

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 Instrument tab, and select the instrument you'd like to create a location for.

Serial No	Instrument Name	Site	Calibration Check	Model	Software	Last Sync
38019	EnSURE 1	Site 1	Calibrated	EnsureTouch	1.70.20	28-Oct-2020 12:20 PM

3. Select Locations/Samples.

Serial No	Instrument Name	Site	Calibration Check	Model	Software	Last Sync
38019	EnSURE 1	Site 1	Calibrated	EnsureTouch	1.70.20	28-Oct-2020 12:20 PM

Instrument Name: EnSURE 1

Locations/Samples Plans Users Settings Calibration Checks

Locations Samples +

4. Select + to add a new location.

Location Name	Exclude	Image	Device Name	Lower	Upper	Group	Surface	Zone	Line	Cleaner	Global
CL	(AB)	-	(AB)	CL	CL	(AB)	(AB)	CL	(AB)	(AB)	(AB)
Desk 1	<input type="checkbox"/>		UltraSnap	20	60						<input type="checkbox"/>
Desk 2	<input type="checkbox"/>		UltraSnap	20	60						<input type="checkbox"/>
Intake 1	<input type="checkbox"/>		UltraSnap	20	60						<input type="checkbox"/>
Outtake 1	<input type="checkbox"/>		UltraSnap	20	60						<input type="checkbox"/>

5. Enter the location information and save.

New Location ✕

Location Name: <input style="width: 90%;" type="text" value="Intake 2"/>	Device Name: <input style="width: 90%;" type="text" value="UltraSnap"/>
Lower: <input style="width: 90%;" type="text" value="20"/>	Upper: <input style="width: 90%;" type="text" value="60"/>
Instructions: <input style="width: 90%;" type="text"/>	Zone: <input style="width: 90%;" type="text"/>
Group: <input style="width: 90%;" type="text" value="Select..."/>	Surface: <input style="width: 90%;" type="text" value="Select..."/>
Line: <input style="width: 90%;" type="text" value="Select..."/>	Cleaner: <input style="width: 90%;" type="text" value="Select..."/>
Image: <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 150px; height: 50px; margin: 5px auto;">No Image </div>	Global: <input type="checkbox"/>

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 Instrument tab, and select the instrument you'd like to create a plan for.

Dashboard	Results	Reports	Instrument			
Instruments +						
Serial No	Instrument Name	Site	Calibration Check	Model	Software	Last Sync
38119	ENSURE 1	Site 1	Calibrated	EnsureTouch	1.70.20	20-Oct-2020 12:20 PM

3. Select the Plans tab.

Instrument Name: ENSURE 1					
Locations/Samples	Plans	Users	Settings	Calibration Checks	
+					

4. Select +, and enter a plan name.

Instrument Name: ENSURE 1					
Locations/Samples	Plans	Users	Settings	Calibration Checks	
+					
<input type="checkbox"/>	<input style="width: 80%;" type="text"/>	Exclude (All)	Plan Type	Locations	Global (All)

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	Location	Device Name
<input type="checkbox"/>		Desk 1	UltraSnap
<input type="checkbox"/>		Intake 1	UltraSnap
<input type="checkbox"/>		Desk 2	UltraSnap
<input type="checkbox"/>		Intake 2	UltraSnap
<input type="checkbox"/>		Outtake 1	UltraSnap

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

Edit Plan
✕

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.