Separating Account Data

Overview

- Export locations
- Create a location import template
- Export instrument users
- Create an instrument user import template
- Sync instruments
- Export results
- Delete SureTrend Cloud users
- Create a new SureTrend Cloud account
- Create new sites
- Invite SureTrend users
- Import plans and locations
- Import instrument users
- Factory reset instruments
- Register instruments to the new account

Note: If you are exporting data for multiple sites and the locations and users are different for each site, you will need to export locations and users for each site and create a template for each site. If the locations and users are same for each site, you can import the data into one site in the new account and use the global attribute to make it available on each site in the new account.

Export locations

- 1. Log into <u>SureTrend Cloud</u>.
- 2. Click <u>Sites</u>.
- 3. If the site menu is not visible, click the name of the site to expand the menu.

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삼 Home	Dashboard	Results	- Reports	Sites
Q Search by Name				
Name				
► Alexandria, AU				
► Ascot, GB				
► Camarillo, US		լիվ		
▶ Centurion, ZA		U		

4. Click the Export button at the top left of the Locations table.

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	Location	s	Plans		Inst	rum
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		Bulk Edit Location Name	Lower Y Q 30	Upper Y Q 60	Zone T	(AI
		Bulk Edit Location Name	Lower Y Q 30 30	Upper Y Q 60 60	Zone T	(AI

5. A download of the locations list will start.

Create a location import template

- 1. Log into <u>SureTrend Cloud</u>.
- 2. On the <u>Home</u> tab, click <u>Import</u>.

- 3. Click Import Plans and Locations.
- 4. Click the Download button in step 1 to download the template.
 - Step: 1 Download CSV template file for plans and locations



- 5. Open the locations list downloaded in the steps above and the import template.
- 6. Copy the locations list data into the template.

Note: This will only create a copy of the locations. This will not create a copy of the plans. If you want to recreate your existing plans, see these <u>Importing instructions</u> for completing the template.

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20 Countertop	30	60	UltraSnap				20	Countertop	UltraSnap	30	60					
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25 ERCP Channel	30	60	UltraSnap				25	ERCP Channel	UltraSnap	30	60					
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28 File Cabinet Handle	30	60	UltraSnap				28	File Cabinet Handl	e UltraSnap	30	60					
29 Floor	30	60	UltraSnap				29	Floor	UltraSnap	30	60					
30 Foot Stool	30	60	UltraSnap				30	Foot Stool	UltraSnap	30	60					
31 G Scope Channel	30	60	UltraSnap				31	G Scope Channel	UltraSnap	30	60					
32 G Scope Distal	30	60	UltraSnap				32	G Scope Distal	UltraSnap	30	60					
33 GYN Stirrups	30	60	UltraSnap				33	GYN Stirrups	UltraSnap	30	60					
34 Handrail	30	60	UltraSnap				34	Handrall	UltraSnap	30	60					
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7. Save and close both files.

Export instrument users

- 1. Log into <u>SureTrend Cloud</u>.
- 2. Click <u>Sites</u>.
- 3. If the site menu is not visible, click the name of your site to expand the menu.

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삼 Home	Dashboard	Results	🕒 Reports	Sites
Q Search by Na	me			
Name				
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► Ascot, GB				
► Camarillo, US	3	շիպ		
► Centurion, ZA	A	\bigcirc		

4. Click the Instrument Users tab.

🐴 Home	Dashboard	Results	C Reports	🔒 Sites	🔇 Мар
Name					
▼ Camarillo, US	3				
	Locations	1	Plans	instrum	ent Users
+					
		Name	T	R	ble
					min
	1	Admin		Ad	
	1	Admin Isaac		Ope	rator

- 5. Click the Export button at the top left of the Instrument Users table.
- 6. A download of the user list will start.

Create an instrument user import template

- 1. Log into <u>SureTrend Cloud</u>.
- 2. On the <u>Home</u> tab, click <u>Import</u>.
- 3. Click Import Instrument Users.
- 4. Click the Download button in step 1 to download the template.

Step: 1 Download CSV template file for instrument users



Step: 2 Add instrument users to template and save

- 5. Open the instrument users list downloaded in the steps above and the import template.
- 6. Copy the instrument user list data into the template.
- 7. Add a 4-digit PIN for each user.



8. Save and close both files.

Sync instruments

For each EnSURE Touch that will be registered to the new account:

- 1. Open the Sync app.
- 2. Tap Sync Now.
- 3. Wait for the sync to complete. The sync log will display an entry with the date and status of sync when finished.

Export Results

- 1. Log into <u>SureTrend Cloud</u>.
- 2. Click <u>Results</u>.
- 3. Click the **From** dropdown menu and select the date of your oldest result.

≡C	Audit	6	Upgrade	<u>⊯</u>	j Quant
From 1/1/2021, 12:00			AM	•	
T	Test Device	T	User Name	Ŧ	Ŧ
art	UltraSnap		Admin		

- 4. Click Ok.
- 5. Click the \mathbf{To} dropdown menu and select today's date.

То	11/20/2023, 11:	59 PM	-	
	Retest Relati	onships 🔵	2	
RLU	Retest T	Retested	Y	Y
303				4

- 6. Click Ok.
- 7. Click the filter button in the Sites column.



- 8. Check each site that will be transferred to the new account and click Ok.
- 9. Click the Export button.

	8	3	朣	?	
	Logout	Settings	Store	Help	Notifications
То	11/2	20/2023, 11:5	9 PM	•	
	R	etest Relatio	onships 🔵	3	
RLU	Retest	T	Retested	TT	
303					

10. A download of your results will start.

Delete SureTrend Cloud users

Requires Global Admin or Owner role.

- 1. Log into <u>SureTrend Cloud</u>.
- 2. Click Settings and select User Management.

8	3	朣	?	
Logout	Settings	Store	Help	Notifications
Ā	Account Mana	igement		
ŀ	Alert Manager	nent		
	nstrument Ma	inagement		
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3. Click in the search box and search for a user.

User Management

Q Spencer		\square
First Name	Last Name	Username
Spencer	Grant	sgranthygie

- 4. Click the delete button at the end of the row for a user.
- 5. Click Yes to confirm.
- 6. Repeat steps 3-5 for each user that will be moved to the new account.

Create a new SureTrend Cloud account

- 1. Go to the <u>SureTrend Cloud login page</u>.
- 2. Click <u>Create a new account</u>.
- 3. Complete the form and click create account.
- 4. You will receive an email to set up your password.
- 5. Click the link in the email.
- 6. Enter your username and the new password.
- 7. Click Set Password.

Create new Sites

Requires Global Admin or Owner role.

- 1. Log into your new <u>SureTrend Cloud</u> account.
- 2. Click <u>Sites</u>.
- 3. If the site menu is expanded, click the site name to collapse it.

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삼 Home	Dashboard	Results	Reports	Sites
Q Search by Na	ime			
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► Ascot, GB				
► Camarillo, US	3	շիդ		
► Centurion, ZA	Ą	0		

4. Click the + button at the top right of the Sites table.

Deactivated Sites:	Show Hide +
Active	
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- 5. Click in the Name field in the new row and add the site name.
- 6. Click the Save button.
- 7. Repeat steps 3-6 for each site.

Invite new SureTrend Cloud users

- 1. Log into your new <u>SureTrend Cloud</u> account.
- 2. Click Settings and select User Management.

User Management

Q Spencer		\searrow
First Name	Last Name	Username
Spencer	Grant	sgranthygie

3. Click the + button at the top right of the Users table.



- 4. Enter the first name, last name, username, email address, and role.
- 5. Click the Sites dropdown menu and assign a site to the user.

User Management

First Name: *			Last Name: *		
Username: *			Email: *		
Role:	SureTrend User	~	Phone:		
Industry:	Food & Beverage	~	Sites:	Camarillo, U	s .
Segment:		~	Job title:		Site Name 1
					Q
					Alexandria, AU
					Ascot, GB
					Camarillo, US
					Centurion, ZA
					Guilford, GB
					Huntingdon, GB
					Mexico City, MX
					Mississauga, CA

- 6. (Optional) Complete the remaining details.
- 7. Click Save.
- 8. Repeat steps 3-7 for each user.

Import plans and locations

- 1. Log into your new <u>SureTrend Cloud</u> account.
- 2. Click Import.
- 3. On the <u>Home</u> tab, click <u>Import Plans and Locations</u>.
- 4. If you have the option to select a site, select the site from the dropdown.
- 5. Click the Upload file button.

Step: 3	Select site:	Camarillo, US	•
Step: 4	Upload templa	te file Upload file	
Disr	niss		Next

- 6. Navigate to the Locations template you created in the steps above.
- 7. Select the file and click Open.
- 8. Click Next.
- 9. Review the import preview for errors. If errors are present, click back and correct the template. Repeat steps 4-8 with the corrected template.
- 10. Click Import Now.

0	C Scope Distal	UltraSnap	30	60
0	Call Button / Button	UltraSnap	30	60
0	Chair	UltraSnap	30	60
•	Countertop	UltraSnap	30	60
0	Crib	UltraSnap	30	60

Plans and Locations to import: 99



Import instrument users

- 1. Log into your new <u>SureTrend Cloud</u> account.
- 2. On the <u>Home</u> tab, click <u>Import</u>.
- 3. Click Import Instrument Users.
- 4. If you have the option to select a site, select the site from the dropdown.
- 5. Click the Upload file button.

Step: 3	Select site:	Camarillo, US	•
Step: 4	Upload templa	te file Upload file	
Disr	niss		Next

- 6. Navigate to the Instrument Users template you created in the steps above.
- 7. Select the file and click Open.
- 8. Click Next.
- 9. Review the import preview for errors. If errors are present, click back and correct the template. Repeat steps 4-8 with the corrected template.
- 10. Click Import Now.

Status	Name	Role	
•	Donovan	Admin	
•	Jose	Admin	
•	Kevin	Admin	
•	Steve	Admin	

_	
Back	Import Now

Factory reset instruments

Instrument Users to import: 4

Performing a factory reset will erase all the data on the instrument. Please ensure you have synced all the data to SureTrend Cloud before performing a factory reset.

Requires Admin role on EnSURE Touch

For each EnSURE Touch that will be registered to the new account:

- 1. From the Home Screen, tap Settings.
- 2. Tap General.

- 3. Tap Factory Reset.
- 4. Tap Factory Reset now.
- 5. Confirm you want to factory reset.
- 6. The instrument will restart and return to the set-up process.

Register instruments to the new account

For each EnSURE Touch that will be registered to the new account:

- 1. Log into your new <u>SureTrend Cloud</u> account.
- 2. On the <u>Home</u> tab, click <u>Register Instrument</u>.
- 3. Enter a name for the instrument and select a site from Sites dropdown menu if available.
- 4. Click Next.
- 5. The cloud will display a username and code to enter on EnSURE Touch.
- 6. Follow set-up prompts on EnSURE Touch. In the registration step, enter the username and code generated in step 5.
- 7. Complete the rest of the set-up steps.
- 8. The instrument is now registered to the new account. It should have all the plans, locations, and users from the steps above.

Contact Hygiena Technical Support for further assistance.

- Phone: 1-888-HYGIENA (1-888-494-4362, option 2)
- Email: techsupport@hygiena.com
- <u>Submit a Support Ticket</u>
- <u>Schedule a Microsoft Teams meeting with support</u>