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.

3. Select Locations/Samples.

4. Select + to add a new location.

5. Enter the location information and save.

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.

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.

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

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.

2. Perform a sync on the selected instrument.
3. The plan and/or location is now excluded from this instrument.