

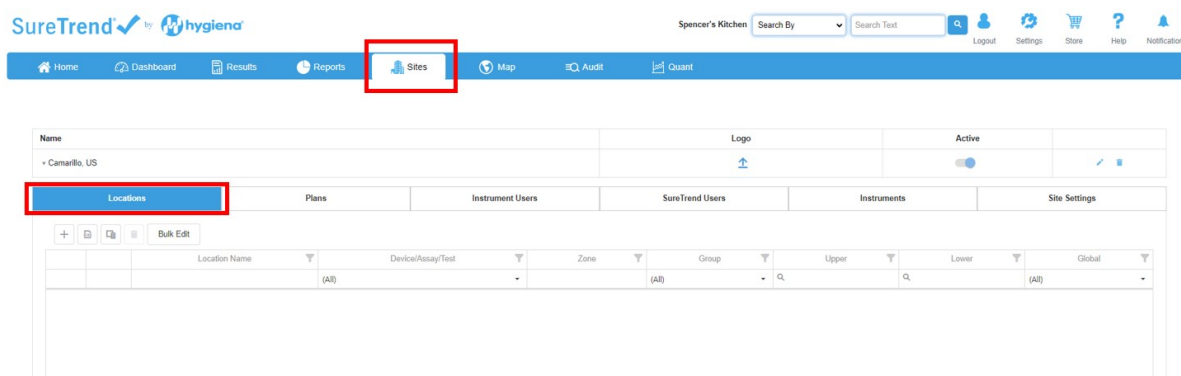
# Managing Plans & Locations In SureTrend Cloud

## Introduction

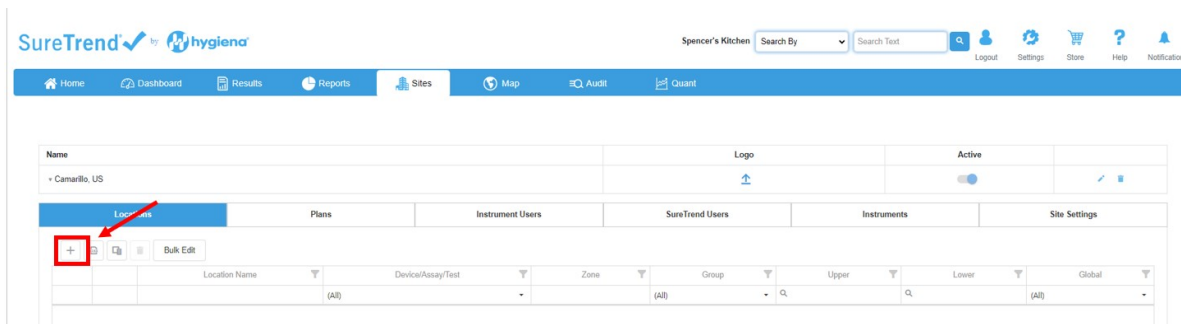
This article will show you how to manage and create Plans & Locations in SureTrend Cloud. Locations are where swabbing tests are performed. Plans are a set of locations for a given area. After setting your plans and locations up in SureTrend Cloud your changes will update Ensure Touch when you sync.

## Creating a Location

1. Sign into [SureTrend Cloud](#).
2. Navigate to the Sites tab, and select the site you'd like to create a location for.
3. Select Locations



4. Select + to add a new location.



5. Enter the location information and save.

New X

Device/Assay/Test: \* UltraSnap

Location Name: \*   ! Lower:

Upper:  Instructions:

Zone:  Group:

Surface:  Line:

Cleaner:  Area:

Image: 

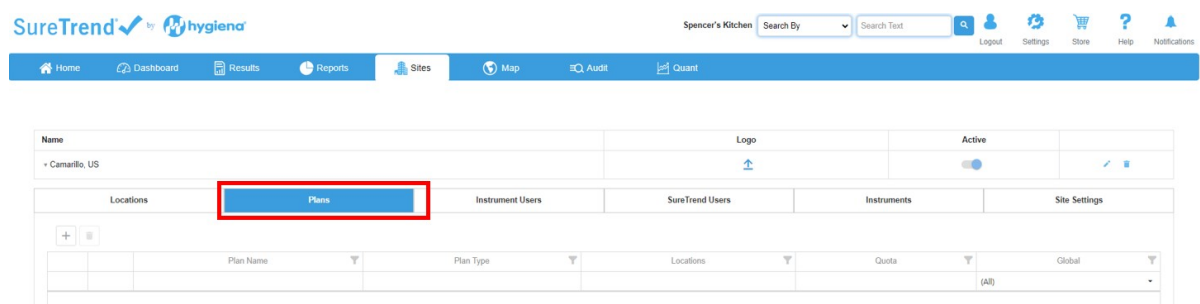
No Image

↑ Global: ☐

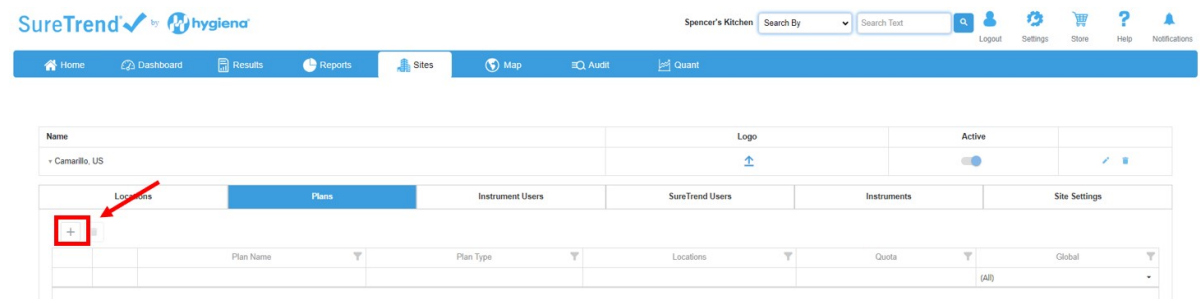
6. Your new location will now show on your instrument after a successful sync.

## Creating a Plan

1. Sign into [SureTrend Cloud](#).
2. Navigate to the Sites tab, and select the site you'd like to create a plan for.
3. Select the Plans tab.



4. Select +, and enter a plan name.



5. To add locations to a plan select the check box next to the Available Locations.

| Plan Name               | Exclude | Plan Type | Locations | Quota | Global |
|-------------------------|---------|-----------|-----------|-------|--------|
| Intake and outtake Plan | (All)   | Basic     | 0         | 0     | (All)  |

| Location  | Device Name |
|-----------|-------------|
| Desk 1    | UltraSnap   |
| Intake 1  | UltraSnap   |
| Desk 2    | UltraSnap   |
| Intake 2  | UltraSnap   |
| Outtake 1 | UltraSnap   |

6. Select next to your newly created plan to edit the plans settings. Orange:

Plan Name: \*
Intake and outtake Plan

Quota: ⓘ 0

Do Not Repeat Locations: ⓘ ☐

Is Random: ⓘ ☐

Global: ☐

Save Cancel

**Red:** The name of the plan.

**Blue:** If you want each location randomly chosen to only be chosen once.

**Purple:** Make the plan globally available to all instruments on that site.

**Green:** The minimum amount of locations to be tested before the plan can be completed.

**Orange:** The locations on a plan is random. For example if you have 5 tests with a quota of 3, a random selection of 3 tests will be selected from the 5 tests.

## Excluding Plans and Locations from an Instrument

1. Navigate to the plan or location you would like to exclude from the selected instrument, and check the Exclude box.

| Location Name | Exclude                             | Image | Device Name | Lower | Upper | Group | Surface | Zone | Line  | Cleaner | Global |
|---------------|-------------------------------------|-------|-------------|-------|-------|-------|---------|------|-------|---------|--------|
| Intake 1      | <input checked="" type="checkbox"/> |       | UltraSnap   | 20    | 60    | (All) | (All)   |      | (All) | (All)   | (All)  |

2. Perform a sync on the selected instrument.

3. The plan and/or location is now excluded from this instrument.