

Importing Plans and Locations to SureTrend Cloud

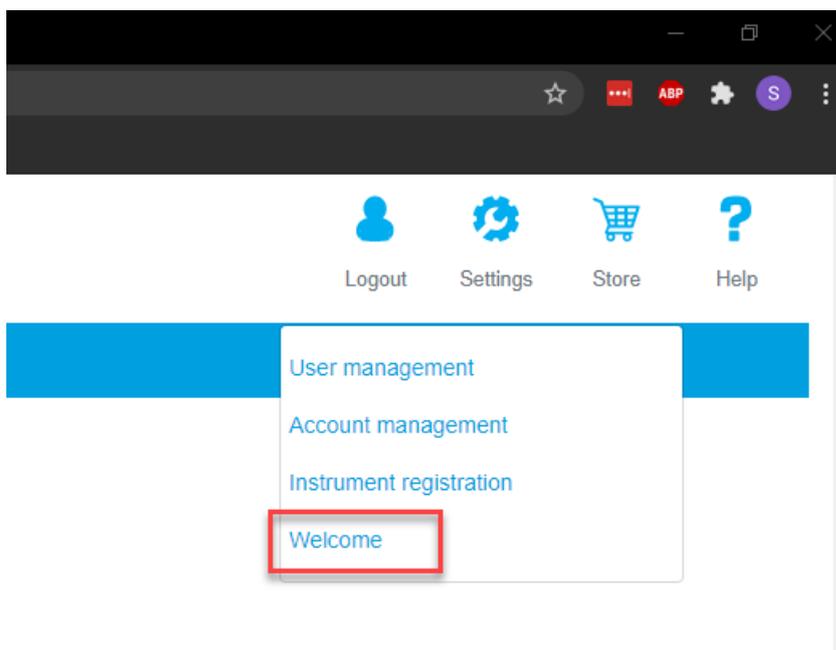
Introduction

Plans and locations allow users to organize test points or routines in easily identifiable and meaningful ways. Using the standard method of adding locations and managing plans in SureTrend Cloud is easy, but can be time consuming when adding large quantities of locations. SureTrend Cloud offers an import feature that allows users to quickly upload multiple locations and associated plans on a spreadsheet. This article will walk you through the process of import plans and locations to your SureTrend Cloud account.

Importing Plans and Locations

Navigate to the Import Page and Download the Template

1. Log in to [SureTrend Cloud](#).
2. Click **Settings** and select **Welcome**.



3. Click the **Import Plans and Locations** button.



4. Click the **Download** button.

Step: 1 Download CSV template file for plans and locations

Food and Beverage

Step: 2 Add plans and locations to template and save

Step: 3 Select site:

Step: 4 Upload template file

Adding Location and Plans to the Template

Primary Fields

- **Plan Name:** Each location will be assigned to the plan listed in the **Plan Name** field. This field is optional and locations without a plan will not be assigned to any plan.
- **Location Name:** The name of the test point. Duplicate locations names will not be imported, but the duplicate locations will be assigned to their associated plan.
- **Device Name:** The name of the test device designated for the specified location (i.e. UltraSnap, SuperSnap, AquaSnap). Any field left blank will

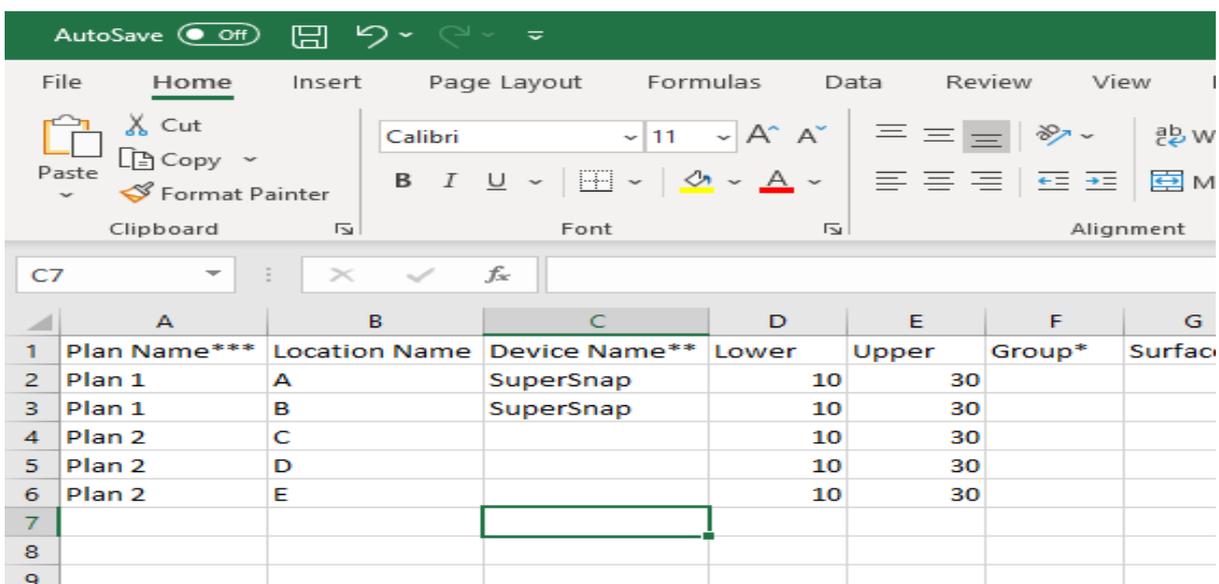
be set to UltraSnap after importing.

- **Lower:** The lower RLU limit required to pass a test.
- **Upper:** The upper RLU limit required to fail a test.

Additional Fields

- **Group:** Used to categorize locations.
- **Surface:** The type of material at the location (i.e. stainless steel, rubber, plastic).
- **Zone:** An integer between 1 and 4 that describes the proximity to product.
 1. Product contact surface (PCS)
 2. Non-PCS within close proximity to PCS.
 3. Non-PCS within process area but more removed from PCS
 4. Non-PCS outside processing areas
- **Line:** Used to categorize locations.
- **Cleaner:** Type of cleaning solution used.

Open the downloaded template and add your location information to the spreadsheet. The required fields are **Location Name**, **Lower**, and **Upper**. Additional fields must be enabled under the instrument settings. In the example below, locations **A** and **B** will be added to **Plan 1**. Locations **C**, **D**, and **E** will be added to **Plan 2**. Locations **C**, **D**, and **E** will be assigned UltraSnap as the device because no **Device Name** is listed.



	A	B	C	D	E	F	G
1	Plan Name***	Location Name	Device Name**	Lower	Upper	Group*	Surface
2	Plan 1	A	SuperSnap	10	30		
3	Plan 1	B	SuperSnap	10	30		
4	Plan 2	C		10	30		
5	Plan 2	D		10	30		
6	Plan 2	E		10	30		
7							
8							
9							

Note: Do not use commas for any of the fields. If using special characters like **Ä**,

change the file type to **CSV UTF-8** encoding when saving the file in Excel.

Uploading the Completed Template

1. Return to the Import Plans and Locations page in SureTrend Cloud.
2. Select a **Site** from the drop-down menu to add the plans and locations to.
Note: Imported plans and locations will only sync to instruments registered to the site selected.

The screenshot displays a four-step process for uploading a CSV template file. Step 1 involves downloading a CSV template file for plans and locations, with a dropdown menu set to 'Food and Beverage' and a 'Download' button. Step 2 is 'Add plans and locations to template and save'. Step 3 is 'Select site:', with a dropdown menu set to 'Default Site' (highlighted by a red box) and an 'Upload file' button. Step 4 is 'Upload template file', showing a file named 'FoodandBeverage (11).csv' (702 bytes) as 'Uploaded'. A 'Next' button is located at the bottom right of the form.

3. Click the **Upload File** button and open the completed spreadsheet.
4. Click the **Next** button.
5. Review the status of each location. Locations with green check marks will be uploaded.
6. Click **Import now**.

You have successfully imported locations and plans. If you require additional assistance managing locations, please contact Hygiena Technical Support by clicking [here](#).