Separating Site Data

If you have multiple facilities recording data in the same site, you may want to create new sites to track and organize the data. The steps below will help you separate locations, users, and instruments from one site to transfer to another site.

Overview

- Export locations
- Create a location import template
- Export instrument users
- Create an instrument user import template
- Create a new site
- Change user permissions
- Import plans and locations
- Import instrument users
- Sync instruments
- Factory reset instruments
- Register instruments to the new site

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.
4. Click the Export button at the top left of the Locations table.
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.
3. Click Import Plans and Locations.
4. Click the Download button in step 1 to download the template.
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 Importing instructions for completing the template.

7. Save and close both files.

Export instrument users

1. Log into SureTrend Cloud.
2. Click Sites.
3. If the site menu is visible, click the name of your site.
4. Click the Instrument Users tab.
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.
5. Open the users list downloaded in the steps above and the import template.
6. Copy the user list data into the template.
7. Add a 4-digit PIN for each user.
8. Save and close both files.

Create a new site

Requires Global Admin or Owner role.

1. Log into SureTrend Cloud.
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.

Change user permissions

Requires Global Admin or Owner role.

1. Log Into SureTrend Cloud.
2. Click Settings and select User Management.
3. Search for a user in the search box.
4. Click on the user row in the Users table.
5. Click the toggle for the new site in the User Sites table.

   Note: You may need to disable the users access to their current site before granting access to the new site.
6. Repeat steps 3-5 for each user that needs access to the new site.

Import plans and locations

1. Log into SureTrend Cloud.
2. Click Import.
3. Click Import Plans and Locations.
4. If you have the option to select a site, select the new site from the dropdown.
5. Click the Upload file button.
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.

Import instrument users

1. Log into SureTrend Cloud.
2. Click Import.
3. Click Import Instrument Users.
4. If you have the option to select a site, select the new site from the dropdown.
5. Click the Upload file button.
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.

Sync instruments

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

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.

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 site:

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 site

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

1. Log into SureTrend Cloud.
2. On the Home tab, click Register Instrument.
3. Enter a name for the instrument and select the new 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 site. It should have all of 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](#)

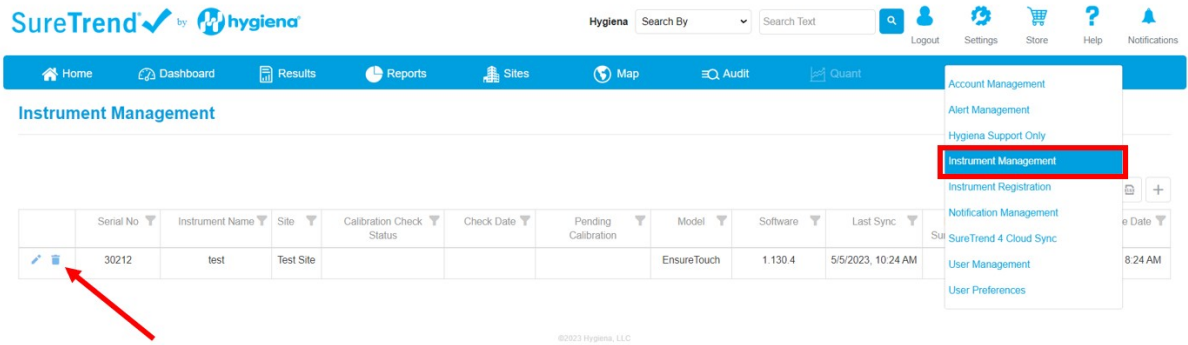# Deactivating Sites in SureTrend Cloud

Introduction

SureTrend Cloud allows users to separate data and registered instruments by sites. You can create sites within the account management page. To disable a site, each EnSURE Touch registered to the site must be cleared. This article will show the step-by-step process to deactivate a site.

Solution

Clear your EnSURE Touch's Registration.
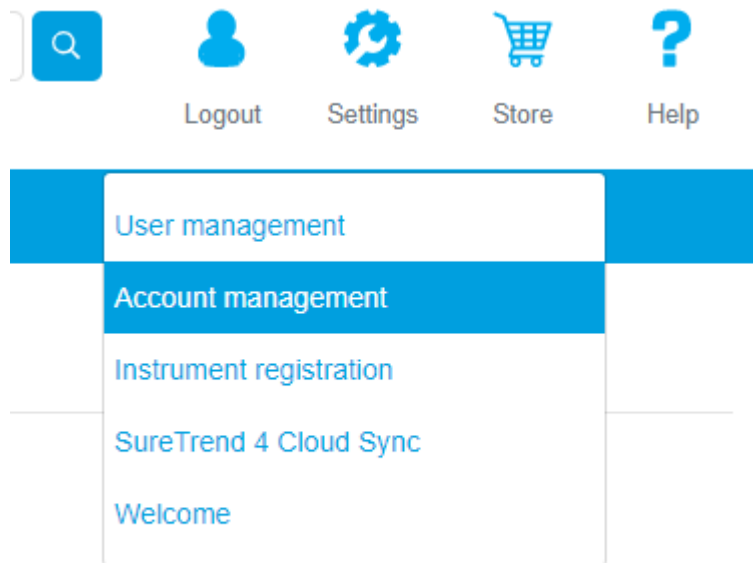
1. Log into [SureTrend Cloud](#).

2. Click **Settings** and select **Instrument Management**.

3. Click delete icon and confirm the prompt to clear the instrument's registration.
4. Repeat steps 3 & 4 for each instrument registered to the Site to be deactivated.

Deactivate the Site

1. Click **Settings** and select **Account Management**.

2. Click the toggle to deactivate the site.

If you require further assistance with managing sites in SureTrend Cloud, please contact Hygiena Technical Support by clicking [here](#).