XPTrack Inventory User Guide

Revision 06/05/2026

By

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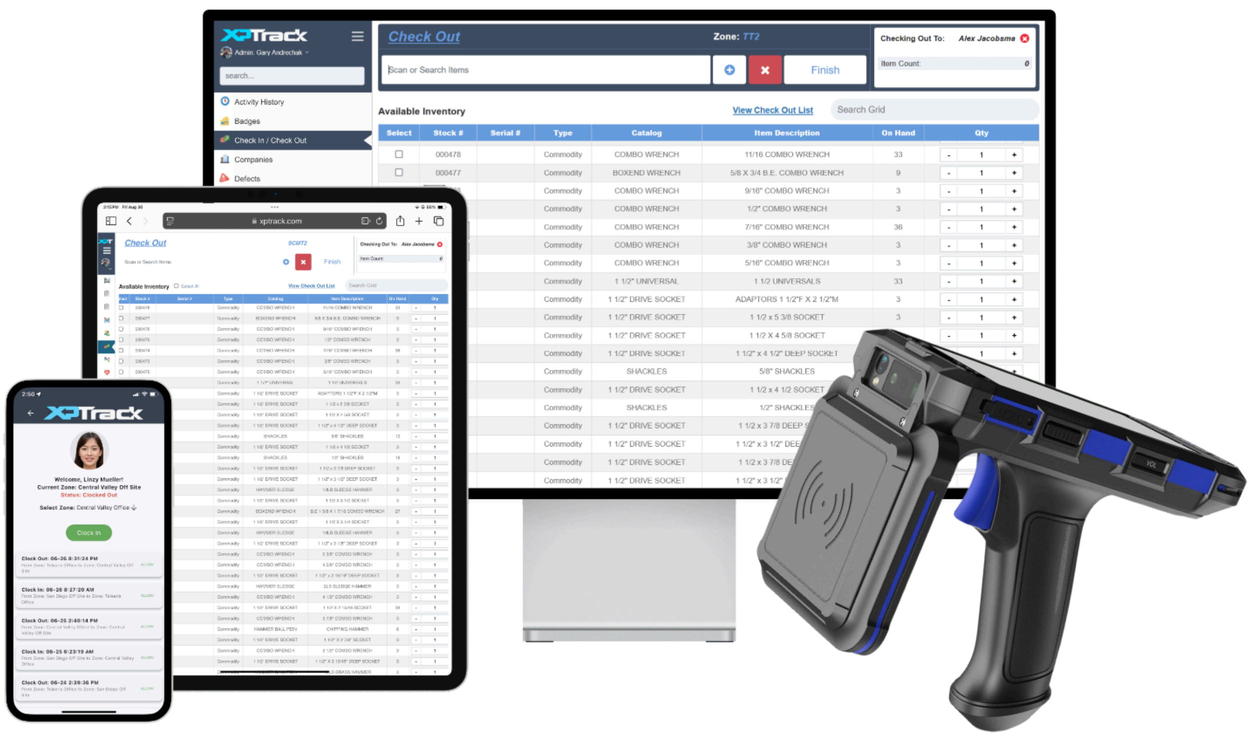
Purpose

This guide covers everything required to set up and successfully operate XPTrack. It walks through creating an account, configuring users and zones, building out the inventory catalog, and managing daily check-in and check-out activities. It also explains how to run reports that show what is happening across an organization's equipment.

XPTrack is designed to give organizations a clear, accountable view of their inventory — who has what, where it is, and what condition it's in. Whether the organization runs a single warehouse or a multi-site operation, this guide is structured to be followed end-to-end during initial setup or used as a reference for a specific section.

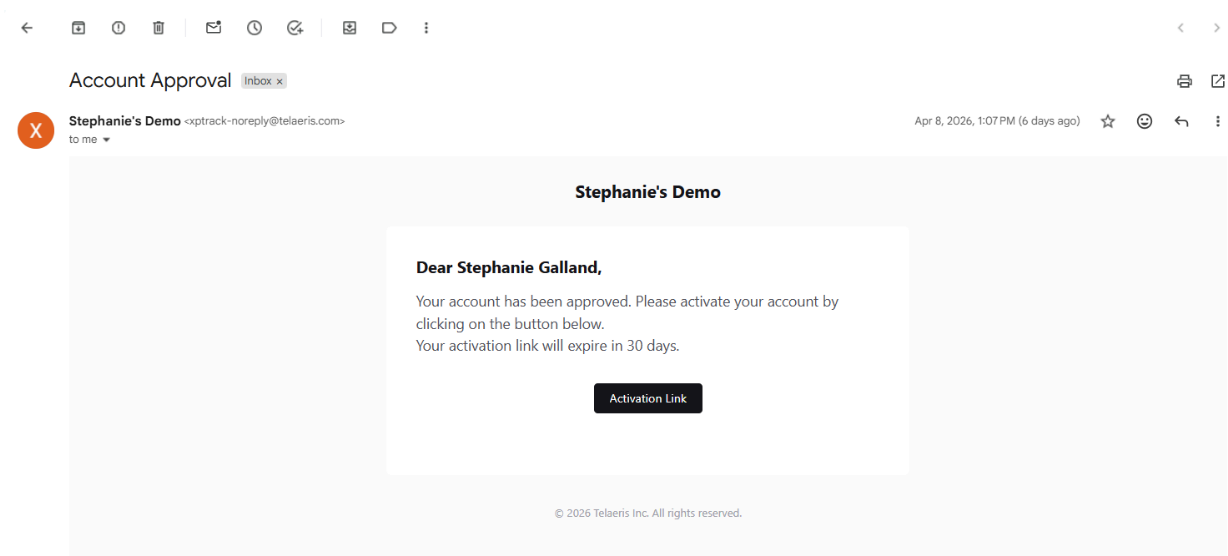


Getting Started

Before XPTrack can be used, the account must be activated and login credentials set. The setup process is short — most users are signed in and ready to begin configuring their workspace within a few minutes.

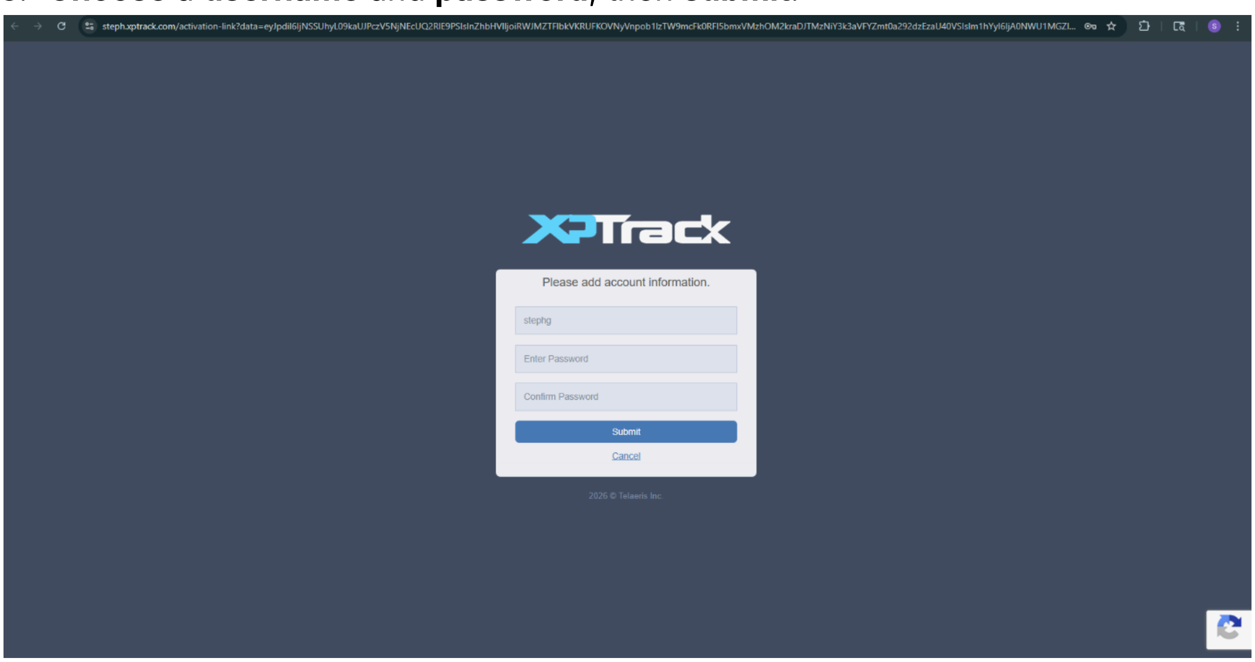
Activating Your Account

When an XPTrack account is created, the user receives an activation email from ***xptrack-noreply@telaeris.com***. This message contains the activation link and is required to access the system for the first time.

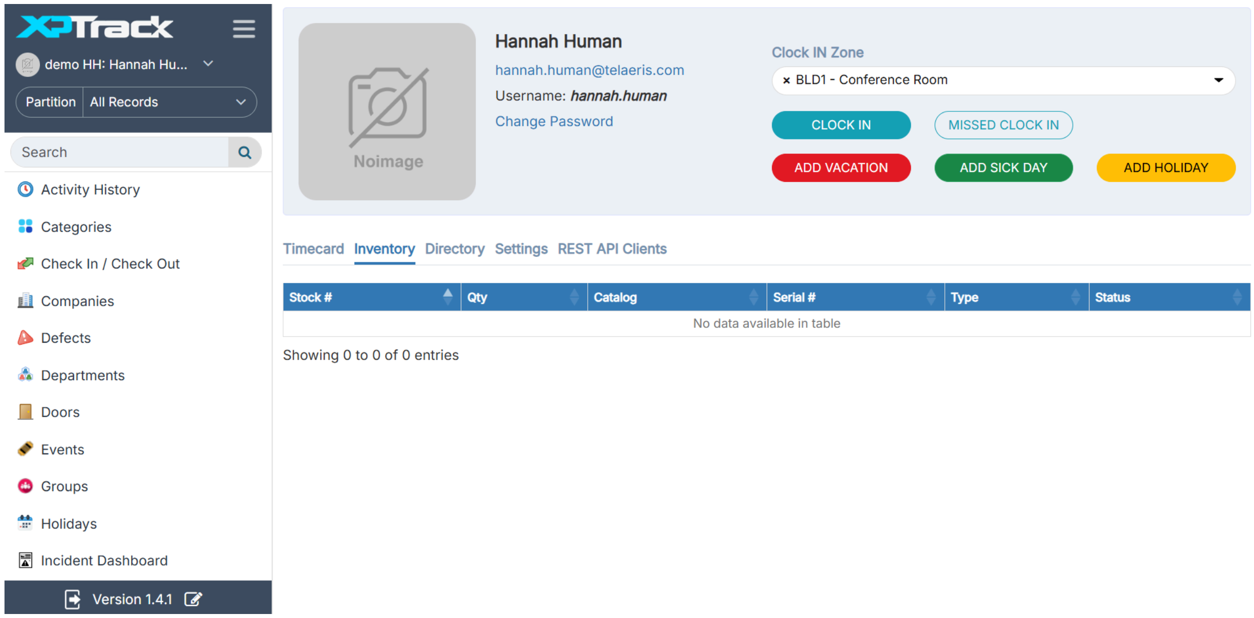


To activate an account:

1. **Open** the activation email.
2. **Click** the black "**Activation Link**" button. The link redirects to **xptrack.com**.
3. **Choose** a **username** and **password**, then **submit**.

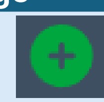
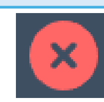
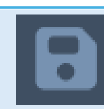


4. The profile page opens, where the name, email, username, and password can be reviewed.
5. Once the profile is confirmed, the XPTrack dashboard opens — the starting point for everything that follows.



Common Symbols

Recognizing the icons used throughout XPTrack helps with navigation. These appear consistently across pages, making the system easier to navigate once they are familiar.

Symbol	Description	Image
Green Plus Sign	Creates a new entry. This appears anywhere a new record can be added — roles, users, zones, items, and more.	
Red X Button	Cancels the current action. This is the button to use to back out of a form that has been started.	
Blue Floppy Disk	Saves changes. **Always click Save** before navigating away to make sure progress is kept.	
PDF	Exports the current view or report to a PDF file.	
CSV	Exports the current view or report to a CSV file, useful for working with the data in spreadsheets or other tools.	

With these symbols established, the next step is setting up the XPTrack workspace.

Setting Up Your Space

Before inventory can be tracked, a few foundational pieces of XPTrack need to be configured: **roles**, **users**, **companies**, and **zones**. These records form the structure that every other part of the system relies on. Setting them up thoughtfully at the start will save significant time later.

Roles

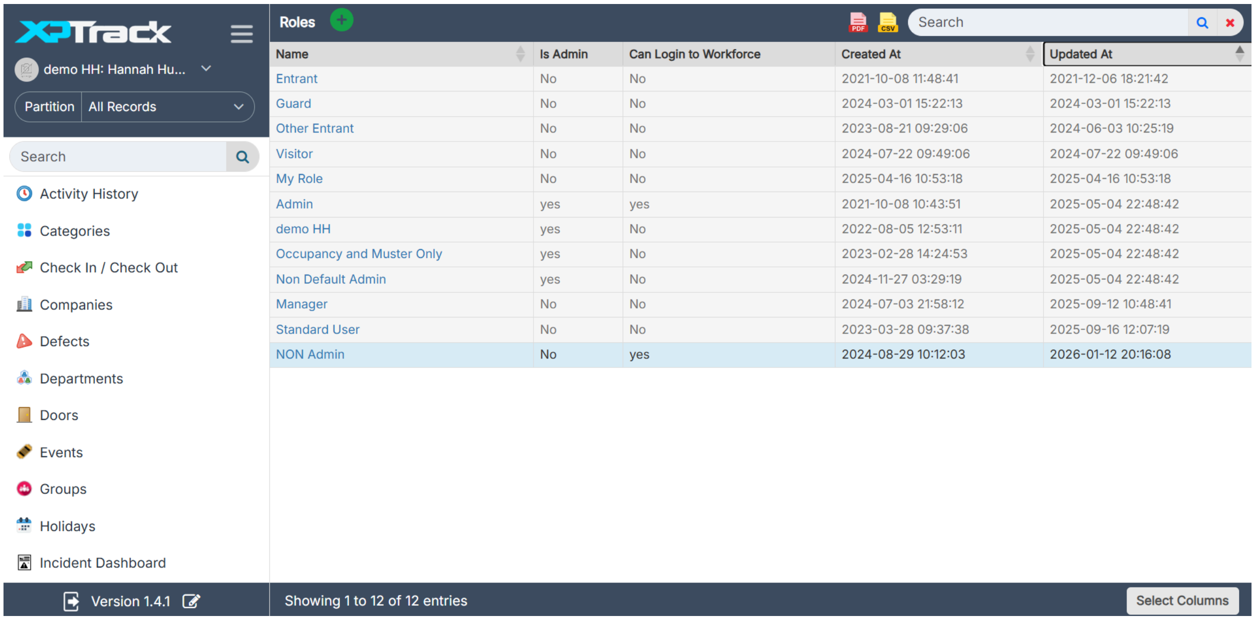
Roles define the permissions assigned to users within XPTrack. They determine what actions a user can perform and which areas of the system they can access. By assigning roles, administrators control feature access and ensure users have only the permissions they need.

XPTrack comes with two default roles:

Admin — Full access to the system, including configuration, user management, and inventory operations. Only assign the Admin role to people who should be able to do anything within XPTrack.

Standard — Limited access. Standard users can be assigned equipment and interact with basic workflows but cannot modify most system functionality.

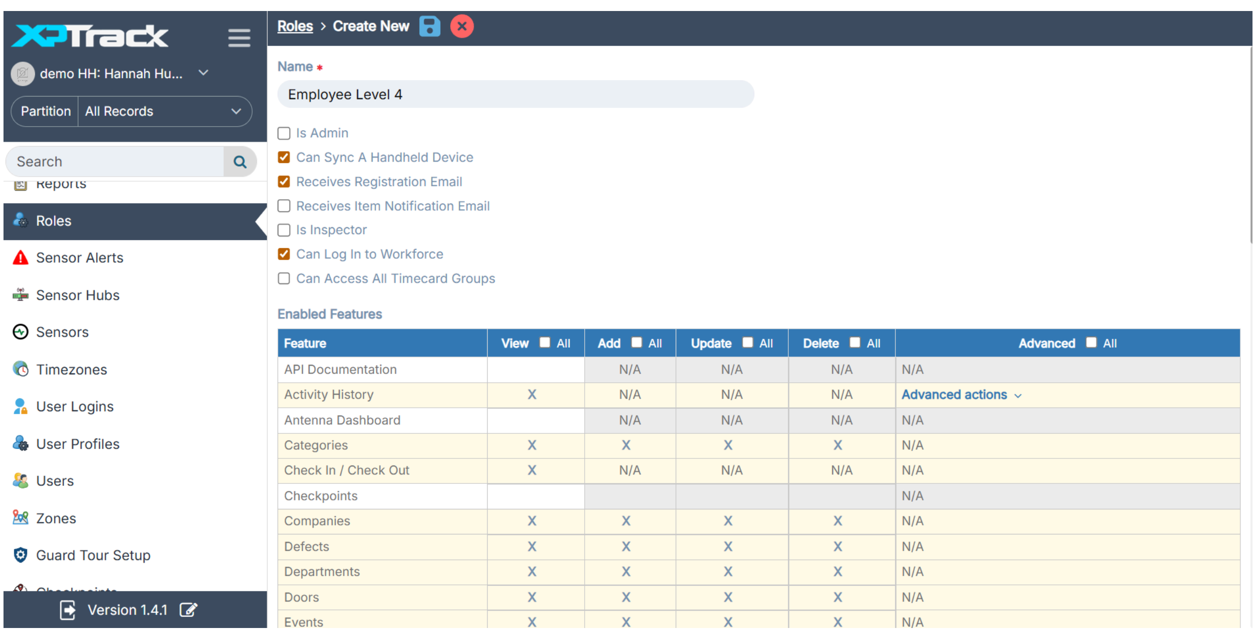
Administrators can also create any number of custom roles to match the way the organization works. For example, a role might allow full administrative access, restrict users to read-only data, or enable specific operational functions such as check-in/check-out or inspections.



To create a new role

Follow these steps:

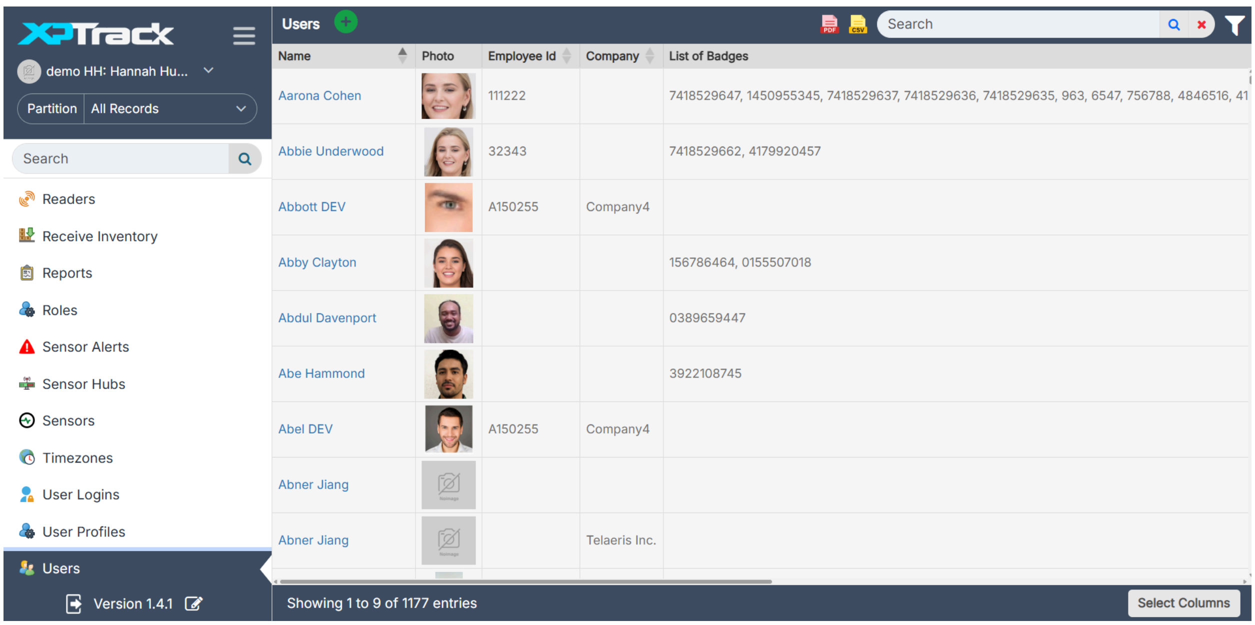
1. **Navigate** to **Roles** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** a **name**.
4. **Configure** the permissions for each **feature** by clicking the feature in the grid. An X signifies that the Role now has permission to that feature.
5. **Click Save**.



Permissions that can be configured per feature include **View** (access records), **Add** (create new records), **Update** (modify existing records), **Delete** (remove records), and **Advanced** (feature-specific permissions). By clicking the feature in the grid, an X will appear. This signifies that the Role now has permission to that feature.

Users

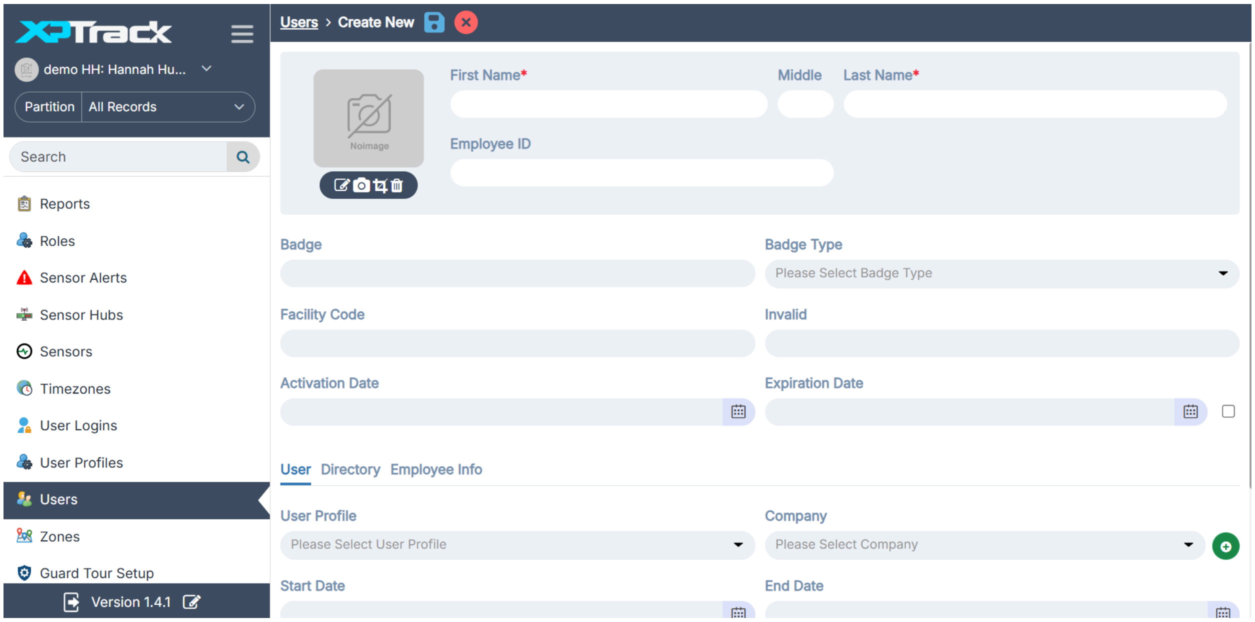
Users represent individuals who interact with the XPTrack system. This typically includes employees, administrators, contractors, and technicians. User records ensure that every action in XPTrack is tied to a specific person, which is essential for accountability and traceability.



To create a new user

Follow these steps:

1. **Navigate** to **Users** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** the user's information — **name**, **email address**, **phone number**, **assigned company**, and **role**.
4. **Click Save** to create the user.



The action can be canceled at any point by clicking the **red X**, which prompts a confirmation before discarding changes.

Once created, the user can begin interacting with the system based on their assigned permissions. User records are displayed in a table where administrators can search, sort, edit information, and update assigned roles or departments. XPTrack records all changes to user records, which can be reviewed from the User main page.

Companies

The **Companies** section is used to create and manage the organizations that exist within XPTrack. A company can be a corporate headquarters, a regional office, a contractor organization, or any other business unit that needs to be tracked. Once a company is created, it can be assigned to users and referenced in other records throughout the system.

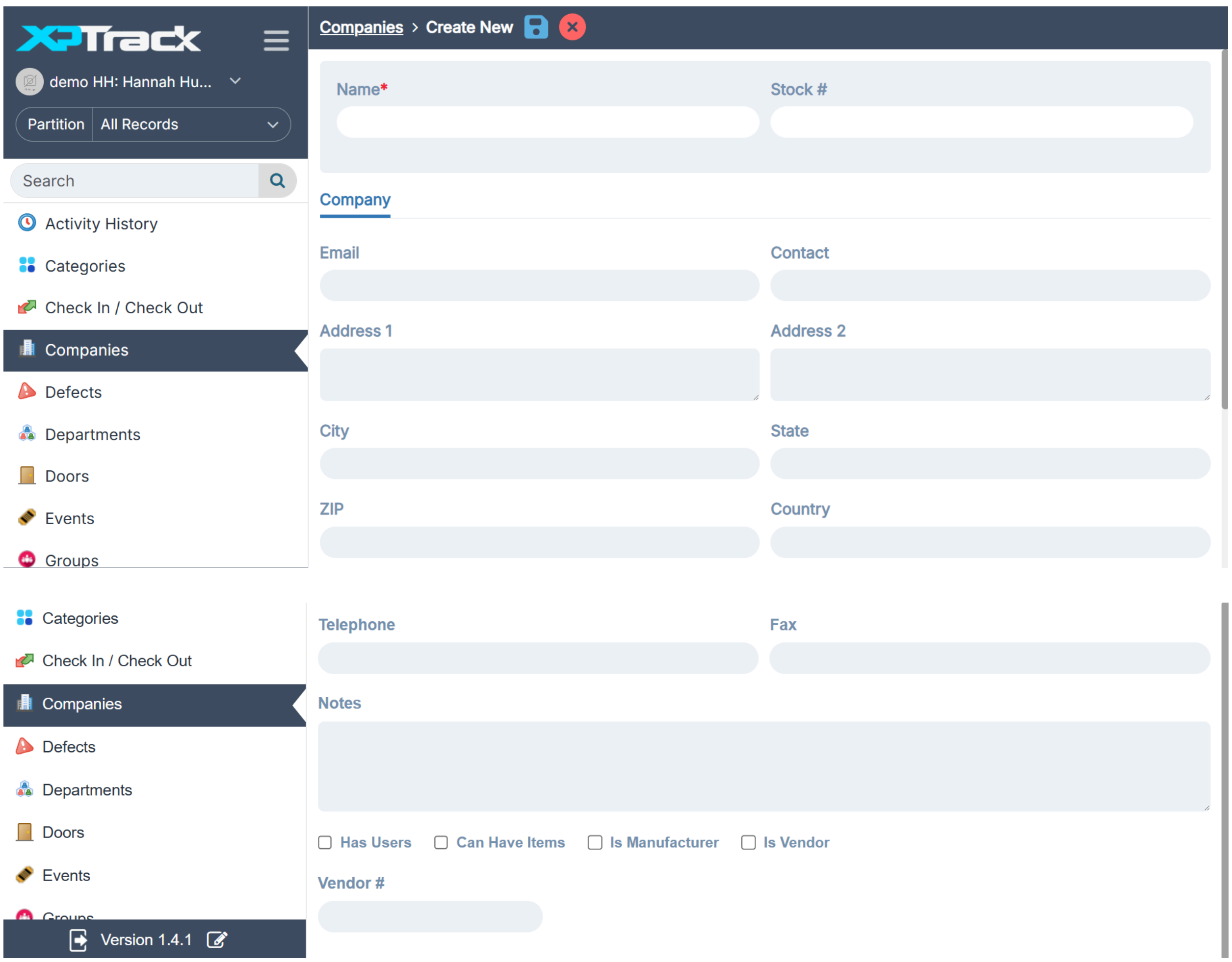
To create a new company

Follow these steps:

1. **Navigate** to **Companies** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** the company information — **name**, **address**, **city**, **state**, **country**, **contact information**, **notes**, and any **stock** or **vendor numbers**.
4. **Assign** the type of company by checking the boxes found at the bottom of the input field. The options include:

- **Has Users**: The company can be assigned to user records on the Users page.
- **Can Have Items**: The company can own or be associated with inventory items.
- **Is Manufacturer**: The company appears in the Manufacturer dropdown when creating catalog entries.
- **Is Vendor**: The company appears as a selectable vendor when receiving inventory or recording stock sources.

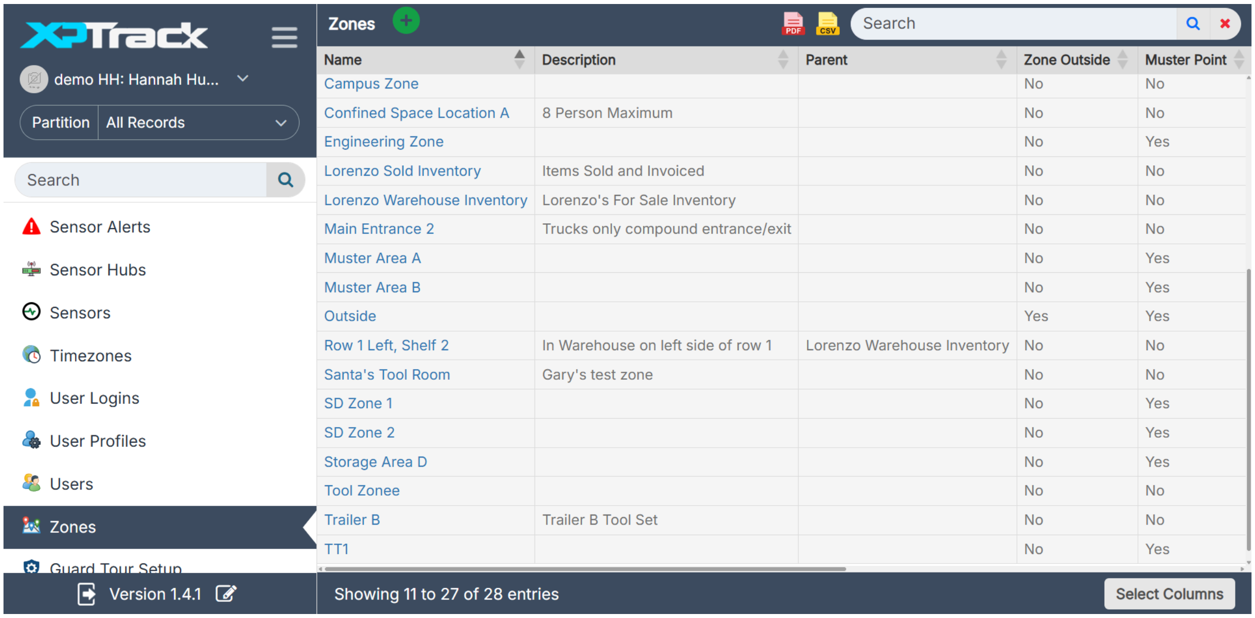
5. **Click Save** to create the record.



The **Companies** page displays all existing records in a table. From here, records can be sorted by column, searched by name, opened to edit their information, and saved. These tools make it easy to keep company records up to date as the organization evolves.

Zones

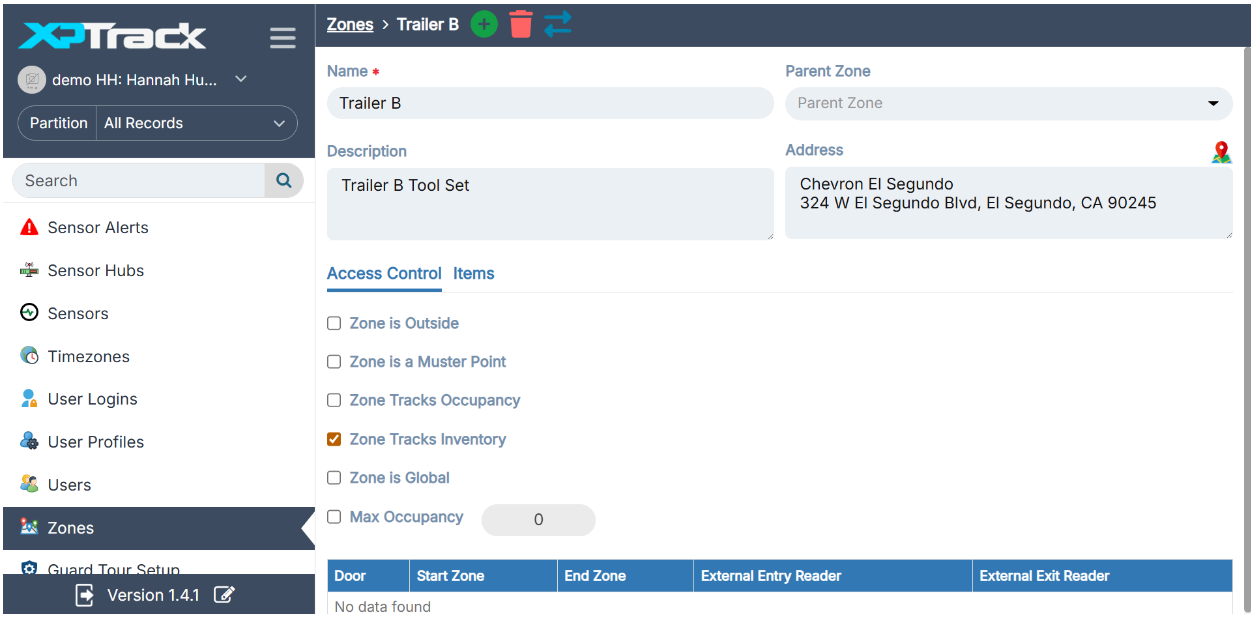
Zones define the physical locations where items live in XPTrack. A zone can be as large as a whole building or as small as a single drawer in a filing cabinet — whatever level of granularity makes sense for the operation. Zones must be set up before items can be checked in or out, because every transaction is tied to a zone.



To create a zone

Follow these steps:

1. **Navigate** to **Zones** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** a name, description, and address.
4. From the access-control perspective, label the zone as outside, a muster point, occupancy-tracking, inventory-tracking, or global, and set a maximum occupancy if applicable.
5. **Click Save**.



For example, a warehouse on a construction site might be named "Warehouse," described as the central tool storage area, and marked as a zone that tracks inventory.

Repeat the process until every zone that needs to be tracked has been created. With roles, users, companies, and zones in place, the system is ready for organizing inventory.

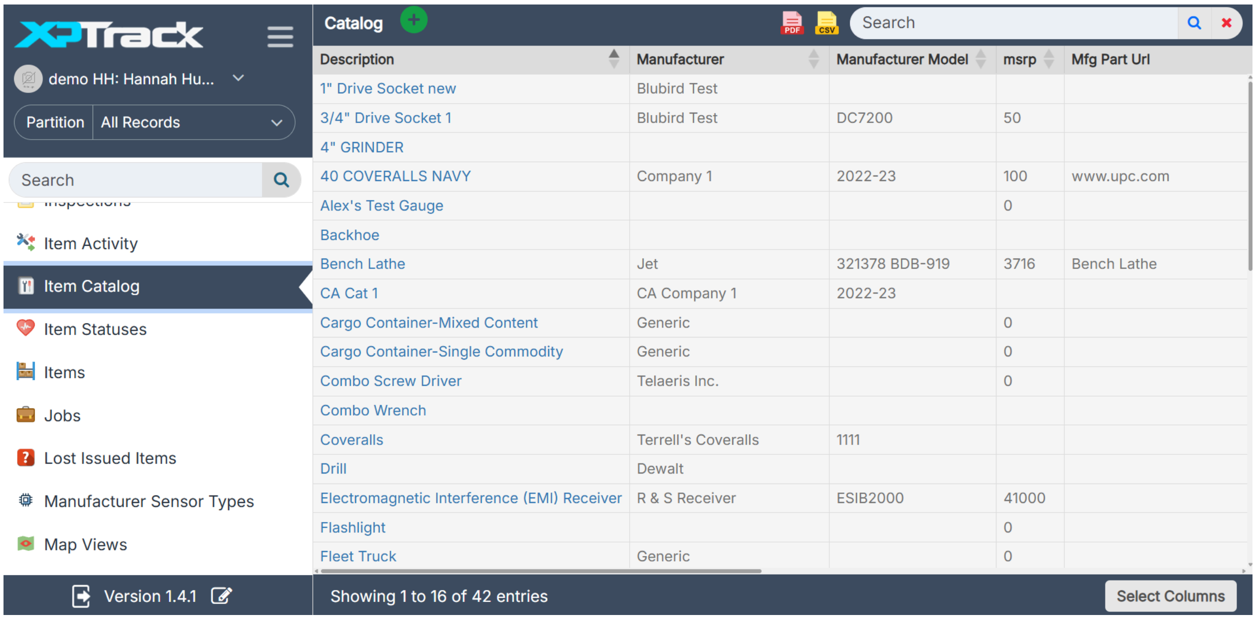
Organizing Inventory

Before inventory can be tracked, it needs structure. XPTrack uses a combination of **zones**, **item catalogs**, and **item statuses** to define where items are stored, how they are categorized, and what condition they are in. Together these create a clear, organized inventory system that lets users locate items quickly, understand their status, and manage them efficiently.

Item Catalog

The **Item Catalog** organizes the different types of equipment XPTrack tracks. It acts as a template system: each catalog entry defines what an item is, and individual items represent specific physical instances of that type. For example, a catalog entry might be "Motorola Radio XTS5000," while the individual items would be Radio #101, Radio #102, and Radio #103. Using the catalog this way keeps inventory consistent and ensures items are created the same way across the system.

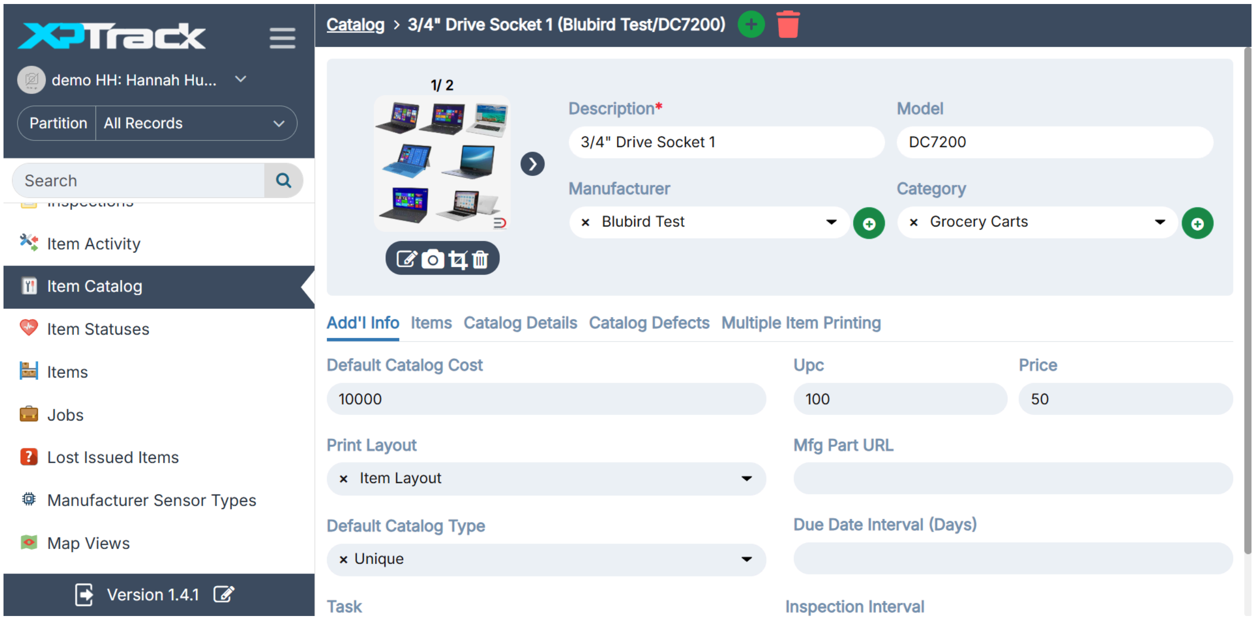
Catalog entries can be grouped into broader categories — Radios, Safety Equipment, Hand Tools, Vehicles, and so on. Categories make it easier to filter, search, and report on inventory. A well-organized catalog reduces duplicate or inconsistent entries, improves search and reporting, and makes inventory easier to manage as it grows.



To create a new catalog entry

Follow these steps:

1. **Navigate** to **Item Catalog** in the left navigation.
2. **Click** the **green plus sign**.
3. **Enter** a description, manufacturer, model, category, item type, and an optional cost.
4. **Click** the **blue floppy disk** to save.



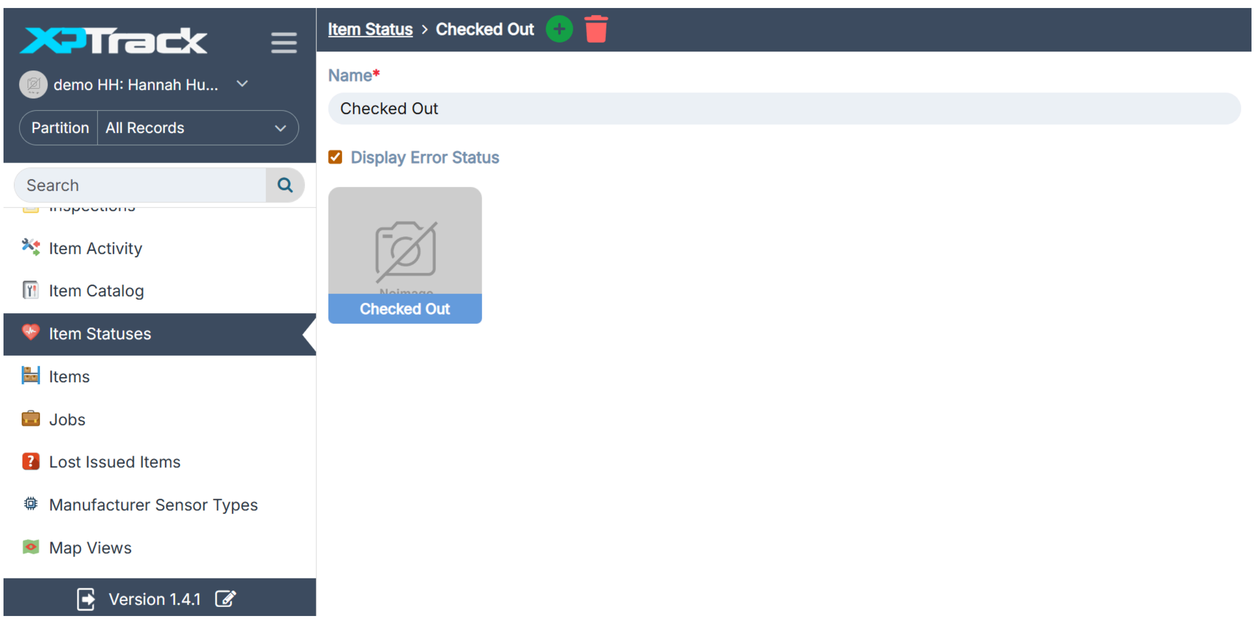
The new entry can then be used when adding individual items.

Each catalog entry requires an item type. **Unique** items are tracked individually — serialized assets like radios or laptops. **Commodity** items are tracked in quantity rather than individually, such as gloves or safety glasses. **Consumable** items are one-time-use and will not be returned, such as earplugs or nails. Choosing the correct type ensures inventory is tracked appropriately.

Manage catalog entries by searching, sorting by name, category, or manufacturer, and editing existing records as needed.

Item Statuses

Item statuses describe the current condition or availability of an item — Available, Checked Out, Out of Service, Lost, and any custom statuses that are configured. Statuses give everyone in the system a quick way to see whether an item is ready for use, in someone's hands, undergoing maintenance, or missing. Statuses can be updated manually when editing an item, or automatically through workflows like check-in/check-out and inspections.



Managing Items

The **Items** section is where individual pieces of equipment are created, tracked, and managed. While the Item Catalog defines what something is, the Items section represents the actual physical assets being tracked. Using the earlier example, the catalog entry might be "Motorola Radio XTS5000" while the items are Radio #101, Radio #102, and Radio #103. Each item record contains the details needed to identify and track that asset through its full lifecycle.

Understanding Items

An **item** represents a single physical asset within XPTrack. Each item is typically associated with a catalog entry (what the item is), a zone (where the item is located), and a status (its condition or availability). Items may also carry identifying information such as a barcode or asset tag, serial number, description, and assigned user if currently checked out.

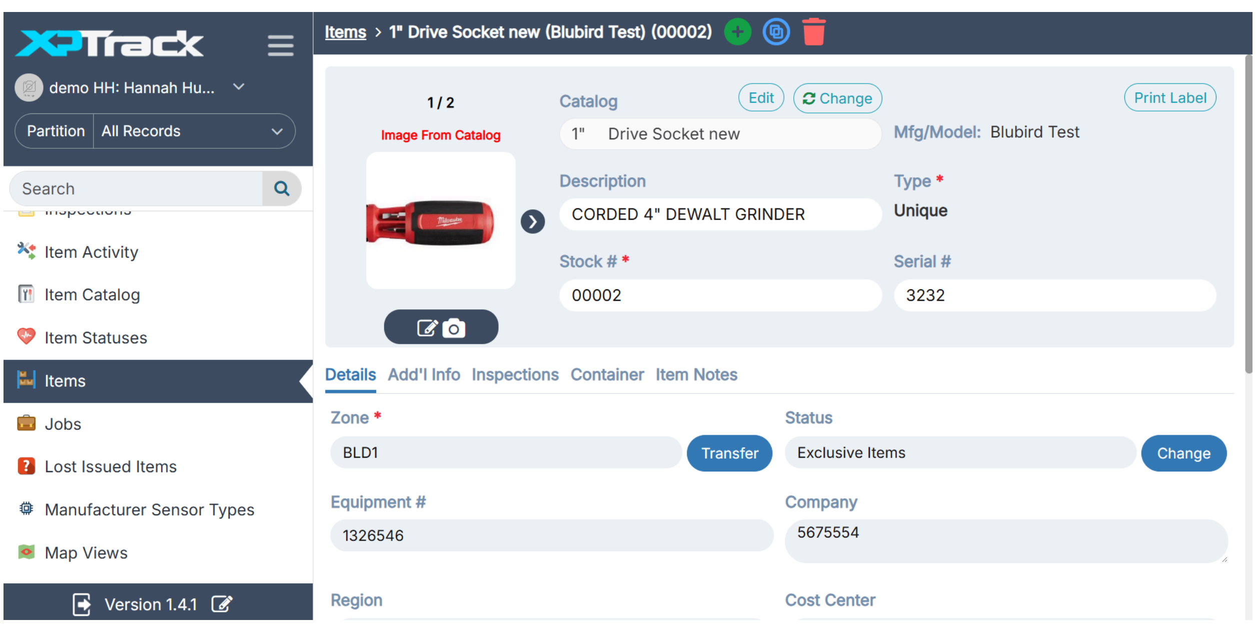
Items are the core of the system. They are what makes it possible to track assets in real time, assign responsibility to users, monitor location and condition, and maintain accurate inventory records. Without properly configured items, the rest of XPTrack's tracking and reporting features cannot function effectively.

Creating an Item

To create a new item

Follow these steps:

1. **Navigate** to **Items** in the left navigation and click the **green plus sign**.
2. **Enter** the required information — the catalog entry the item belongs to, a description or name, the barcode or asset tag, a serial number if applicable, the zone where the item will be stored, and its starting status (typically Available).
3. **Click Save**.

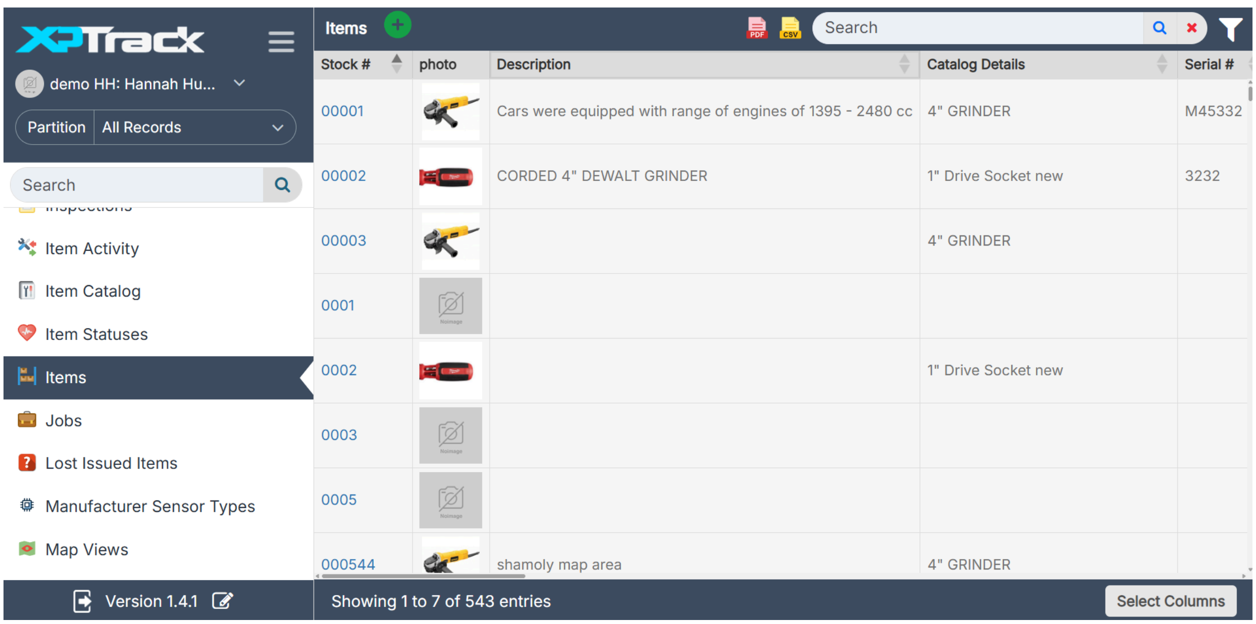


Once created, the item is ready for tracking and operations such as check-in and check-out.

Many identical items can be created one at a time or through bulk entry using the import or receive-inventory workflows. Bulk entry is particularly useful for large inventories where many similar assets need to be added at once.

Managing Item Records

The Items page displays all inventory in a table. From here, item details, current location, and status are visible, along with whether an item is assigned to a user. To find a specific item, use the search bar or sort by columns such as name, status, location, or catalog type — especially helpful when managing large inventories.



To edit an item

Follow these steps:

1. **Select** the item from the list.
2. **Update** the desired fields (zone, status, description, and so on).
3. **Click Save**.

Keeping item records current is what makes XPTrack's reporting accurate.

Receiving and Managing Inventory

Receiving inventory is the process of adding new items into XPTrack. It is typically the first step when bringing equipment onboard, and it ensures that inventory is recorded, categorized, and assigned to a location from the start. Items can be added individually or in bulk depending on volume and type. Once received, items are available for assignment, inspection, and the rest of XPTrack's operational workflows.

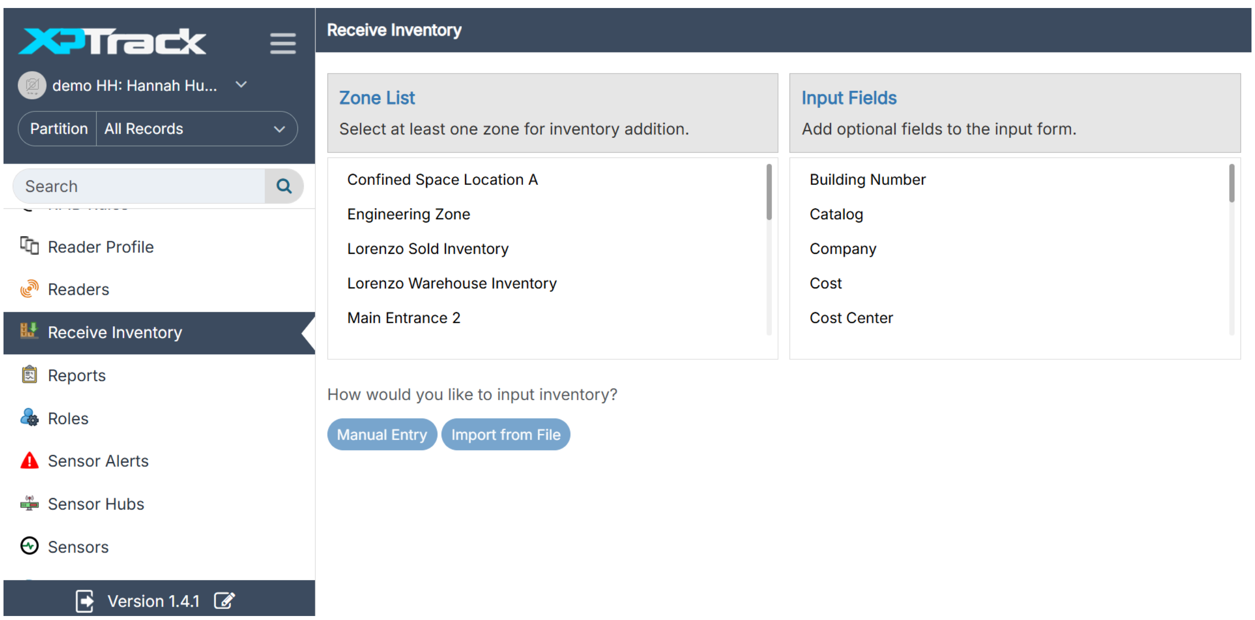
Receiving Inventory

The **Receive Inventory** feature adds new items into the system and assigns them to a zone. This is most used when new equipment is purchased, when inventory is delivered to a site, or when items are entered into XPTrack for the first time.

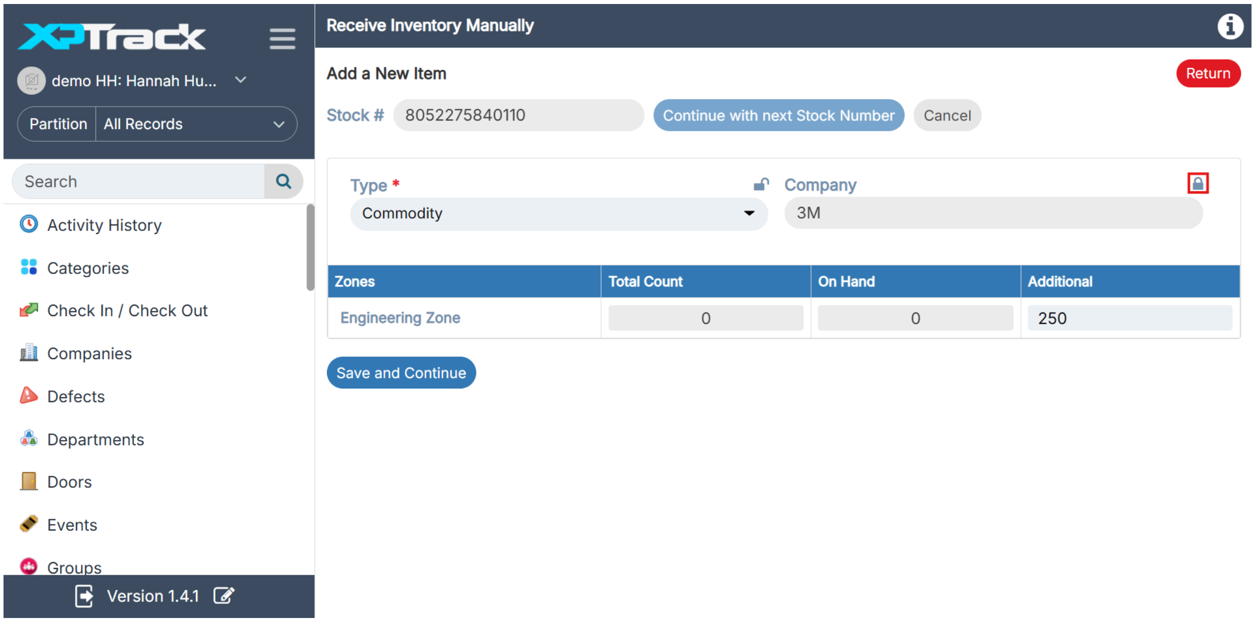
To receive inventory

Follow these steps:

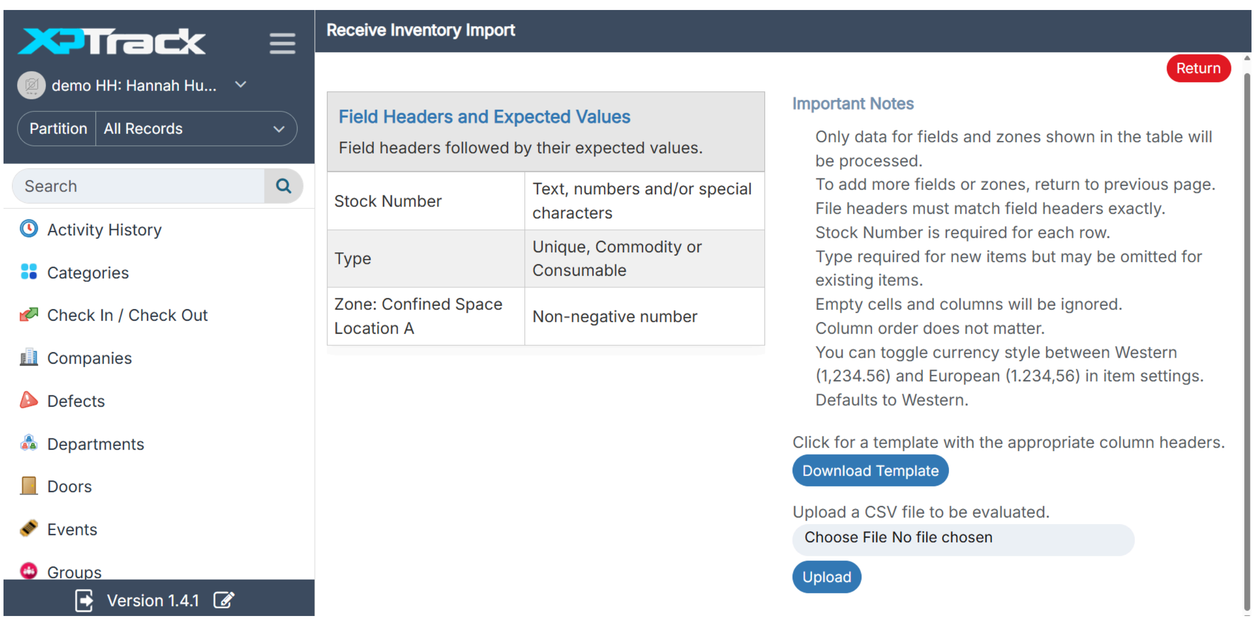
1. **Navigate** to **Receive Inventory** in the left navigation.
2. **Select** at least one zone from the Zone List for inventory addition.
3. **Select** Input Fields to optionally add fields to the input form. Input Fields are especially useful when adding many of the same item. More on Input Fields in Step 5.
4. **Select** whether to input inventory through Manual Entry or through Import from File.



5. When inputting manually, scan or enter a Stock Number, select Item Type, input Total Count and count On Hand, and any other additional information needed. For the Input Fields selected in Step 3, a value (such as Company, Building Number, and Cost) can be set and locked in so it carries over to each new row instead of being re-entered every time. To lock an input field value, enter the value and click the lock symbol.



6. When uploading inventory from a file, follow the instructions on the following page. A template with appropriate column headers can be downloaded; click **Choose File** to select the completed CSV and click **Upload** to import it. (Note: there is no Save button on the file import form — **Upload** completes the action.)



Each item will then appear in the Items list and be ready for use in operational workflows.

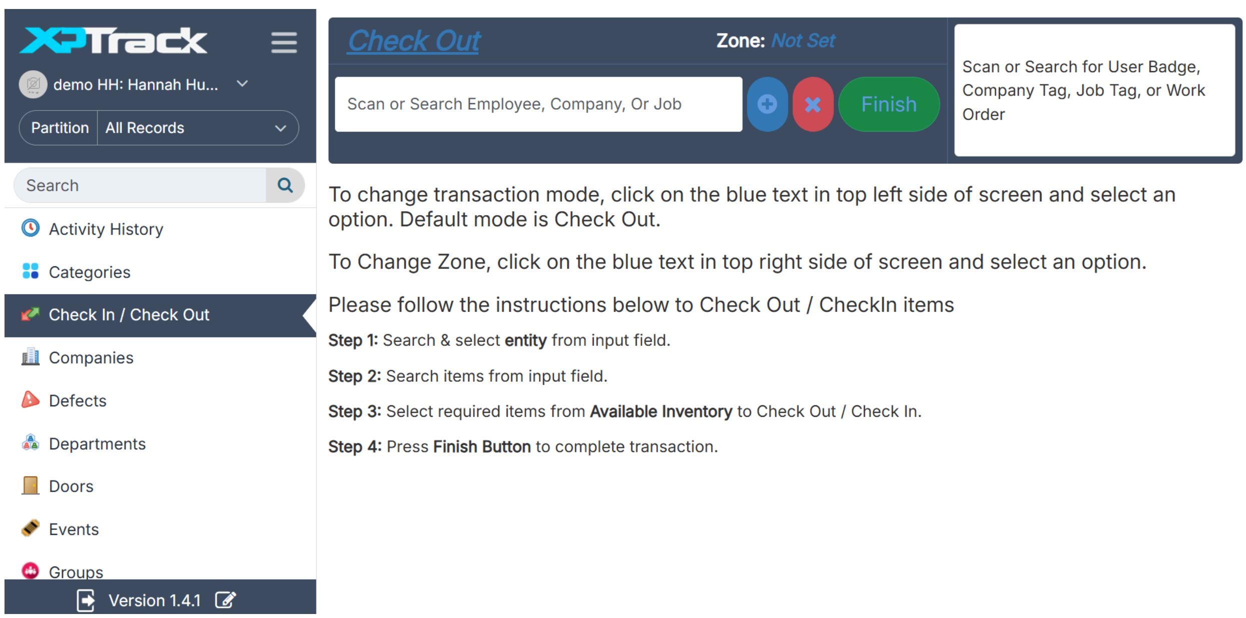
Check In / Check Out

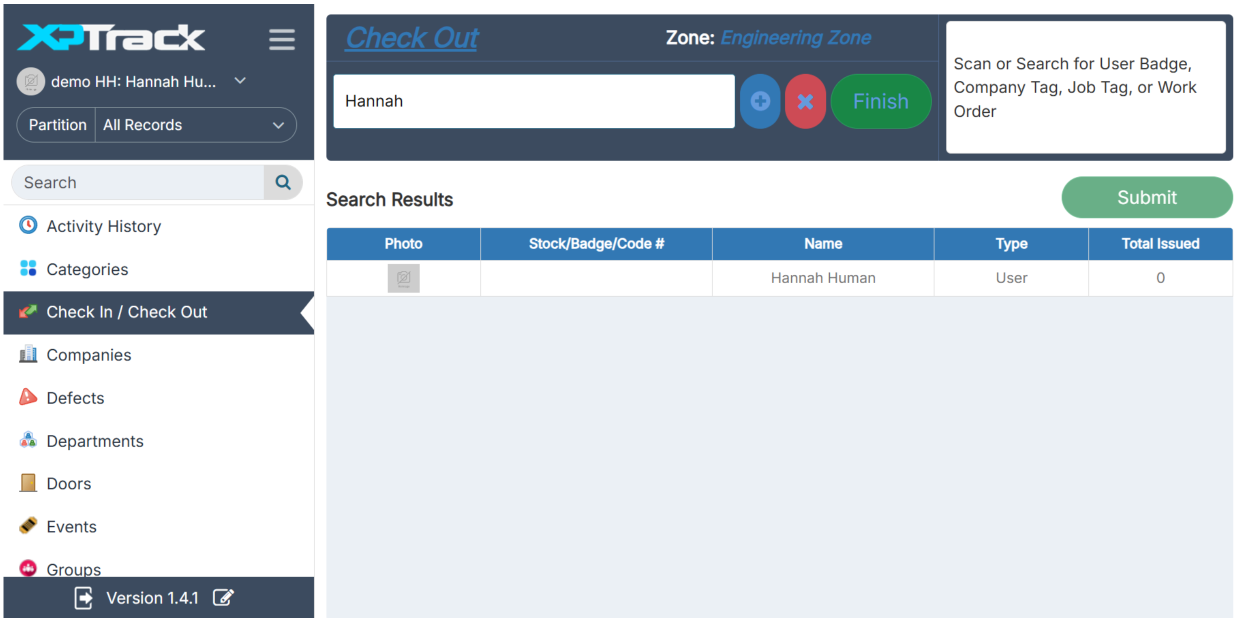
Checking items in and out is one of the most common day-to-day tasks in XPTrack. Think of it as the digital equivalent of a sign-out sheet, only much smarter. When a user checks out an item, XPTrack records who took it, when, and where it came from. When the item is returned, that record is closed and the item is marked available again.

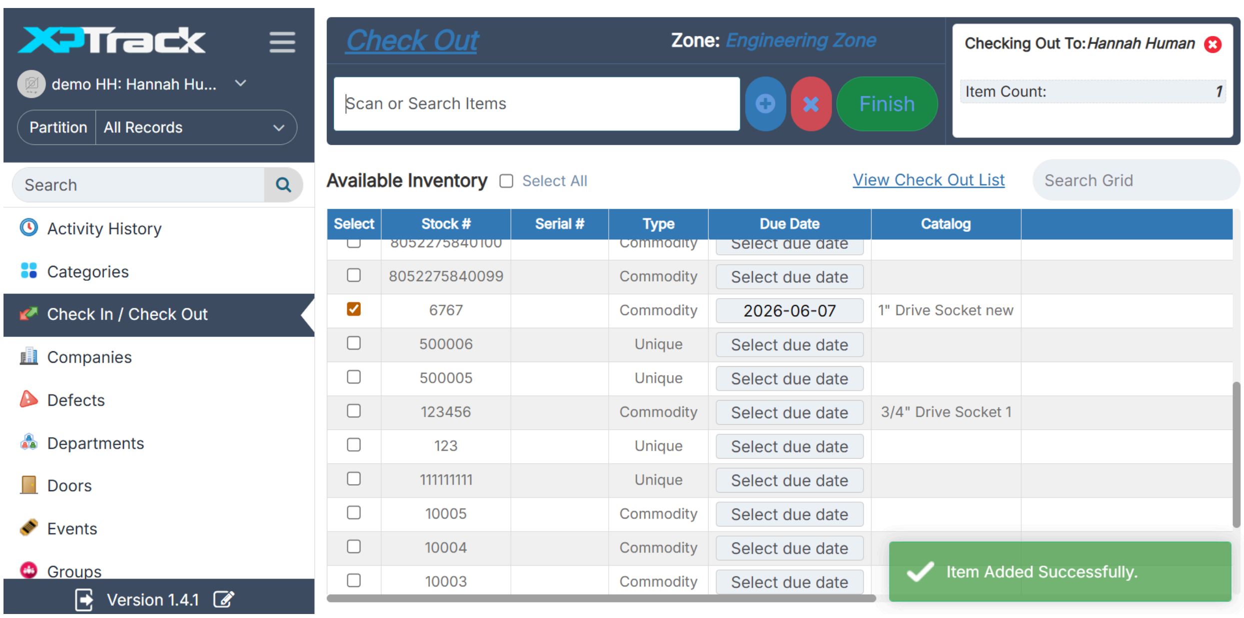
To check out an item

Follow these steps:

1. **Navigate** to **Check In / Check Out** in the left navigation and **select Check Out** by clicking on the text in the top left side of the screen.
2. **Search** for or scan the item.
3. **Select** the user it is being assigned to and confirm the zone the item is leaving from.
4. **Click Finish**.







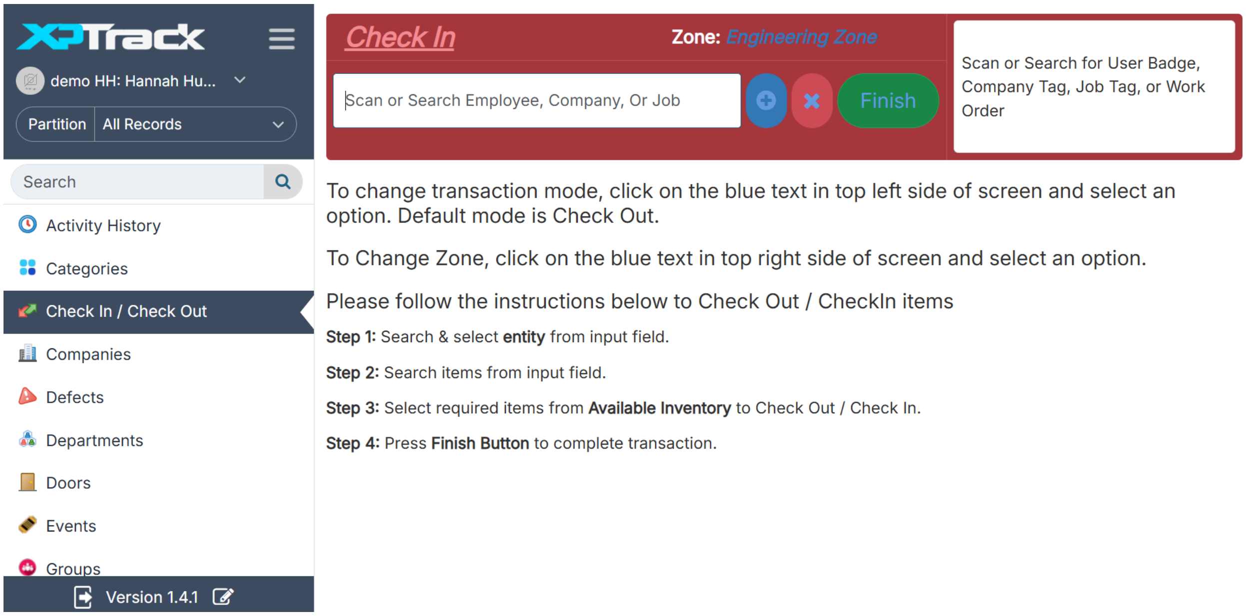
The item will reflect the assigned user and its status will update accordingly. XPTrack automatically timestamps every transaction, providing a clear record of when the item left.

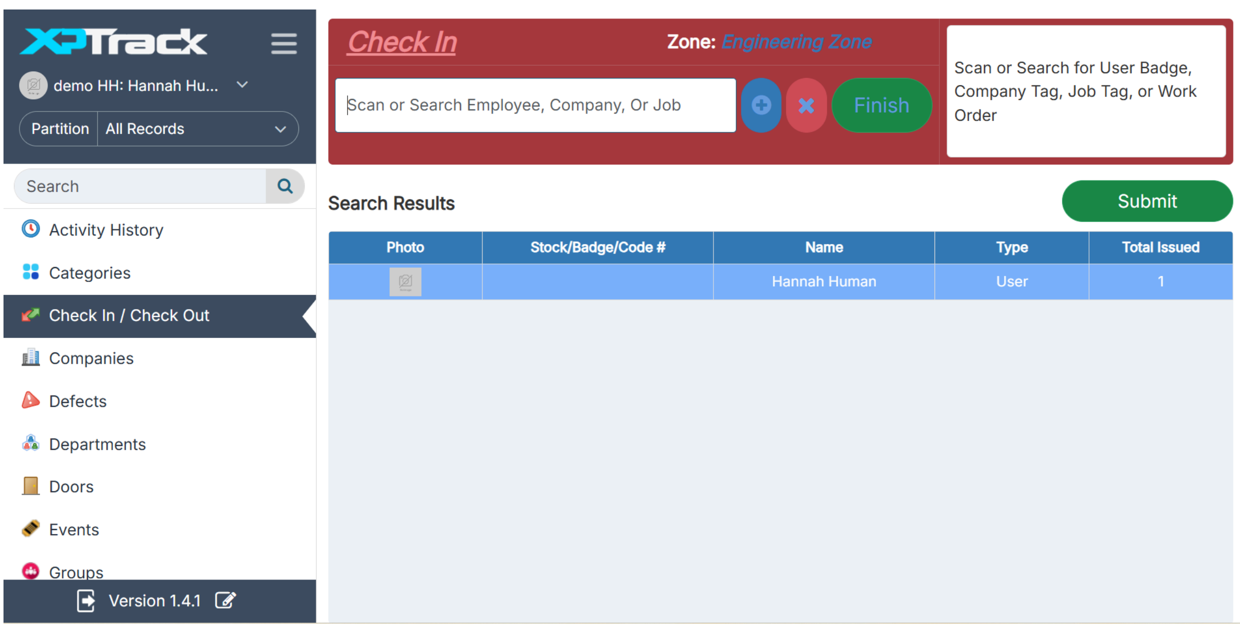
To check an item back in

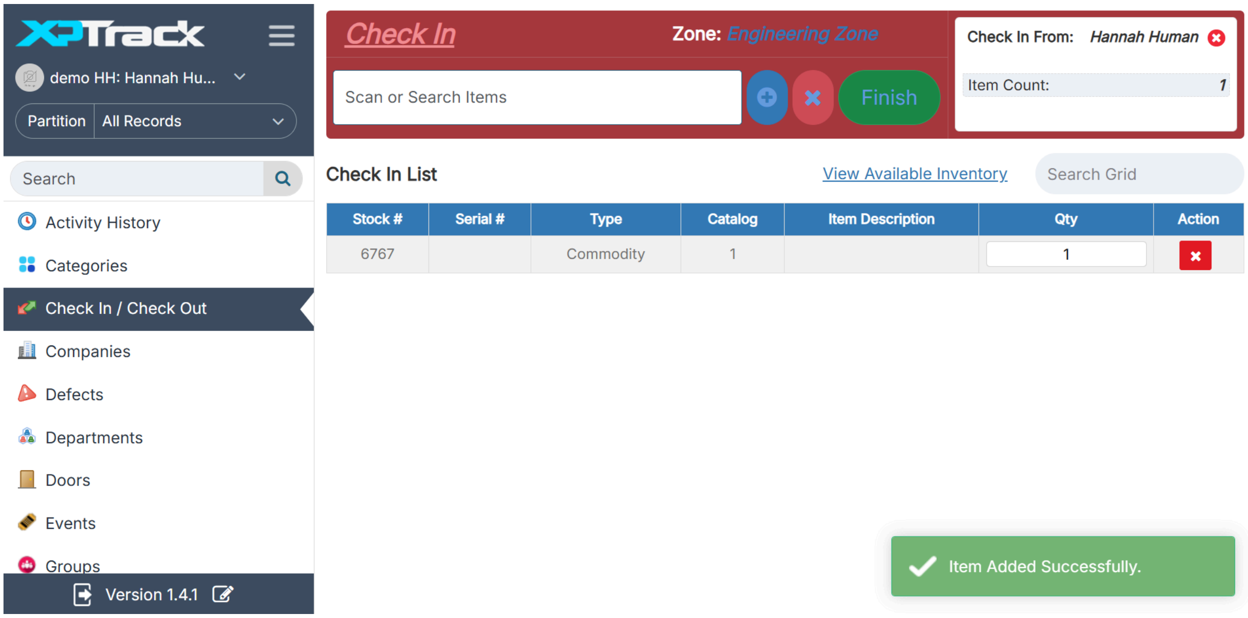
Follow these steps:

1. **Navigate** to **Check In / Check Out** in the left navigation and **select Check In** by clicking on the text in the top left side of the screen.
2. **Search** for or scan the item.

3. **Select** the user it is being assigned to and confirm the zone the item is returning from.
4. **Click Finish**.







The item will now show as available in its assigned zone, ready to be checked out again or used in other workflows.

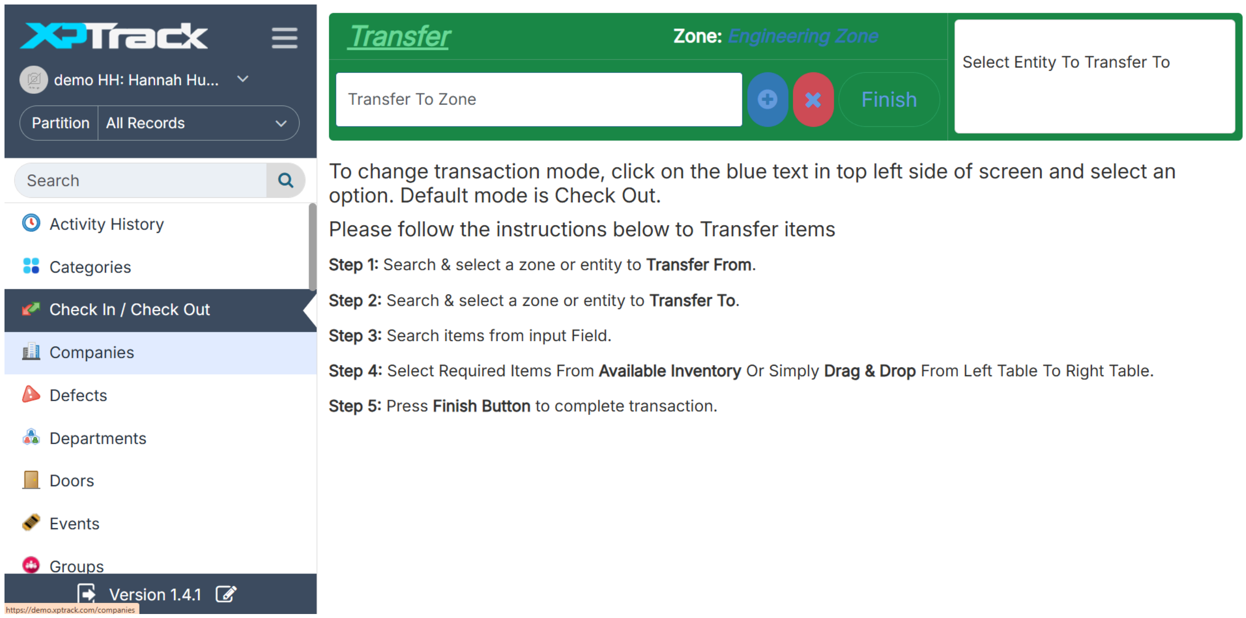
Transferring Inventory

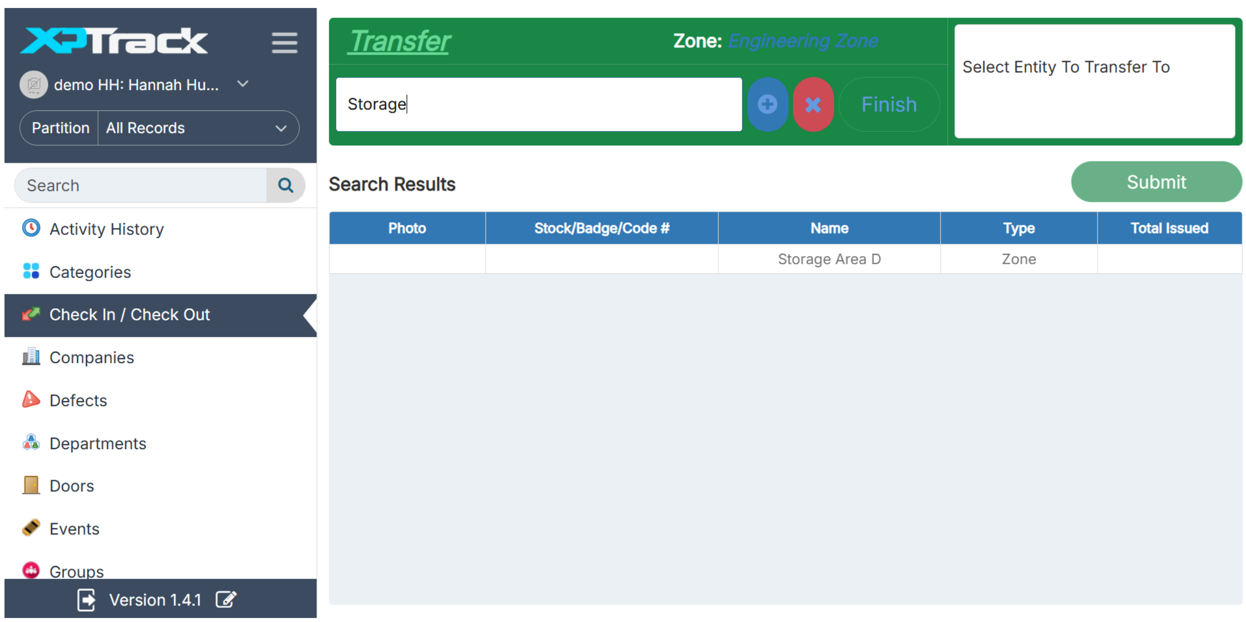
Sometimes items need to move between zones without being checked out to an individual — equipment moving from the warehouse to a job site, or tools being reorganized between storage rooms. The **Transfer** feature handles this. Transferring an item updates its zone assignment without creating a personal check-out record, keeping location data accurate so anyone looking up the item will find it in the right place.

To transfer an item

Follow these steps:

1. **Navigate** to **Check In / Check Out** in the left navigation and **select Transfer** by clicking on the text in the top left side of the screen.
2. **Select** the Zone, or other Entity, by selecting the text in the top center of the screen.
3. **Search** for the entity to transfer the item to.
4. **View** the Inventory Lists and drag Inventory between zones and input quantity to be transferred.
5. **Click Finish**.


XPTrack
demo HH: Hannah Hu...
Partition
All Records
Search
Activity History
Categories
Check In / Check Out
Companies
Defects
Departments
Doors
Events
Groups
Version 1.4.1
Transfer
Zone: Engineering Zone
Transfer To Zone
Finish
Select Entity To Transfer To
To change transaction mode, click on the blue text in top left side of screen and select an option. Default mode is Check Out.
Please follow the instructions below to Transfer items
Step 1: Search & select a zone or entity to Transfer From.
Step 2: Search & select a zone or entity to Transfer To.
Step 3: Search items from input Field.
Step 4: Select Required Items From Available Inventory Or Simply Drag & Drop From Left Table To Right Table.
Step 5: Press Finish Button to complete transaction.


XPTrack
demo HH: Hannah Hu...
Partition
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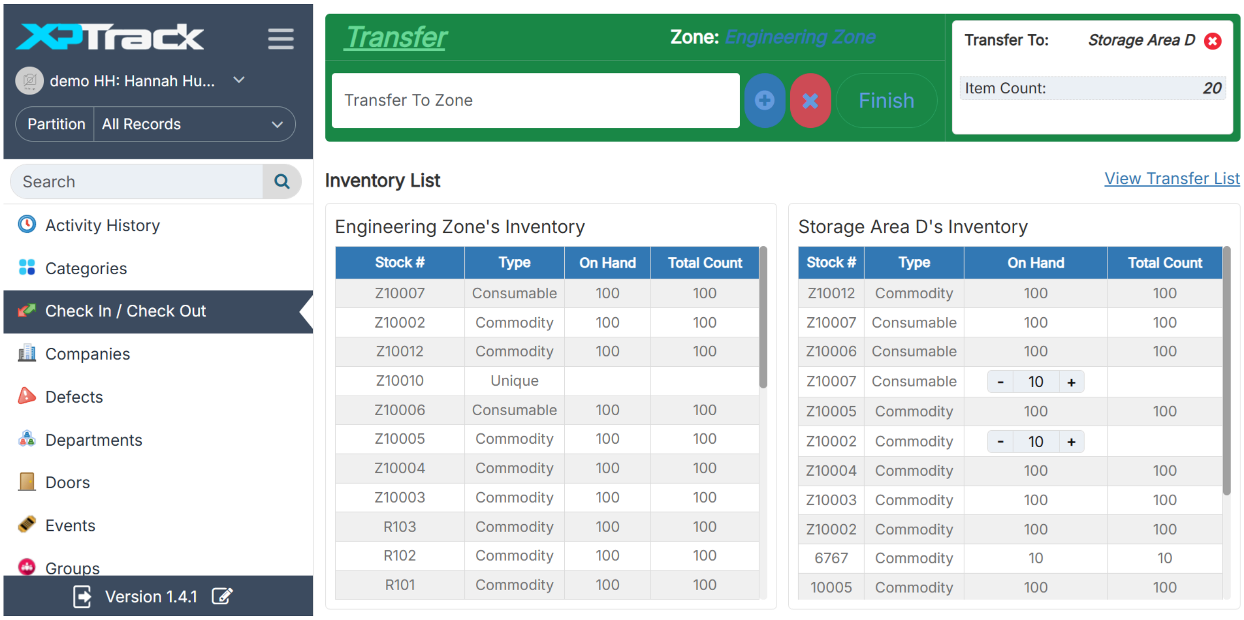
Companies
Defects
Departments
Doors
Events
Groups
Version 1.4.1
Transfer
Zone: Engineering Zone
Storage
Finish
Select Entity To Transfer To
Search Results
Submit
Photo
Stock/Badge/Code #
Name
Type
Total Issued
Storage Area D
Zone



XPTrack updates the item's zone and logs the transfer with a timestamp, providing a complete audit trail of where items have been.

Item Inspections

Keeping equipment in good working order is essential, and XPTrack makes it easy to stay on top of it. The **Inspections** feature lets designated users document the condition of items on a regular cadence, creating a record that can be reviewed over time. Inspections are particularly valuable for safety-critical equipment that requires regular checks, high-value assets that need condition monitoring, equipment shared across many users, and anywhere a documented maintenance history is required.

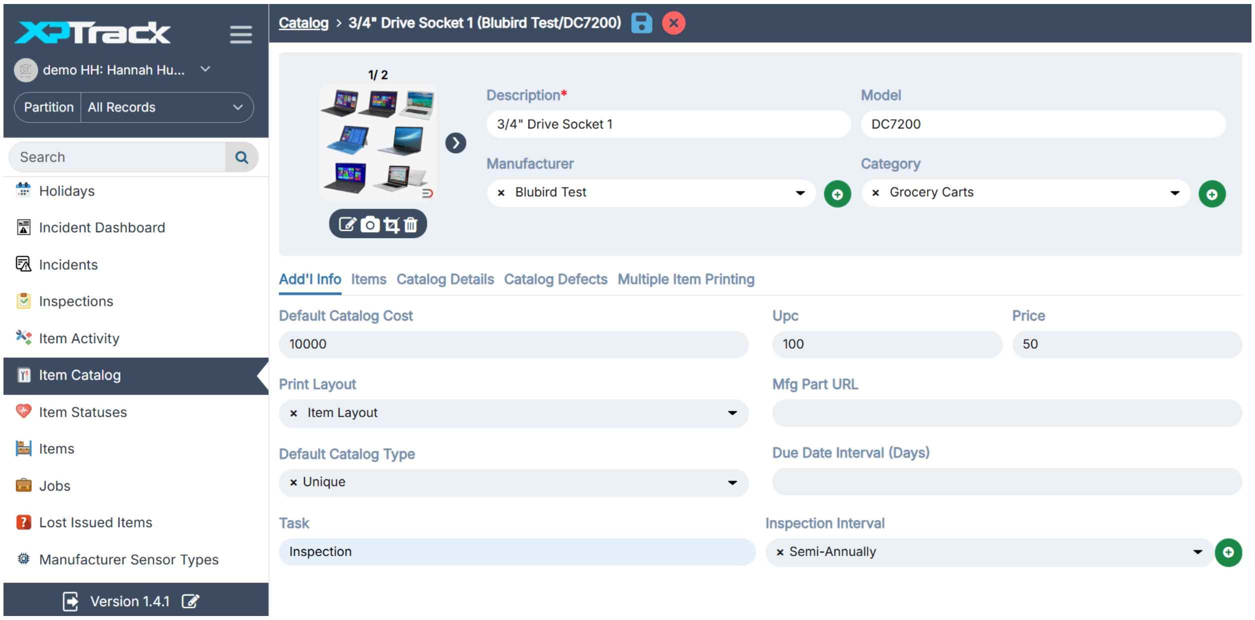
Inspections are configured at the Catalog level. For any Catalog entry whose default Item Type is Unique, a Task and an Inspection Interval can be added — once that is set, every item belonging to that catalog entry will automatically appear in the Inspections grid when it's due. This means setup happens once per catalog entry, not once per item. In the Inspections grid, items that are overdue turn red and appear at the top; items that are upcoming are highlighted yellow.

To set up inspections for a catalog entry

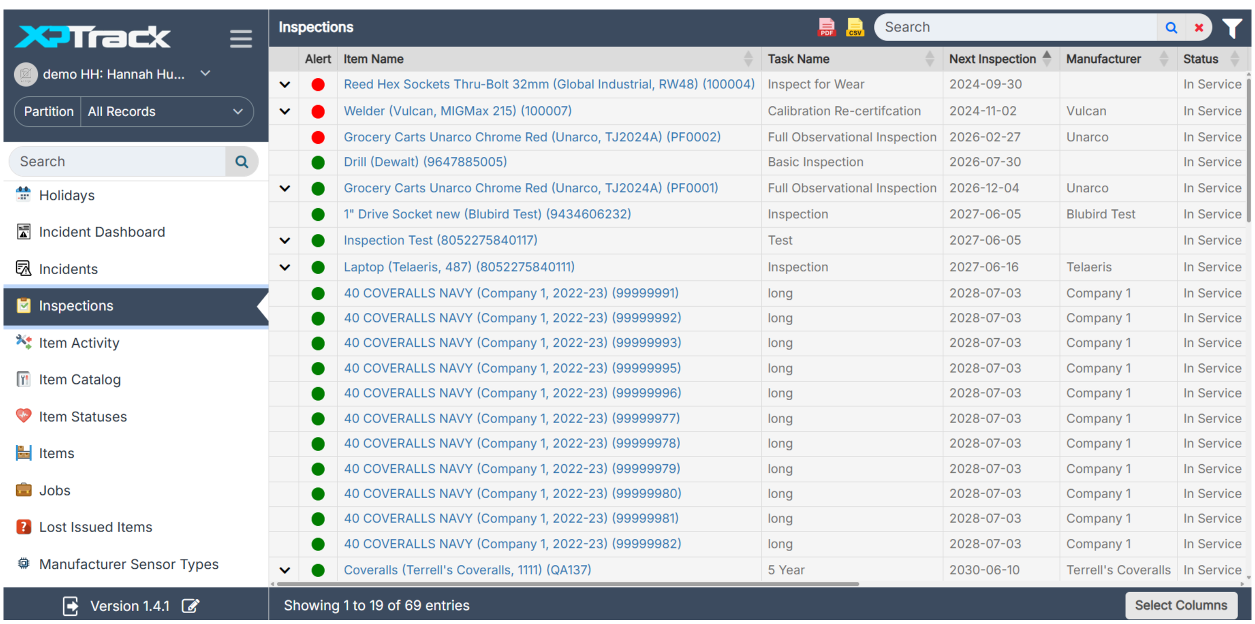
Follow these steps:

1. **Navigate** to **Item Catalog** in the left navigation and open a catalog entry with an Item Type of Unique.
2. **Add** a Task describing what the inspection should cover.
3. **Set** the Inspection Interval (how often the item needs to be re-inspected).

4. **Click Save.**



All items associated with that catalog entry will now appear in the Inspections grid when their interval comes due.

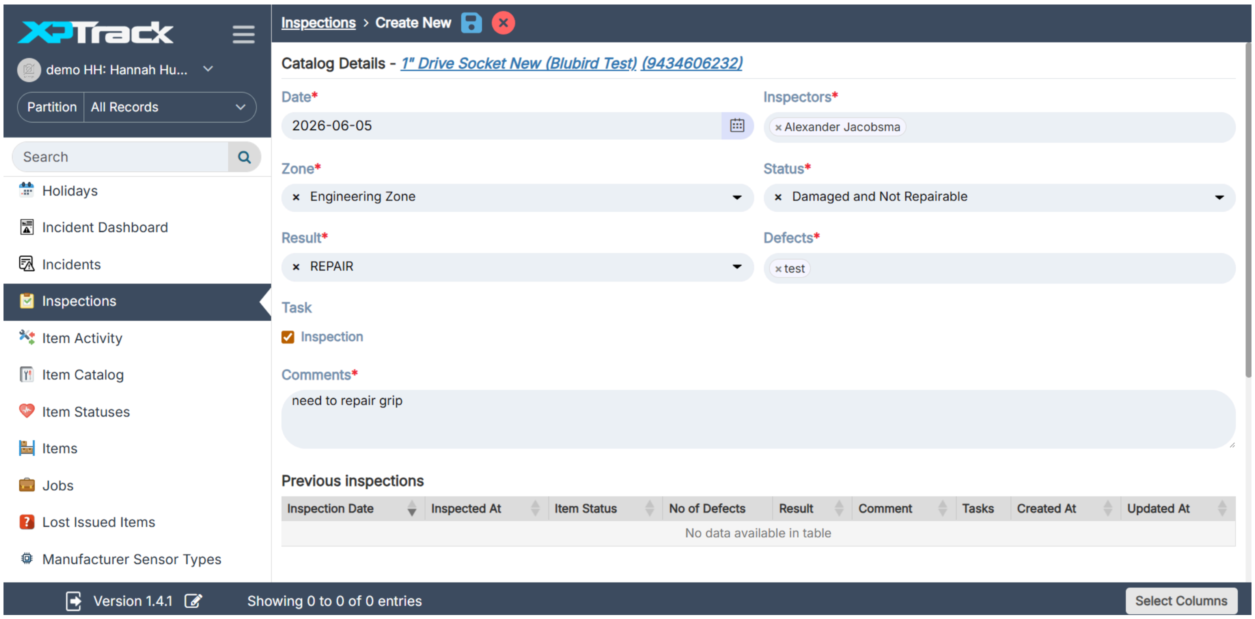


To perform an inspection

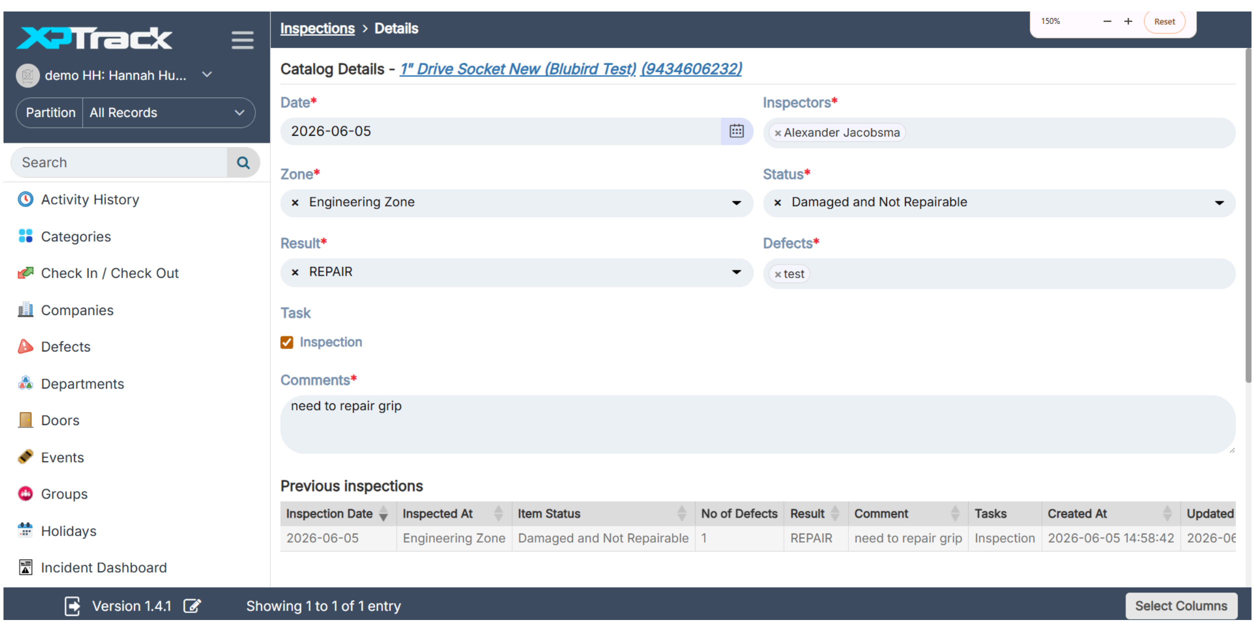
Follow these steps:

1. **Navigate** to **Inspections** in the left navigation.

2. **Select** an item that is due for inspection from the grid. Overdue items appear in red at the top; upcoming items are highlighted yellow.
3. **Set** a Zone for the inspection and assign a Status and **Result** from the dropdown options.
4. **Add** a comment describing the condition or any observations.



5. **Click Save** to record the inspection.



Once saved, the item's inspection clock resets and it will next appear when the interval expires again. All inspection records are stored and can be reviewed at any time, giving the organization a clear maintenance history for every piece of equipment.

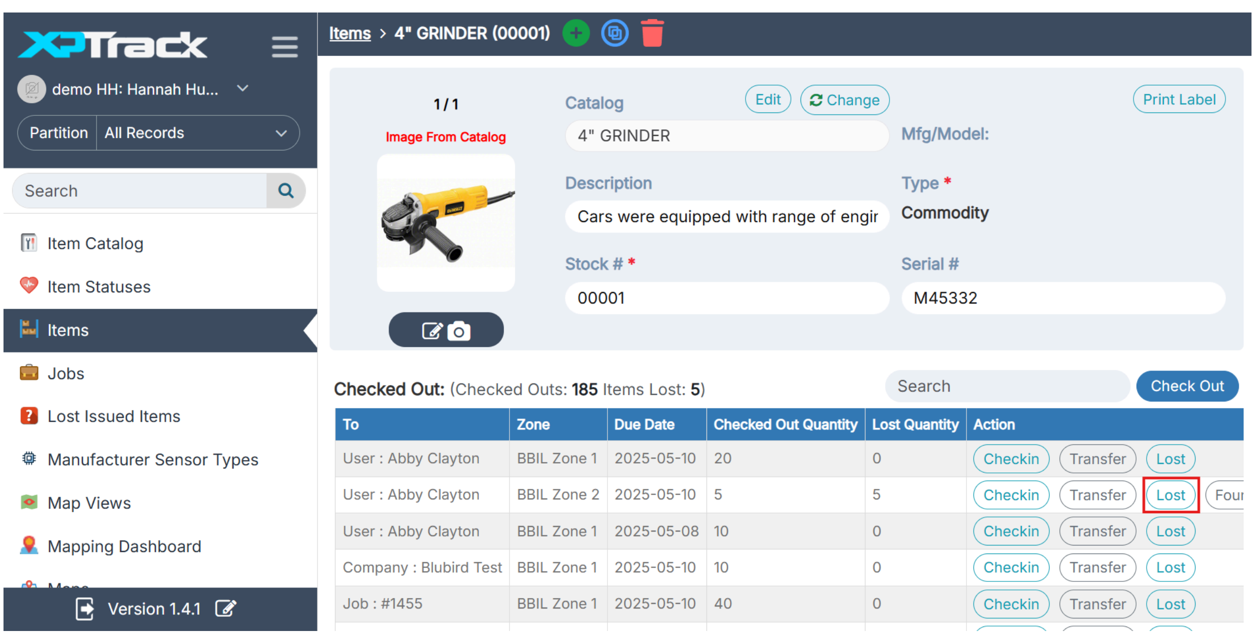
Lost Issued Items

Sometimes an item can't be located. Rather than leaving its status ambiguous in the system, XPTrack provides a way to formally flag an item as **lost**. This keeps inventory records accurate and ensures the right people know about the situation. Lost items are managed from the Items page. If an item is currently checked out to a user, locate it in the checked-out grid at the bottom of the item's page and **select Lost** — this removes the item from active inventory and moves it into the Lost Items section. Marking an item as lost does not delete it — the record remains, along with the full history of who last had it and when it was last seen. That information can be invaluable if the item turns up later or if an investigation is needed.

To mark an item as lost

Follow these steps:

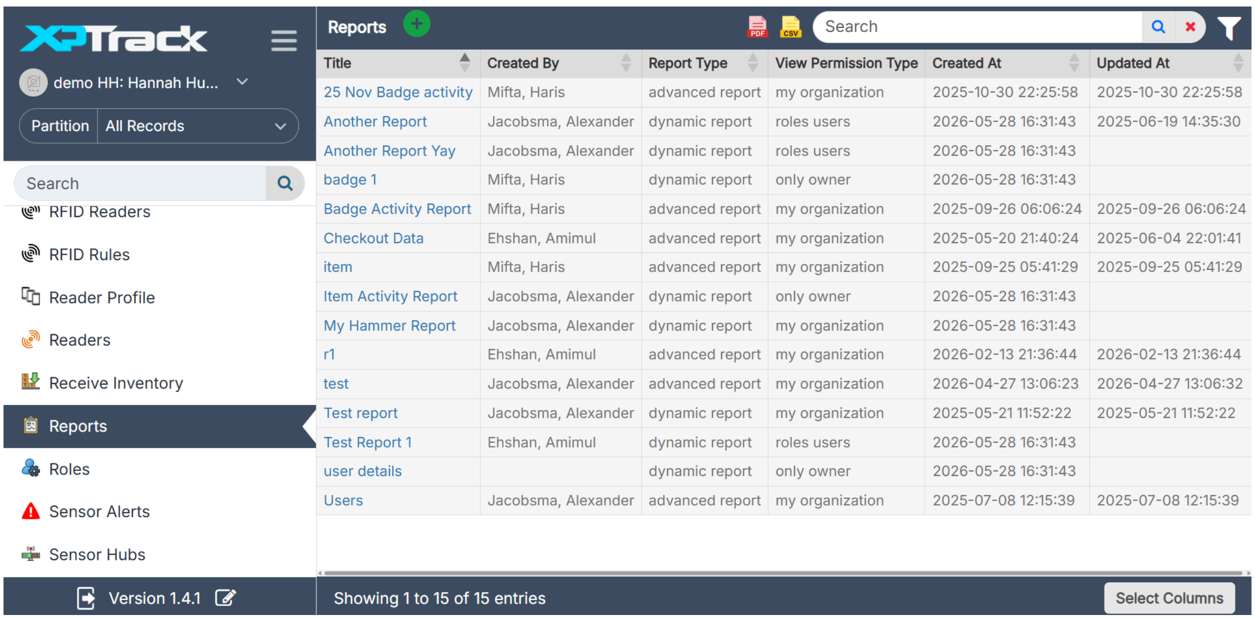
1. **Navigate** to **Items** in the left navigation.
2. **Locate** the item using the search bar or by browsing, then open the record.
3. **Scroll** down to the checked-out grid at the bottom of the item's page.
4. **Find** the user the item is currently checked out to by scrolling or using the search bar.
5. **Select Lost** to mark the item as lost.



If the item is later recovered, it can be updated back to an active status. XPTrack retains the full history of all status changes, providing a complete picture of the item's journey.

Reports

After all the work of setting up zones, users, and inventory — and using XPTrack day in and day out — the Reports section is where everything comes together. Reports pull meaningful information out of the system to show what is actually happening with the equipment. Whether the need is to see what items are currently checked out, review a history of transactions, audit item movements across zones, or track inspection results, XPTrack's reporting tools provide the necessary visibility.



Types of Reports

The Reports page lists every report saved in the workspace, showing its title, who created it, its type, view permissions, and when it was created and last updated. From here, reports can be searched, filtered, sorted by any column, displayed by chosen columns, and exported to PDF or CSV.

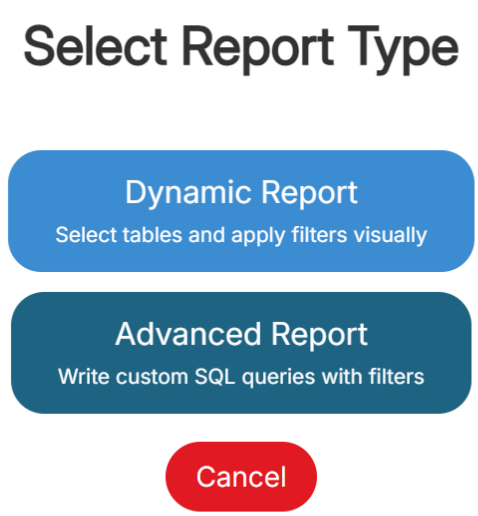
XPTrack supports two kinds of reports:

Report Type	Description
Dynamic Report	A visual, no-code report builder. Choose a data source such as Item Activity, Badge Activity, Muster

	Activity, Event Activity, Issued Item, Item Zone, Catalog Item, Item, or User — then drag fields into Table Fields, Conditions, and Sort to shape the output. Click **Result** to preview the data on the right.
Advanced Report	A SQL-based report builder for custom queries. Pick from the list of available views (badge_activities_view, badges_view, catalog_items_view, categories_view, companies_view, devices_view, doors_view, and more), write a SELECT statement in the editor, optionally bind filter parameters such as :PUSERID or :PZONEID, and click **Run Query** to preview the results. An **Insert AI Prompt** option is available to help draft queries.

Running a Report

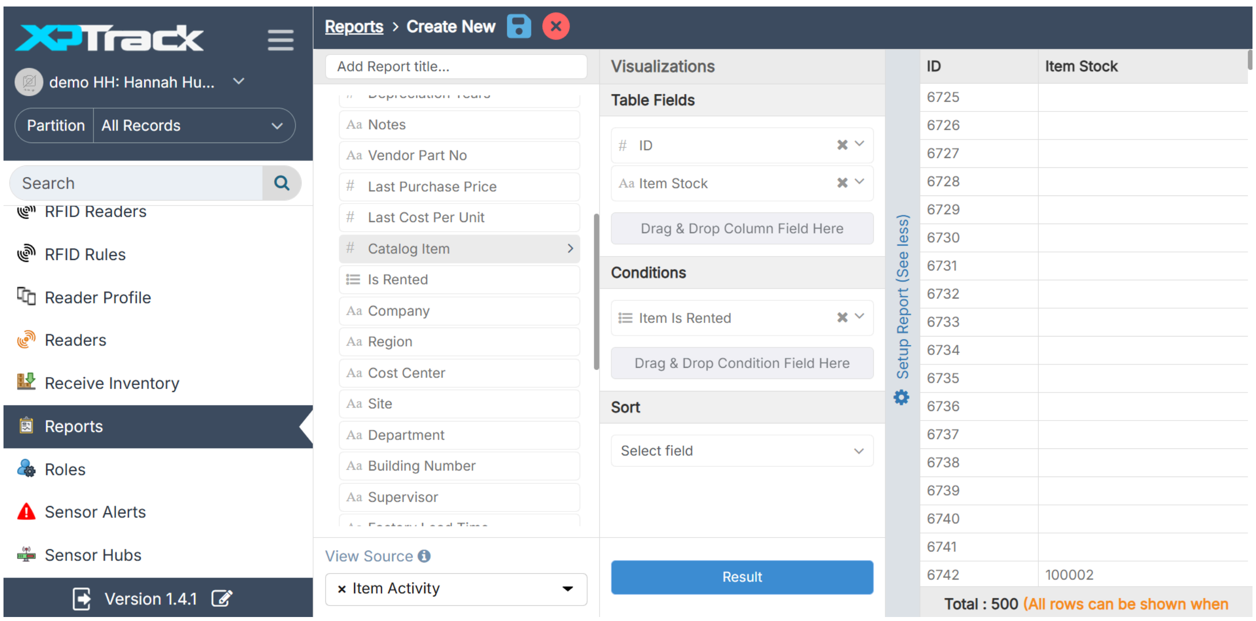
To create a new report, navigate to **Reports** in the left navigation and click the **green plus sign**. A dialog prompts for a report type — **Dynamic Report** or **Advanced Report** — then follow the steps below.



Building a Dynamic Report

A **Dynamic Report** uses a visual builder — no SQL required.

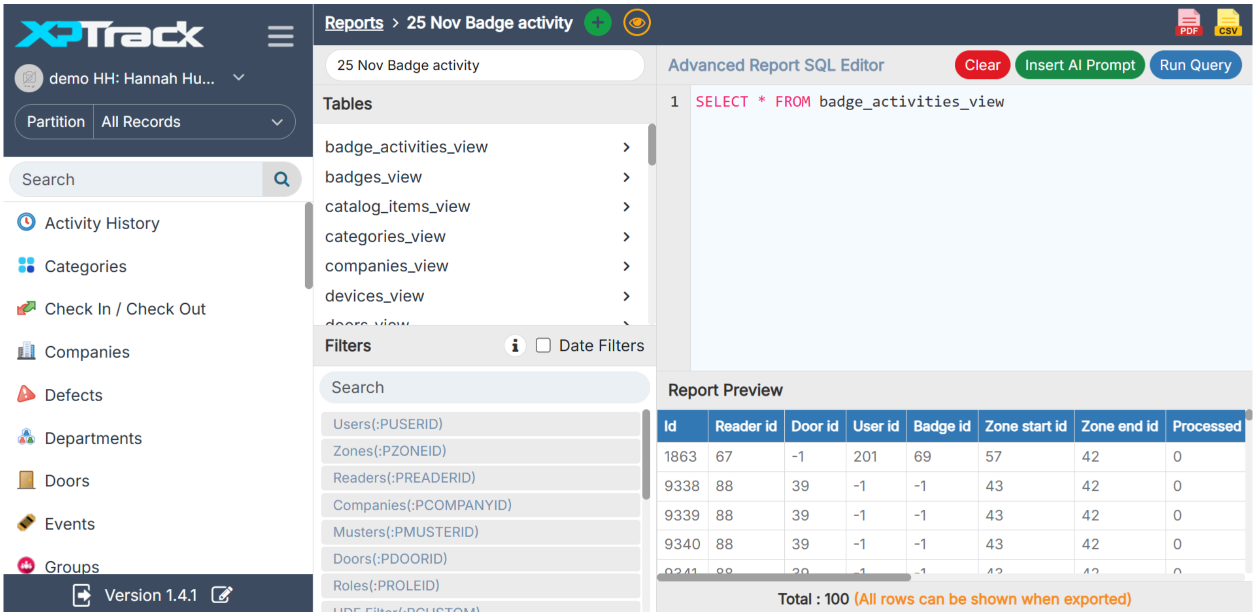
1. **Click** the **green plus sign** on the Reports page and select **Dynamic Report**.
2. From the Select dropdown at the bottom, choose a **data source — Item Activity**, **Badge Activity**, **Muster Activity**, **Event Activity**, **Issued Item**, **Item Zone**, **Catalog Item**, **Item**, or **User**. The available fields appear on the left.
3. **Drag** fields into **Table Fields** to set the columns.
4. **Drag** fields into **Conditions** to filter rows.
5. **Use** the **Sort** dropdown to choose a sort field.
6. **Click Result** to preview the data on the right.
7. **Enter** a **report title** at the top, then click the **blue floppy disk** to save.



Building an Advanced Report

An **Advanced Report** supports custom SQL against the XPTrack views — useful when the Dynamic builder does not provide the required joins or aggregations.

1. **Click** the **green plus sign** on the Reports page and select **Advanced Report**.
2. **Pick** a table or view from the **Tables** list on the left (badge_activities_view, badges_view, catalog_items_view, companies_view, devices_view, doors_view, and others).
3. **Write** a **SELECT** statement in the **SQL editor** on the right.
4. To make the report interactive, drag **filter** parameters such as Users(:PUSERID), Zones(:PZONEID), or Companies(:PCOMPANYID) from the **Filters** panel into the query.
5. Optionally click **Insert AI Prompt** for help drafting the query.
6. **Click Run Query** to preview results in the Report Preview pane below.
7. **Enter** a **report title** at the top, then click the **blue floppy disk** to save.



To run a saved report, click its title on the Reports list. Apply any available filters, then review the results on screen.

To export the results, use the **red PDF button** or the **yellow CSV button** in the top right. Because XPTrack tracks everything automatically, reports always reflect real activity — no manual data entry required.

Handheld and Mobile Client

XPTrack is not just a desktop experience — it is designed to work in the field too. The XPTrack **handheld and mobile client** lets users perform the same core functions from a mobile device or handheld scanner, which is especially useful in warehouses, on job sites, and anywhere being at a desk is not practical.

With the handheld client, users can scan barcodes and asset tags to quickly locate items, check items in and out on the spot, transfer items between zones, conduct inspections in the field, and view item details and current status.

Please refer to the XPTrack Inventory Handheld Guide for installation and setup walkthrough.

Congratulations!

This guide has covered everything needed to get the most out of XPTrack. From setting up roles and users, to receiving and tracking inventory, to running reports, XPTrack is designed to make operations more organized, accountable, and efficient. For questions along the way, contact an administrator or the XPTrack support team.