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# SureTrend Instruction Manual

## SureTrend™ V.4

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### INSTALLATION HELP

Click the links below to view  
our installation guides

- > [System Requirements](#)
- > [Standalone Install Guide](#)
- > [Distributed Install Guide](#)
- > [Network Install Guide](#)
- > [SQL Server Install Manual](#)

### DOCUMENT INFO

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### EASY TO READ. EASY TO FOLLOW.

This all-inclusive manual covers topics ranging from basic to advanced. It has been created with images to be visually easy to follow while reading the instructions. This manual is best read digitally as it references a number of links to easily download supplementary material and other resources with a simple click. This manual is a work in progress and will continue to evolve based on customer feedback.

# RESULTS DATA ANALYSIS

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FOR THE  
FUTURE

Recognized worldwide for accuracy, ease-of-use and affordability, our ATP monitoring systems are used extensively by food and beverage processors, hospitals, and more. When coupled with our leading-edge data analysis tool, SureTrend, you have the most advanced and complete hygiene control system available today.

# WHAT IS NEW IN VERSION 4

## THE BEST ATP MONITORING AND ANALYSIS APP JUST GOT BETTER.

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### ADVANCED INSTALLATION METHODS

In order to comply with your organizations security and IT standards we have designed SureTrend to be versatile in how its installed, containing multiple installation options depending on your needs. Install SureTrend silently via group policy or Command Prompt. You may also choose to install SureTrend for a single user or in a multi-user mode to support a number of users syncing data and sharing results across a single database. No matter which you choose no patient or confidential data is ever sent over to us. All your data is yours.

### TOP-TIER SECURITY & PERFORMANCE

SureTrend is a powerful software program that allows you to upload test results to a database, analyze trends, and generate reports. To make these processes the fastest possible we have implemented new database options and improved wide area network and local area network performance. To further enhance security and performance for your business we have now included Microsoft SQL Server compatibility so you have a more secure, reliable, and accessible option of storing your important data.

### ENHANCED USER EXPERIENCE

SureTrend 4 is designed for the future offering all of our customers' most requested features. We offer the most popular and industry-leading UI available that is both simple to use and simple to master. You will find essential functions like randomization, filtering and advanced reporting all the way to SureTrend exclusive features like the ability to create custom fields and customize application headings and captions to match titles your organization uses in other applications.

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# CH. 1 - HOME & DASHBOARD

## Overview



The Home tab allows you to view different dashboards that give you crucial insights on data synced from Hygiena ATP monitoring systems. The two dashboards you can choose from allow you to view Fails by Location or Fails by Plan.

## FINDING YOUR WAY AROUND

- 1 Here you can choose your dashboard and choose a time period to filter data from.
- 2 A table of data available for the period of time set.
- 3 Here you can find graphical representations, trend tables and other information.

## CH.2 - SYNCING

### Synchronization Options

- **Complete Process:** Will sync results and programming data across SureTrend and unit
- **Upload Results:** Will only sync results from the monitoring unit into SureTrend
- **Download Program Information:** Will only sync programming data from SureTrend to unit
- **Download Users:** Will only sync users from SureTrend to unit
- **Erase all program information and results:** Will completely erase all results and programming data from unit
- **Erase Results:** Will only erase results from unit

☒ Auto Detect Serial Port   ☒ Sync Unit Date Time

☐ Erase Results   ☒ Automatically add unit

Serial Port

### Other Options

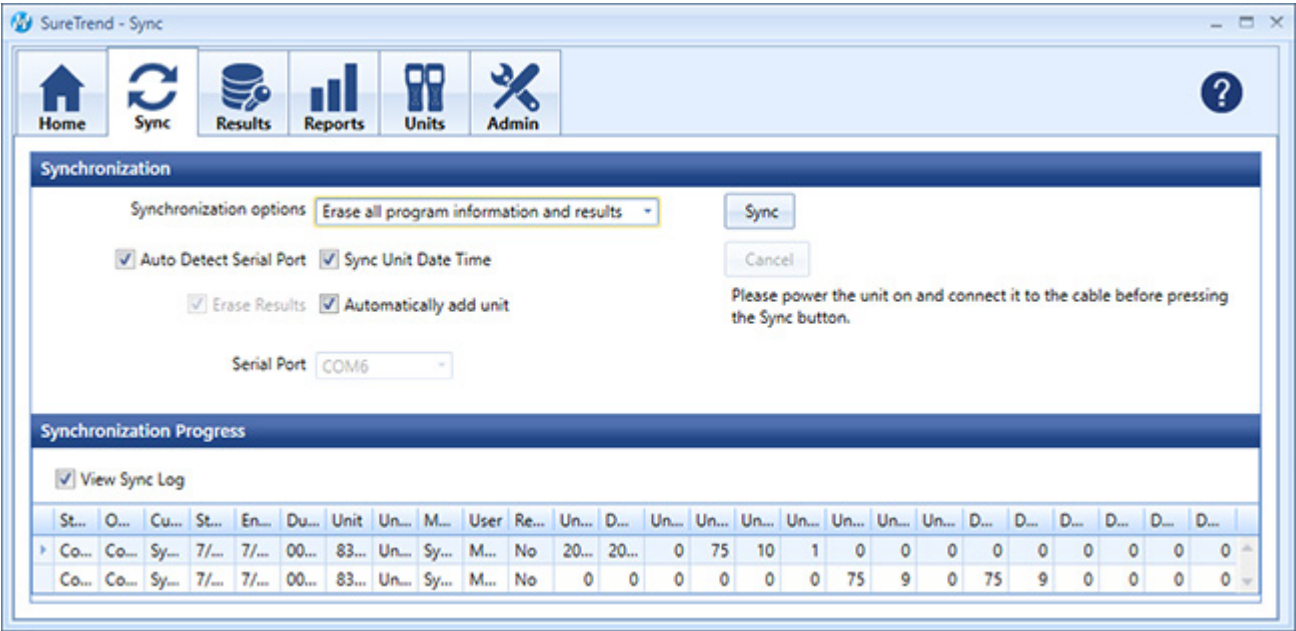
Keep **Auto Detect Serial Port** checked as this will automatically allow the unit and SureTrend to communicate to each other without any input from you. Keep **Sync Unit Date Time** checked to ensure the time and date stay accurate on the unit with the current date and time on the machine you are syncing from. Keep **Automatically add unit** checked if you want SureTrend to always add a unit to its collection when its first synced.

Checking the **Erase Results** box will erase any results from the unit after a sync has been performed. **NOTE:** Even if the sync fails the results may be removed from the unit. Because of this perform a sync first without this box checked. Verify new results have been added from the unit and then perform another sync with this box checked to clear the unit.



# CH.2 - SYNCING

## Synchronization Progress



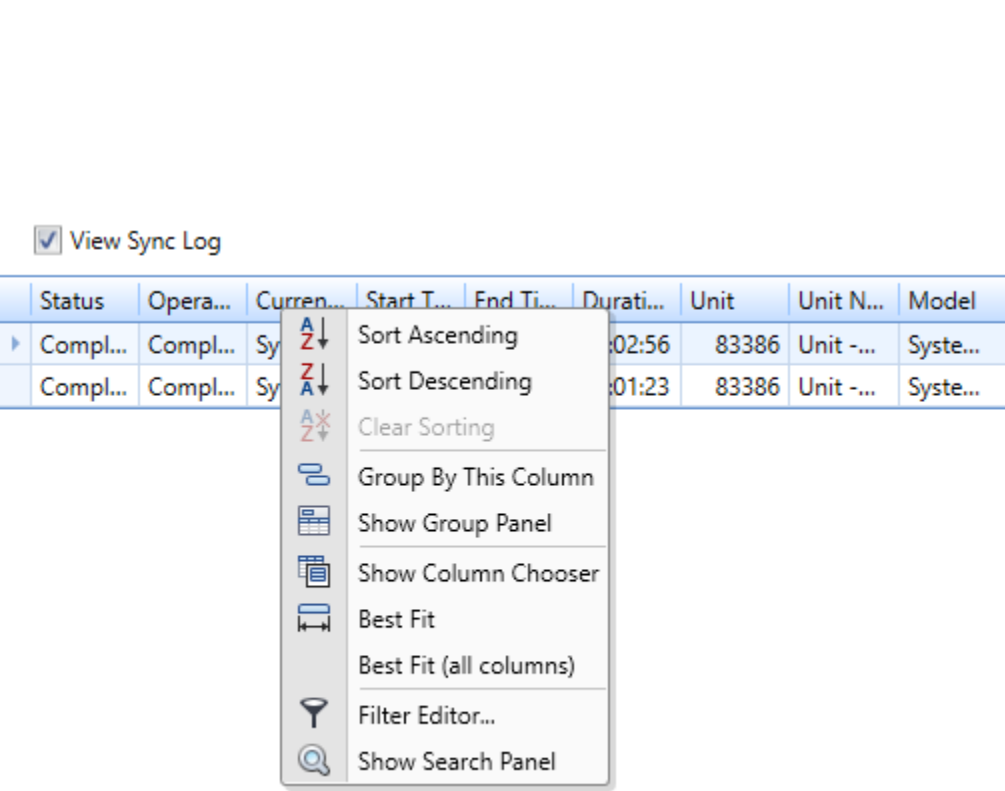
The Synchronization Progress area will display a table of results from the sync process. From here you can view information like sync status, start and finish time, along with unit name and number. More importantly, you can view how many results, locations, plans, and users were found on the unit along with how many were imported into SureTrend’s database.

You may be experiencing syncing issues if information is found on the unit but after the sync process completes nothing was written into SureTrend’s database.

**NOTE:** If data is not synced from the device to SureTrend it may also mean that duplicate entries exist so they are being ignored. Be sure to always erase results from your unit after verifying they have been successfully imported so you do not keep duplicate entries on your unit that will not get imported during the next sync.

## CH.2 - SYNCING

### Synchronization Progress



You can customize the columns in the Synchronization Progress section by right clicking any column and choosing from the options as shown in the image above.

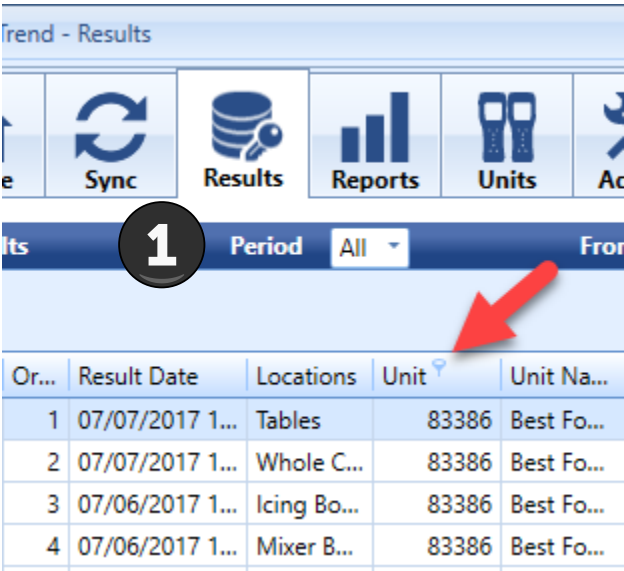
Show Column Chooser will allow you to add or remove columns from the view

Best Fit / Best Fit (all columns) will neatly give a column equal spacing based on the text within

Sort Ascending / Sort Descending will sort the table based on the selected column alphabetically or numerically

# CH.3 - RESULTS

## Viewing & Filtering Results



### FILTERING COLUMNS

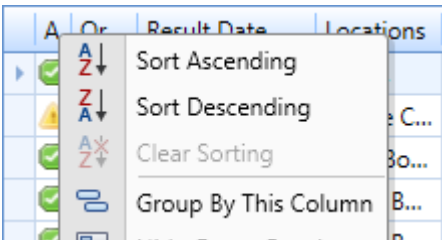
Clicking on the little pin next to any column title will allow you to filter that column by any data present in that column.

With this feature you can customize the results view to only show the exact data you are interested in, i.e. showing results from specific units, users, locations or dates only.

### 1 VIEW CUSTOM TIME PERIODS

You can select to view only results from a specific period here. For example: this month, last month, this week or last week. You can choose **All** to display all results and reset any custom time periods you may have turned on.

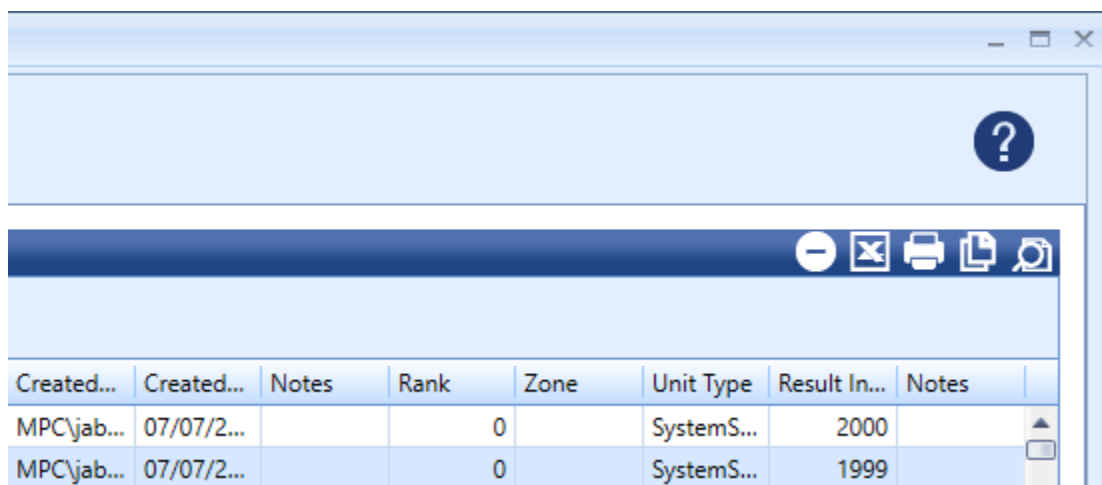
You can also use the **From** and **To** to show custom date ranges of your choosing. Just select the starting and ending dates and view all results within that time frame.



Right click on any column title and to choose from a menu of options that will allow you to further customize the view of your results. You can even choose to resize columns to make them easier to view






## CH.3 - RESULTS

### Managing & Deleting Results



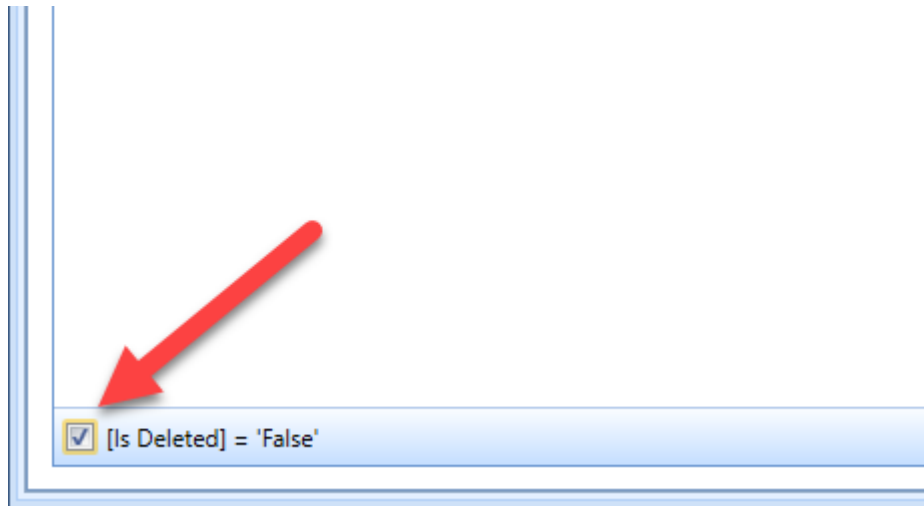
Created...	Created...	Notes	Rank	Zone	Unit Type	Result In...	Notes
MPC\jab...	07/07/2...		0		SystemS...	2000	
MPC\jab...	07/07/2...		0		SystemS...	1999	

You have several options from which to choose from when it comes to utilizing your data. The icons in the top right corner of the Results area will allow you to do the following:

-  will remove the selected results(s) from the list of non-deleted results
-  will allow you to export an Excel spreadsheet containing your results
-  will allow you to print out a complete list containing your results
-  will allow you to copy any results
-  will allow you to preview a table containing your results

## CH.3 - RESULTS

### Viewing & Filtering Results

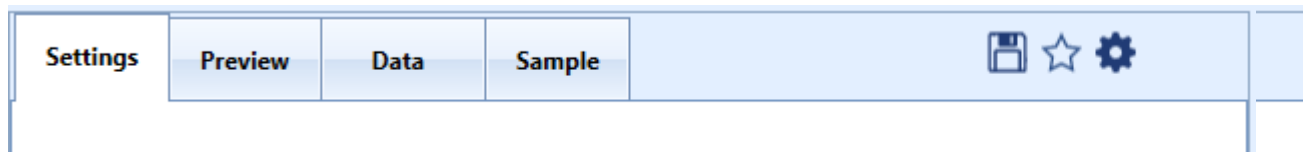


Once you delete a result from the list it is marked as deleted, but it is not actually removed from the database. You will not see it in the list of results anymore, however. If you want to see any or all of your results marked as deleted then you can check or uncheck this box in the lower left corner of the Results screen.

This is useful for auditing purposes or in cases where you may have accidentally “deleted” a result and wish to recover it. It is also a good way of seeing what has been marked for removal by someone.

## CH.4 - REPORTS

### Report Settings

A dialog box titled 'Filters'. It contains three dropdown menus: 'Period' set to 'Last Week', 'From' set to '10/30/2017 12:00 AM', and 'Plan' set to 'All'. There is a small '...' button to the right of the 'Plan' dropdown.

### FILTERS

Here you can choose what will be in your report. By default **All** is chosen which means all plans, all users, all locations, etc. will be included in the reports data.

Checking the box **“Include Deleted Rows”** will include deleted results in the report.

A dialog box showing a list of users. The 'User ID' dropdown is set to 'All'. Below it is a list box with the following items: '(Select All)', 'Any User', 'MPC\hmcgill' (which is selected with a checkmark), and 'MPC\jabrahams'. At the bottom are 'OK' and 'Cancel' buttons. Below the dialog box is a checkbox labeled 'Include Deleted Rows'.

### BE SELECTIVE

Clicking on any of the fields will allow you to pick and choose what data will appear in your reports. For example, you can specify specific plans, locations, users, or even units to include in your reports if you do not want to include all.

A horizontal bar with four tabs: 'Settings' (active), 'Preview', 'Data', and 'Sample'. To the right of the tabs are three icons: a floppy disk (save), a star (favorites), and a gear (settings). A large red arrow points to the floppy disk icon. Below the bar is a text input field containing 'nmary' and a button labeled 'ution-Fail Summary | From:%From% To:%To%'.

### SAVE YOUR REPORT

You can save your entered information if this is a report you conduct often by clicking the floppy disc icon.

Pressing the star will allow you to add this report to your Favorites list. Clicking the gear icon will allow you to save and customize this report.

# CH.4 - REPORTS




## Report Settings

Settings

Preview

Data

Sample



Report Properties

Report Name

Average RLU's vs Lower Limit 1

Title

Average RLU's vs Lower Limit

Report Type

Results Summary

### REPORT PROPERTIES

This panel is only available when working with a saved or custom report.

Change **Report Name** that appears in the Customized Reports list, choose a **Title** that will appear at the top of the report and choose a **Report Type** as well.

Display Options

Chart Type

Bar

X Axis




Y Axis

### DISPLAY OPTIONS

This panel is only available when working with a saved or custom report.

Select the type of chart you want your report to include. You can select from a variety of bar, line, point and pie charts. You may also edit the axis text.

Color Options

Series Caption	Series Color
Grand Total   Avg L...	 #FF587B16
Grand Total   Avg R...	
Grand Total   Resul...	

### COLOR OPTIONS

This panel is only available when working with a saved or custom report.

Select the color(s) you want to appear in your report charts, graphs, or tables.

## CH.4 - REPORTS

### Report Preview



#### 1. SEARCH

Allows you to search for any text present in the report. This is useful for finding information based on specific keywords, phrases, etc.

#### 5/6. SCALE/ZOOM

Adjust scaling of the report to fit perfectly on your page. Zoom in or out or select a specific zoom setting to view the report easier.

#### 2. OPEN

Open any saved Preview Document Files (.prnx).

#### 7. EXPORT

Export the report to a file. Choose from various document types like PDF, CSV, XLS or TXT; plus modify export settings.

#### 3. SAVE

Save any preview to a Preview Document File (.prnx) on your computer.

#### 8. SEND

Export and email the report. Choose from various document types like PDF, CSV, XLS, or TXT; plus modify export settings before sending.

#### 4. PRINT

Open your print configuration screen to print the report and modify print settings.

#### 9. WATERMARK

Create a textual or picture watermark and apply it to the report.



## CH.4 - REPORTS

### Report Data

## ADDING FIELDS

### 1 Choose fields to add...

All possible fields you can include in your reports are listed here. Drag and drop them into **Filter Area** (2), **Column Area** (3), **Row Area** (4) or **Data Area** (5).

### 2 Filter Area

Fields put into this area can be filtered out against in your report(s). Use it to filter out specific data from the rest of the results you are reporting on.

### 3 Column Area

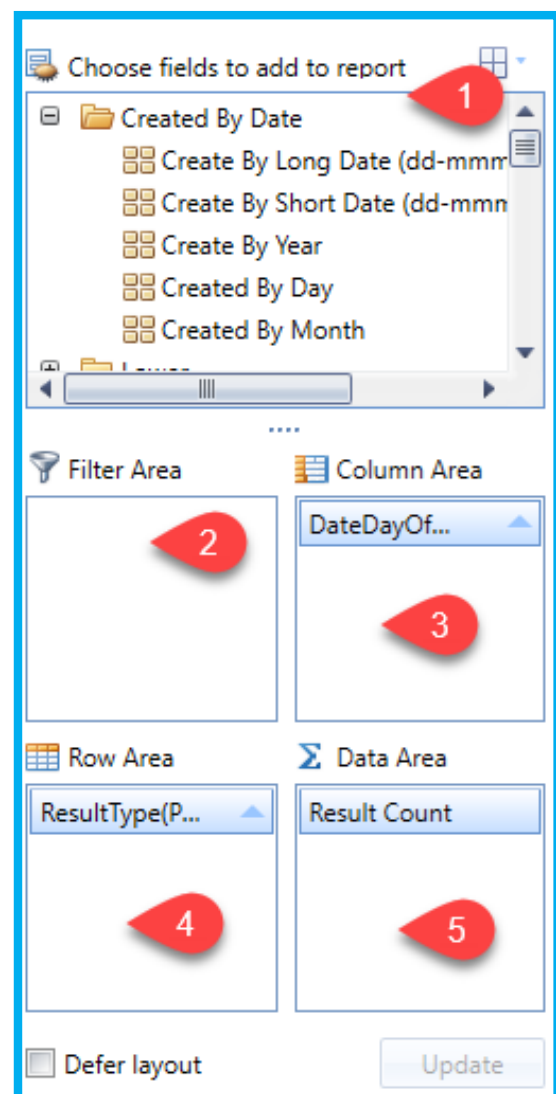
Fields put into this area become the columns of your tables, x-axis of your bar graphs and the number of pie charts you have.

### 4 Row Area

Fields put into this area become the rows of your tables, x-axis categories of your bar graphs and slices of your pie charts.

### 5 Data Area

Fields put into this area become items under each field in **Row Area**.



# CH.4 - REPORTS

## Using Pre-Canned Reports

Pass Caution Fail Reports
PCF Summary
PCF Summary By Day of Week
PCF Summary By Location
PCF Summary By Plan
PCF Summary By User
PCF Summary Year to Year
PCF Summary Month to Month
PCF Summary Month to Month Year over Year
PCF Summary Day to Day Week over Week
PCF Detail By User By Location
PCF Detail By User
PCF Detail By Plan
PCF Detail By Location By User
Failed Test Reports
Trend Reports
Retest Reports
Auditor Reports
Customized Reports

### QUICK AND EASY

The pre-canned reports that come built-in with SureTrend are helpful ways to get important reports you need quick without needing to configure advanced reporting options.

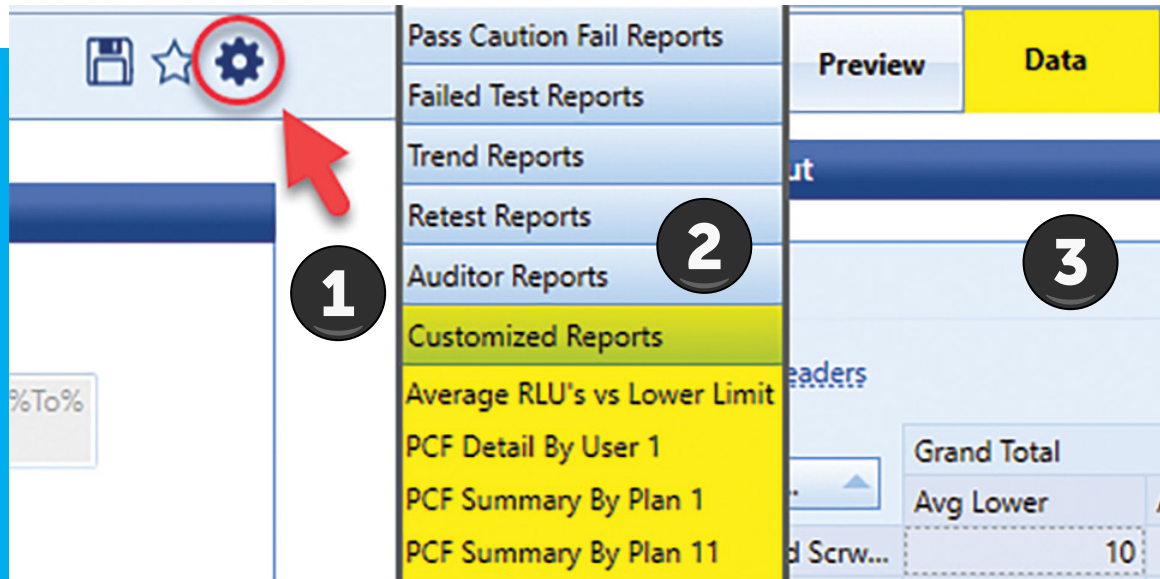
Select a report and with all options left alone see what all your data looks like in a table, graph or pie chart. You can filter what data appears in the report using drop-downs and even choose a specific time period too.



### 34 REPORTS INCLUDED

Discover reports for trend analysis, auditing, and even summaries of your collected data. You will be able to preview, export and print it from the Preview tab (discussed on page 15).

To modify any pre-canned report and create a custom report refer to the instructions beginning on page 19.



## CREATING CUSTOM REPORTS

### 01

#### CREATE THE CUSTOMIZED REPORT

To begin, choose from any of the available pre-canned reports. Once you find one to your liking click the gear icon in the upper right corner of the screen to save it as a customized report.

### 02

#### MODIFY THE CUSTOMIZED REPORT

Click on the **Customized Reports** tab and you will see your new customized report in the list with the default name. You may now customize **Report Properties**, **Display Options** and **Color Options** along with applying filters to your report. Be sure to click the Save icon to save your changes.

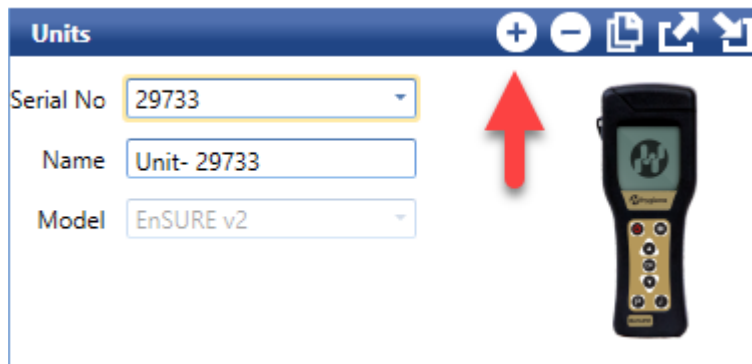
### 03

#### MODIFY REPORT DATA

In the **Data** tab you will be able to make advanced customizations to your report. You can change how the data will appear and what data shows up on your tables and charts. Refer to page 17 for more on the specific changes you can make and how they will reflect in your report. Be sure to click the **Save** icon to save your changes.

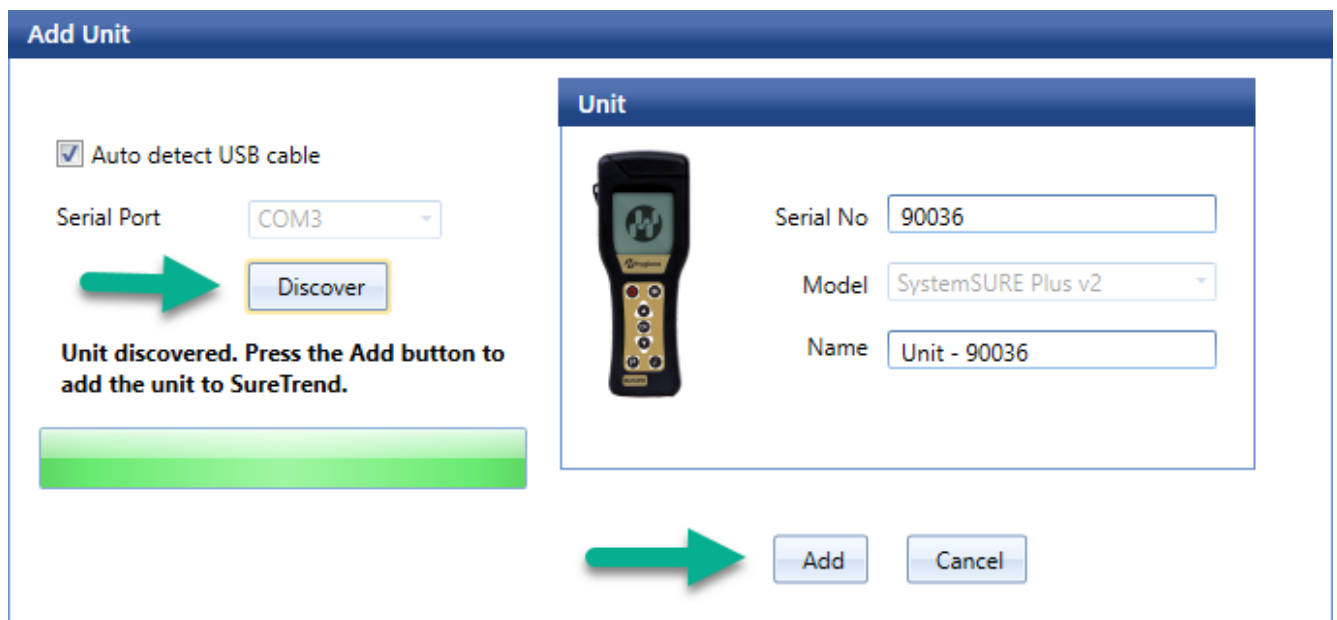
## CH.5 - UNITS

### Adding & Managing Units



There are two ways you can add a Unit to SureTrend.

1. Connect your unit to the machine and perform a sync. This will automatically import the unit and sync any data.
2. Click the Plus icon in the Units section. In the window that pops up click **Discover** and then click **Add**. Be sure **Auto detect USB cable** is checked.



## CH.5 - UNITS


### Adding & Managing Units



1. **Add/Discover Unit:** Add a non-existing unit to SureTrend
2. **Delete Unit:** Remove the selected unit from SureTrend
3. **Copy Unit:** Copy program settings from an existing unit to another unit
4. **Export unit to XML file:** Export a unit from SureTrend to an XML file
5. **Import unit to XML file:** Import a unit into SureTrend from an XML file

## CH.5 - UNITS

### Transferring Unit Data




**Units**


+ -

Serial No.

Name

Model



**From Unit**


Serial No.


Name

Model



**To Unit**

☒ Auto detect USB cable



Serial No.

Name

Model

Serial Port

One of the ways you can transfer data is by copying it from a unit already in SureTrend. With the Copy Unit feature you can transfer program data (including users, locations, and plans) to another unit already in SureTrend or to a unit connected to SureTrend via USB cable.

Click **Discover** to transfer data to a unit connected via USB cable. To transfer to a unit already in SureTrend select it from the **Serial No.** drop-down box. Click **Copy** once you are ready to proceed and copy the data.

## CH.5 - UNITS

### Transferring Unit Data



**Export Units:** Clicking this icon will export your unit to an XML file which can then be saved in a safe location as a backup or transferred to another device or SureTrend installation.

Exported units should be imported into matching SureTrend versions. For example exporting a unit in SureTrend 4.0.3.3 may not import into SureTrend 4.0.3.4 successfully. Exported Units from SureTrend 4.0.3.4 can be imported into SureTrend 4.0.3.4 regardless of Build number.

If you are trying to export and import XML files to and from different versions of SureTrend (i.e. 4.0.3.3 to 4.0.3.4) then you want to do so through the Import Data feature of SureTrend (discussed on page 40).

**Import Units:** Clicking this icon will import your unit from an XML file and add it to the SureTrend database. This will copy over the unit name and serial number as well. If you are intending on copying this data to another unit in SureTrend after importing the XML file continue with following the steps on page 22 for copying a unit. Choose to copy from the unit you just imported to any other unit you choose.

# CH.5 - UNITS

## Adding & Managing Users

12345

Users		
Order	User Name	
*	Grid New Row Text	
0	Any User	
1	Eva	
2	Mari	
3	Pam	
4	Judy	

- 1. Add users from a list of previously created users in SureTrend
- 2. Paste users to a Unit that have been copied from another Unit
- 3. Add a new user to the unit
- 4. Delete the selected User from the unit
- 5. Save all changes



Make sure to always click the disc icon to save your changes. Any user(s) you may have added or removed will not be committed unless you click this icon when done.

Users		
Order	User Name	
I	0	My new user
	0	Any User
	1	Eva
	2	Mari
	3	Pam
	4	Judy

You can quickly add new users by just typing their name in the top row of the **User Name** column where it says **Grid New Row Text**. When you press the **Enter** key on your keyboard it will add the user to the bottom of the list.

User Name		
Pan		
My		
Ma		
Jud		
Eva		

A Z

Sort Ascending

Z A

Sort Descending

A Z

Clear Sorting

Group By This Column

Show Group Panel

Show Column Chooser

You can drag names around to reorder them or right click **User Name** at the top to find more sorting options. Be sure to click **Save** to commit any changes you have made.



# CH.5 - UNITS

## Adding & Managing Locations

12345

Locations																
Or...	Location Name	Gro...	Surf...	Up...	Lo...	R...	Zone	Room Nu...	Perso...	No...	Corrective A...					
* 6 Grid New Row Text																
0	90 degree Belt			60	59	0	Product contact su...	0	0							
1	Accumulator Infeed			60	59	0	Product contact su...	0	0							
2	Accumulator Outf...			60	59	0	Product contact su...	0	0							
3	Any Location			60	59	0	Product contact su...	0	0							
4	Batter Holding Tank			60	59	0	Product contact su...	0	0							
5	Batter Mixing Tank			60	59	0	Product contact su...	0	0							

## HOW LOCATIONS CAN BE USED

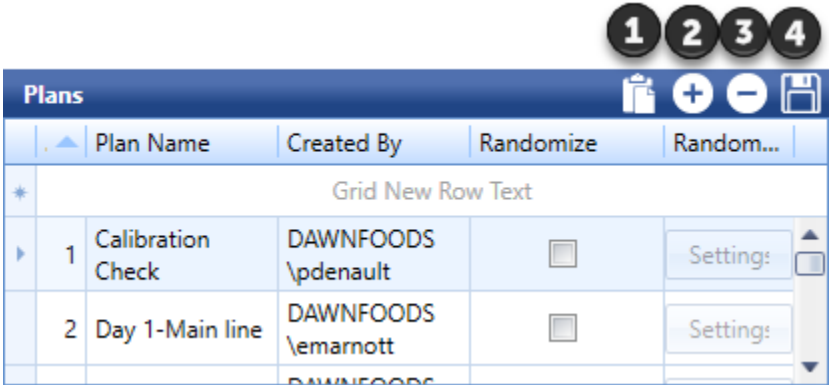
Usually locations are used as the physical locations you test with a unit. And since SureTrend can hold up to 5,000 locations you can add plenty and group them by using the **Groups**, **Surfaces**, or **Room Number** fields. You may also create custom fields as described on page 37.

### BY THE NUMBERS

1. Select users from SureTrend’s database and add or remove any from the selected unit
2. Paste users to a unit
3. Add a new user to the unit
4. Remove the selected user(s) from the unit
5. Save and commit all changes
6. Quickly add new users by typing their name in here and pressing **Enter** when done
7. Click on this pin icon in any column to filter what you want to see

# CH.5 - UNITS

## Adding & Managing Plans



## HOW PLANS CAN BE USED

Usually plans are used to categorize locations or groups of locations. For example plans could be buildings across your organization, floors within a building or rooms in a building. SureTrend can hold up to 100 plans so it would not be wise to use them as the physical locations you test with a unit.

### BY THE NUMBERS

1. Paste Plans
2. Add a new Plan to the list
3. Remove highlighted Plans
4. Save and commit all changes

# CH.5 - UNITS

## Adding & Managing Plan Locations

1234

Plan Locations											
	Loc...	Gro...	Surf...	U.	L.	R.	Roo...	Pers...	Notes	Corr...	
▶	Cal-Posi... rod			1...	8...	0	0	0			
	Cal-Neg... rod			5	4	0	0	0			

## HOW PLAN LOCATIONS CAN BE USED

Plan locations are simply locations created that are attached to specific plans. Once a location is added to a plan and you view that plan it will show all locations attached to it (its plan locations). Since locations can vary plan by plan some plans may share the same locations while others may not.

### BY THE NUMBERS

1. Randomize the locations based on Randomization settings
2. Select Locations to include in the selected Plan
3. Remove highlighted Locations from the selected Plan
4. Save and commit all changes

## CH.5 - UNITS

### Randomization

**Unit location risk ranking**

Rank 0: Manually selected

Rank 1: Ultra Risk Locations  %

Rank 2: High Risk Locations  %

Rank 3: Moderate Risk Locations  %

Rank 4: Low Risk Locations  %

Rank 5: Ultra Low Risk Locations  %

---

Must equal 100%  %

### WHAT IS RANDOMIZATION?

Randomization is perfect for ATP monitoring and testing locations based on chance, rather than by choice. This reduces bias as much as possible. Randomization is designed to “control” (reduce or eliminate if possible) bias by all means.

We know how important this can be for many organizations which is why we have included professional-grade randomization features in SureTrend 4.



### TURNING ON RANDOMIZATION

In the **plans** section of the units area you will find a checkbox next to each plan you have created. Checking this box will initiate randomization for that plan. Check this box for every plan you wish to include in your randomization initiative.

This will activate the **Settings** button next to the checkbox. Click on this button to bring up the **Unit Location Risk Ranking** screen.



### UNIT LOCATION RISK RANKING

Locations you create can be ranked from Ultra Risk down to Ultra Low Risk. There are 5 ranks total you can categorize your locations into. You may keep the default percentages presented to you or change the numbers to reflect what you feel closer match your organizations priority. Make sure any changes equal 100%.

# CH.5 - UNITS

## Randomization

Unit location risk ranking

Rank 0: Manually selected

Rank 1: Ultra Risk Locations

20 %

Rank 2: High Risk Locations

20 %

Rank 3: Moderate Risk Locations

20 %

Rank 4: Low Risk Locations

20 %

Rank 5: Ultra Low Risk Locations

20 %

Must equal 100%

100 %

Restore Default

Apply

Cancel

RANDOMIZING  
TEST POINTS

If you are only interested in randomizing the locations you will be testing in your plans with no regards to risk assessment then you could simply make each rank valued at 20%.

In the **Locations** section you could then assign numbers 1 through 5 in the **Rank** column for each of your locations. Now when you randomize your plan each location has an equal chance of being chosen.

### EXAMPLE 1:

Say you only want to utilize three ranks, in this case High Risk, Moderate Risk and Low Risk then you would set Ultra Risk and Ultra Low Risk to 0%. You would then apply a percentage to the remaining three ranks applying more weight to the higher risks since those are most important. So you could have High Risk set to 60%, Moderate Risk set to 30%, and Low Risk set to 10%. All areas should now equal 100% total.

### EXAMPLE 2:

Say you only want to utilize two ranks, in this case High Risk and Low Risk then you would set Ultra Risk, Moderate Risk and Ultra Low Risk to 0%. You would then apply a percentage to the remaining two ranks applying more weight to the higher risk since it is more important. So you could have High Risk set to 70% and Low Risk set to 30%. All areas should now equal 100% total.

## CH.5 - UNITS

### Randomization

**Locations**

Order	Location Name	Group	Surface	Upper	Lower	Rank	Zone
155	Table by packing			30	10	5	
15	Cal-Positive rod			160	80	5	
14	Cal-Negative rod			5	4	4	
0	90 degree Belt			60	59	3	
158	Depanner Scraper			30	10	2	
156	Icing weight table			30	10	2	
157	White bucket4spatula			30	10	1	

**Plans**

O..	Plan Name	Created By	Randomize	Randomize Settings
1	Calibration Check	DAWNFOODS\pdenault	<input checked="" type="checkbox"/>	Settings
2	Day 1-Main line	DAWNFOODS\emarnott	<input type="checkbox"/>	Settings
2	Day 2-Main line	DAWNFOODS\emarnott	<input type="checkbox"/>	Settings
2	Day 3-Main line	DAWNFOODS\emarnott	<input type="checkbox"/>	Settings
2	Day 4-Main line	DAWNFOODS\emarnott	<input type="checkbox"/>	Settings
2	Line 2-All Sites	DAWNFOODS\emarnott	<input type="checkbox"/>	Settings

### STEP 1

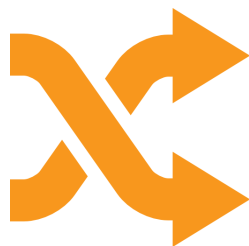
#### Turning Randomization On

Click the checkbox to turn on randomization for the selected plan. Once checked the Settings button next to it will become enabled.

### STEP 2

#### Unit Location Risk Ranking

You can categorize your locations into up to 5 predefined ranks. Keep the default percentage values or change them. Check out pages 28 - 29 for more info.



# HOW IT WORKS

We will walk you through the process of working with randomization for the first time from start to finish. Refer to pages 28 - 29 for detailed information about steps 1 and 2 if necessary, or to get a general overview of what randomization is and see examples.

	Room Number	Personnel	Notes	Corrective Action
3		0	0	
		0	0	
		0	0	
		0	0	
		0	0	
		0	0	
		0	0	
		0	0	

Plan Locations

	Location...	Group	Surface	Upper	Lo...	Rank	Room N...	Personnel	Notes	Correcti...
1	Cal-Negative rod			5	4	1	0	0		4
2	Cal-Positive rod			160	80	2	0	0		

5

## STEP 3

### Ranking Locations

With your ranks created from Step 2, now rank each location you wish to randomize by adding a number to the Rank column.

## STEPS 4 & 5

### Randomizing Plan Locations

Click the Randomize Plan icon (4) and you will see your locations randomized based on the rank numbers you gave them (5).

# CH.5 - UNITS

## Customizing Columns & Filtering

Locations		
Order	Location Name	Group
*		
▶	0 90 degree Belt	
	1 Accumulator Infeed	
	2 Accumulator Outfeed	
	3 Any Location	
	4 Batter Holding Tank	
	5 Batter Mixing Tank	
	6 Batter Pre scale	

You can right click any column in SureTrend to bring up a context menu of various filtering and sorting options. Click directly on a column to switch between sorting ascending or descending. The Filter Editor will allow you to create advanced filters displaying only the specific entries you wish to see. You can filter entries using a combination of variables and conditions.



Make sure to always click the disc icon to save your changes. Any ordering changes you save will reflect on your unit the next time you do a complete sync with the **Erase Results** box checked.

Locations	
Order	Location Name
*	(Blanks)
	(Non blanks)
▶	0 90 degree Belt
	1 Accumulator Infeed
	2 Accumulator Outfeed
	3 Any Location
	4 Batter Holding Tank
	5 Batter Mixing Tank
	6 Batter Pre scale

- 1. Hover over a column to display the filter pin. Click it to filter an entire column by specific entries contained within it.
- 2. After clicking the filter pin you can choose from a list of entries in that column to filter by.

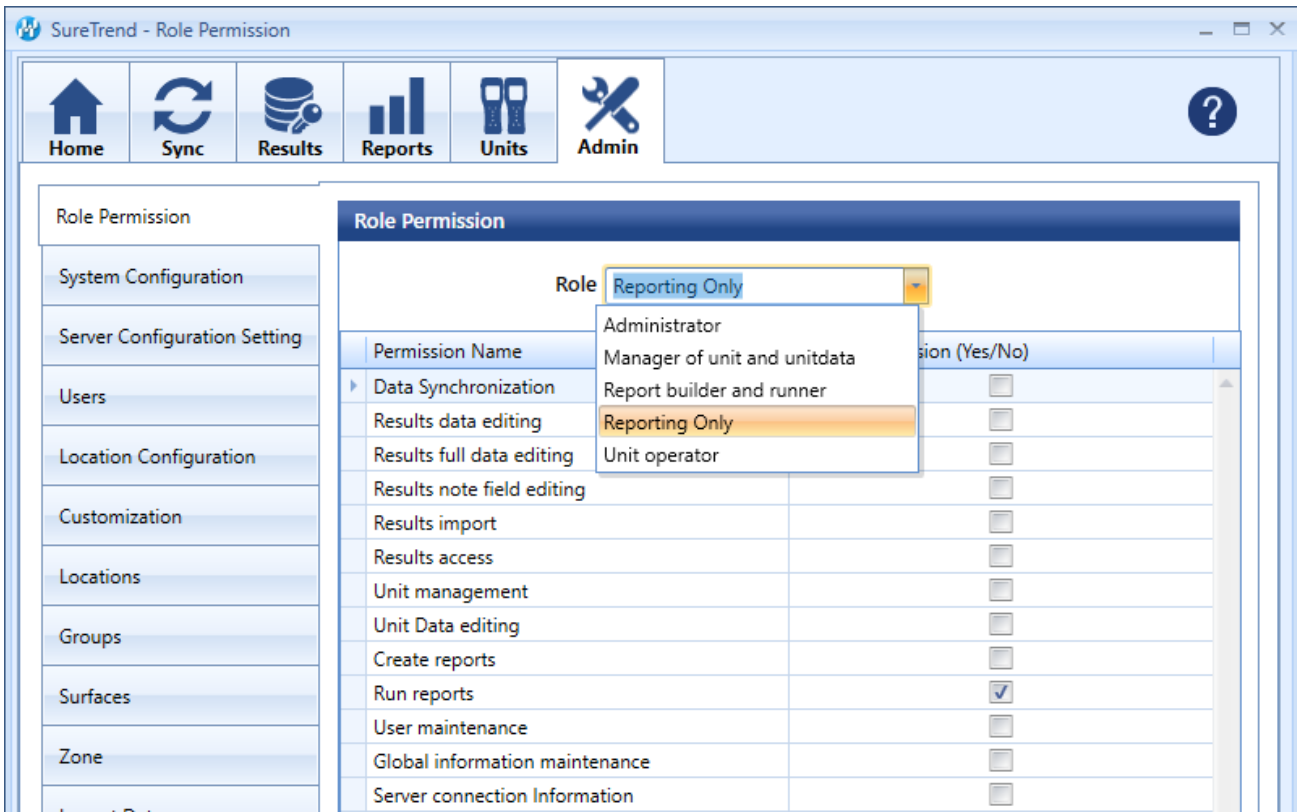
User Name	
▶	A↓ Sort Ascending
	Z↓ Sort Descending
	A× Clear Sorting
	Group By This Column
	Show Group Panel
	Show Column Chooser

You can drag entries around to reorder them or right click a column title to find more sorting options. Be sure to click **Save** to commit any changes you have made.



# CH.6 - ADMINISTRATIVE FUNCTIONS

## Role Permission



The **Role Permission** tab allows you to modify the permissions set for the 5 roles built into SureTrend.

**Administrators** have full access to the application.

The **Manager of unit and unitdata** role has the ability to edit data, access results, along with updating and managing Units.

The **Report builder and runner** role has most permissions except syncing data from Units, fully editing results, and certain administrative functions.

**Report Only** allows for running reports only.

**Unit Operators** can add and edit notes on results.

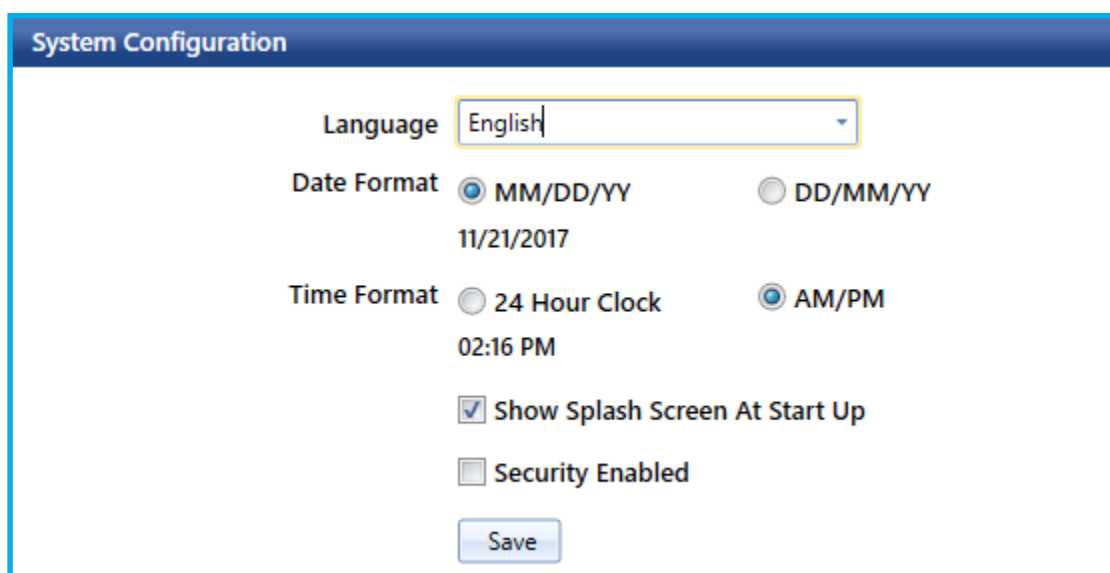
## CH.6 - ADMINISTRATIVE FUNCTIONS

### System Configuration

## CONFIGURE SYSTEM INFORMATION

---

Information set here will determine how certain information is displayed in SureTrend and will show up on a unit during the next synchronization if the checkbox **Sync Unit Date Time** is checked in the **Sync** tab.



The image shows a 'System Configuration' dialog box with a blue title bar. Inside, there are several settings: 'Language' is a dropdown menu set to 'English'; 'Date Format' has two radio buttons, 'MM/DD/YY' (selected) and 'DD/MM/YY', with the example '11/21/2017' shown below; 'Time Format' has two radio buttons, '24 Hour Clock' and 'AM/PM' (selected), with the example '02:16 PM' shown below; there are two checkboxes, 'Show Splash Screen At Start Up' (checked) and 'Security Enabled' (unchecked); and a 'Save' button at the bottom.

**System Configuration**

Language: English

Date Format: ☒ MM/DD/YY ☐ DD/MM/YY  
11/21/2017

Time Format: ☐ 24 Hour Clock ☒ AM/PM  
02:16 PM

☒ Show Splash Screen At Start Up

☐ Security Enabled

Save

## CH.6 - ADMINISTRATIVE FUNCTIONS

### System Configuration Setting

## MODIFYING SURETREND DATABASE SETTINGS

---

### OPTION 1 // SQLCE



SureTrend's default option, the SQL Compact Edition database file (suretrend.sdf) is located in the `C:\ProgramData\Hygiena\SureTrend` folder. The database file may be moved to a new location (like a network file share). Click [here](#) for instructions on how to move a SureTrend database. The default SureTrend database password is **systemsure**. It is highly recommended you do not change this password unless absolutely necessary.

---

### OPTION 2 // DISTRIBUTED



One of SureTrend's two server modes, this option is intended for SureTrend installations set up on a server to share its suretrend.sdf file with many users, or to connect to a shared SureTrend server installation by entering the host machines IP address or hostname in the **Server** field. The default port is 83. Please refer to the installation documentation linked on the cover page for more information regarding distributed installations and how to set them up.

---

### OPTION 3 // SQLSERVER



One of SureTrend's two server modes, this option is intended for SureTrend installations on a server to share its data with other users. The SQL Server information would be entered here to connect the SureTrend Server to the SQL Server. On clients, the SQL server's information can be entered in here to directly connect them to the database as well.

More commonly, after setting this area up on the SureTrend installation present on the server, any subsequent clients would connect to the SureTrend server itself instead of the SQL server directly. In order to accomplish that you would choose **Distributed** on client machines and enter the IP address or hostname of the server the SureTrend host is installed on. This is a more secure and more viable method of having clients connect to the SureTrend server versus connecting them to the SQL server directly. Please refer to the installation documentation linked on the cover page for more information regarding SQL server installations and how to set them up.

## CH.6 - ADMINISTRATIVE FUNCTIONS

### Users

The screenshot shows the 'Users' configuration window. It includes the following fields and options:

- Field 1:** Unit User Name (dropdown menu, value: hmcgill)
- Notes:** Text input field
- ☒ Also a suretrend user
- Field 2:** Authentication (dropdown menu, value: Windows Authentication)
- Field 3:** User Name (text input field, value: MPC\hmcgill)
- Field 4:** Password (text input field)
- Confirm Password:** Text input field
- Field 5:** Role to this user (dropdown menu, value: Administrator)
- Save:** Button

You can see every user in your SureTrend database by clicking on **Field 1** as shown in the image above. Users that will only be added to a meter require only **Field 1** to be completed then click **Save**. If you want to administer roles and allow other functionality in SureTrend you will need to check the box **Also a suretrend user** and fill out the remaining fields as shown in 1 - 5 of the image above. They are detailed below.

### SETTING UP A USER

- 1** Enter the name you would like to appear on a unit synced with this user.
- 2** Choose between **Windows** or local **Password Authentication**.
- 3** Enter a user name. If **Windows authentication** was chosen you can search AD for a user.
- 4** A password is mandatory and can only be entered if **Windows authentication** was not chosen.
- 5** Choose a role. By default they will be an **Administrator** unless you specify something else here.

## CH.6 - ADMINISTRATIVE FUNCTIONS

### Location Configuration

Location Configuration				
Language: English		Standard		
Field Name	Caption	Data Type	Status	
RoomNumber	Room Number	Number	<input checked="" type="checkbox"/>	
Personnel	Personnel	Text	<input checked="" type="checkbox"/>	
Notes	Notes	Text	<input checked="" type="checkbox"/>	
CorrectiveAction	Corrective Action	Text	<input checked="" type="checkbox"/>	

If **Standard** is selected in the drop-down box you can choose between four predefined fields: **Room Number**, **Personnel**, **Notes**, and **Corrective Action**. If you check the box in the **Status** column you will activate these extra fields and can view them as extra columns in the **Results** and **Units** sections. These fields can be used for any extra information you want to record in **Results**, **Locations**, **Plans**, etc. where these new columns are available.

Location Configuration				
Language: English		Custom		
Field Name	Caption	Data Type	Status	
CustomField1			<input type="checkbox"/>	
CustomField2			<input type="checkbox"/>	
CustomField3			<input type="checkbox"/>	
CustomField4			<input type="checkbox"/>	
CustomField5			<input type="checkbox"/>	
CustomField6			<input type="checkbox"/>	
CustomField7			<input type="checkbox"/>	
CustomField8			<input type="checkbox"/>	
CustomField9			<input type="checkbox"/>	
CustomField10			<input type="checkbox"/>	

If **Custom** is selected in the drop-down box you can create and customize up to 10 custom fields that can be used for any extra information you want to record in **Results**, **Locations**, **Plans**, etc. where these new columns are available. If you check the box in the **Status** column you will activate these extra fields.

Double click on a cell under **Caption** to give the custom field any name you wish. Double click under **Data Type** to select the type of field you want to have. You can select from **Text**, **Number** or **Yes/No**.

## CH.6 - ADMINISTRATIVE FUNCTIONS

### Customization

Resource Key	Caption	ToolTip
[-] Group Name: Help search button text		
Search	Search	
[-] Group Name: Message		
Form closing	Please change the row otherwise you will lost the...	
Message Title	SureTrend - Data Analysis Software	
[-] Group Name: MessageBox Button		
OK	OK	
[-] Group Name: Tab Caption		

The **Customization** section allows you to modify various text used throughout the SureTrend application. You can customize the names of columns, tabs, and other aspects of the SureTrend user interface to more closely match the lingo or terminology used within your organization.

To get started, choose an area of SureTrend you are interested in modifying from the **User Interface** drop-down menu at the top. Once you have selected a user interface you would like to make changes to just browse through the lists of button text, grid columns, and messages to find the one you would like to redefine.

Select the predefined caption to change it and even add a Tooltip which will appear when the mouse is hovered over that area in the application. This is useful for quick tips for users to see on what to put into a particular column or field. Any changes you make will reflect the next time you restart SureTrend. Changes are saved by clicking Enter after typing in your changes.

## CH.6 - ADMINISTRATIVE FUNCTIONS


Locations / Groups / Surfaces / Zones

### REVIEWING UNIT DATA IN THE ADMIN TAB

---



#### LOCATIONS

This section allows you to view your entire collection of locations currently in the SureTrend database. Consider this a master list of all locations (even those not currently attached to a unit). You can globally add or remove locations here. Any locations removed from here will also be removed from their respective units. Any locations added here should also be added to a Unit. Do this by clicking  to add the location in the **Units** tab.



#### GROUPS

This section allows you to view all the groups currently created in the SureTrend database. Consider this a master list of all groups (even those not currently used with a location). You can globally add or remove groups here. Any groups removed from here will also be removed from their respective units. Any group added here should also be added to a unit.



#### SURFACES

This section allows you to view all the Surfaces currently created in the SureTrend database. Consider this a master list of all surfaces (even those not currently used with a location). You can globally add or remove surfaces here. Any surfaces removed from here will also be removed from their respective units. Any surface added here should also be added to a unit.



#### ZONE

This section allows you to view all the zones currently created in the SureTrend database. Consider this a master list of all zones (even those not currently used with a location). You can globally add or remove zones here. Any zones removed from here will also be removed from their respective units. Any zone added here should also be added to a unit.

## CH.6 - ADMINISTRATIVE FUNCTIONS

### Import Data

The screenshot shows the 'Import Data' dialog box. The 'Source' tab is selected, showing 'Source' as 'SureTrend 4.0 or Later'. The 'Import Data' tab is active, showing 'Provider' as 'SQL Server Compact', 'Location' as 'C:\ProgramData\Hygiena\SureTrend\suretrend.sdf', and 'Password' as a masked field. The 'Import' section on the right has four checked checkboxes: 'Archives', 'Results', 'Units', and 'Users'. At the bottom, there are three buttons: 'Preview', 'Import', and 'Cancel'.

**Import Data** allows you to import data from a SureTrend 3.x or SureTrend 4.x database. You can also import data from an Excel spreadsheet.

Please follow our more in-depth instructions on importing data into SureTrend. You can view it online or download it by clicking the link below.

> [Click here to view \*\*Importing Data into SureTrend 4\*\* documentation](#)



## CH. 7 - MISC.

### Upgrading SureTrend

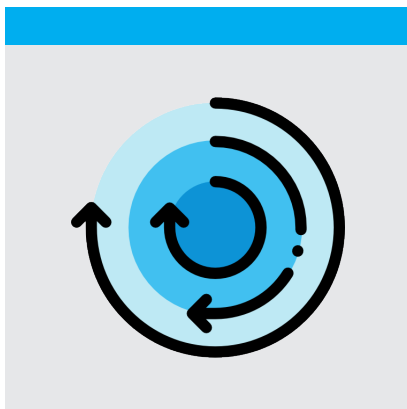
## STAYING CURRENT

---

Download the latest version of SureTrend from our website or by clicking [here](#).

Always make a backup of your database before performing an upgrade.

The default database location is: C:\ProgramData\Hygiena\SureTrend\suretrend.sdf



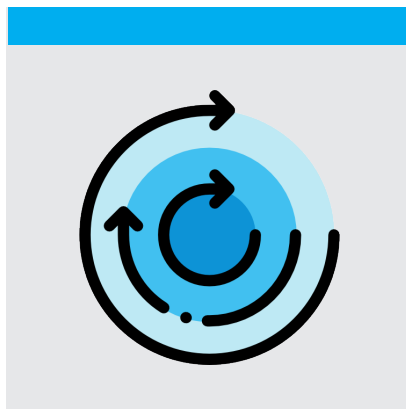
### STANDALONE UPGRADE

#### A Single PC Running SureTrend 4.x

Install the latest version over  
your currently installed version.

**Do not uninstall your old  
version first.**

You may be prompted to update  
your database when starting  
SureTrend after the upgrade.  
Select **Yes** and continue.



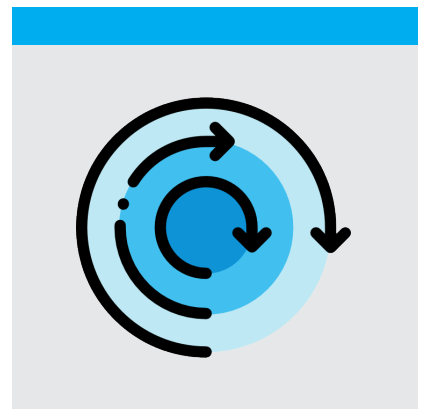
### SERVER UPGRADE

#### A SureTrend Server & All Client Installations

On your server install the latest  
version over your currently  
installed version. **Do not  
uninstall your old version first.**

You may be prompted to update  
your database when starting  
SureTrend after the upgrade.  
Select **Yes** and continue.

Repeat steps on all client  
installs.



### NETWORKED UPGRADE

#### SureTrend Installations Sharing a Database

Install the latest version of  
SureTrend on **EVERY** machine  
connecting to the database  
stored on the network. Install  
the latest version over your  
currently installed version.

You may be prompted to update  
your database when starting  
SureTrend after the upgrade.  
Select **Yes** and continue.

## CH. 7 - MISC.

### Tips & Tricks

## FROM THE PROS

---



### DATABASE LOCATION

By default SureTrend's database is located at **C:\ProgramData\Hygiena\SureTrend\suretrend.sdf** upon installation of the software.



### DATABASE PASSWORD

The default database password of suretrend.sdf is **systemsure**. This password should never be changed unless there is a really good reason to as tampering with it could lead to permanent data loss!



### LOCATION NAMES

Location names in SureTrend have a maximum size of 20 characters. This matches the 20 character display limit on the meters. Be sure to keep this in mind when creating and naming locations.



### LIMITATIONS

SureTrend can hold a maximum of 200 users, 5000 locations, 100 plans, and 250 locations per plan.

All meters can hold a maximum of 2000 results at any given time.



### NETWORK DATABASE

A SureTrend database can only be moved onto the network if it is a standard standalone installation. Distributed, multi-user installations on or using a server cannot have their database moved onto a network location.



### WHAT IS MY VERSION?

To find the version of SureTrend you are running go to the **Admin** tab and click on the **About** tab on the lower left. You will see what version and build you have currently installed.

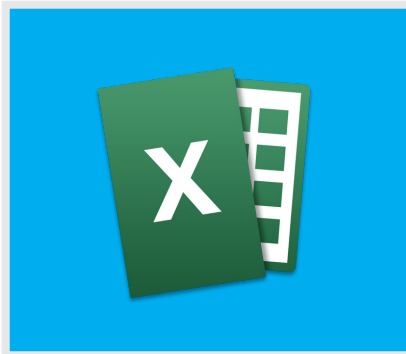
## CH. 7 - MISC.

### Download Reference Sheet

## DIRECT ACCESS TO RESOURCES YOU NEED

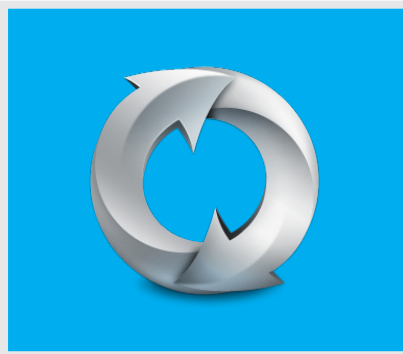
---

Click the links below to download any SureTrend resources you may need.



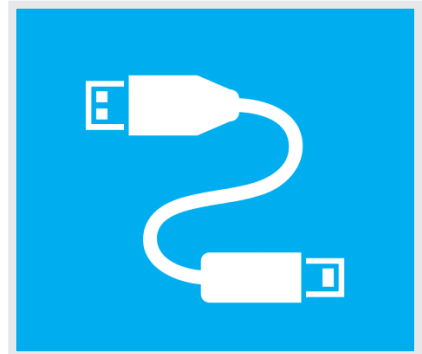
### EXCEL TEMPLATE

A sample spreadsheet for importing data into SureTrend from Excel



### SYNC UTILITY

A SureTrend luminometer diagnostics tool



### USB DRIVER

Official SureTrend USB PC driver to sync a Unit with a machine



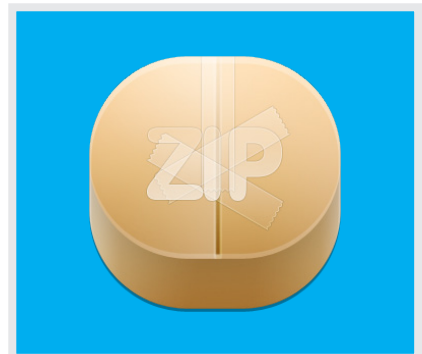
### BLANK DATABASE

Default SureTrend database to start fresh or replace a corrupted file



### SURETREND 4.x

The latest version of SureTrend



### SURETREND.ZIP

Self-contained folder containing a working SureTrend copy

## CH. 7 - MISC.

### Troubleshooting

## RESOLVING TYPICAL ISSUES

---

### SureTrend is asking me for a username and password at startup

SureTrend should never ask for a username or password. If it asks you to login when starting up that means it cannot connect to its database properly. If you just installed SureTrend on a server make sure you have [HTTP Activation](#) enabled and try starting the application again. If you have SureTrend installed on a PC and are receiving this contact a Hygiena support representative and we can easily assist you.

---

### I am seeing other peoples' results in SureTrend

You most likely have been setup to a shared database. This means you can see everyone elses synced results and they can see anything you sync as well. There is no way to prevent this, but you can use filtering to limit what you see to only what you care about. When you are working with reports, create custom reports and only include the units, users, plans or locations that interest you so the rest are not included.

---

### I have synced results but I cannot see them in SureTrend

Make sure the data and time is correct on your unit. When batteries die or are replaced the data and time resets. If you take results with an incorrect date/time and sync them they could get lost in SureTrend amongst other results. Be sure you do not have any filtering in place that could be limiting what you see. Make sure your syncs were successful and the sync log shows data was actually imported from the device.

---

### New Locations/Users/Plans. are not syncing to my device

In order to have new programming data (i.e. locations, users, plans, date/time changes) sync over to your device you need to choose **Erase all program information and results** on the Sync tab. Keep in mind you will lose all results currently on the unit unless you sync them prior to doing this. On the units tab make sure you see the red text, **Unit data has been modified...** If you do not see this text try adding a dummy location or plan to initiate a response from SureTrend and then delete it. You can then sync and the changes will be made.

## CH. 7 - MISC.

### Troubleshooting

## RESOLVING TYPICAL ISSUES

---

### Receiving “Network Connection Lost” message

Possible solutions: (1) Remove the unit not syncing due to this message and re-add it by doing a new sync. (2) Uninstall and re-install SureTrend (make sure to backup your database first). (3) Replace your database with a new blank one (download from page 43). You can import your users, locations, and plans from your original database using SureTrend's **Import Data** feature. (4) In Server Configuration Setting set Config Type to **SQLCe**.

---

### I receive sync errors when trying to sync my Unit

There can be a number of reasons why you would have trouble syncing. The most important thing to check first is if you are running the latest version of SureTrend. If you are apart of a multi-user setup, connecting to a host server, the server may need to be updated too before you can update SureTrend on your machine. For more information on upgrading SureTrend to the latest contact a Hygiena representative to help you through the process.

---

### I am having a problem using SureTrend what can I do?

If you are having any problem using SureTrend like syncing, connecting your unit, or even starting the application please send your most recent SureTrend error log to a Hygiena representative upon contacting us for support- even if we do not ask for it as it. It will be sent to a SureTrend Technical Specialist to quickly resolve any problems. The error logs can be found at %localappdata%\Hygiena and are ordered by date.

---

### I am trying to import from Excel and it is not working

There can be a number of reasons why this would not work. You could be missing prerequisites SureTrend requires for this feature to work successfully. You may also have an improperly formatted Excel spreadsheet. In order to make sure the formatting is correct download our official Excel template (download from page 43). Use this as a guide. If you still encounter issues importing data from Excel contact a Hygiena representative to help you through the process.

## CH. 7 - MISC.

### Troubleshooting

## RESOLVING TYPICAL ISSUES

---

### I renamed my SureTrend database and now SureTrend will not start

Change the name of your SureTrend database back to what it was prior to you changing it. SureTrend should start now. Copy and paste the database and rename the copied file to the new name you want leaving the original database file alone. Now in SureTrend navigate to the **Admin Tab** and go to **Server Configuration Setting**. If your Config Type is **SQLCe** you can change the database to the newly named one. Save and restart SureTrend. Verify SureTrend starts and go back to **Server Configuration Setting** to verify it is using the newly named database file. If everything was successful you may delete your old database file.

---

### I moved my SureTrend database and now SureTrend will not start

Move the database back to its original location prior to you moving it. SureTrend should start now. Copy and paste the database to its new location leaving the original database file alone. Now in SureTrend navigate to the **Admin Tab** and go to **Server Configuration Setting**. If your Config Type is **SQLCe** you can change the database location now to point to the new location. Save and restart SureTrend. Verify SureTrend starts and go back to **Server Configuration Setting** to verify it is using the newly located database file. If everything was successful you may delete your old database file.

---

### Syncing is slow

If the database you are connecting to is located on a network file share the syncing and reporting process will take longer. How much longer depends on your network bandwidth utilization and capabilities. Sharing a SureTrend database on a server or using our SQL server option instead may make the process a lot faster.

---

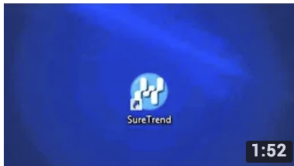
### SureTrend will not start and I am using a PC I share with other people

If you have SureTrend installed on a PC you share with other people and it gives you a message that it is already running or will not start you will need to restart the PC. SureTrend can only be opened once on a machine and if a user opened it and never closed it before locking their account or disconnecting no one else on the machine will be able to open SureTrend until the user is logged out or the machine is restarted.

## Find instructional videos at [youtube.com/hygienaTV](https://youtube.com/hygienaTV)



### SureTrend V4 Instructional Video Series for Healthcare [PLAY ALL](#)



**1: Installation & Unit Set-Up:  
SureTrend Healthcare Series**

HygienaTV  
2.1K views • 2 years ago  
CC



**2: Adding Users: SureTrend  
Healthcare Series**

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1.6K views • 2 years ago  
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**3: Creating Locations:  
SureTrend Healthcare Series**

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1.9K views • 2 years ago  
CC



**4: Making Test Plans:  
SureTrend Healthcare Series**

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1.7K views • 2 years ago  
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### SureTrend V4 Instructional Video Series for Food & Beverage [PLAY ALL](#)

Follow along to set up your Hygiena monitoring system in SureTrend v4 Data Analysis Software and start running reports!



**1: Installation & Unit Set-Up:  
SureTrend Food & Beverage...**

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**2: Adding Users: SureTrend  
Food & Beverage Series**

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CC



**3: Creating Locations:  
SureTrend Food & Beverage...**

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1.7K views • 2 years ago  
CC



**4: Making Test Plans:  
SureTrend Food & Beverage...**

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or at  
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