



SATIS Tally Quick Start Guide

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While you are setting up your iPhone it needs to have good internet connectivity, once setup, it will work with intermittent connections.

1. What is SATIS Tally?

SATIS Tally is a professional data gathering and tracking tool that can be used in many applications. It consists of a control website and an iPhone app that can be downloaded from the Apple App Store. The data will be displayed in real-time as it is collected on a web dashboard and can be exported for further analysis using standard tools.

SATIS Tally was initially developed to enable the United Kingdom Disaster Emergency Medical Team (UK-EMT) to register and track patients in overseas field hospitals. It has been designed to work effectively in mass casualty events, triage and for routine compliance monitoring.

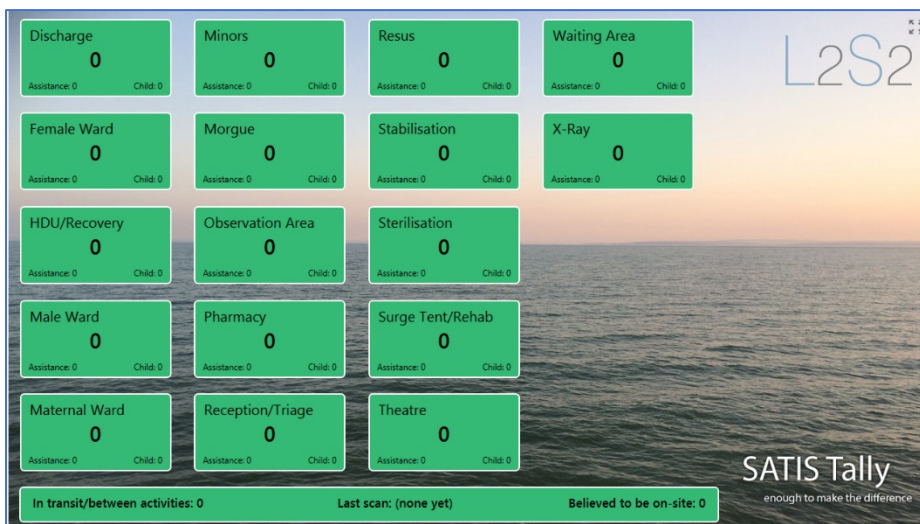
2. How do we use Tally?

As a member of a Tally group, all we need to do is start the app, choose a zone, scan an ID code and answer a handful of simple questions. If the iPhone has connectivity, the data will automatically upload and be shown on the Tally dashboard. Without connectivity, the data will be held until next time you have a connection.

As the owner of a Tally group you can create a new Tally dashboard, invite members, set their access permissions, zones, questions, counters and alerts as well as invite other Tally groups to link their dashboards to yours. You will need to use a large screen, high resolution browser to get the best out of the Tally website.

3. How to create a new dashboard

You can create a new dashboard either from the SATIS Tally website (<https://satisfally.l2s2.com> video: <https://youtu.be/XnkQsXTmoqw>) or directly from your iPhone video: <https://youtu.be/ft8c9b26dzg> .If you join via the website you will have the opportunity to choose from a few example dashboards, whereas, if you join from an iPhone your initial dashboard example will be of a simple field hospital; either way, this is your starting point and you can fully customise every aspect of your SATIS Tally dashboard from the website. To get started, click **Free Trial Account** in the website or **Create dashboard** on the iPhone menu that appears after you have downloaded and swiped through the help screens.



If you sign up from the iPhone or choose the field hospital example shown here will be created. The green ‘Zones’ represented by tiles on the dashboard will be transferred to the phone. Select a zone on the phone and scan a wristband, answer the questions and the count on the zone tile will be updated. Tally assumes that a wristband can only be in one zone at a time, so if you

change the zone on the phone and scan a wristband again, it will be added to the new zone and subtracted from the old zone. Using the website configure options you can customise all aspects of the dashboard [video: https://youtu.be/hBvPG6hjCFs](https://youtu.be/hBvPG6hjCFs)

As your email address is your username, you can only access one dashboard from one email address.

If you want to create or be a member of multiple Tally dashboards you will need to use separate, unique email addresses for each site. *Tip: If you have a gmail.com account you can create multiple email addresses by adding +qualifier to your main email account e.g. account+01@gmail.com where in this case 01 is the qualifier (you can use numbers or words but no spaces and no special characters). All mail sent to these accounts will come to your main account.*

You can sign up for as many Tally group accounts as you wish, but you will need to use a unique email address for each site. Licenses for advanced products like nested dashboards and label printing are per site and are not transferable between sites.

The dashboard and control website will not be easy to use on a small mobile device as they are intended to be used on high resolution large screens.

4. How to join an existing Tally group

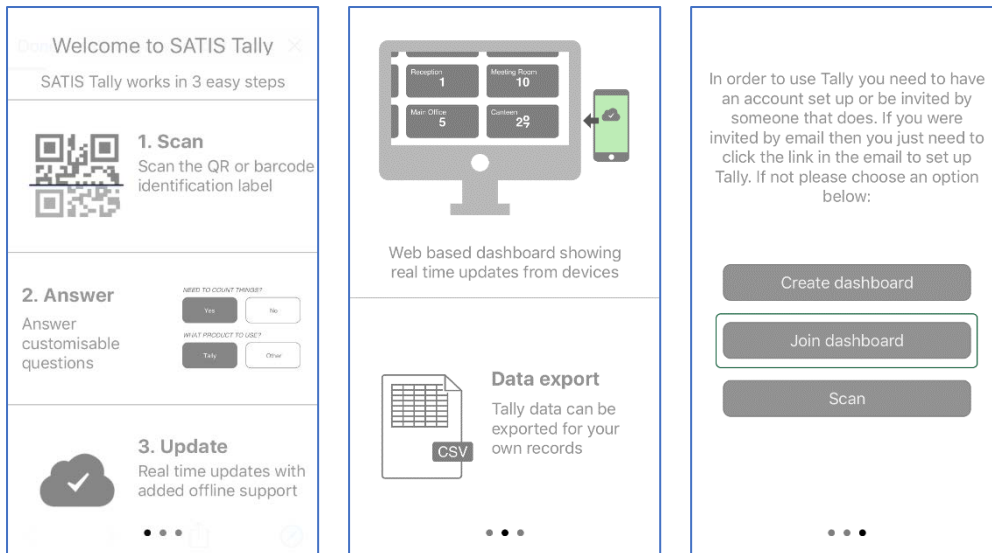
Membership of a Tally group is by invitation only, as once you are a member, your data will automatically be shown on the group dashboard.

The easiest way to join an existing Tally group is to use your iPhone to open the email invitation you were sent by the Tally group owner. Click the get SATIS Tally link to take you to the App Store and download the app. Run the app and follow the onscreen instructions to setup your phone. Your site owner will be told that your app is ready and will need to approve your account before you can start scanning.

Once approved, the app will be set up automatically. To use the app you will need to give permission for the app to use your camera and if you intend to use data tracking you will need to approve the use of your GPS when asked.

5. How to attach a new phone to your account

If you already have an account in a dashboard and can remember your username you can attach a new phone by simply downloading the SATIS Tally app from the App Store and clicking the **Join dashboard** option from the menu shown after you swipe through the help screens.



iPhone 5S welcome screens

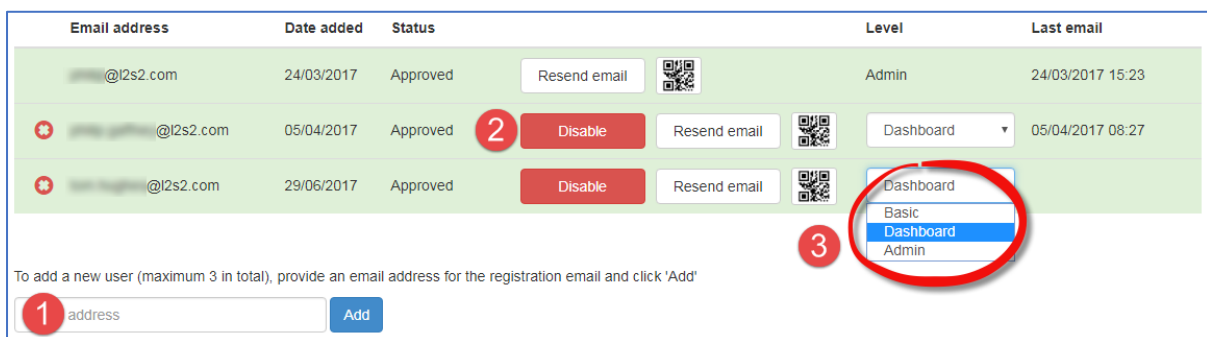
When you click **Join dashboard** enter your email address and password pair for the dashboard you want to use with the iPhone.

If your device was already associated with another Tally dashboard the association will be moved to the new site as the device can only be used with one site at a time.

Once approved, the app will be set up automatically and a success message will be displayed to tell you it is ready to use. If this is the first time you have used the app on your phone you will need to give permission for the app to use your camera and if you intend to use data tracking you will need to approve the use of your GPS when asked.

6. How to invite a new member to your group (dashboard)

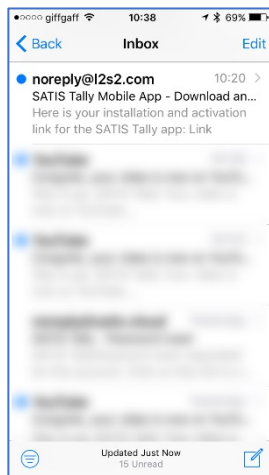
Log in to the <https://satistally.l2s2.com> website using your email address and password. Remember that an email address is associated with a single Tally dashboard. Choose the Configure menu option and select the Devices tab. At the bottom of the page enter the email address of the user you wish to invite to contribute to your dashboard and click Add. The user will be sent an email invitation to get the software and join your site.



Devices tab accessed from Configure menu

1. Enter email address of new member (cannot already be in use with Tally)
2. Approve / Disable account
3. Choose access permissions – Basic allows device use only, Dashboard grants device and dashboard use, Admin allows site to be configured and user management

Automated email invite sent to new member



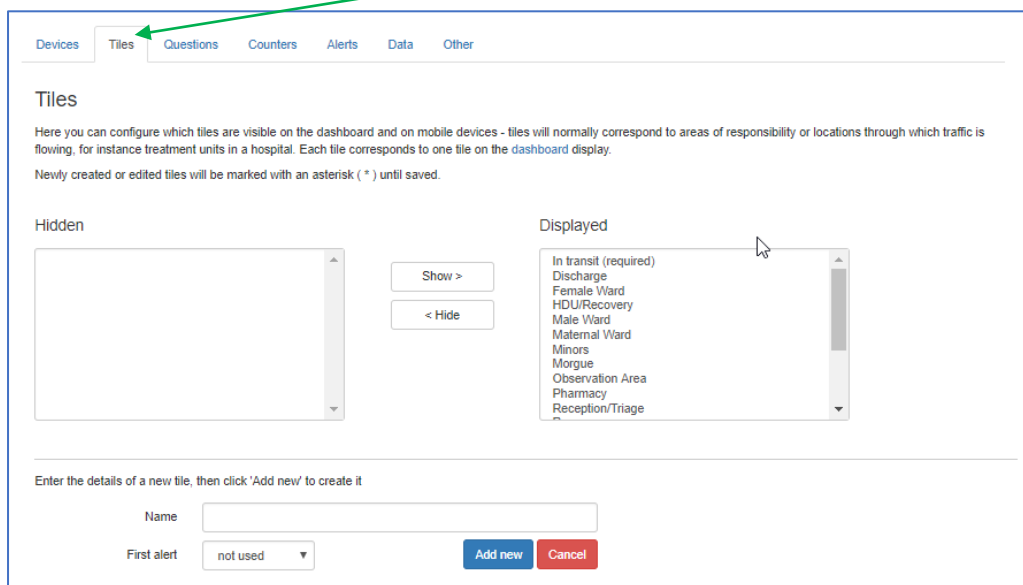
When you use the dashboard website to invite a new contributor to join, SATIS Tally will send an email invitation to the user for you. If the user opens the invitation on their iPhone and clicks the link the app will be automatically downloaded from the Apple App Store and configured to join your dashboard.

If the invitee's iPhone is already associated with a different dashboard clicking the link will dissociate the iPhone from that dashboard and associate it with yours.

An iPhone can only be associated with one dashboard at a time but it is easy to change the association at any time.

7. How to name your Tiles

Tally allows you to define the Tiles on your dashboard. Tiles may correspond to physical places, workflow steps or anything you wish to track. You create and edit Tiles in the Tally website and when you save your configuration, these will automatically be transferred to all iPhones attached to your group. You can define what Tiles are called according to your own context in the Configuration->Other menu e.g. Zones, Locations, Activities...



Tiles tab in Configure menu. The first use wizard offers a few examples, including a simple field hospital shown above.

Video: <https://youtu.be/hBvPG6hjCFs>

Tip: Use a single short word to rename the Tiles tab e.g. Zones, Locations, Activities – whatever makes sense in your application. All iPhones will be updated as soon as they connect to your dashboard.

8. How to set your alerts

You can set counts for each tile at which the tile colour will change to a user definable colour. To set an alert, select a Tile e.g. Theatre from the available Tiles list. This will put the Tile name into the **Name** text box. If you change the **First alert** dropdown list from **not used** to **triggered at**, a box appears in which to enter the count that will trigger the first alert (in this example set to 10). A **Second alert** definition is also revealed. Up to three alerts may be set.

Edit the details of the selected tile, then click Update to accept your changes

Name	<input type="text" value="Theatre"/>
First alert	<input type="text" value="not used"/> ▼
	<input type="button" value="Update"/> <input type="button" value="Cancel"/>

First Threshold Set to 10

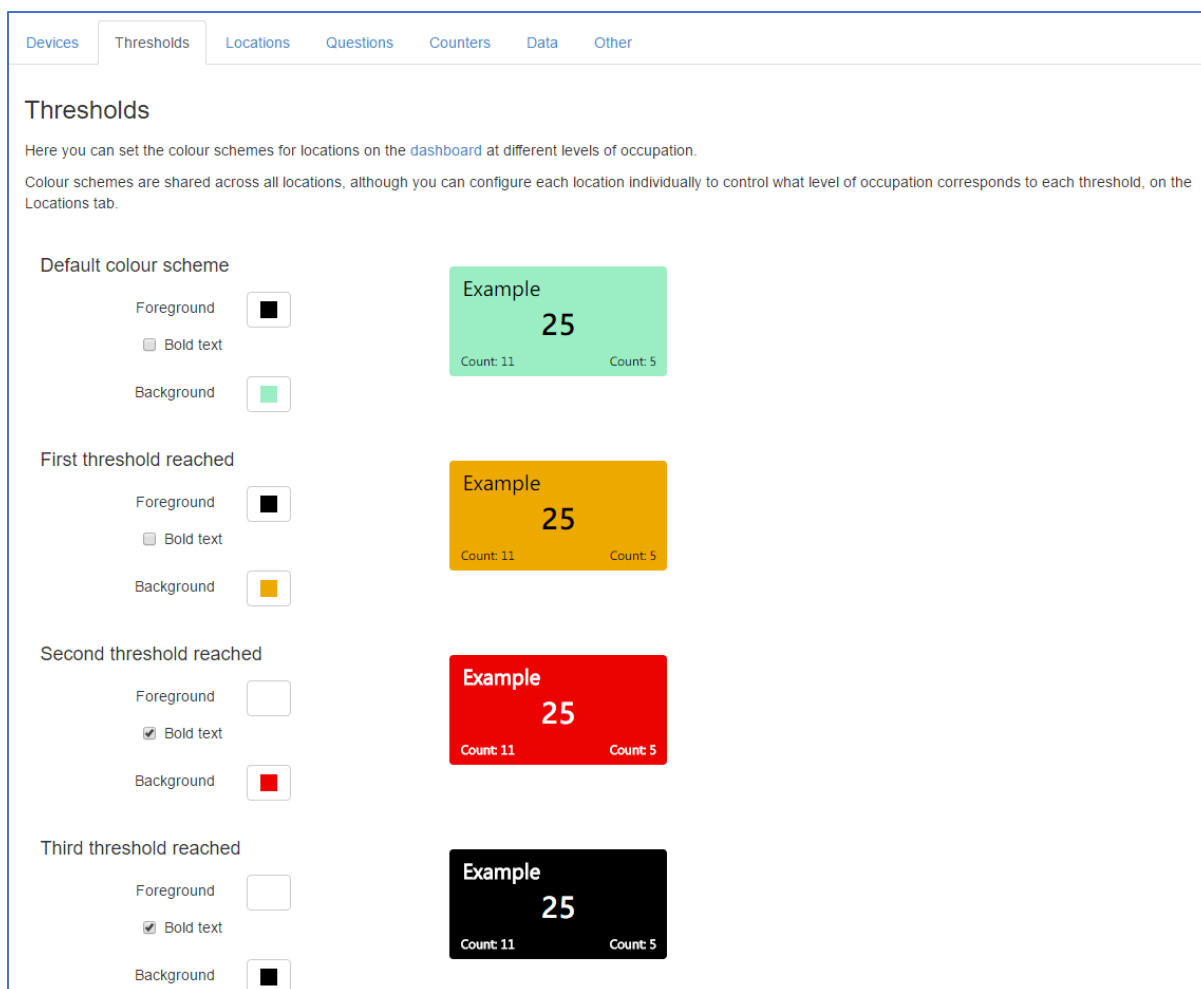
Edit the details of the selected tile, then click Update to accept your changes

Name	<input type="text" value="Theatre"/>
First alert	<input type="text" value="triggered at"/> ▼ <input type="text" value="10"/>
Second alert	<input type="text" value="not used"/> ▼
	<input type="button" value="Update"/> <input type="button" value="Cancel"/>

Tip: If you want a Tile to show the second alert (typically red) as soon as a count is reached without going through lesser alerts, set all the alerts to the same count – the highest alert will override the lesser alerts.

9. How to set your alert colours

The colours for each alert apply to all Tiles on the dashboard. Although you can set the colours to any you choose, if you want to RAG (red, amber, green) rate your tiles you can achieve this by setting the background colour to green, the first alert level to orange and the second alert level to red.



Alerts tab accessed from the Configure menu

You can set the colour scheme for screen alerts from Alerts in the Configure menu. The alerts are intended to draw attention when specified counts of scanned IDs are reached in each location. In original use, this was used to highlight occupancy levels in the different treatment centres of a field hospital. The functionality can be useful in numerous scenarios.

10. How to set your questions

Once you have started to collect data you will not be able to change the questions as this would invalidate your data. If you want to change the questions, first export your data to save it and then use the Clear option to reset the dashboard. You will then be able to create and edit questions and answers.

When a member scans an ID code they will be presented with one screen of up to six questions. The question will be shown on a single line on the phone and will need to be short. Typically, the quickest surveys are achieved with single word questions that have only a true or false answer, for example, Alive? Yes, No. This type of logical question will be displayed as two buttons on the phone and is very easy to use. If more than two answers are offered for a question, the button will be replaced by a dropdown that will require the user to choose one option.

Questions and answers may be set through the Tally Website Configure->Questions menu option. You will need a reasonable sized screen with a high-resolution browser to configure the site.

Devices Thresholds Locations **Questions** Counters Data Other

Questions

Here you can configure what data points are collected for each new registration - changes made here will be visible to mobile devices using the app. Drag questions and answers (using the '☰' handle) to change the order in which they appear.

☰	Question	Sex	disable
	Answers	☰ Male	
		☰ Female	
☰	Question	Child	disable
	Answers	☰ Yes	
		☰ No	
☰	Question	Alive	disable
	Answers	☰ Yes	
		☰ No	
☰	Question	Ambulatory	disable
	Answers	☰ Yes	
		☰ No	
☰	Question	Patient	disable
	Answers	☰ Yes	
		☰ No	

Questions tab accessed from Configure menu

As you change the order of the questions and answers by using drag and drop the effect will be shown in the phone graphic as they will appear on the iPhone. Remember to click the Save button when you are done.

11. How to set your counters

In addition to the main record count for each Tile, SATIS Tally allows the counts for two of the questions used to qualify each record to be displayed in the appropriate Tiles on the dashboard. These counters should be reserved for the information that most helps Command and Control allocate resources.

To modify the questions selected for the counters you need administration permissions. If you have adequate permissions, you will find the Counters tab in the Configure Menu of the SATIS Tally website.

Devices Thresholds Locations Questions Counters Data Other

Additional counters

Locations displayed on the dashboard show the total number of records currently believed to be at that location. Additionally, each location can show up to two more counters, summarising records at that location that have specific properties set.

First counter

Header

Count records with property set to

Second counter

Header

Count records with property set to

Example

999

Assistance: 999 Child: 999

Counters Tab on the Configure menu

You can edit the text to be displayed against each count: in the example above, whether a patient is ambulatory or not is reflected by the need for Assistance. The number of patients in a given Tile who need assistance is determined by the number of patients that have Ambulatory set to No.

The dropdown options are derived from the defined questions, therefore, design the questions first as changing the questions requires the database to be cleared. Changing the Counters only affects the dashboard display and therefore doesn't require the database to be cleared.

12. How to set the dashboard background picture

You are not stuck with our background image, you can upload your own through the Configure-> Other menu tab in the Tally website. For best results, your image should be 1280x720 pixels and kept small to load fast. Usually GIF and JPEG formats will be best.

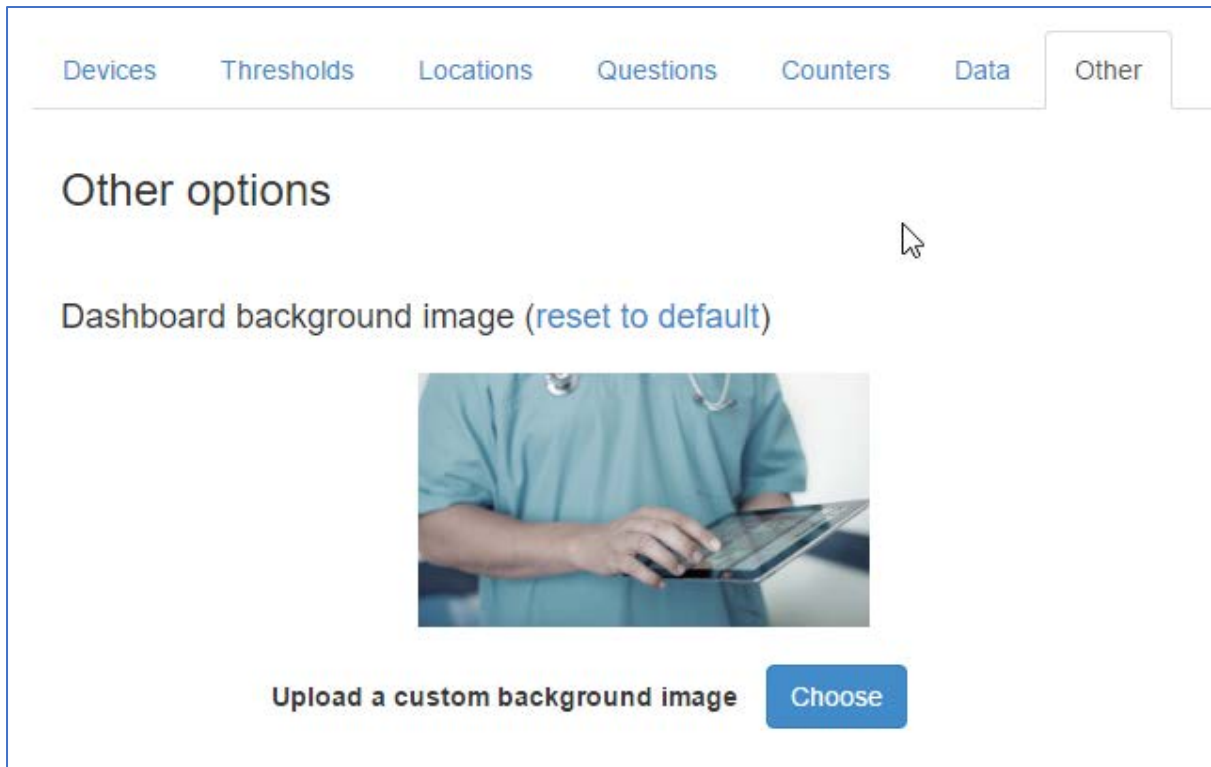
If you use nested dashboards use different images for each dashboard as it will make navigation clearer.

13. How to export your data

The Configure-Data menu tab allows you to download your stored data to your machine.

14. How to set the dashboard background picture

You are not stuck with our background image, you can upload your own through the Configure-> Other menu tab in the Tally website. For best results, your image should be 1280x720 pixels and kept small to load fast. Usually GIF and JPEG formats work best.



Other options can be accessed from the Configure menu

Downloading data does reset your store, if you want to Clear the data you should enter your account password. When you click Delete, you will irrevocably delete your data.

15. How to use GPS tagging

In the Configure->Other menu tab you will be able to switch GPS tagging on by checking the box. This will send an instruction to all member devices to GPS tag the data each time an ID is scanned. Bear in mind that unless you own the devices and lock them down, the members will be able to turn off GPS tagging as the Apple IOS gives users control over their devices.

When you export your data captured with GPS tagging on, your file will have a latitude and longitude entry for each reading whenever the device can 'see' the GPS satellites. You can switch to a map view from the dashboard to see where IDs were scanned. Hovering over a pin will display the last answers to the questions asked. ✓

16. How to Clear your data

Go to the Configure->Data menu tab in the Tally website. Enter your (administrator) password into the Delete data box and click the Delete button. This will PERMANENTLY delete your data so export it first if you need it.

You will need to delete the stored data before you can change the questions.

17. How to invite other groups to contribute to your dashboard – nested dashboards

This is an advanced paid for service that allows tiles in your dashboard to link to other SATIS Tally dashboards so that when a tile is clicked, a child dashboard will be displayed. This works particularly well when each dashboard is owned by a different team, coordinated by a central resource.

18. How to change your dashboard name

Go to the Configure->Other menu and enter the name you want to display at the bottom left of your dashboard. Don't forget to **Save** when you are done.

19. How to order wristbands

SATIS Tally will work with most QR codes and barcodes on wristbands and labels provided the quality of the code printing is adequate to be resolved by the iPhone's camera. Most wristband suppliers will provide only sequential numbering and in which case, you will need to turn off the force check sum checking. High quality, check sum and sequential bands are available from L2S2. Please call 44 1223 234550 to discuss your needs.

20. How to show questions every scan

In some applications for SATIS Tally you may only wish to ask the questions the first time an ID is captured, for example, for initial patient registration. Use the Configure->Questions page to choose whether to ask the question every time an ID is scanned.

Note: When you use Tally off-line or when the connectivity is very poor, the questions will be asked each time an ID is scanned whether or not you have chosen this behaviour. This is because without connectivity Tally cannot determine if the ID has already been scanned by another member.

21. How to use your data

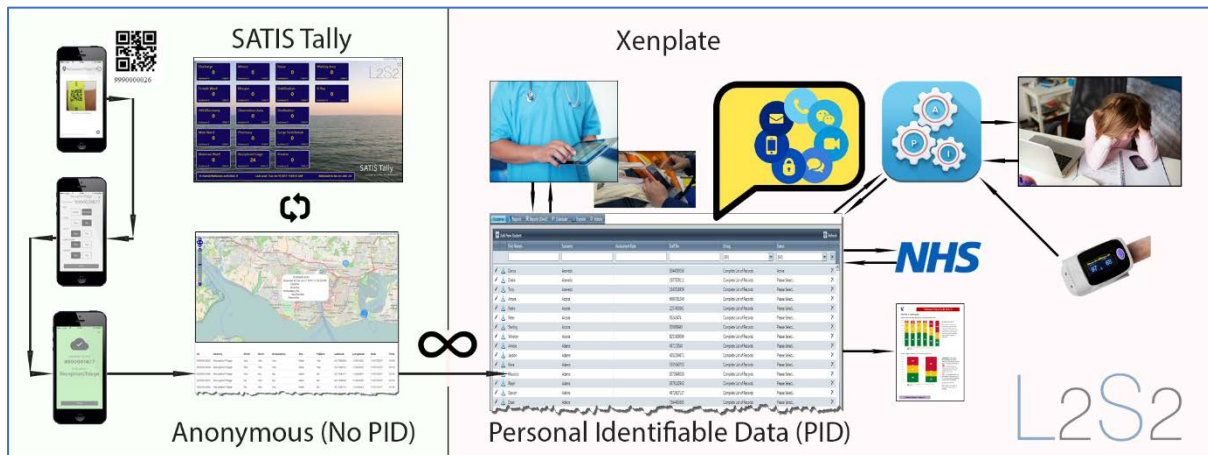
The built-in dashboard will show the number of scanned ID codes at each of your zones. With good connectivity, this will update in real time, however, if your members' devices collect data off-line then only the latest scan of each ID code will be displayed, although all of their data will be stored in the database. The dashboard can also show two counters at each zone to provide immediate feedback of critical information. If you set alerts, your dashboard screen will highlight critical information. Remember, any user you authorise can view your dashboard on any internet connected browser.

Once your data is exported you can use programs like Microsoft Excel or Tableau to analyse the data. You can show where your data was collected if you use tools like Hamster Maps.

22. How to get support

Your first stop is probably at the SATIS Tally forum as you will find answers to many questions that have been asked before. We use a moderated forum to make sure that answers to your questions have been checked by an engineer before you waste time following erroneous advice. You are of course welcome to phone us on 44 1223 234550 to ask for assistance if you wish.

23. Xenplate secure record system integration



SATIS Tally does not use Personal Identifiable Data (PID). It is not possible to trace back from a unique ID to an individual person and this makes SATIS Tally ideal for circumstances in which it is important to count patients and collect basic population information but where the complexity of governance compliance is undesirable or unrealistic. It allows Bring Your Own Devices (BYOB) to be used, often dramatically reducing the cost of major surveys.

However, for accountability and cooperative working it is often necessary to use an Electronic Patient Record (EPR) system to hold medical history associated with the identity of the patient. The Xenplate EPR is one example of a system that has been approved for frontline patient use by the NHS. SATIS Tally is able to directly interface to Xenplate such that the unique anonymous ID is associated with a patient's details in Xenplate. The questions in SATIS Tally can be mapped to fields in the EPR using simple drag and drop menus.

In the diagram above, the steps for using Tally (light green background) are to scan a wristband (unique QR code ID), answer a few simple questions and save these to the dashboard. The location of each scan will appear on a map along with the collected data. This is a low risk, no PID application. If integration is deployed, the data is pushed into Xenplate (light red background) where the ID is associated with a record ID. Xenplate has extensive capabilities to allow mobile working, custom forms, communications, report generation, a patient portal and an API for device integration.

This is the configuration used with the United Kingdom Emergency Medical team in their field hospital that is deployed to International disasters by the World Health Organisation. New patients are registered and triaged using SATIS Tally and are managed medically using Xenplate as a full functioned EPR. This configuration meets international requirements for confidentiality and safety.