

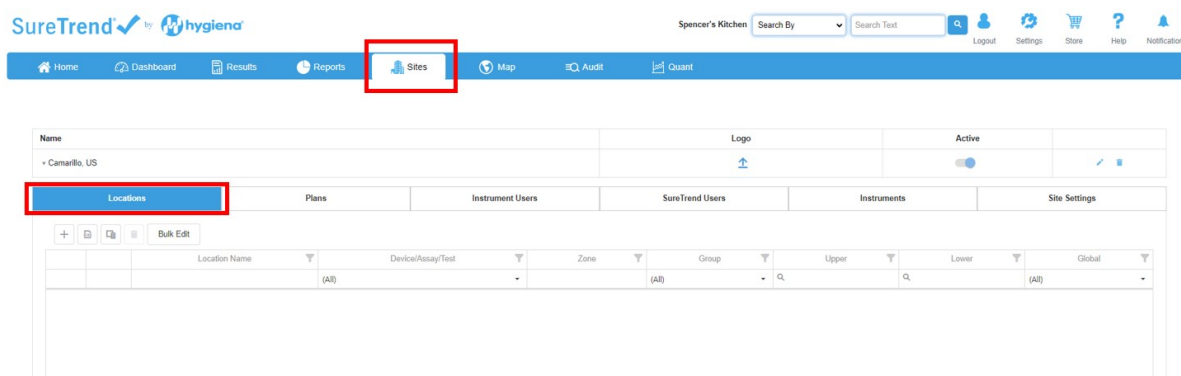
Managing Plans & Locations In SureTrend Cloud

Introduction

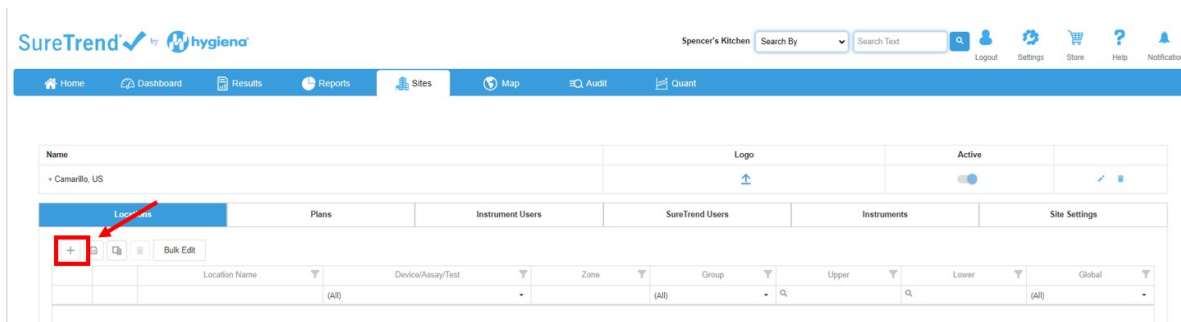
This article will show you how to manage and create Plans & Locations in SureTrend Cloud. Locations are where swabbing tests are performed. Plans are a set of locations for a given area. After setting your plans and locations up in SureTrend Cloud your changes will update Ensure Touch when you sync.

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:

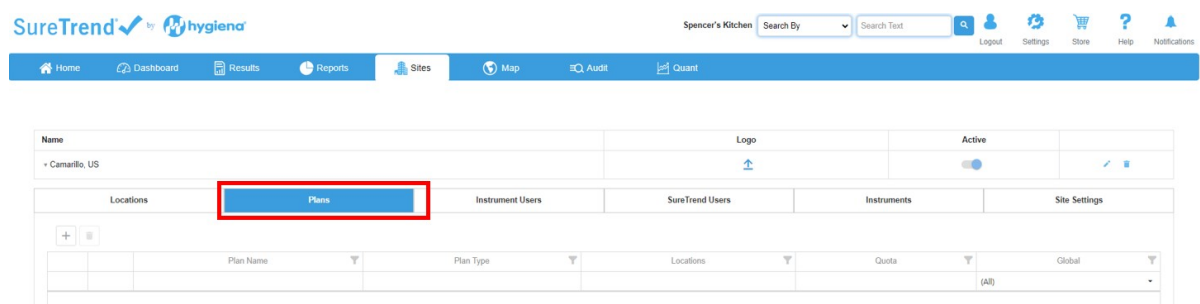
No Image

↑ Global: ☐

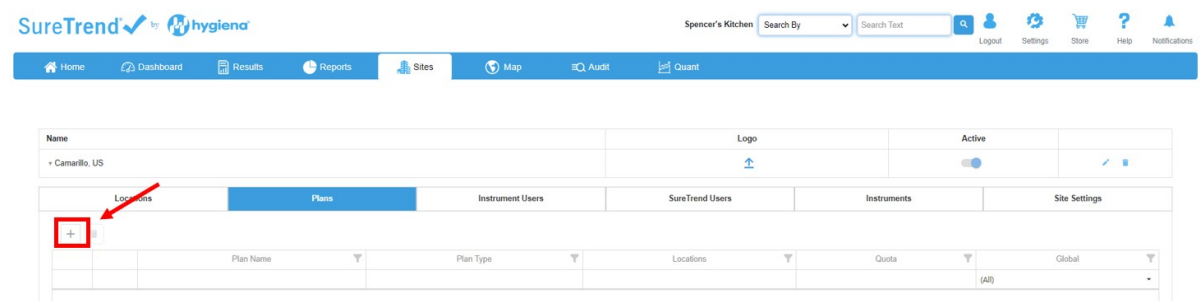
6. Your new location will now show on your instrument after a successful sync.

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.

<div><div><div></div><div></div></div></div>													
<input type="checkbox"/>		Plan Name	▼	Exclude	▼	Plan Type	▼	Locations	▼	Quota	▼	Global	▼
		Q		(All)	▼	Q		Q		Q		(All)	▼
<input type="checkbox"/>		Intake and outtake Plan		<input type="checkbox"/>		Basic		0		0		<input type="checkbox"/>	
Locations in plan: Intake and outtake Plan													
<div><div><div></div><div></div></div></div> Available Locations <div><div><div></div><div></div></div></div>													
<input type="checkbox"/>		Location	▼		Device Name	▼	<input type="checkbox"/>		Location	▼		Device Name	▼
				<input type="checkbox"/>			<input type="checkbox"/>		Desk 1			UltraSnap	
				<input type="checkbox"/>			<input type="checkbox"/>		Intake 1			UltraSnap	
				<input type="checkbox"/>			<input type="checkbox"/>		Desk 2			UltraSnap	
				<input type="checkbox"/>			<input type="checkbox"/>		Intake 2			UltraSnap	
				<input type="checkbox"/>			<input type="checkbox"/>		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
<input type="checkbox"/>	Q	(All)		(All)	Q	Q	(All)	(All)	Q	(All)	(All)	(All)
<input type="checkbox"/>	Intake 1	<input checked="" type="checkbox"/>		UltraSnap	20	60						<input type="checkbox"/>

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