

Importing Plans, Locations, and Users into SureTrend Cloud

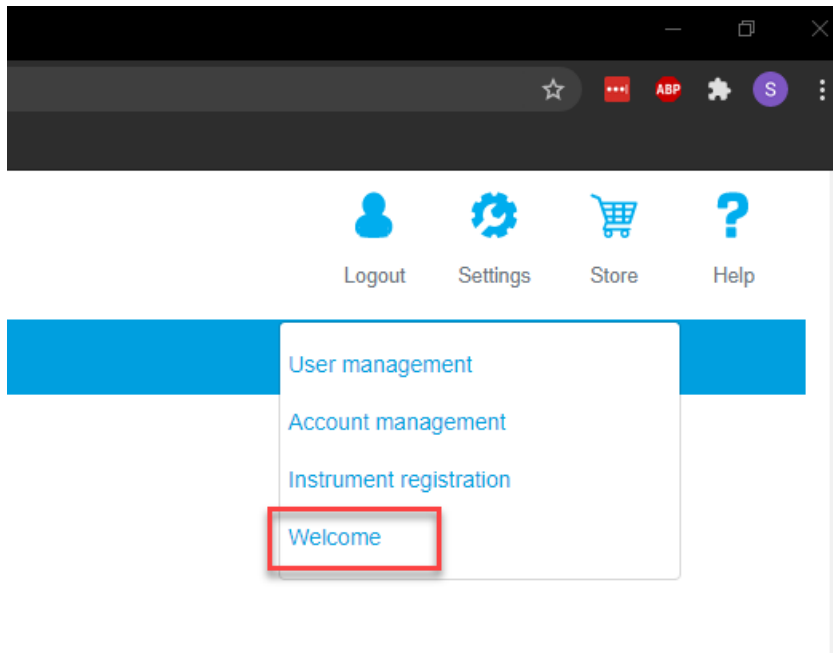
Introduction

Plans and locations allow users to organize test points or routines in easily identifiable and meaningful ways. Using the standard method of adding locations and managing plans in SureTrend Cloud is easy, but can be time consuming when adding large quantities of locations. SureTrend Cloud offers an import feature that allows users to quickly upload multiple locations and associated plans on a spreadsheet. The import feature also allows SureTrend Cloud users to import lists of instrument operators. This article will walk you through the process of import plans, locations, and users to your SureTrend Cloud account.

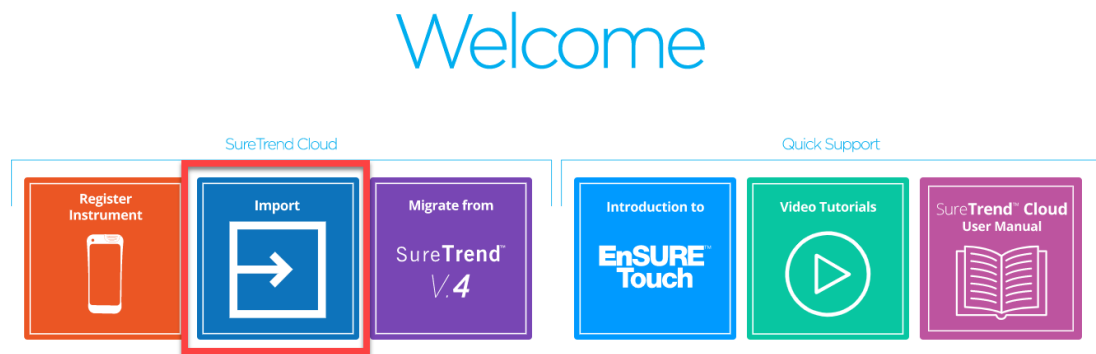
Importing Plans and Locations

Navigate to the Import Page and Download the Plans and Locations Template

1. Log in to [SureTrend Cloud](#).
2. Click **Settings** and select **Welcome**.



3. Click the **Import** button.



4. Click **Import Plans and Locations**.



5. Click the **Download** button.

Step: 1 Download CSV template file for plans and locations

Food and Beverage

Step: 2 Add plans and locations to template and save

Step: 3 Select site:

Step: 4 Upload template file

Adding Locations and Plans to the Template

Primary Fields

- **Plan Name:** A grouping of your testing points by department, line, room etc. Each location will be assigned to the plan listed in the **Plan Name** field. This field is optional and locations without a plan will not be assigned to any plan.
- **Location Name:** The name of the test point or item/object that is to be swabbed. Duplicate locations names will not be imported, but the duplicate locations will be assigned to their associated plan.
- **Device Name:** The name of the test device designated for the specified location (i.e. UltraSnap, SuperSnap, AquaSnap). Any field left blank will be set to UltraSnap after importing.
- **Lower:** The lower RLU limit required to pass a test.
- **Upper:** The upper RLU limit required to fail a test.

Additional Fields

All additional Fields can be turned on so they show while running the test.

- **Group:** Used to categorize locations.
- **Surface:** The type of material at the location being swabbed (i.e. stainless steel, rubber, plastic).

- **Zone***: An integer between 1 and 4 that describes the proximity to product.
 1. Product contact surface (PCS)
 2. Non-PCS within close proximity to PCS.
 3. Non-PCS within process area but more removed from PCS
 4. Non-PCS outside processing areas
- ***Note: Zone is only used in Food and Beverage leave blank if it doesn't apply to your facility.**
- **Line**: Used to categorize locations.
- **Cleaner**: Type of cleaning solution used.

Open the downloaded template and add your location information to the spreadsheet. The required fields are **Location Name**, **Lower**, and **Upper**. Additional fields must be enabled under the instrument settings. In the example below, locations **A** and **B** will be added to **Plan 1**. Locations **C**, **D**, and **E** will be added to **Plan 2**. Locations **C**, **D**, and **E** will be assigned UltraSnap as the device because no **Device Name** is listed.

	A	B	C	D	E	F	G
1	Plan Name***	Location Name	Device Name**	Lower	Upper	Group*	Surface
2	Plan 1	A	SuperSnap	10	30		
3	Plan 1	B	SuperSnap	10	30		
4	Plan 2	C		10	30		
5	Plan 2	D		10	30		
6	Plan 2	E		10	30		
7							
8							
9							

Note: Do not use commas for any of the fields. If using special characters like **Ä**, change the file type to **CSV UTF-8** encoding when saving the file in Excel.

Uploading the Completed Template

1. Return to the Import Plans and Locations page in SureTrend Cloud.
2. Select a **Site** from the drop-down menu to add the plans and locations to.

Note: Imported plans and locations will only sync to instruments

registered to the site selected. If no site selection is available, the data will be imported to the default site.

Step: 1 Download CSV template file for plans and locations

Food and Beverage

Step: 2 Add plans and locations to template and save

Step: 3 Select site: Default Site

Step: 4 Upload template file

FoodandBeverage (11).csv 702 bytes
Uploaded

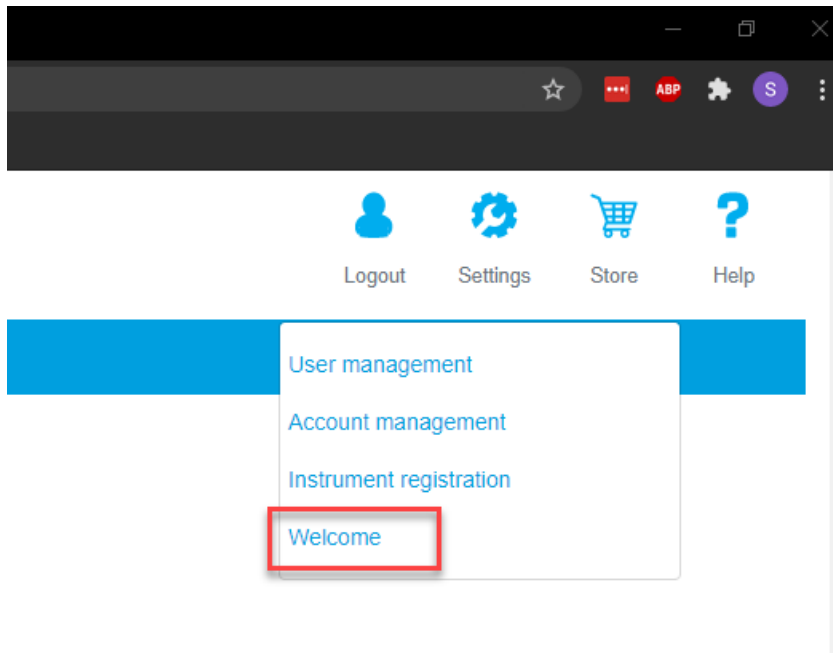
3. Click the **Upload File** button and open the completed spreadsheet.
4. Click the **Next** button.
5. Review the status of each location. Locations with green check marks will be uploaded.
6. Click **Import now**.

You have successfully imported locations and plans.

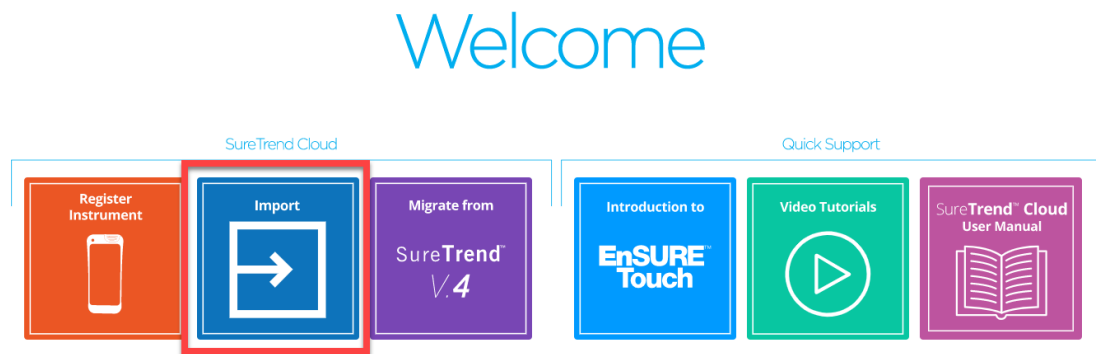
Importing Users

Navigate to the Import Page and Download the User Template

1. Log in to [SureTrend Cloud](#).
2. Click **Settings** and select **Welcome**.



3. Click the **Import** button.



4. Click **Import Instrument Users**.



5. Click the **Download** button.

Step: 1 Download CSV template file for instrument users

Step: 2 Add instrument users to template and save

Step: 3 Select site:

Step: 4 Upload template file

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Adding Users to the Template

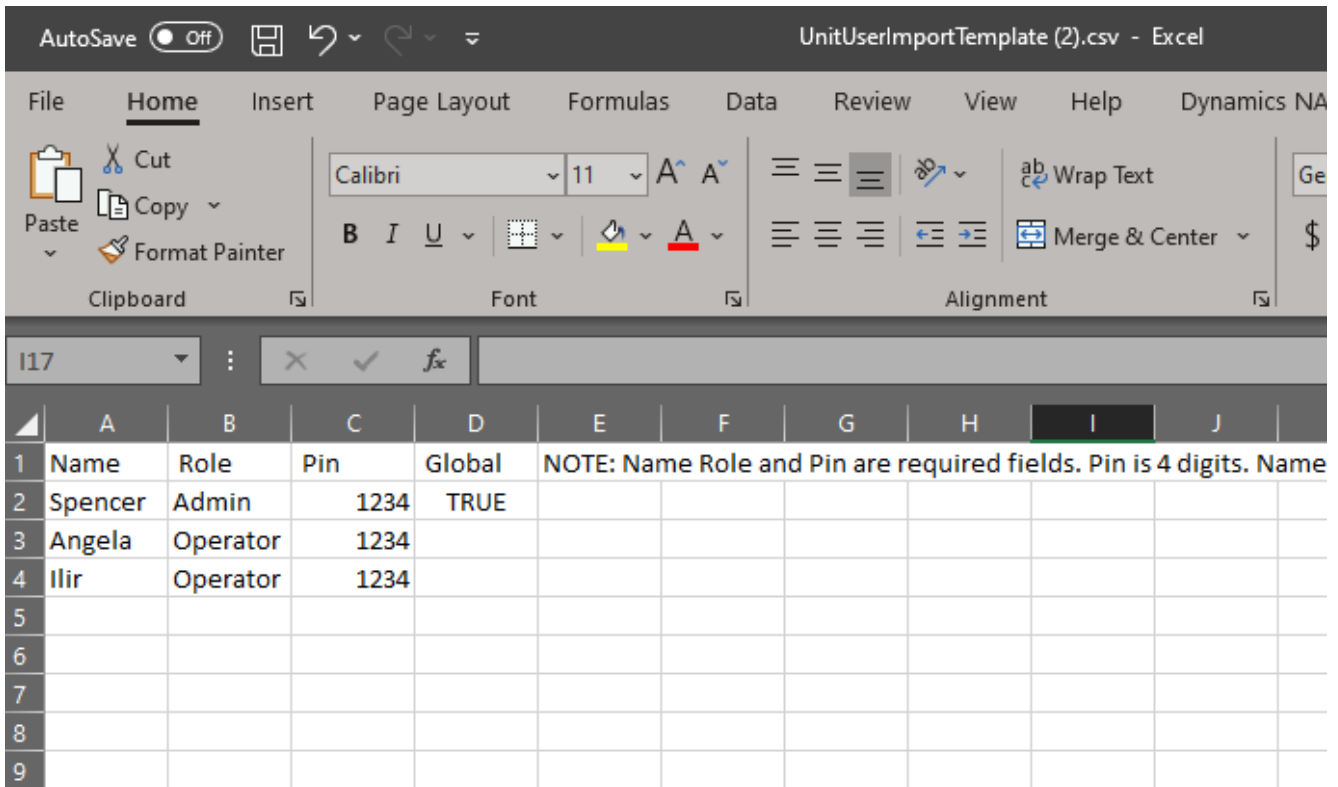
Required Fields

- **Name:** The username of the instrument operator that will be record with each result while signed into the instrument.
- **Role:** The two roles that can be assigned to the user are operator and admin. Operators have limited access to settings, Admins have full access to the instrument.
Note: The instrument must have at least one admin in order to enable security and require users to log in.
- **PIN:** A four digit code the user will need to log in to the instrument.

Optional Field

- **Global:** A value of “true” can be added to a user to make that user available across all sites in the account.

Open the user template in Excel and add your user information to the template. The name, role, and pin fields are required. In the example below, the user Spencer will be set up as an admin and their log in will be available on all instruments registered to the account because the value TRUE was entered into the Global field. Angela and Ilir will only be available on the instruments registered to the site where this template was uploaded.



Note: Do not use commas for any of the fields. If using special characters like **Ä**, change the file type to **CSV UTF-8** encoding when saving the file in Excel.

Uploading the Completed User Template

1. Return to the Import Users page in SureTrend Cloud.
2. Select a **Site** from the drop-down menu to add the users to.

Note: If the users do not have the Global attribute enabled, the imported users will only sync to instruments registered to the site selected. If no site selection is available, the data will be imported to the default site.

Step: 1 Download CSV template file for instrument users

Step: 2 Add instrument users to template and save

Step: 3 Select site:

Step: 4 Upload template file

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3. Click the **Upload File** button and open the completed spreadsheet.
4. Click the **Next** button.
5. Review the status of each user. Users with green check marks will be uploaded.
6. Click **Import now**.

You have successfully imported users.

If you require additional assistance managing locations or users, please contact Hygiena Technical Support by clicking [here](#).