

Separating Account Data

Overview

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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 [SureTrend Cloud](#).
2. Click [Sites](#).
3. If the site menu is not visible, click the name of the site to expand the menu.

Search by Name...

Name

▸ Alexandria, AU

▸ Ascot, GB

▸ Camarillo, US

▸ Centurion, ZA

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








Name

▾ Camarillo, US

Locations

Plans

Instrume

<input type="checkbox"/>		Location Name 	Lower 	Upper 	Zone 	
		Q	Q	Q	Q	(All
<input type="checkbox"/>		ANES Cart	30	60		
<input type="checkbox"/>		ANES Keyboard	30	60		
<input type="checkbox"/>		ANES Machine	30	60		

5. A download of the locations list will start.

Create a location import template

1. Log into [SureTrend Cloud](#).
2. On the [Home](#) tab, click [Import](#).

- Click [Import Plans and Locations](#).
- Click the Download button in step 1 to download the template.

Step: 1 Download CSV template file for plans and locations

Food and Beverage

Download

Step: 2 Add plans and locations to template and save

- Open the locations list downloaded in the steps above and the import template.
- 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 [Importing instructions](#) for completing the template.

Location Name	Lower	Upper	Device/Assay/Test
ANES Cart	30	60	UltraSnap
ANES Keyboard	30	60	UltraSnap
ANES Machine	30	60	UltraSnap
ANES Mouse	30	60	UltraSnap
Arm Table	30	60	UltraSnap
B Scope Channel	30	60	UltraSnap
B Scope Distal	30	60	UltraSnap
Back Table	30	60	UltraSnap
Bair Hose	30	60	UltraSnap
Bathroom Handrails	30	60	UltraSnap
Bathroom Sink	30	60	UltraSnap
Bed Rails / Controls	30	60	UltraSnap
Bovie	30	60	UltraSnap
C Arm	30	60	UltraSnap
C Scope Channel	30	60	UltraSnap
C Scope Distal	30	60	UltraSnap
Call Button / Button	30	60	UltraSnap
Chair	30	60	UltraSnap
Countertop	30	60	UltraSnap
Crib	30	60	UltraSnap
Donut Positioner	30	60	UltraSnap
Door Handle	30	60	UltraSnap
Door Lever	30	60	UltraSnap
ERCP Channel	30	60	UltraSnap
ERCP Distal	30	60	UltraSnap
ERCP Elevator	30	60	UltraSnap
File Cabinet Handle	30	60	UltraSnap
Floor	30	60	UltraSnap
Foot Stool	30	60	UltraSnap
G Scope Channel	30	60	UltraSnap
G Scope Distal	30	60	UltraSnap
GVN Straps	30	60	UltraSnap
Handrail	30	60	UltraSnap
Hands	30	60	UltraSnap

Plan Name	Device Name	Lower	Upper	Group	Surface	Zone	Line	Cleaner
ANES Cart	UltraSnap	30	60					
ANES Keyboard	UltraSnap	30	60					
ANES Machine	UltraSnap	30	60					
ANES Mouse	UltraSnap	30	60					
Arm Table	UltraSnap	30	60					
B Scope Channel	UltraSnap	30	60					
B Scope Distal	UltraSnap	30	60					
Back Table	UltraSnap	30	60					
Bair Hose	UltraSnap	30	60					
Bathroom Handrail	UltraSnap	30	60					
Bathroom Sink	UltraSnap	30	60					
Bed Rails / Control	UltraSnap	30	60					
Bovie	UltraSnap	30	60					
C Arm	UltraSnap	30	60					
C Scope Channel	UltraSnap	30	60					
C Scope Distal	UltraSnap	30	60					
Call Button / Button	UltraSnap	30	60					
Chair	UltraSnap	30	60					
Countertop	UltraSnap	30	60					
Crib	UltraSnap	30	60					
Donut Positioner	UltraSnap	30	60					
Door Handle	UltraSnap	30	60					
Door Lever	UltraSnap	30	60					
ERCP Channel	UltraSnap	30	60					
ERCP Distal	UltraSnap	30	60					
ERCP Elevator	UltraSnap	30	60					
File Cabinet Handl	UltraSnap	30	60					
Floor	UltraSnap	30	60					
Foot Stool	UltraSnap	30	60					
G Scope Channel	UltraSnap	30	60					
G Scope Distal	UltraSnap	30	60					
GVN Straps	UltraSnap	30	60					
Handrail	UltraSnap	30	60					
Hands	UltraSnap	30	60					

- Save and close both files.

Export instrument users

- Log into [SureTrend Cloud](#).
- Click [Sites](#).
- If the site menu is not visible, click the name of your site to expand the menu.

Search by Name...

Name

▸ Alexandria, AU

▸ Ascot, GB

▸ Camarillo, US

▸ Centurion, ZA

4. Click the Instrument Users tab.

Name

▼ Camarillo, US

Locations

Plans

Instrument Users



<input type="checkbox"/>		Name	Role
<input type="checkbox"/>		Admin	Admin
<input type="checkbox"/>		Isaac	Operator
<input type="checkbox"/>		Mira	Operator

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 [SureTrend Cloud](#).
2. On the [Home](#) tab, click [Import](#).
3. Click [Import Instrument Users](#).
4. Click the Download button in step 1 to download the template.

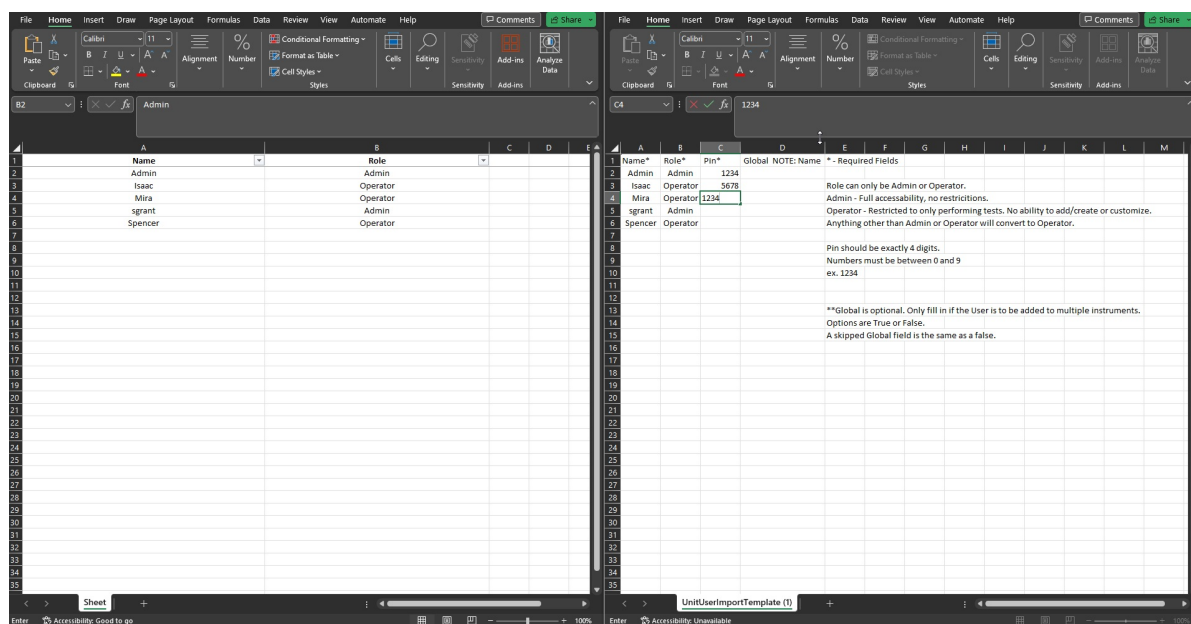
Step: 1 Download CSV template file for instrument users

Download



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 [SureTrend Cloud](#).
2. Click [Results](#).
3. Click the **From** dropdown menu and select the date of your oldest result.

From

1/1/2021, 12:00 AM





	 Test Device	 User Name		
art	UltraSnap	Admin		




4. Click Ok.
5. Click the **To** dropdown menu and select today's date.





To

11/20/2023, 11:59 PM

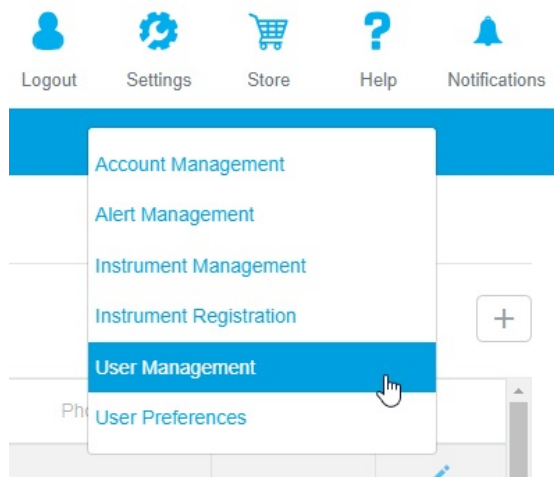


Retest Relationships 

RLU	Retest 	Retested 	
303	<input type="checkbox"/>	<input type="checkbox"/>	

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



3. Click in the search box and search for a user.

User Management

Search:

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.

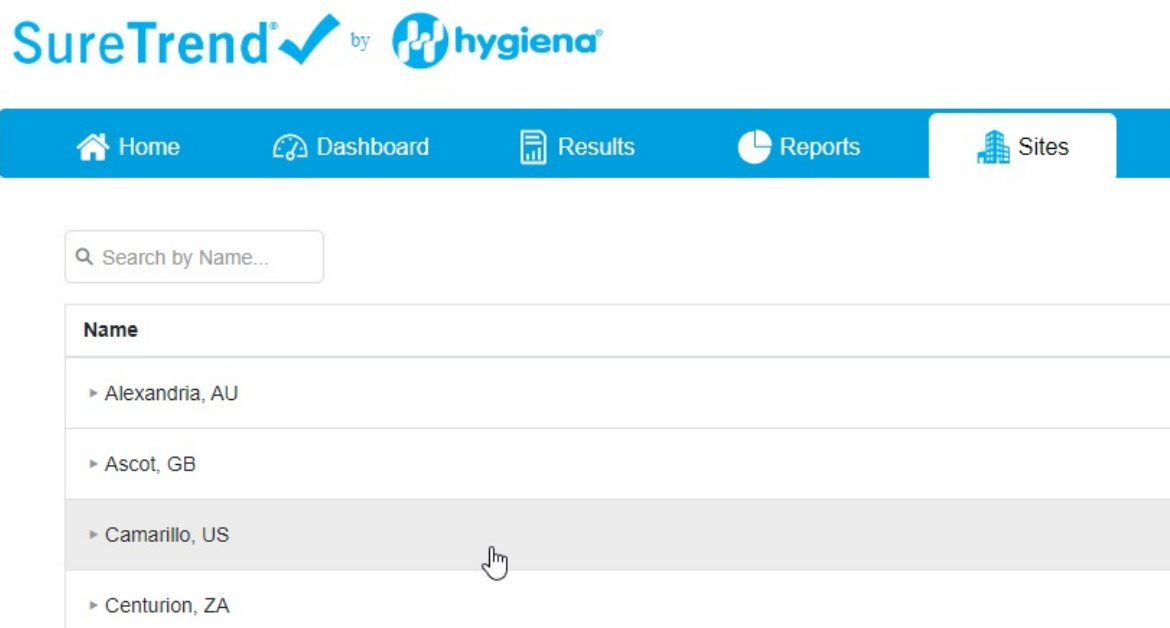
Create a new SureTrend Cloud account

1. Go to the [SureTrend Cloud login page](#).
2. Click [Create a new account](#).
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.

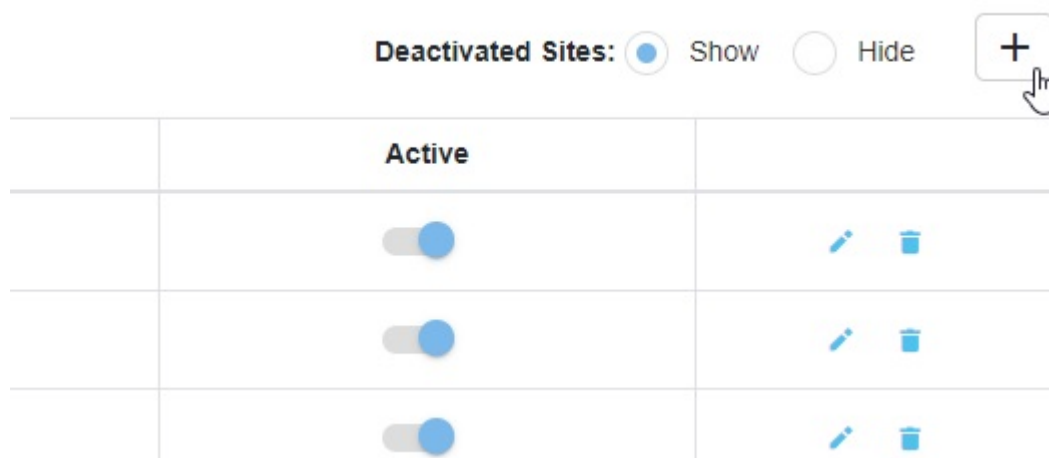
Create new Sites

Requires Global Admin or Owner role.

1. Log into your new [SureTrend Cloud](#) account.
2. Click [Sites](#).
3. If the site menu is expanded, click the site name to collapse it.



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



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 [SureTrend Cloud](#) account.
2. Click Settings and select [User Management](#).

User Management




Q Spencer|



First Name	Last Name	Username
Spencer	Grant	sgranthygie

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



	Phone	Active	
		<input checked="" type="checkbox"/>	 
		<input checked="" type="checkbox"/>	 

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: Phone:

Industry: Sites:

Segment: Job title:

☒ Site Name ↑
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 [SureTrend Cloud](#) account.
2. Click [Import](#).
3. On the [Home](#) tab, click [Import Plans and Locations](#).
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 template file **Upload file**

Dismiss **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.

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

Plans and Locations to import: 99

Back

Import Now

Import instrument users

1. Log into your new [SureTrend Cloud](#) account.
2. On the [Home](#) tab, click [Import](#).
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 template file **Upload file**

Dismiss **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	

Instrument Users to import: 4

Back **Import Now**

Factory reset instruments

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 [SureTrend Cloud](#) account.
2. On the [Home](#) tab, click [Register Instrument](#).
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
- [Submit a Support Ticket](#)
- [Schedule a Microsoft Teams meeting with support](#)