OPERATE. UNDERSTAND. VERIFY.

Service, Warehouse and Stocktaking Complete Practical Guide

Uptime Control 2.0.0-alpha.1

Detailed procedures, clear responsibilities and traceable checks.

Edition 25 November 2026
Linux x86_64 + Docker | V2 pilot documentation

No real customer data in illustrations. Usage rights follow the separate agreement.

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01 Scope and your route through V2

This edition describes 2.0.0-alpha.1 using local source code and pilot evidence dated 21/22 November 2026. Documentation date: 25 November 2026. This is a pilot build; a manual does not constitute production acceptance. Existing core functions and the new workflows are explained together.

1. Sign in with your personal account and second factor. Check your identity, site and assigned machines.

2. Technicians start with the guided intervention. Service managers configure procedures and handle open cases. Warehouse staff use the inventory workspace.

3. Practise only on an explicitly approved training site. Illustrations contain synthetic training data, not a customer installation.

4. After each posting, check the confirmation and the stored result. Completing a form is not the same as saving it.

The previous role guides are included and extended with V2 chapters. Older screenshots illustrate core functions; V2 screenshots were captured during the pilot on 21/22 November 2026. They document that build, not a new operational acceptance performed today.

Language and screen labels

The service workflow supports German and English. The warehouse and procedure editor retain German labels in this build. English instructions therefore also give the actual German control names. Free text is not automatically translated.

02 Permissions before the first intervention

Establish responsibility

Administrators manage users and grants. WarehouseManager is assigned to a site; it is not a general technician or report-release role. The responsible service department can also manage inventory within its authorised site. A technician does not automatically receive full warehouse access.

1. Identify the responsible site and machines. Use personal accounts rather than shared logins.

2. Assign the appropriate role and scope in user administration. Assign warehouse managers at site level.

3. Sign in with a training account carrying that role. Only authorised sites and machines should be available.

4. Test one allowed read and write workflow with synthetic data. Check an unrelated site as a negative case: access must be denied.

5. If a machine is missing, check assignment and active status. Do not replace everyday access with an administrator account.

Common messages

No machines assigned: check the account and assignment. Ticket module not enabled: ask administration to check module configuration. No warehouse permission: check role and site scope rather than repeatedly submitting.

Material withdrawal linked to a service record remains tied to the authorised intervention and machine. The warehouse role alone does not grant permission to correct service records or release official availability reports.

03 Service record: machine, times and initial state

Prepare

You need an assigned machine, actual intervention start and end, and the observed machine state. Do not present an estimated downtime start as a confirmed fact.

1. Open the service workspace. Select the machine and compare its identifier and site.

2. Check intervention start and end. Prefilled times are suggestions and must match the actual visit.

3. Use the machine time zone. During a daylight-saving transition, explicitly select the first or second occurrence of an ambiguous local time.

4. Select the initial state: machine stays operational; you stop it because of the fault; it is already down because of the fault; or scheduled maintenance shutdown.

5. For your own shutdown, enter the actual stop time. If already down, state whether the onset is known. Enter an evidenced time when known; otherwise choose Unknown.

6. Select Continue. Resolve required-field and time errors first.

Check the result

Intervention time measures the work. Downtime may begin before the visit or end before the work finishes. The two intervals can therefore differ. An unknown onset requires clarification; a guess must not become a confirmed historical stop time.

Example

Machine down from 08:30, visit 09:00-10:00, restored 09:30: 60 minutes of work and 60 minutes of actual downtime before application of the evaluation rule.

04 Repeat interventions and the original fault

1. Read the existing notices and interventions after selecting the machine.

2. Choose Yes, the same fault; No, a new fault; or Not sure - request review.

3. For the same fault, explicitly confirm the appropriate original record. A shared date or machine does not prove a shared cause.

4. Add new findings. Do not replace the original description with an invented new fault.

5. If uncertain, allow a review case to be created and inform the service manager. Official release for the affected period waits for clarification.

Common mistake

A machine was restored and fails again later. Do not select a new fault solely because it happened later: the confirmed causal relationship matters. Conversely, two unrelated causes do not automatically form one continuous outage.

Concurrent changes

If the machine context has changed, review the current relationship again. The designed response preserves your text. Submit only after reviewing; do not open a second browser to bypass the check.

05 Fault code and guided procedure

1. Copy the displayed fault code exactly. For a known code, compare the message, component/sensor group and installation position.

2. If machine, message or position does not match, clarify the mapping with the service manager. The procedure is guidance, not a substitute for safety authorisation at the machine.

3. With no code or an unknown code, manually choose an appropriate published route. Do not invent a similar code.

4. Perform the displayed work instructions in order. Select answers only after carrying out the actual check.

5. Your answer leads to the next step or a final action. Confirm only work actually performed.

6. If the template changes during entry, select the procedure again when prompted. Do not combine old and new template revisions.

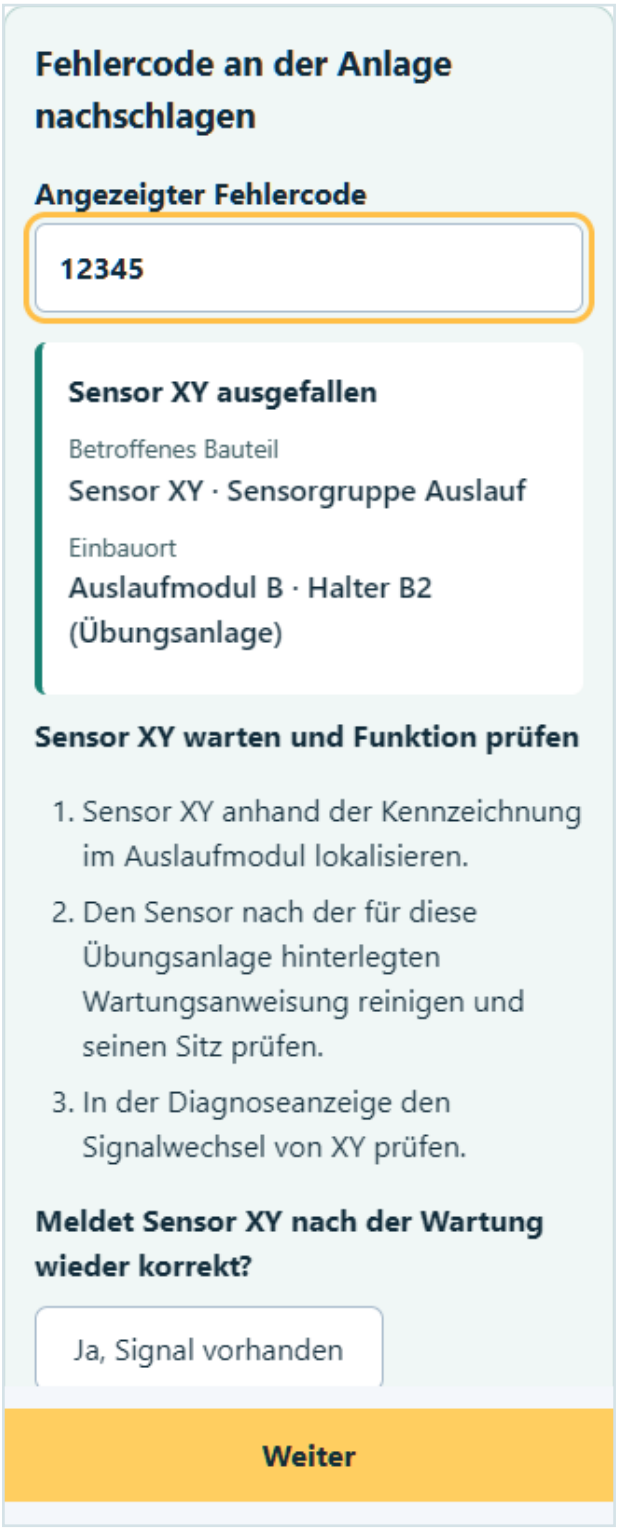
Example

Training code 12345 maps to sensor XY. Compare its location and message, perform the prescribed test and choose the observed result. The code alone does not prove the sensor must be replaced.

Check

The review includes the selected procedure. Before saving, ensure the selected answers agree with your observations.

Figure 1 | Fault code and guided procedure



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

06 Spare parts in the service record

1. After following the procedure, inspect the spare parts allowed for the final action. Compare part number and description.

2. Choose the actual warehouse location and quantity withdrawn. Stock at another location is not stock at the selected location.

3. Do not record a reservation as a withdrawal. Confirm only material actually taken for this intervention.

4. In the final review, check item, quantity and location. Changing the procedure can invalidate an earlier parts selection; review it again.

5. After a successful save, inspect the service record and related stock movement. If transmission is unclear, retry the same submission rather than creating another withdrawal.

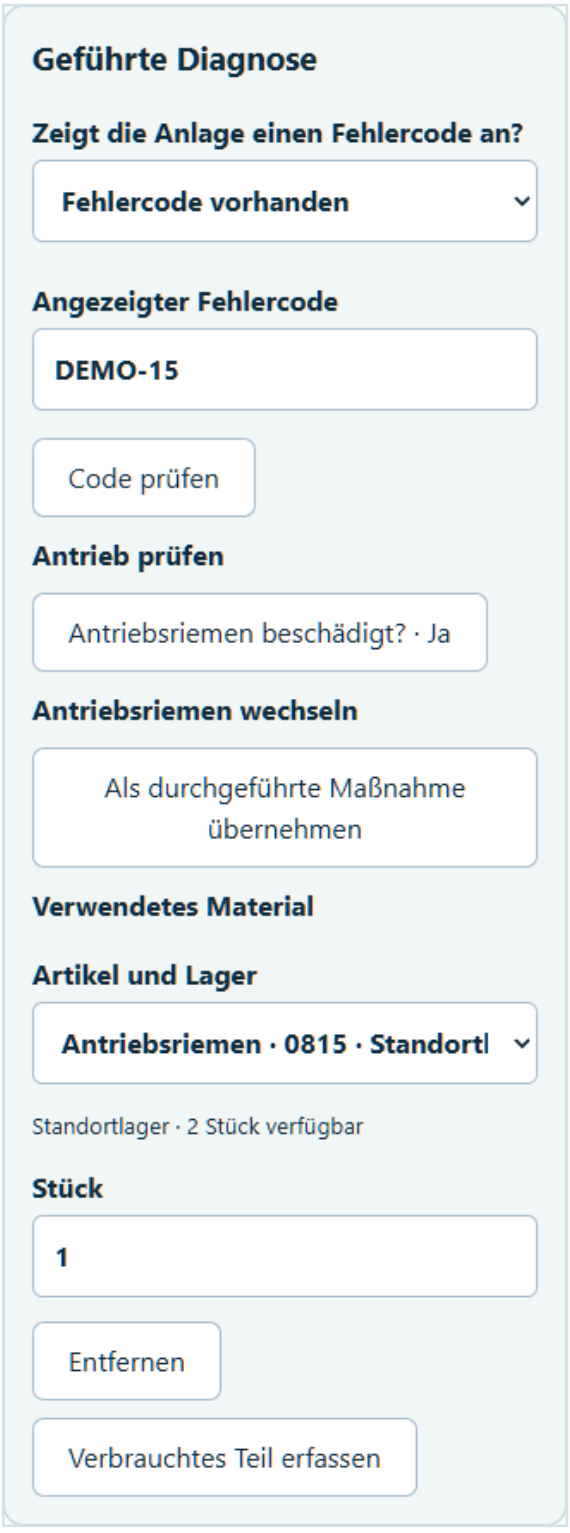
Insufficient stock

After rejection, reload the current quantity and consult warehouse staff. Do not use a negative quantity or a false location as a workaround. If stocktaking locks the location, wait for release or clarify the actual permissible material route.

Returns

Return unused material already posted through the authorised warehouse function, referencing the original withdrawal. A return is a new traceable transaction; do not delete the original evidence.

Figure 2 | Spare parts in the service record



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

07 Final state, restoration and saving

1. Record work performed and the functional check with its result. A bare “done” does not explain the intervention.

2. Explicitly select Operational, Provisionally operational, Still out of service or Further action required.

3. For an operational machine, confirm the actual restoration time. This ends the recorded outage; the work may finish later.

4. If further work is needed, enter the next action and review time. For Further action required, also confirm whether the machine is usable, not usable or its usability is unconfirmed.

5. On Review, read machine, times, initial state, cause, original fault, procedure, parts and final state together.

6. Select Save record. Wait for the confirmation that the service entry and ticket have been saved, and retain the displayed references.

Calculation example

Visit 09:00-10:00, machine stopped at 09:00 and restored at 09:20: 60 minutes of work but 20 minutes of downtime before contractual evaluation. Work duration is not automatically downtime.

Unconfirmed transmission

Use Check submission again for the same submission. Do not create a replacement while the original result is unknown. Without connectivity, use the agreed telephone route for urgent faults; a local draft does not notify service management.

08 Separate scheduled maintenance correctly

1. For a planned shutdown, select Scheduled maintenance shutdown. Do not rename a real fault as maintenance.

2. Check intervention and shutdown times. Describe maintenance work and the functional check specifically.

3. Confirm final state and actual restoration just as for other interventions.

4. Before saving, verify that the record is still classified as maintenance.

5. In evaluation, distinguish maintenance time from fault-related time. Pure scheduled maintenance must not be treated as a fault alarm without a factual basis.

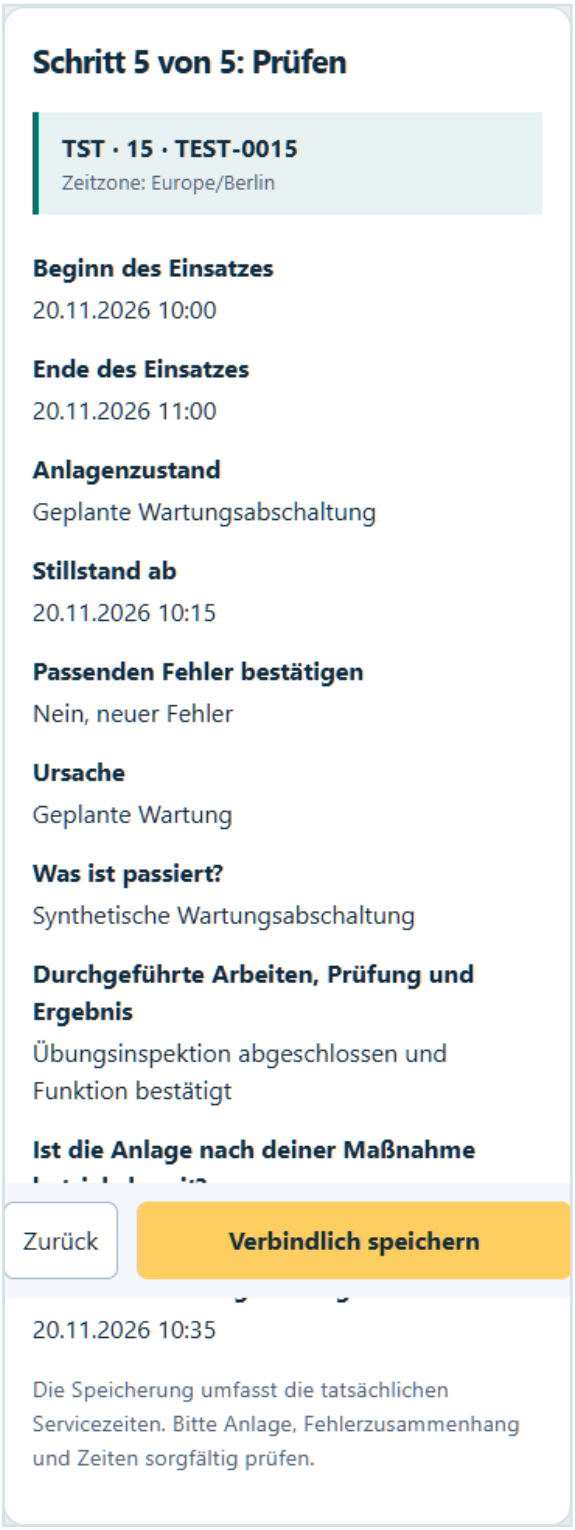
A fault discovered during maintenance

Record the observation and its time clearly. Ask the responsible service manager to review the distinction instead of assigning the whole duration to one cause automatically.

Check

Carry the maintenance classification through the subsequent review. A successful functional check does not replace an accurate timestamp; both are required.

Figure 3 | Separate scheduled maintenance correctly



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

09 Service manager: create and publish procedures

Prepare

Define a responsible procedure for each site and machine type. Maintain permitted spare parts in the relevant warehouse first. Use only approved manufacturer and work instructions.

1. Open Prüfwege verwalten (Manage procedures) for the correct machine type. Compare the displayed type and revision.

2. Choose Neuer Arbeitsweg (New procedure) or edit an existing one. Give it an unambiguous name.

3. Separate fault codes with commas; leave blank for routes without a code. Add the machine message, component/sensor group and physical position.

4. Enter a question or action for the first step. Add ordered work instructions, one instruction per line.

5. For a decision, choose Antwort mit Folgeschritt hinzufügen (Add answer with next step), name the answer and edit its next step. Every relevant answer needs a meaningful continuation.

6. At a final action, select allowed spare parts. Parts belong to final actions, not an unanswered decision.

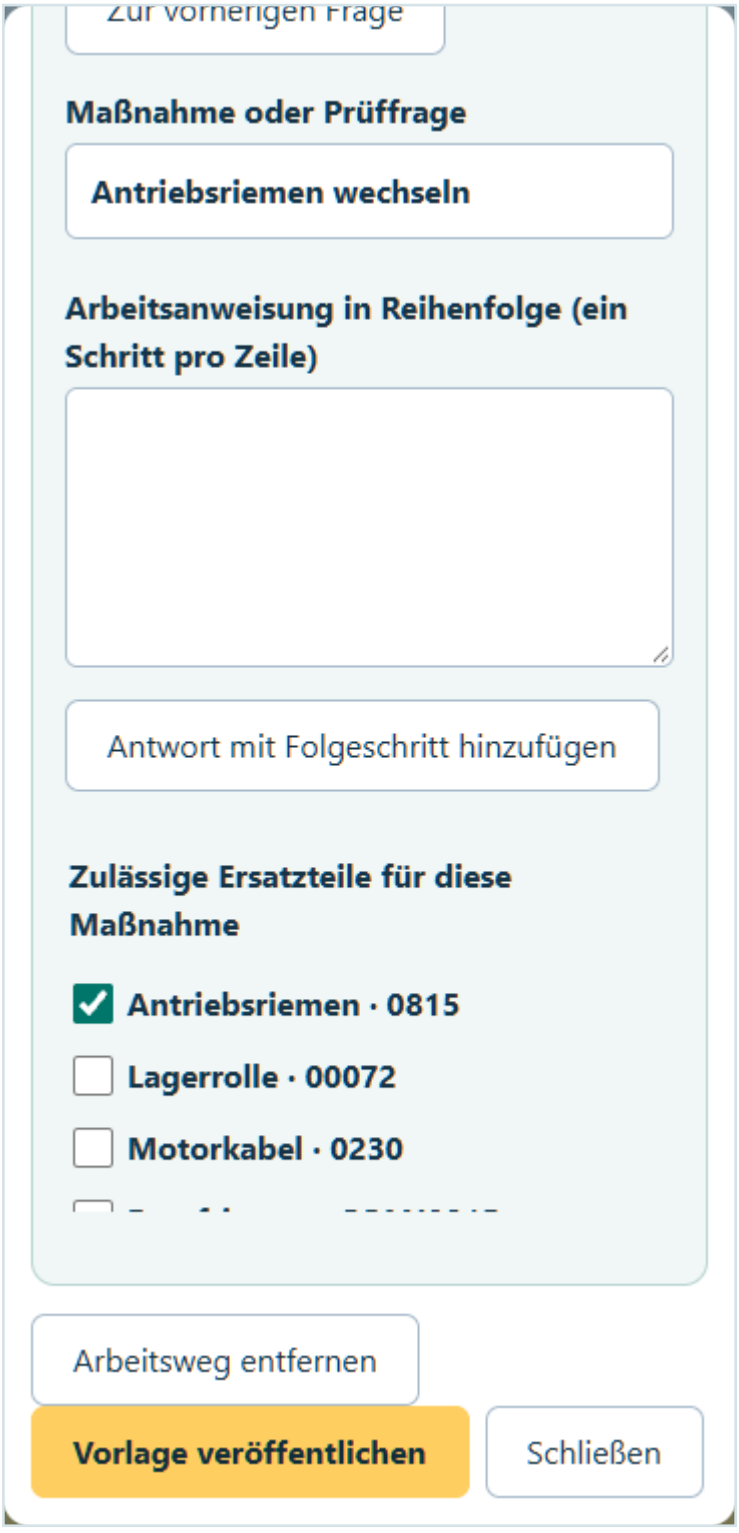
7. Review every branch. Correct ambiguous instructions, dead ends and conflicting parts assignments before publication.

8. Select Vorlage veröffentlichen (Publish template) and wait for confirmation. Test the known-code and manual entry paths on a training machine.

Changes

Removing an answer also removes its descendants from the next revision. Converting a final action into a question removes its parts mapping. Read confirmation dialogs fully. Closing with unsaved changes does not publish them.

Figure 4 | Service manager: create and publish procedures



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

10 Service overview and open cases

1. Check your responsibility scope and filter in the service overview. Counts refer to the visible scope.

2. Select the count of open faults, overdue reviews or pending closure reviews to open the matching case list.

3. Compare the machine and original fault. Read previous interventions, final states and next steps in the history.

4. For continuing downtime, verify responsibility, next action and review time. A missing spare part needs a specific procurement action, not just an open status.

5. Resolve factual uncertainty, such as an unknown onset or unclear repeat-fault relationship, before official report release.

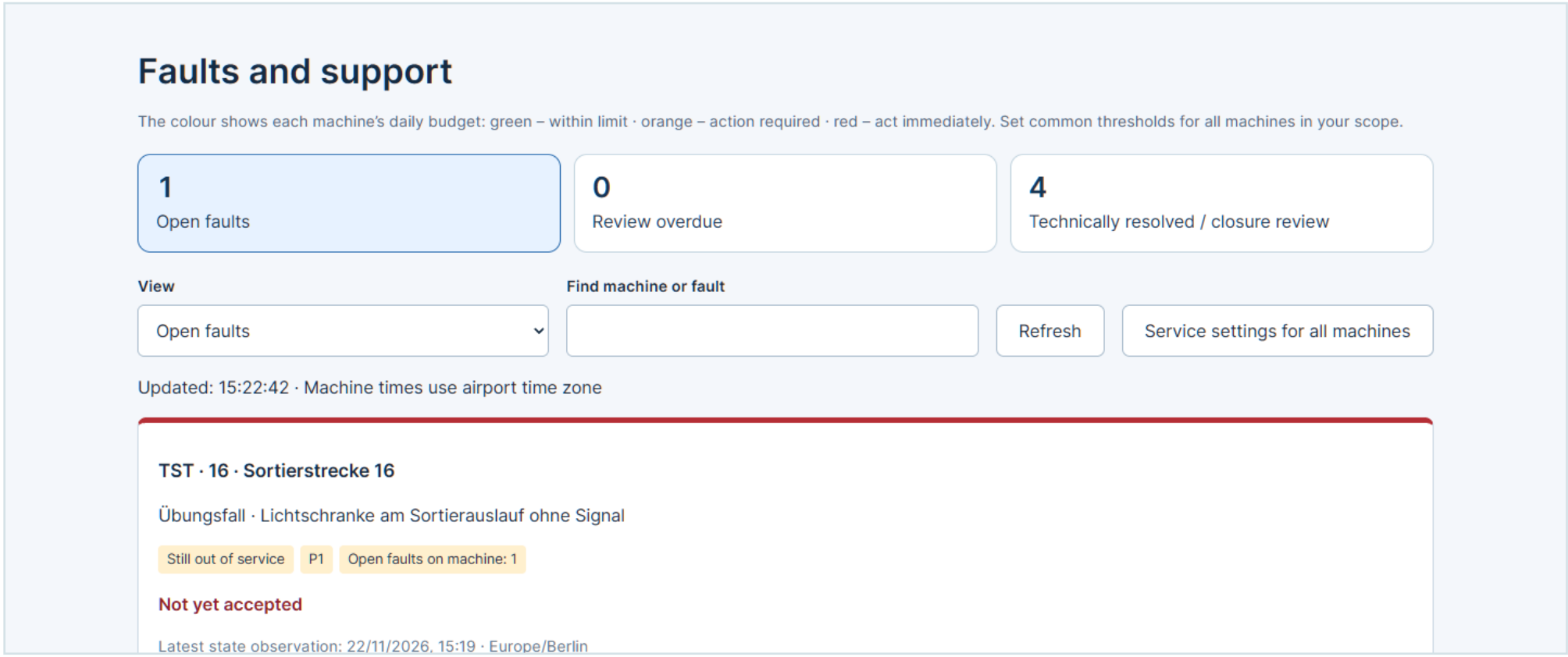
6. Reopen the case after changes and check that its current state and the count agree.

7. If a search has no results, use Alle Fälle anzeigen (Show all cases), then narrow the filter again.

Example

A machine is waiting for a replacement sensor. Arrange the sensor, identify the responsible person, set a review time and perform the functional test afterwards. Only confirmed restoration ends the actual outage; completing procurement alone does not.

Figure 5.1 | Service overview and open cases



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Figure 5.2 | Service overview and open cases



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

11 Distinguish escalation and the downtime indicator

1. Have the agreed response deadlines and site day boundaries available before changing settings.

2. Open the preview in service settings and select an example time.

3. Examine transitions from E0 to E3 and their deadlines. Check boundary cases immediately before and after a deadline.

4. Save only once the preview matches the agreed process. Read back the saved values afterwards.

Two different timelines

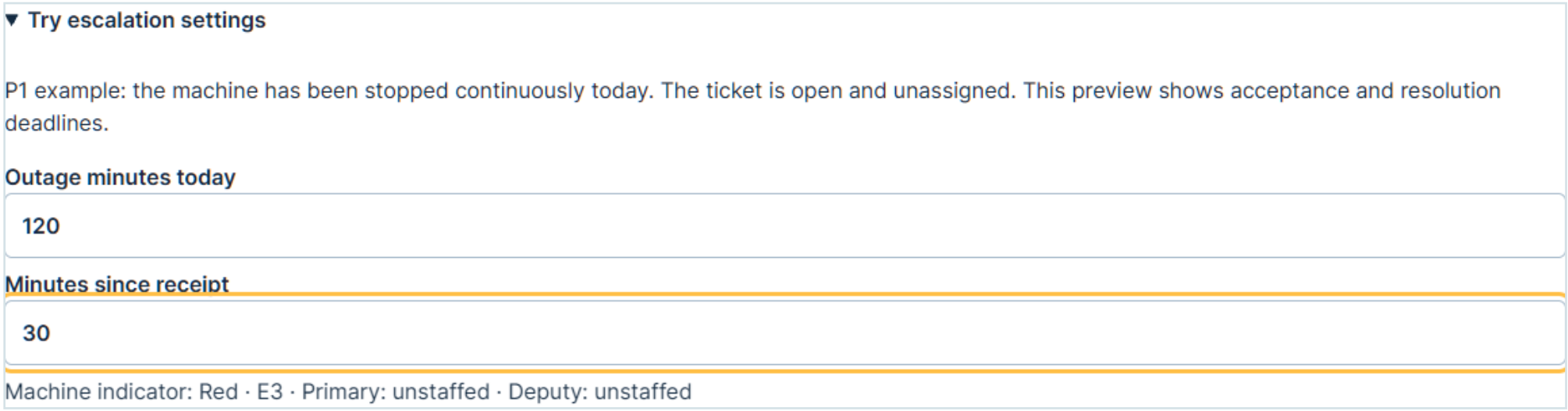
Escalation deadlines concern receipt of the notification and the response. The machine indicator uses downtime documented in the service record. A late entry can therefore contain an actual outage longer than the time since notification.

Scheduled maintenance does not trigger a fault alarm in this build. Check classification before treating an expected alarm as missing.

Team verification

Document the agreed escalation and organisational notification route. An overview indicator alone does not prove that a particular person has read a message.

Figure 6 | Distinguish escalation and the downtime indicator



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12 Find and assess stock

1. Open the warehouse and select your site. Check the site again before every posting.

2. Select “Bestände” (Stock). Search by article number or description and narrow the storage location.

3. Check article number, location and actual on-hand stock. Similar descriptions at different locations do not automatically identify the same stock record.

4. Compare minimum stock, target stock and outstanding orders. An open order is not physical stock.

5. Use “Bewegungsjournal” (Movement journal) to investigate differences. Check movement type, quantity, source and destination, time, operator, reason and linked service event where applicable.

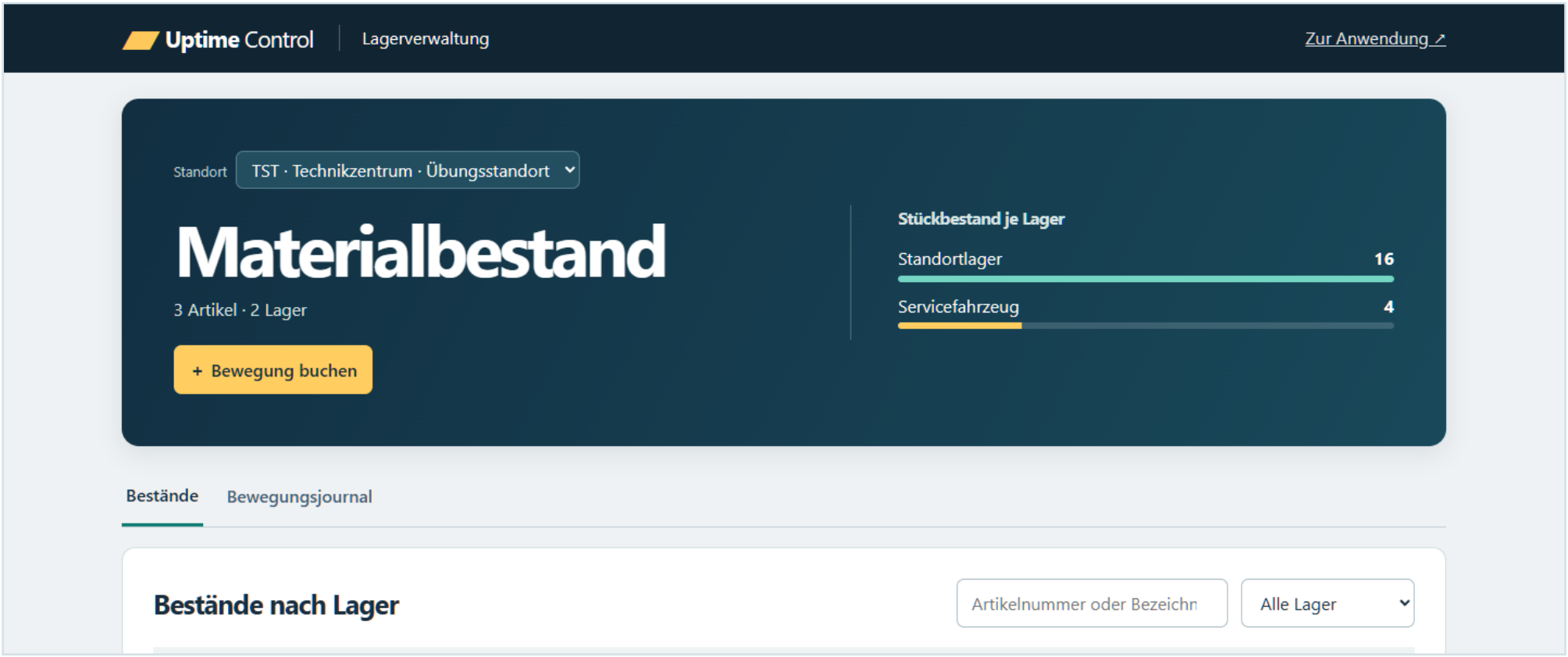
Example

Location A-01 holds three belts and two more are on order. Three can be issued now, not five. Only a posted receipt increases stock.

Empty view

Check site, location and search text. Clear filters before creating another article. An administrator must resolve missing site permission; creating a duplicate article will not solve it.

Figure 7.1 | Find and assess stock



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

Figure 7.2 | Find and assess stock



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

13 Article master data and shelf labels

1. Open “Artikelstamm” (Article master data) and choose the storage location.

2. Create the article with a unique article number and a clear description. Verify the location before saving.

3. Add a barcode and supplier if required. The barcode must match the article actually used.

4. Enter minimum and target stock as non-negative whole numbers. Target stock must not be lower than minimum stock.

5. Save and find the article again. Compare its number, description and location.

Editing an existing article

Article number and location cannot be freely renamed after creation. Edit the available master-data fields. Do not create uncontrolled replacement records for a wrong assignment; agree the correction with the responsible person.

Print a shelf label

Open the article label function. The preview contains description, article number, location and a QR code based on the barcode or article number. Open browser printing, choose the printer and paper, and inspect the preview for clipping.

Print a sample first. Scan it at the actual shelf and verify the identified article. A screen test does not replace testing a printed label.

Automatic ordering

This setting creates or supports internal procurement records. This build does not send an order to a supplier. External ordering remains a separate task.

14 Receipts, transfers and corrections

Before every posting

Select site, article and location. Verify the physical event and quantity. Provide a meaningful reason; an adjustment must not conceal an unresolved error.

Goods receipt

1. Select “Wareneingang” (Receipt) and the destination location.
2. Count the quantity actually received and compare article and delivery note.
3. Enter quantity and a recognisable reference in the notes.
4. Post once, then verify stock and movement journal.

If an internal order exists, use its delivery function. This also updates outstanding quantity; do not post the same delivery manually as well.

Transfer

1. Select “Umlagerung” (Transfer), article, source and destination.
2. Check sufficient stock at source and confirm neither involved location is locked by stocktaking.
3. Enter quantity and reason, confirm once and verify both balances.
4. Physically move the goods. A posting alone does not move them.

Positive / negative correction

Use corrections for investigated stock discrepancies outside an active stocktake. Explain the cause and agreed action. Use the stocktaking function for a systematic count.

Handling errors

For insufficient stock, first check article, location and quantity. For a stocktake lock, contact the responsible person; do not bypass it with another article. After an uncertain response, inspect journal and stock before creating a new posting.

15 Issues and traceable returns

Issue

During service work, record parts actually installed or consumed in the related service event. Warehouse staff can use the offered warehouse issue transaction. Check the event assignment and avoid posting the same consumption through both routes.

1. Select article, source location and quantity actually issued.
2. Check stock and the service event where applicable.
3. Post and verify the journal entry and reference.

Return

1. Open “Rückgabe” (Return) and select the original issue as reference.
2. Verify article, original event and quantity physically returned.
3. Inspect the part. Do not return defective items to usable stock without an agreed operational process.
4. Enter the permitted return quantity, location and reason, then confirm.
5. Verify the new balance and link to the original issue in the journal.

Example

Two sensors are issued for a job; one is installed. Return the unused sensor against the original issue. Do not overwrite the original issue or use a negative issue as a substitute.

Missing reference

If the original issue is not offered, check site, article, event and permissions. Resolve the situation with the warehouse owner rather than selecting an unrelated event.

16 Procurement and partial deliveries

Understand the requirement

A shortage indication appears when on-hand stock is below minimum and on-hand plus outstanding orders does not reach target stock. Additional demand is based on target minus on-hand and outstanding quantities.

Example: on-hand 2, minimum 4, target 10, already outstanding 3. Additional demand is 5. The three outstanding items are still unavailable for use.

Record an order

1. Open “Beschaffung” (Procurement) at the correct site.
2. Review article, supplier, location, demand and existing open orders.
3. Choose “Bestellung erfassen” (Record order) and enter supplier and a positive whole-number quantity.
4. Save and verify outstanding quantity.
5. Send the order separately through the agreed supplier channel. This build does not dispatch supplier orders.

Post a partial delivery

1. Open the matching order and its delivery function.
2. Enter only the quantity physically received. It must not exceed the remaining outstanding amount.
3. Confirm and inspect delivered versus ordered quantities, remaining balance and warehouse stock.
4. Post a later remainder against the same order.

Example: three of five ordered items arrive. After posting, three are delivered and two remain outstanding. An additional manual receipt would incorrectly double-count stock.

17 Article import with preview and verification

Prepare the file

Supported formats are UTF-8 CSV, XLSX and structured tabular PDF. A scanned image PDF is not automatically a readable article table. Each import is limited to 1,000 records and 2,000,000 bytes.

Use clear column headings. Article number and description are required. Barcode, supplier, minimum and target stock can be mapped. Article numbers must be unique within the file. Stock limits must be non-negative whole numbers; target must not be below minimum.

Validate and commit

1. Select the correct storage location first. The import applies to that location.

2. Choose the file and “Datei prüfen” (Check file).

3. Map each required target field to the matching source column. Do not reuse the same source column for different meanings.

4. Review the first records and total record count. Pay particular attention to leading zeros in article numbers and barcodes, and to special characters.

5. Resolve all reported errors in the file or mapping, then check again.

6. Only then select “Artikel verbindlich übernehmen” (Commit articles).

7. Find several imported articles in the master data and compare their values with the source file.

Existing articles and stock

An existing article with the same number at the selected location is treated as a master-data update. Importing articles is not a goods receipt and creates no opening stock. Record physical quantities separately through warehouse transactions.

Errors

For an unreadable PDF, use structured CSV or XLSX instead. Split oversized files into meaningful batches. After an uncertain result, inspect the article master data before committing again.

18 Prepare a stocktake and lock the location

Preparation

Assign an owner, location, counting time and procedure for urgent issues. Resolve unexplained receipts and issues beforehand. Ensure articles exist at the location and labels are readable.

An active stocktake locks stock transactions at the affected location. Other locations can continue operating. Allow a realistic counting window and inform service and warehouse staff before starting.

Start the stocktake

1. Open “Inventur” (Stocktaking) at the correct site.
2. Select the location to count and inspect its article list.
3. Start the stocktake and read the confirmation about the transaction lock.
4. Confirm only when the physical location is ready for counting.
5. Verify active status and the displayed location.

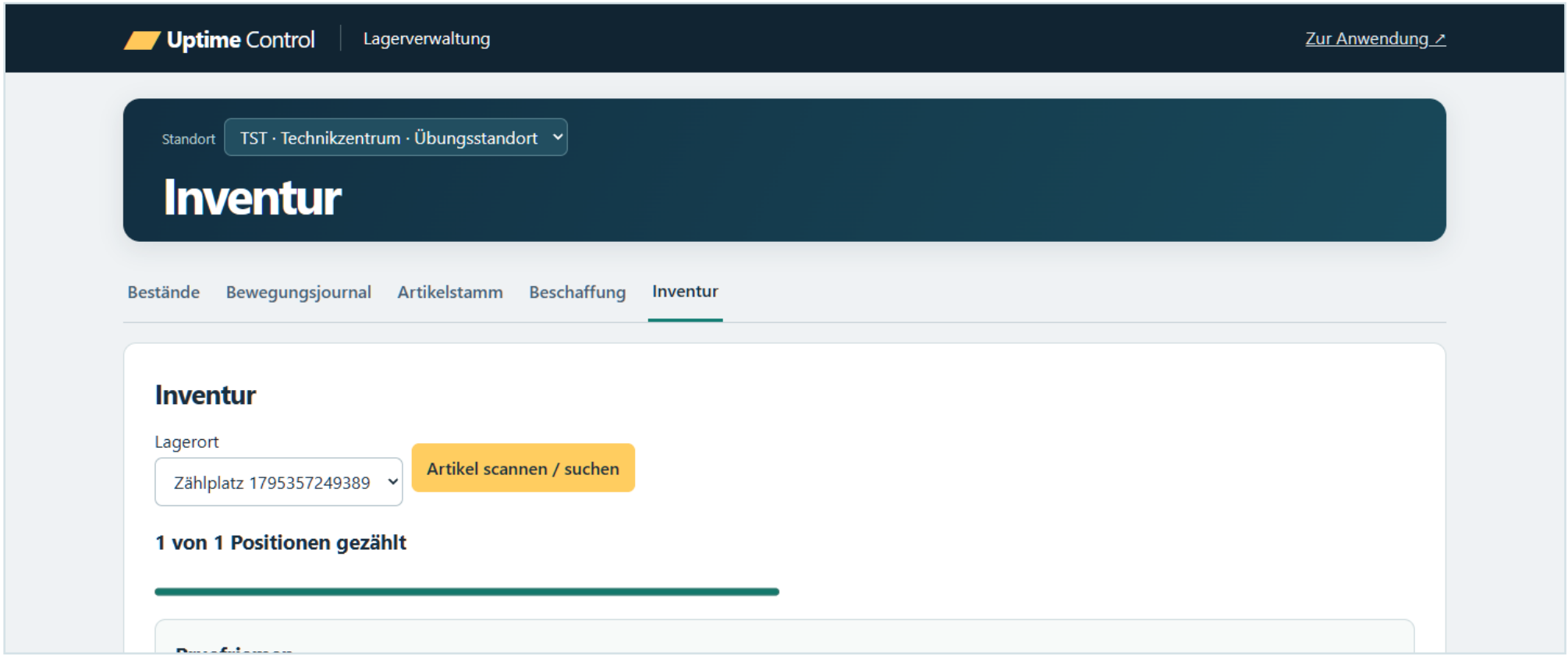
What must stop

Do not make unrecorded physical movements at the locked location. Removing goods during counting distorts the result even if the application blocks the transaction.

Urgent requirement

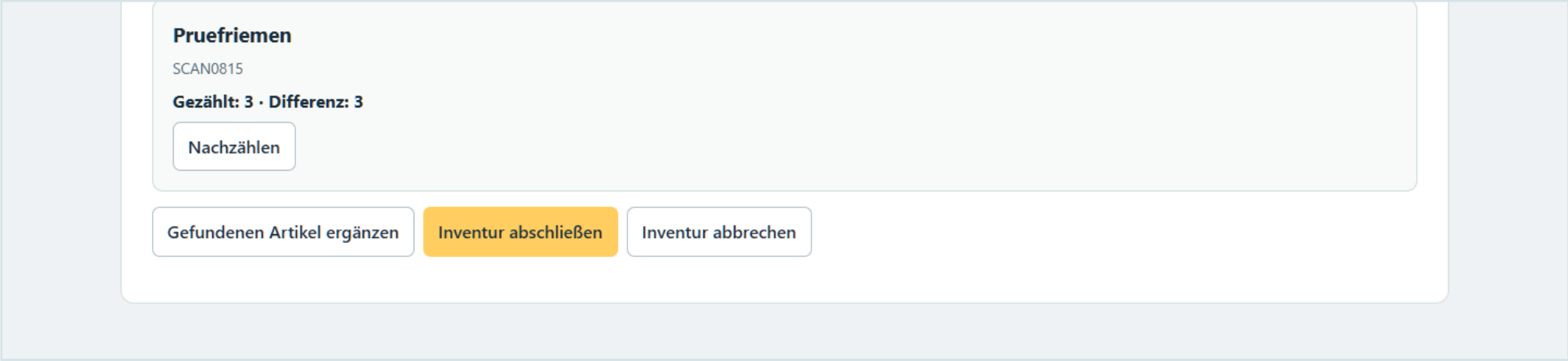
If an issue is unavoidable, the responsible person must decide whether to cancel the stocktake and restart after the movement. Do not work around the lock by posting a correction at another location.

Figure 8.1 | Prepare a stocktake and lock the location



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

Figure 8.2 | Prepare a stocktake and lock the location



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

19 Count, scan and recount

Manual entry

1. Open the active stocktake and “Artikel scannen / suchen” (Scan / find article).

2. Enter article number or barcode and verify the identified article.

3. Count the physical items. Enter the complete counted quantity as a non-negative whole number. Zero explicitly means none present.

4. Save and verify the confirmed quantity in the list.

5. Repeat for every article. An empty field is not a confirmed zero count.

Camera and handheld scanner

Browser camera scanning requires secure HTTPS, device permission and a supported camera. Grant access only to your own Uptime address. Hold the code steady in adequate light.

A connected handheld scanner can enter the code into the search field. Manual entry remains available. Always verify the article before saving a quantity.

The available continuous-entry option can return to the next scan after saving. This is not an offline mode; confirmed saving needs a server connection.

Recount and unknown article

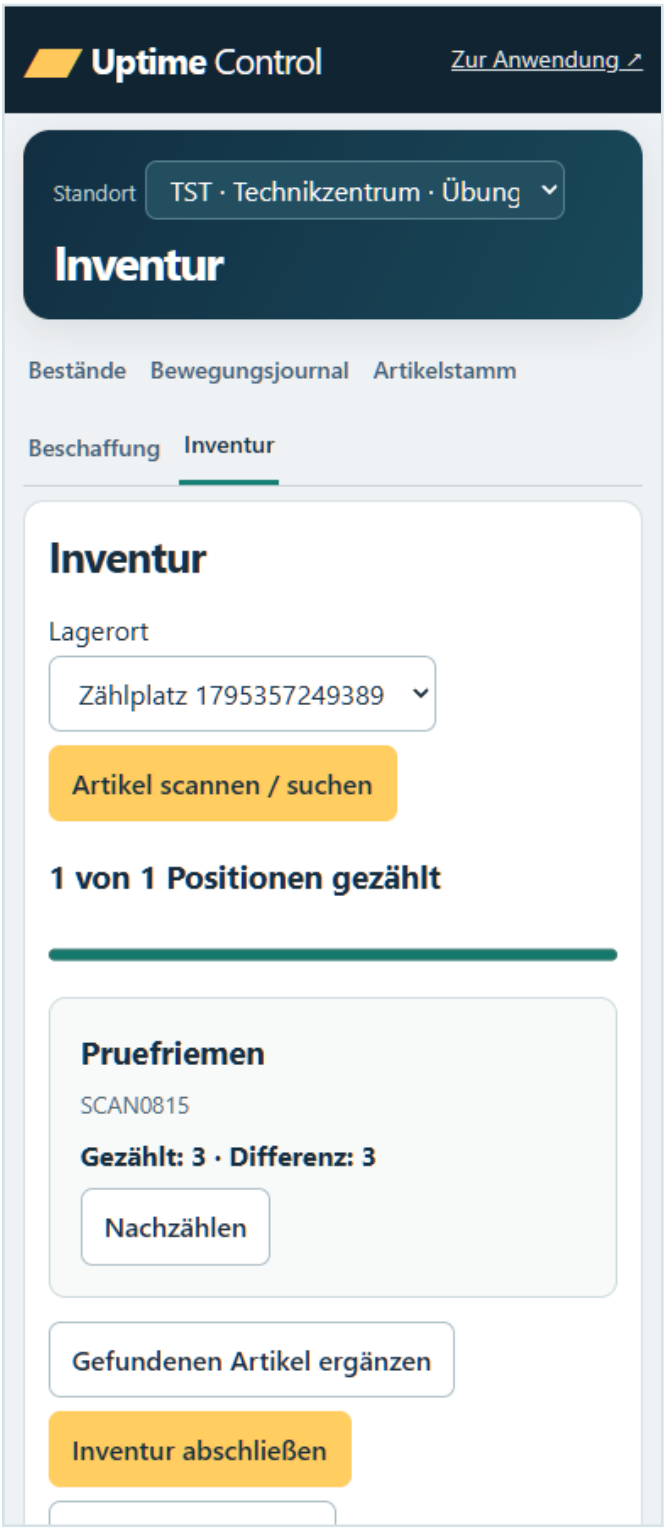
Open a previously counted article again. Check its loaded quantity, recount physically and save the corrected total, not merely the difference.

If an article is not recognised, check code, location and master data. An authorised user can create a genuinely discovered missing article at the location and then count it. Do not assign its quantity to a similarly named item.

Verification boundary

The supplied illustrations and checks demonstrate software workflows with sample data. Physical camera scanning on the customer's actual phone and label printing still require verification during introduction.

Figure 9 | Count, scan and recount



Synthetic training data. V2 captures: 21/22 November 2026; other images: previous-edition core workflows. Some V2 screens retain German labels; the chapter explains their English meaning.

20 Complete, cancel and export a stocktake

Prepare completion

Ensure every line has a confirmed counted quantity. Completion is unavailable while lines remain uncounted. Recount unusual differences and investigate physical movements during counting.

Commit completion

1. Open the completion function and verify location and stocktake.
2. Read the displayed number of discrepancies and assess plausibility.
3. Confirm once. Accepted differences are posted as traceable stock changes.
4. Check completed status, released location, new balances and movement journal.
5. Open stocktake history and export the count protocol as CSV.

Read the protocol

The protocol includes stocktake ID, location, status, article, expected quantity, counted quantity, difference, UTC timestamp and operator ID. UTC can differ from local display time. Preserve the original export and use a copy for analysis.

Cancel instead of complete

Cancellation releases the location and retains entered counts but posts no stocktake adjustments. Record the reason and arrange a new stocktake if necessary.

Concurrent editing

If another operator has changed the stocktake meanwhile, saving may be rejected because your version is outdated. Reload, inspect the latest saved values and only then decide whether to re-enter anything. Do not repeatedly confirm without checking.

Example

Expected stock 5, counted 3: after verified completion the difference is −2 and stock is 3. Cancellation leaves the previous stock unchanged; counting alone does not post an adjustment.

21 End-to-end exercise and acceptance

Use an approved test site with synthetic data. Do not accidentally perform this exercise against production stock.

1. Administrator: verify site, machines, users and roles. A user without site permission must not edit the data.

2. Warehouse: create a test article, receive five items and print a label. Check stock and journal.

3. Technician: record a service event for an already stopped machine. Keep outage onset separate from your own working time.

4. Guided path: use a known fault code, answer the questions and assign a test part actually used.

5. Completion: document the functional test, record restoration time and save. Stock must match the physical issue.

6. Service lead: trace event, downtime, working time and any outstanding review. Separately test a follow-up case with a review deadline.

7. Warehouse: test a referenced return and partial delivery. Check stock and outstanding order quantity.

8. Stocktake: lock the location, count all articles, investigate a deliberately introduced difference, complete and export CSV.

9. Counter-check: cancel a second stocktake. It must not post a difference and the location must become available again.

10. Operations: check sign-out, sign-in, MFA and the agreed backup. Record date, role, expected and actual outcome.

Acceptance boundary

This exercise is a template, not an already signed customer acceptance record. The actual installation, physical devices, printers, cameras, permission assignments and operational approvals must also be checked.