventaris replaces people's names, e-mail addresses, phone numbers and the name of your organisation with placeholders such as `P-4821`. The data **Swyron AI** reads also refers to people only by placeholder; they only turn back into names on our server. The mapping exists only in your session.

To be honest: recognition works with the names from your staff and with common forms such as "Mrs Smith" or "Hello Anna". A name in an unusual form can slip through. So don't put personal data into a question that doesn't need it.

The question is processed by an external provider of a language model. Inventaris keeps the conversation only for the duration of your session; only the number of questions is recorded. Who the provider is and what happens to the data there is set out in the privacy policy.

To the privacy policy, section **Swyron AI**

PART 6

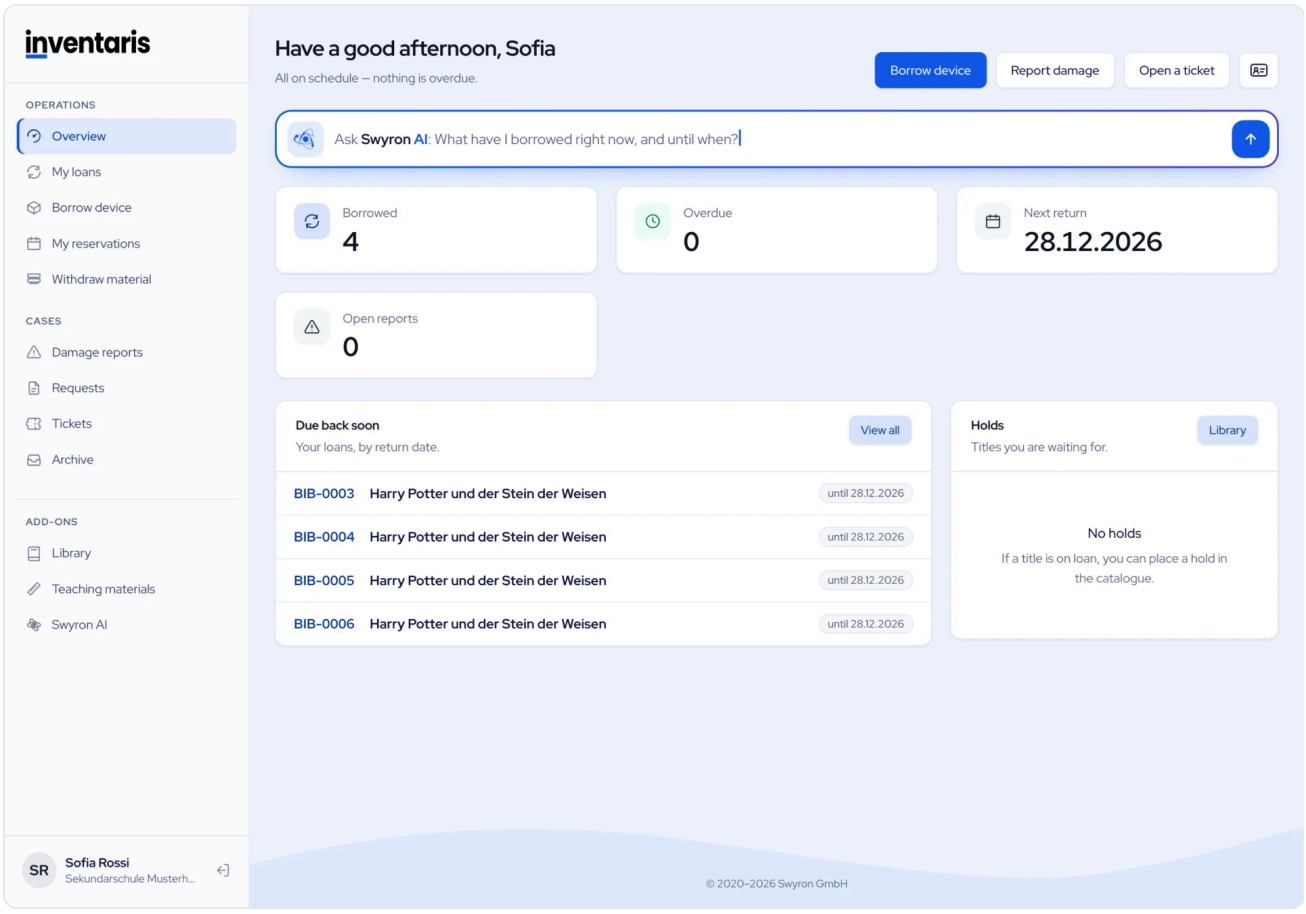
# For borrowers

This part is meant for everyone who uses devices, not manages them. It deliberately stands on its own: you can print it separately and put it up in the staff room, without anyone needing the other six parts.

## 6.1 What you see

As a borrower you see only your own things. Not what colleagues have borrowed, and not the entire stock. No values, no settings. The same goes for students (role Student), only shorter still: overview, my loans, library and card.

Your menu has the same headings as the administration's, just fewer items beneath them: under Operations is what you do every day — seeing what you have, and getting something. Under Cases is what you report, and what has become of it. Under Add-ons is what your organisation has booked on top: library, teaching materials and Swyron AI.




A borrower's overview with their menu. Whether Borrow device and Withdraw material appear in it is decided by your organisation in the settings.

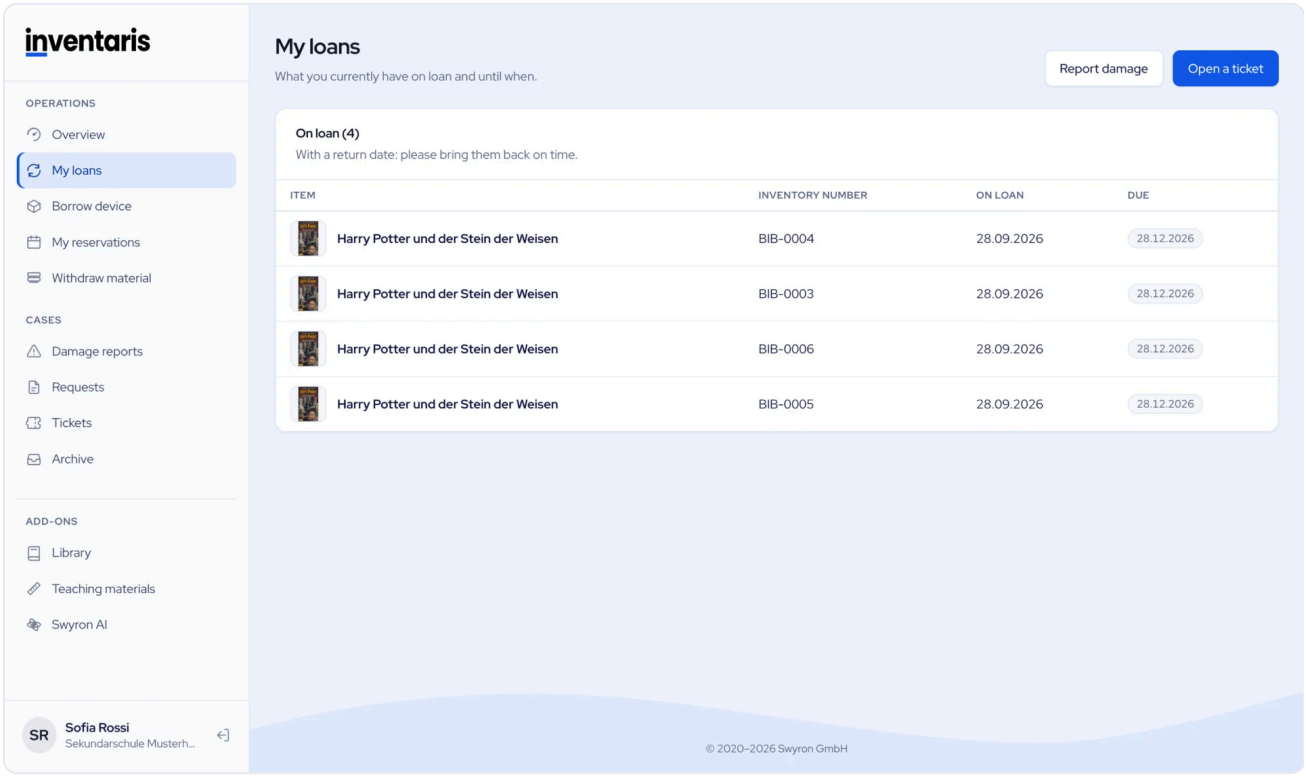
| MENU ITEM | FOR THAT |
|---|---|
| Operations | |
| Overview | Your home page: what you have, what is due back soon, your reservations and reports, plus the buttons for the most common tasks. See below. |
| My loans | What you currently have and until when. If there is a red number next to it, something is overdue. |
| Borrow a device | Only if your organisation has switched on self-checkout: scan or choose a device and book it to yourself, without the counter. See 6.3. |
| Reservations | Reserve a device for a particular day. |
| Withdraw material | Only if your organisation has switched on self-withdrawal: take consumables in your own name. |
| Cases | |
| Report damage | When something is broken or missing. |
| Requests | When something needs to be purchased. |
| Tickets | Everything else that needs attention. |
| Archive | What you have dealt with. It sits at the end of the cases, because that's where you look for it when an old case turns up again. |
| Add-ons | |
| Library | Search, borrow and place holds on books. See 6.9. |
| Teaching materials | Like the library, for teaching materials. |
| **Swyron AI** | Questions about your loans and help when a device doesn't do what it should. See 6.11. |

> The number next to a menu item
>
> It always means: **something of yours is here**. A red number next to **My loans** means that something is overdue. If there is no number, nothing is outstanding.

### Your overview

After signing in you land on your overview. At the top are the buttons for the most common tasks: **Borrow device** (if self-checkout is switched on), **Report damage**, **Open a ticket** and, far right, your card (6.10). Below that is the **Swyron AI** question field, if your organisation has switched it on for you, then the figures: what you have borrowed, what is overdue, when the next return is due and how many of your reports are open. Under **Due back soon** is what has to go back next, alongside your reservations and, with the library, your holds. Students see the same page without reservations and reports.

## 6.2 My loans




Loans with a due date at the top, permanent assignments below, one device per line.

The page has two cards: at the top **On loan**, everything with a return date; below it **Permanently assigned**, what stays with you without a due date. Staff and admins find the page under “Personal” in the menu.

At the top right are **Report damage** and **Open a ticket**. If something is broken or missing, it is damage (6.5); if something doesn’t work as expected, a ticket (6.7). The ticket is the more common case and therefore the blue button.

The information on the right tells you how much time is left:

| | |
|---|---|
| 5 days left | All in order. |
| due tomorrow | Please remember to return it. |
| 3 days overdue | The due date has passed. Please return it or have it extended. |
| no due date | Fixed-assigned: the device belongs to you permanently. No return date, no reminder. |

### How to extend

You can't do that directly. The counter sets the due date. Write a short message to the contact address in your reminder email, or open a ticket (6.7).

**The reminder email**

If reminders are switched on, you receive an email a few days before the due date with the list of your devices and the date. Once the due date has passed, it comes again at a fixed interval. As soon as you return the items, it stops. You don't have to do anything to turn it off.

If you have a Microsoft account and Inventaris is installed in Teams, the same reminder also arrives under **Activity** in Teams.

## 6.3 Borrowing a device yourself

Where: Operations → Lend device

**Only if your organisation has switched it on**

Self-checkout is off by default – in most organisations issuing goes through a counter. If the item **Borrow device** isn't in your menu, it isn't switched on for you. Contact the administration; for them it's in 2.3.

1. **Specify the device**
   Scan the inventory number or choose from the list. The list holds only devices that are released for self-checkout and are currently free – what is missing there is handed out by administration at the counter.
2. **What for (optional)**
   A keyword helps if someone is looking for the device: «Class camp», «Assembly hall».
3. **Press Book to me**
   The device then appears under **My loans**, with the due date that was announced at the top of the form.

**What you don't decide yourself**

**Who it is booked to:** always to you. There are no fields for name, class or email – those come from your staff sheet.
**The due date:** your organisation sets it (default 14 days). If you need the device longer, the administration extends it on the loan.
**The quantity:** one device per booking. For a second one, simply book again.

### Why a device doesn't work

| REPORT | WHAT'S BEHIND IT |
|---|---|
| This device is only issued at the counter. | It isn't released for self-checkout. The expensive camera and the measurement case are handed out by someone who knows who's standing in front of them. |
| This device is currently not available. | It's on loan, fixed-assigned, under repair or blocked. |
| This device is already reserved for this period. | Someone else has reserved it. Your own reservation never stands in your way – it is redeemed with the booking. |
| This device has since been taken. | Between selecting and booking, someone else has taken it. Choose another. |

### Take consumables

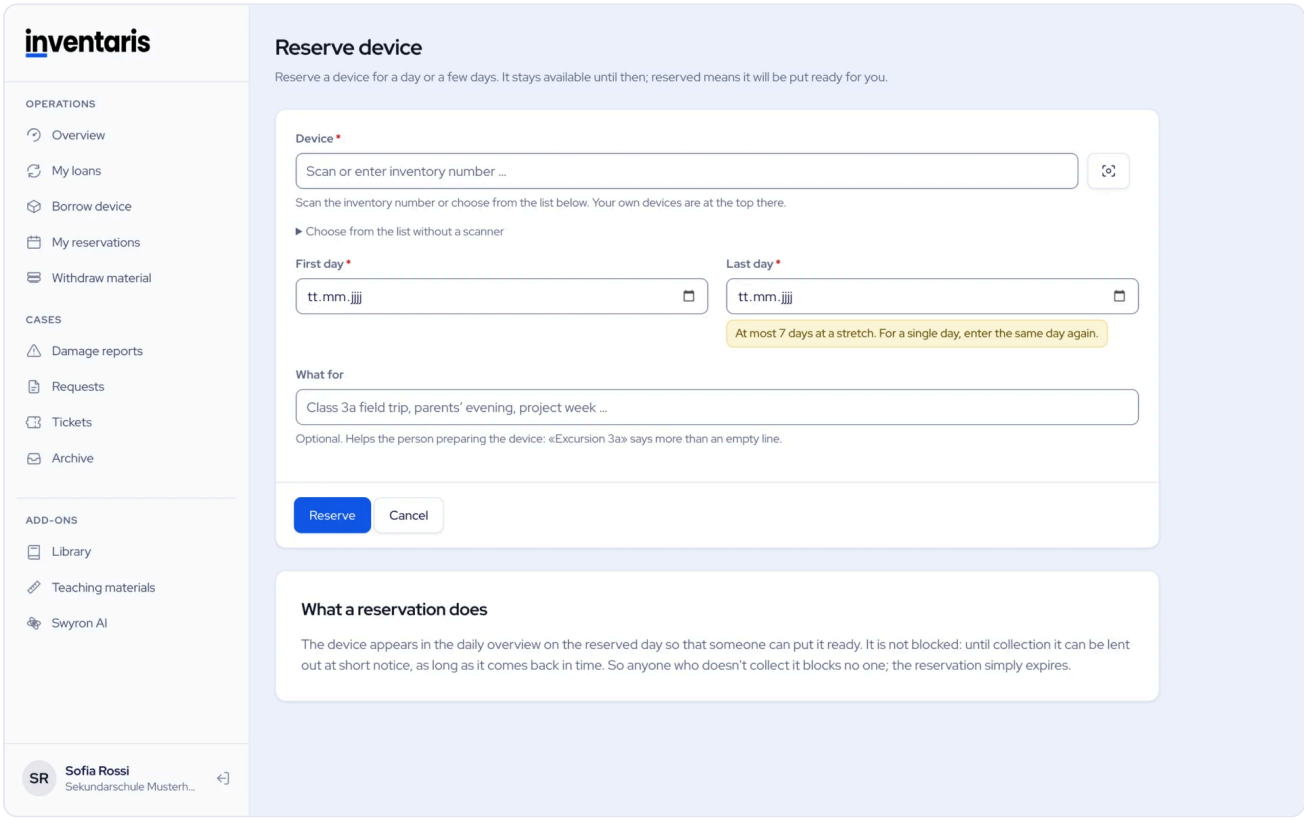
If **self-withdrawal** is also switched on, the menu additionally shows **Withdraw material**: a list of what is in stock, with a quantity field per line. Withdrawals are always made in your name — at the bottom of the page are your recent withdrawals, in case you want to check whether a booking has come through. Only administration can add stock.

## 6.4 Putting a hold on a device

Where: My reservations → Reserve device

Staff and admins see the whole organisation's under "Reservations"; their own are under **Personal** → **My reservations**.

Need the projector on Thursday? Reserve it instead of hoping. Then no one else can reserve it for that day, and on Thursday morning the administration sees that it needs to be ready.




For a single day the first date is enough. The second sets itself.

1. **Choose the device**
   From the list. It holds the devices you are allowed to reserve yourself. If one you expect is missing, your organisation hands it out at the counter — a brief question there, and it's done.

2. **From when to when**
   For a single day: fill in only the first field. How many days in a row are possible is set by your organisation; usually seven.

3 Purpose

optional

«Physics week», «Parents' evening». Helps the counter with getting things ready.

4 Submit

What happens next

- The reservation appears as Reserved in your list.
- On the day itself it appears on the administration's screen under **Reserved today**.
- You collect the device as usual at the counter; there it becomes a loan.
- If you don't need it after all: **Withdraw**. The reservation disappears, and the device is immediately free for others again.

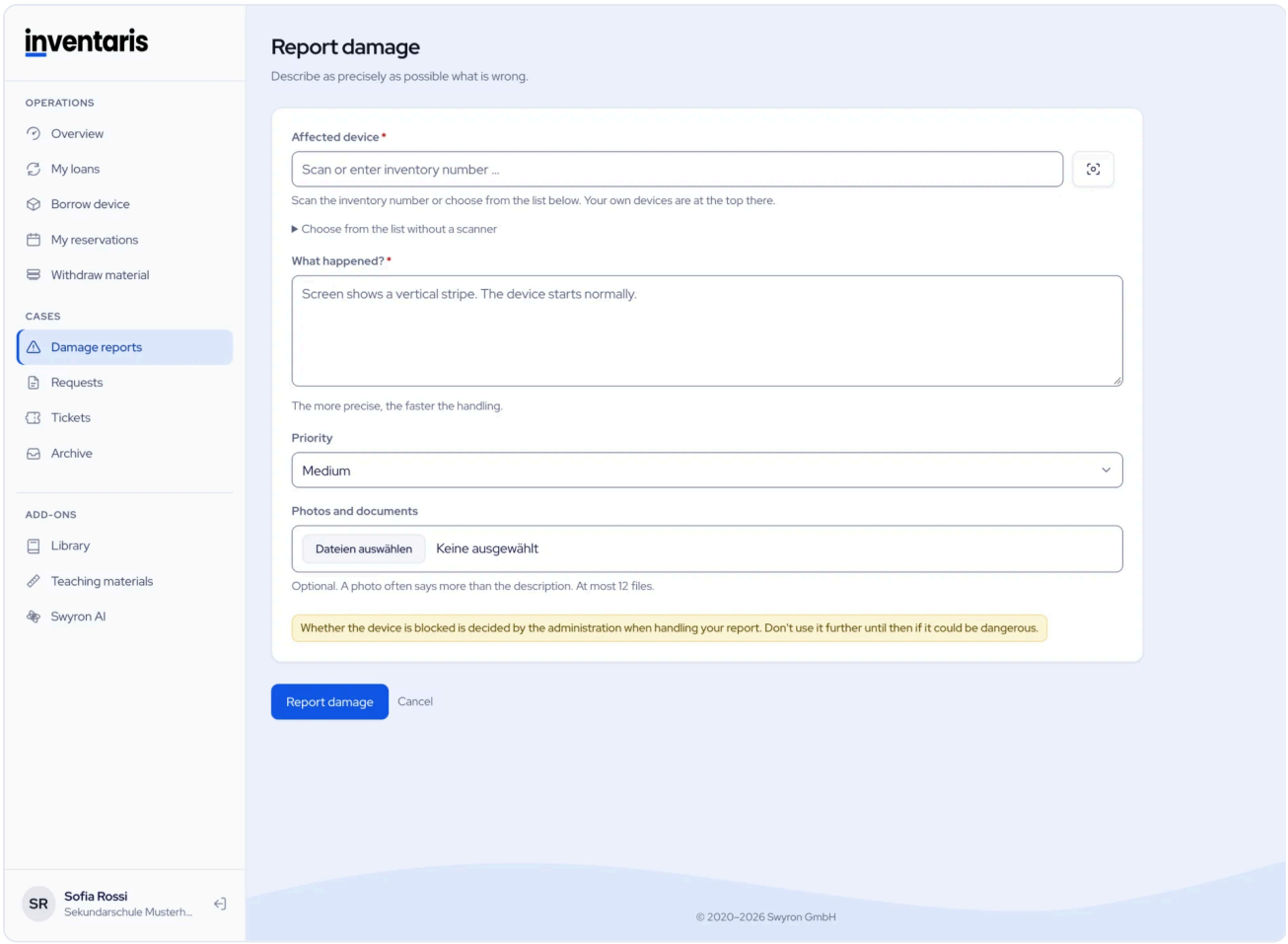
When the device is already taken

Then the application tells you so right when you submit, together with the period for which it is already on hold. Choose another day or an equivalent second device.

## 6.5 Reporting damage

**Where:** Damage reports → Report damage

Something is broken, missing or behaving strangely. Better to report it once too often: a report costs thirty seconds, an unnoticed fault costs the next lesson.




The photo can be attached right here, not only after saving.

### What belongs in a good report

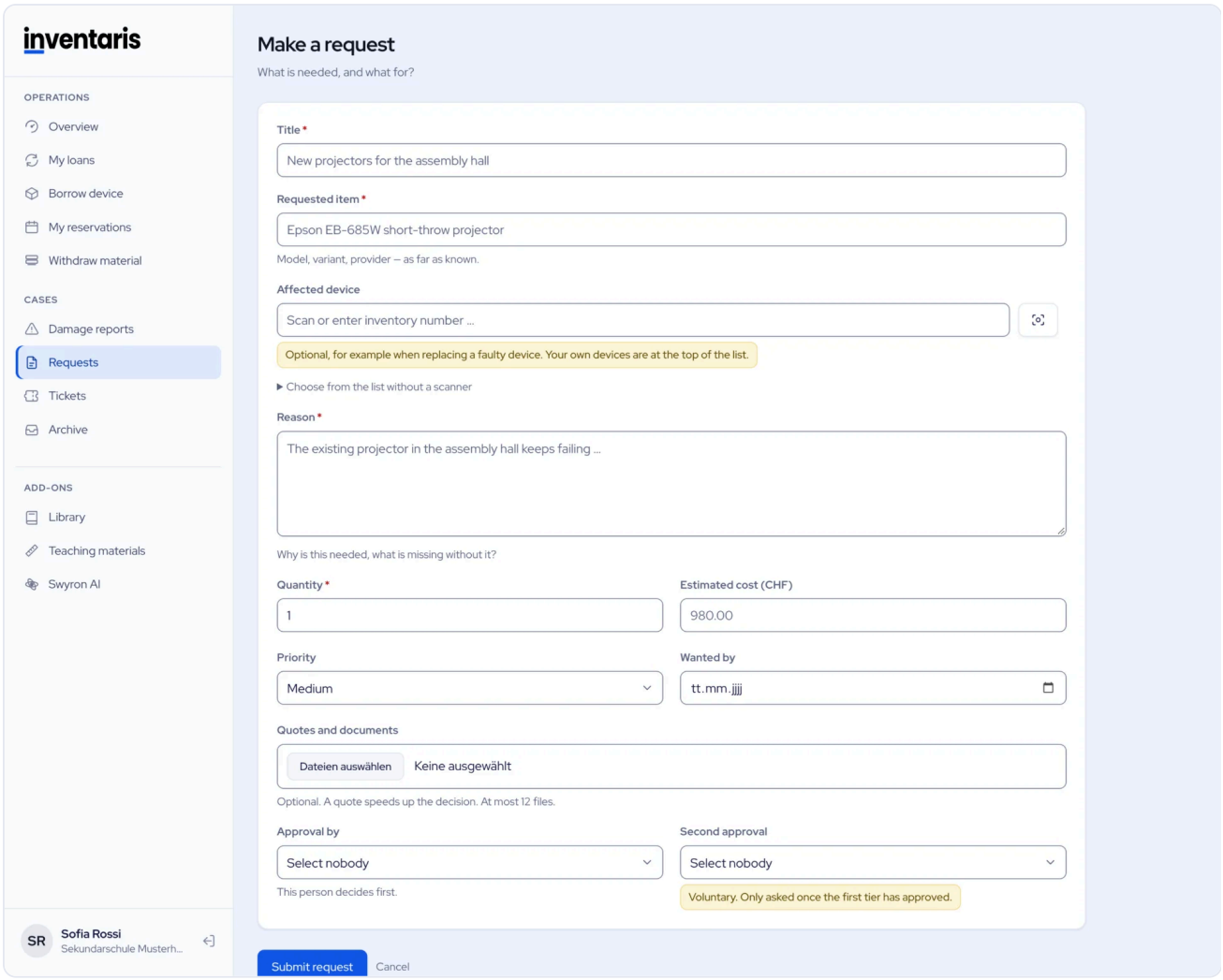
- **Which device:** best via the inventory number on the sticker.
- **What exactly happens:** «the picture flickers after about ten minutes» instead of «doesn't work».
- **Since when**, and whether it happened before.
- **A photo.** For anything visible it saves half the follow-up questions.

> **What happens next**
>
> Your report appears at the administration with the state `Open`. As soon as someone takes it up, it changes to `In progress`. You see this in your own list and do not have to ask. The device stays usable at first; whether it is blocked is decided by the administration.

## 6.6 Making a request

**Where:** Requests → Submit request

For acquisition requests: something new, something additional, a replacement for something old.




Quantity, estimated price and preferred date help the person who decides. The approver is optional.

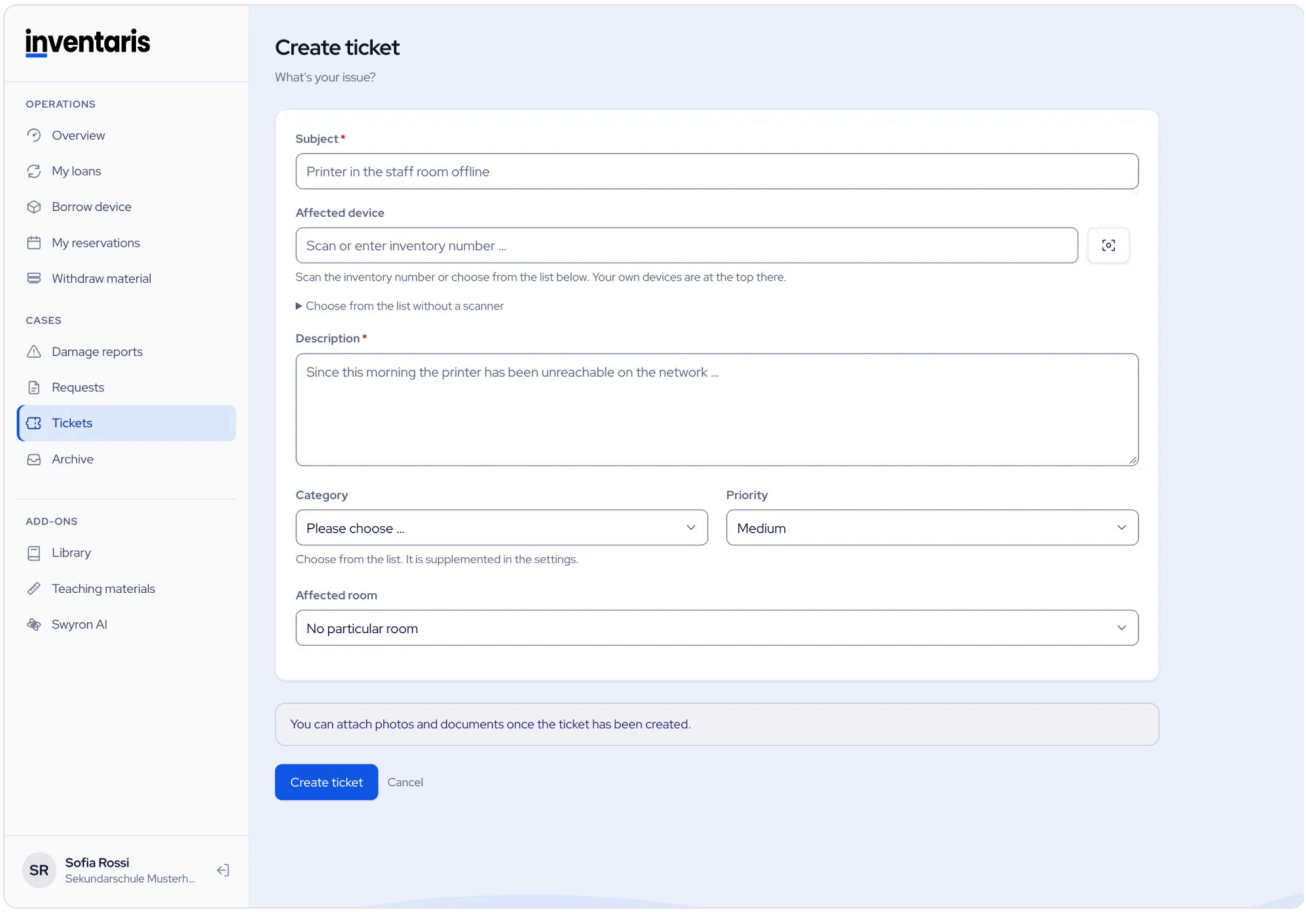
> **A sentence that makes your request better**
>
> In the reason, write **what won't work without the acquisition**, not what would be nicer with it. «Two classes need the document camera at the same time, on Tuesdays one goes without» is an argument. «Would be handy» is not.

You can see the progress in your list: from Submitted through Approved and Ordered to Delivered. If it's rejected, the reason is shown alongside.

## 6.7 Opening a ticket

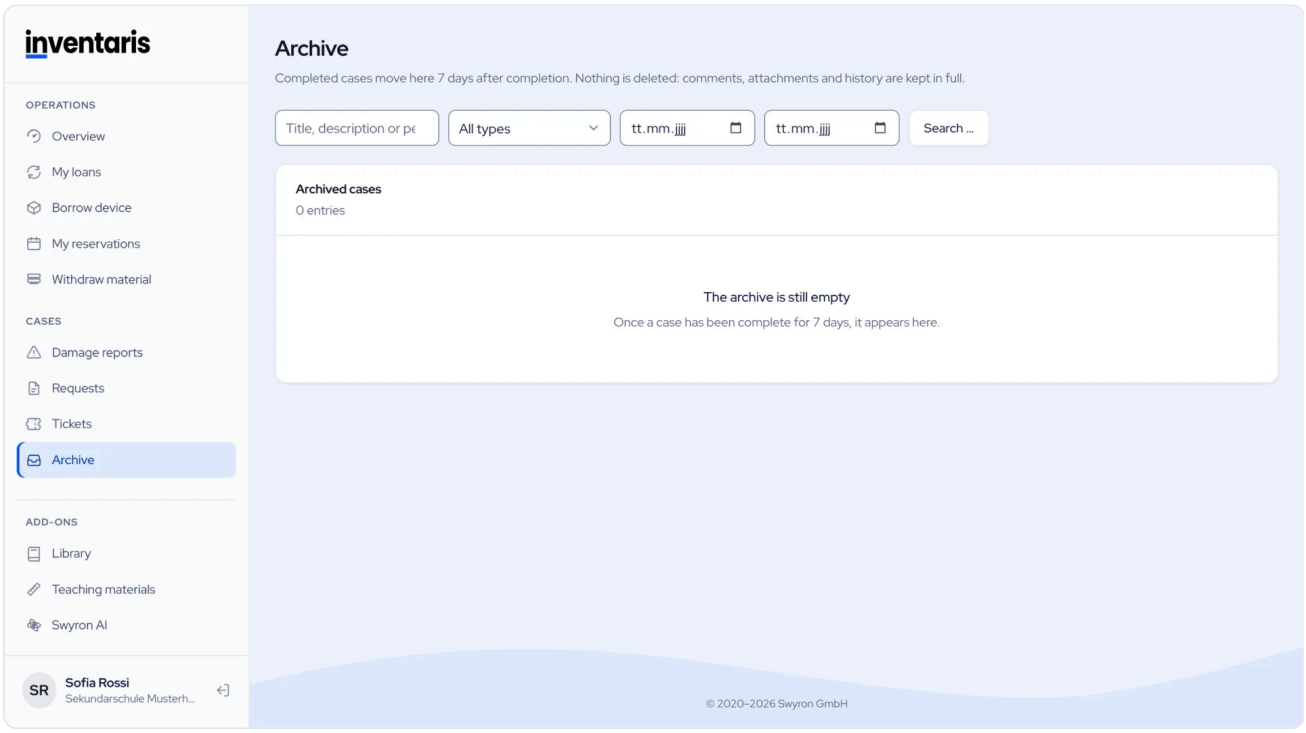
Where: Tickets → Open ticket

Anything that is neither damage nor a request: 'Please realign the beamer in B12', 'Wi-Fi in the assembly hall keeps dropping', 'Please extend the loan until Friday'.




The priority says how urgent it is. Use urgent sparingly. Otherwise everything is soon urgent.

## 6.8 Your archive

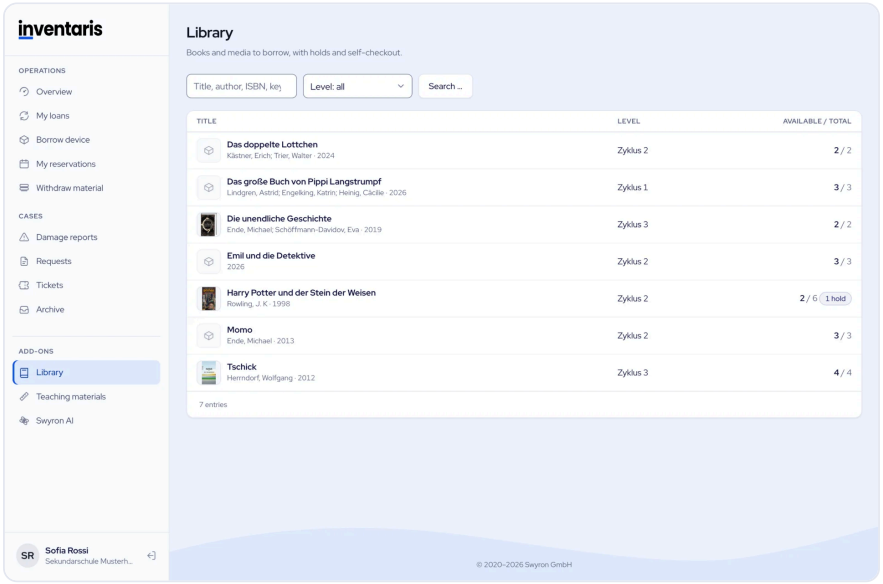



Everything of yours that is done: returned loans, resolved reports, completed requests.

What is done moves here after seven days. This keeps your active lists short, and the one open device isn't lost among thirty returned ones. Nothing gets lost: everything is still here, with a date.

## 6.9 Borrowing and placing holds on books

If your school has booked the library, you'll find it in the menu. Search by title, author or keyword, open the book and press Borrow: the next available copy is booked to you and appears under My loans. The loan period is shown on the button. Returns are made at the desk.

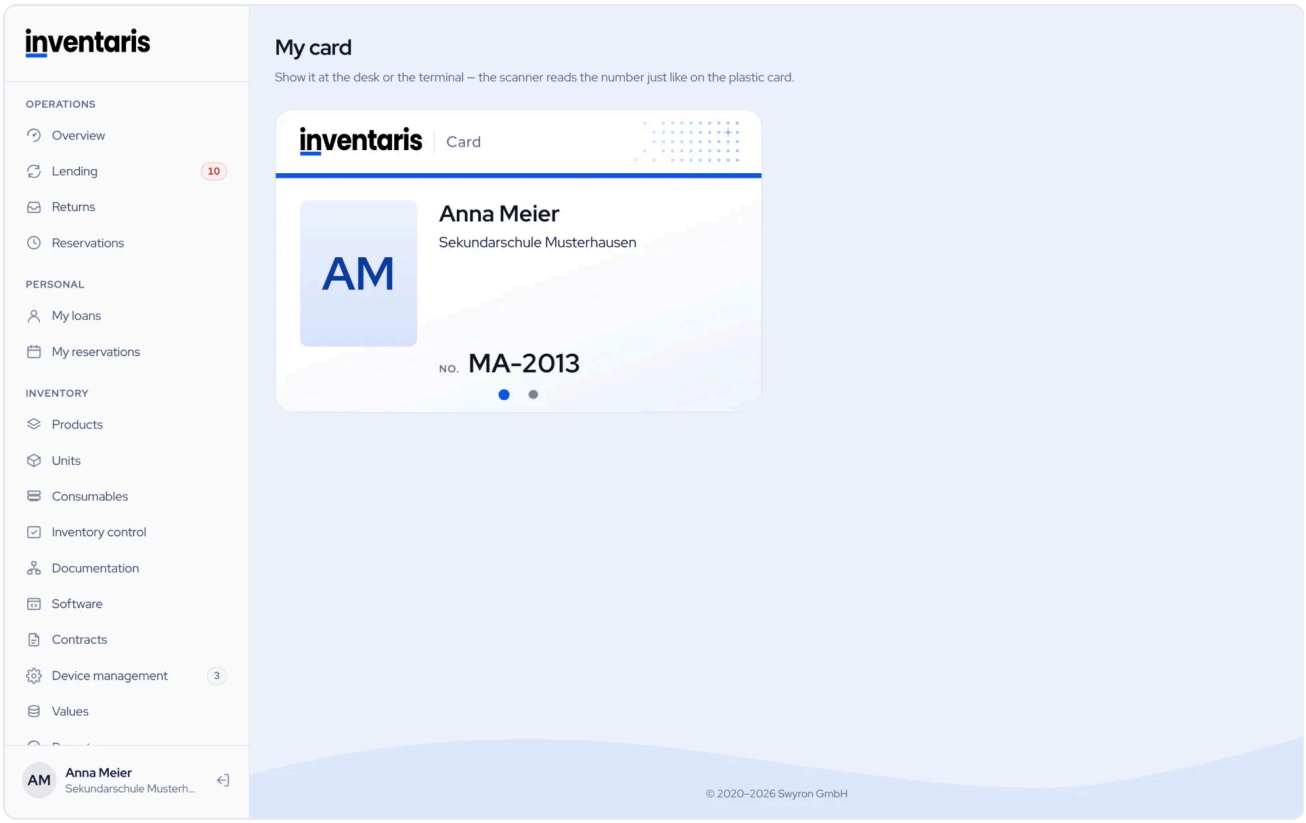



Borrowers and students see the catalogue without management buttons and borrow on the title page with Borrow.

If no copy is available, press Place hold. As soon as one comes back, you get an email and it waits for you for seven days. You can cancel the hold on the title page at any time.

## 6.10 Your card

Your employee number also exists as a card in the application: the same number as on the printed card, in the same format. At the counter it is scanned from the screen like the plastic card. Every account has one, except the kiosk account.




The card on its own page: the person with the number on the front. The dots below switch to the back with the QR code and barcode.

- **Opening it.** On the overview, the last button on the far right is your card. It opens a window with front and back; swipe between them or choose the side below.
- **On the phone** the card sits at the very top of the overview, at first only its header. One tap folds it open, a second one closes it again.
- **On the front** are name, function, organisation and number, **on the back** a QR code and a barcode. The codes only carry the number and always sit on a white background, in dark mode too – otherwise no scanner could read them.
- **Apple Wallet and Google Wallet.** If your organisation offers the wallet, a button appears below the card on the smartphone: on the iPhone **Add to Apple Wallet**, on an Android phone **Add to Google Wallet**. On computers and tablets these buttons never appear. In the Teams app the button opens the phone's browser, because Teams cannot open the wallet itself. If the button is missing on the phone too, your organisation doesn't offer the wallet; the card in the application still works.

> **The card stays up to date**
>
> If your name, function or number changes, the card in the application shows it immediately. The card in the wallet follows the night after. You don't need to add it again.

## 6.11 Help from Swyron AI

If your organisation has booked the **Swyron AI** add-on and switched it on for you, it appears in the menu under **Add-ons**, and there is a question field on your overview. You ask in everyday language, for example "What have I borrowed at the moment, and until when?" or "The projector shows no picture – what can I do?".

- **Your loans, reservations and reports.** **Swyron AI** only sees what is yours – just like you.

- **Help with a device.** Give the inventory number from the label, for example “NB-0012 won’t start”; without a number **Swyron AI** asks for it. Help is available for devices you have borrowed, that are assigned to you permanently or that are fixed in a room. Numbered steps can be ticked off as tried.
- **Help from your organisation’s documents.** If your organisation has released instructions for everyone, for example for the projector in the hall, **Swyron AI** helps you from them and names the document. You don’t see the list of documents itself.
- **If it doesn’t help,** **Swyron AI** suggests a ticket, or a damage report if something is broken. A button opens the form, pre-filled from the conversation. Check every field and tick **I have checked the details and they are correct.** Only then is it reported — **Swyron AI** itself creates nothing.

For borrowers **Swyron AI** is switched on by default, for students off; when switched on, students get the same help, only without reports. Names, e-mail addresses and phone numbers are replaced by placeholders before sending. More on this, including its limits, in 5.11.

PART 7

# Look up

The tables you look for when you're in the middle of something.

## 7.1 All states at a glance

### Unit

| | |
|---|---|
| Available | On site, can be borrowed. |
| On loan | Out. Who has it is shown on the inventory sheet. |
| Faulty | Locked. Not available to borrow until someone lifts the lock. |
| In repair | Off site or in the workshop. |
| Retired | Taken out of service, but kept in the history. |
| Lost | No longer findable. |

### Loan

| | |
|---|---|
| Open | Out, due date running. |
| Overdue | Due date exceeded. |
| Returned | Completed. |
| No due date | Fixed assignment. Never becomes overdue. |

## 7.2 Scanner, keyboard, phone

### Which scanners work

Any handheld scanner that identifies itself as a keyboard («HID mode»). You need no software and no driver: the scanner simply types the number in and presses Enter. This applies to USB scanners as well as to wireless or Bluetooth ones.

> **The one setting on the scanner**
>
> It must send an **enter character** after the code (**Enter suffix** or **CR**). Then the application picks up the scan by itself and you don't have to click anything else. How this is set is in the scanner's manual. Usually you scan a setup code there.

### With the keyboard alone

| | |
|---|---|
| `Tab` | One field forward. |
| `Shift` + `Tab` | One field back. |
| `Enter` | Submit the form or apply the scan. |
| `Esc` | Close an open window (follow-up query, image view). |

### On the phone

The application runs in the phone's browser, without anything needing to be installed. The menu sits behind the button with the three lines at the top right. When recording, you can use the camera instead of a scanner: next to every scan field there's a small camera icon.

On the iPhone, place the application via **Share → Add to Home Screen**; after that it has its own icon and starts without an address bar.

**In the Teams app** on iPhone, iPad and Android, Teams does the scanning: a camera icon appears next to every number field, iPhone included. On a computer, Teams offers no camera; use a hand scanner or the keyboard there.

## 7.3 Common questions

### I've forgotten my password.

On the sign-in screen, press **Forgotten your password?**. You get an email with a link that is valid for one hour.

### I was signed out in the middle of my work.

After 15 minutes without use the session ends on its own. Just sign in again. At the issuing counter a Kiosk account is worth it for this (2.8); that stays signed in.

### A device can't be borrowed.

Three possibilities: it's already on loan, it's marked Faulty, or it's reserved for this period. The message tells you which one applies. The unit's inventory sheet tells you more precisely.

### A scan isn't recognised.

Check whether the cursor is really in the scan field. Then whether the sticker is legible. If the code is damaged, type the number in by hand. That works in every scan field.

### We have recorded two devices with the same serial number.

One of the two is wrong. If you search the units for the number, compare it with the labels and correct the wrong one. Device management reports such cases explicitly instead of guessing.

### Can we get our data back out?

Yes, at any time and without asking. Every list has a button to export as a CSV file; it can be opened in any spreadsheet program.

## 7.4 Terms from A to Z

| | |
|---|---|
| Loan | A case: one person takes units and brings them back. |
| Booking type | Loan material, fixed to an employee or fixed to a room. |
| Unit | The individual device with its own inventory number. |
| Inventory number | Your own number on the sticker. Unique within your organisation. |
| Kiosk | An account for the computer at the counter. Not signed out automatically. |
| Storage location | The fine location within a room: "Cabinet 3, compartment B". |
| MDM | Device management: Intune, Jamf Pro or Mosyle. Provides stock, system and last check-in. |
| Employee number | The number on the ID card that is scanned at the counter. |
| Staff | Who is allowed to borrow. Doesn't need an account. |
| Product | The model. Created once, for all units of this model. |
| Reservation | A claim on a device for a period. Not yet a loan. |
| Serial number | The manufacturer's number. Anchor for device management. |
| Set code | Links units that are handed out together. One scan, all devices. |
| Student | A role for pupils that only sees the library and its own loans. |
| Swyron AI | Add-on: questions about the stock in everyday language, help with a device via its inventory number. |
| Current value | Today's value, depreciated on a straight-line basis from the acquisition month. |