



ARTERY TUTORIAL

Controller features

A tour of the console, the fleet, the rota, records and admin tools

For: controllers and admins

Artery v4.00 · October 2026

The screenshots use a made-up group, Wychwood Blood Bikes. Every name, hospital and phone number in them is fictional.

arterybb.uk

What this tutorial covers

A tour of the controller console: signing in, finding your way around, the fleet, the rota, messages, records and reports, the Team window (regular shifts, swaps, documents, training, stages) and the admin tools. For logging jobs see the tutorials on adding a job and phone jobs; for alerts see welfare and safety.

1. Signing in

Open your group's Artery address (Map view) or the same address with `/index2.html` (Dashboard). Choose your name, type your password and sign on. Signing on makes you the **duty controller**: volunteers see your name in their portal, and alerts that go to "the duty controller" come to you.

Admins: two-step login

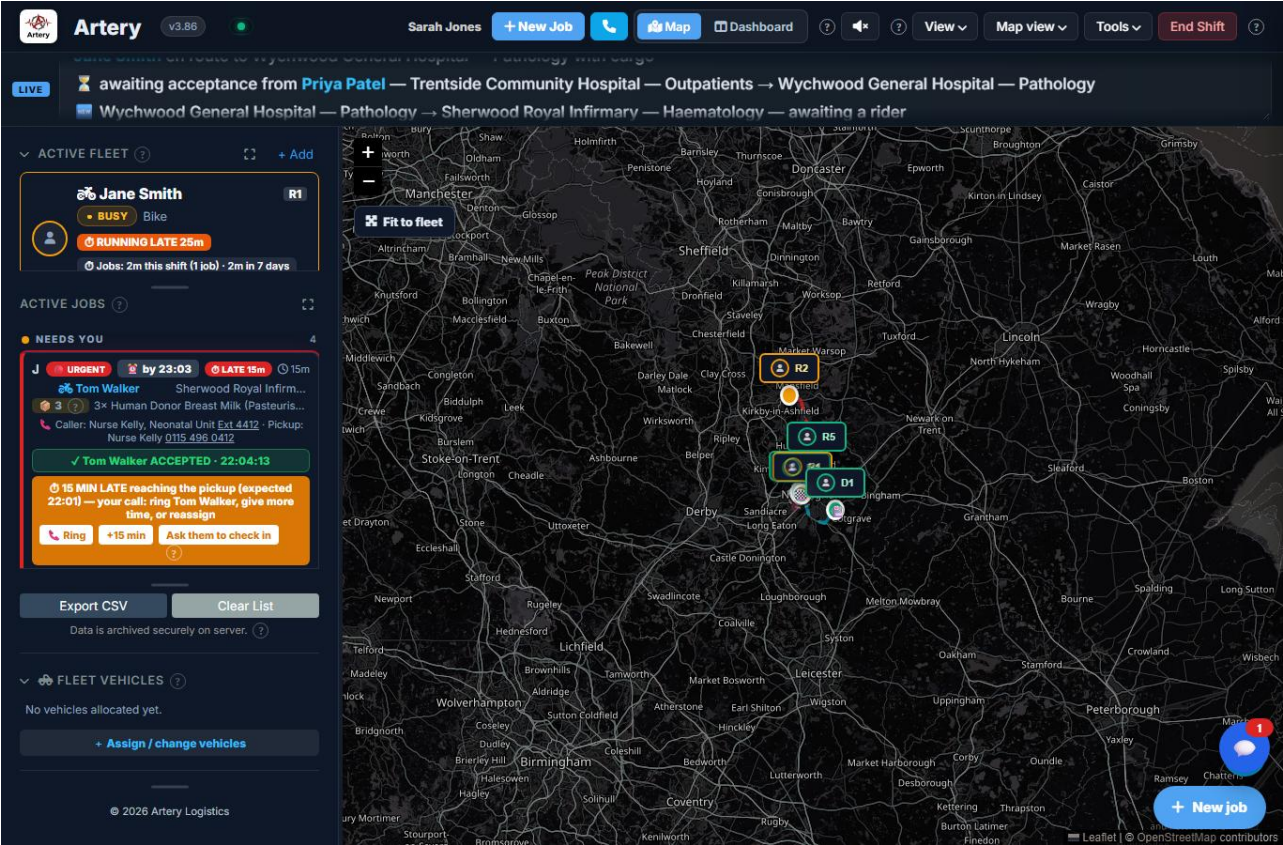
If you have turned on two-step login, after your password you are asked for the 6-digit code from the authenticator app on your phone (or one of your backup codes). See section 11.

2. Two layouts, the same features

Switch between them with **Map / Dashboard** at the top. The **Dashboard** shows cards and today's numbers; the **Map view** centres on a live map of riders and sites. Both have exactly the same features. Pick whichever suits your screen.

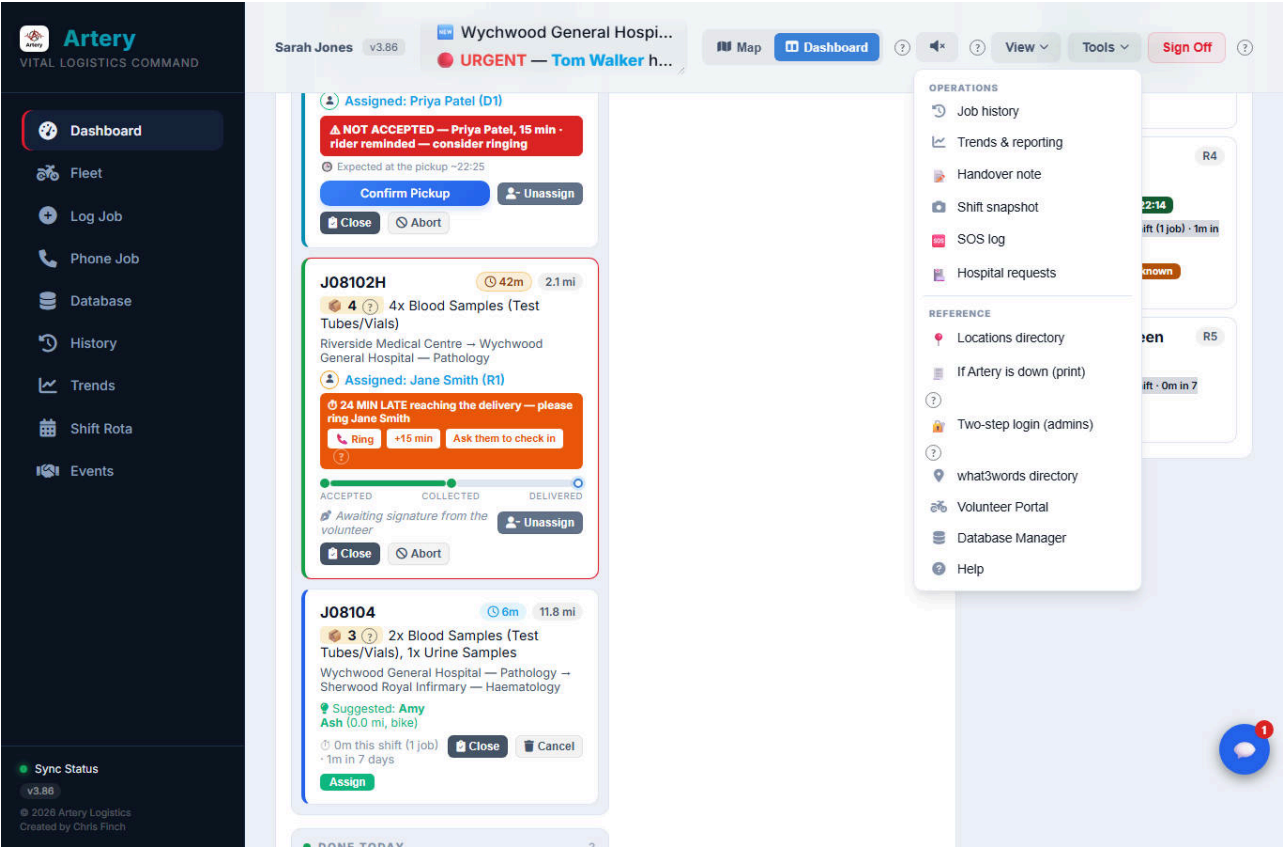
The screenshot displays the Artery Dashboard interface. At the top, the user is logged in as Sarah Jones (v3.86). The dashboard shows a greeting "Good evening, Sarah Jones!" for Thursday, October 8, 2026. Key metrics are displayed in four cards: 6 Active Riders, 4 Active Jobs, 2 Completed Today, and 0 On Break. Below these are buttons for "Create New Job", "Phone Job", and "Sign On Rider". The main section is divided into three panels: "Job Board" (showing a job J08103P assigned to Tom Walker), "Moving" (showing no jobs underway), and "Active Fleet" (showing riders Jane Smith, Tom Walker, Priya Patel, and Dave Hughes). The left sidebar contains navigation links for Dashboard, Fleet, Log Job, Phone Job, Database, History, Trends, Shift Rota, and Events. The bottom left corner shows the sync status and version information.

The Dashboard: today's numbers, the job board (Needs you / Moving / Done today) and the Active Fleet.



The Map view: the fleet and active jobs on the left, live positions on the map.

Across the top: the **activity feed** (what is happening right now), the speaker button for **spoken alerts**, **View** (light/dark theme, lock the console) and **Tools**.



The Tools menu.

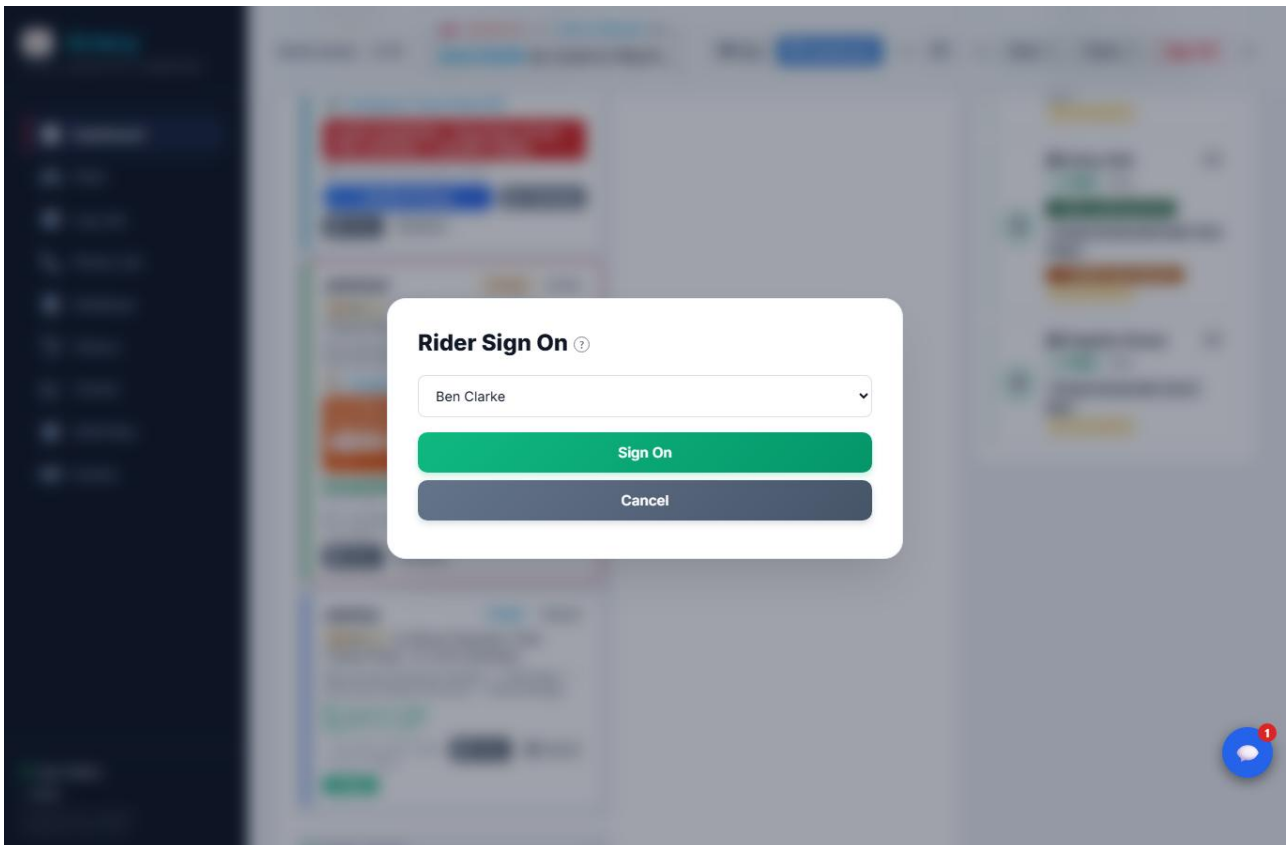
3. The fleet

Fleet shows every rider on shift with a status you can read at a glance (✓ FREE, ● BUSY, II BREAK), their vehicle, how much job time they have done this shift and this week (to share the work fairly), and any safety badge: running late, SOS, home safe.

The screenshot shows the Artery Fleet management interface. The sidebar on the left contains navigation links: Dashboard, Fleet (highlighted), Log Job, Phone Job, Database, History, Trends, Shift Rota, and Events. The main area displays two rider cards. The first card is for Dave Hughes (R3), showing a status of FREE, a Bike, a HOME SAFE badge at 22:03, and NO ALERTS. The second card is for Sophie Green (R5), showing a status of FREE, a Bike, and NO ALERTS. Below these cards is a 'Vehicle Allocation' section with dropdown menus for Jane Smith, Tom Walker, Priya Patel, Dave Hughes, and Sophie Green, all currently set to 'none'. At the bottom, there are buttons for 'Export CSV' and 'Clear List', and a note that data is archived securely on the server.

The Fleet view.

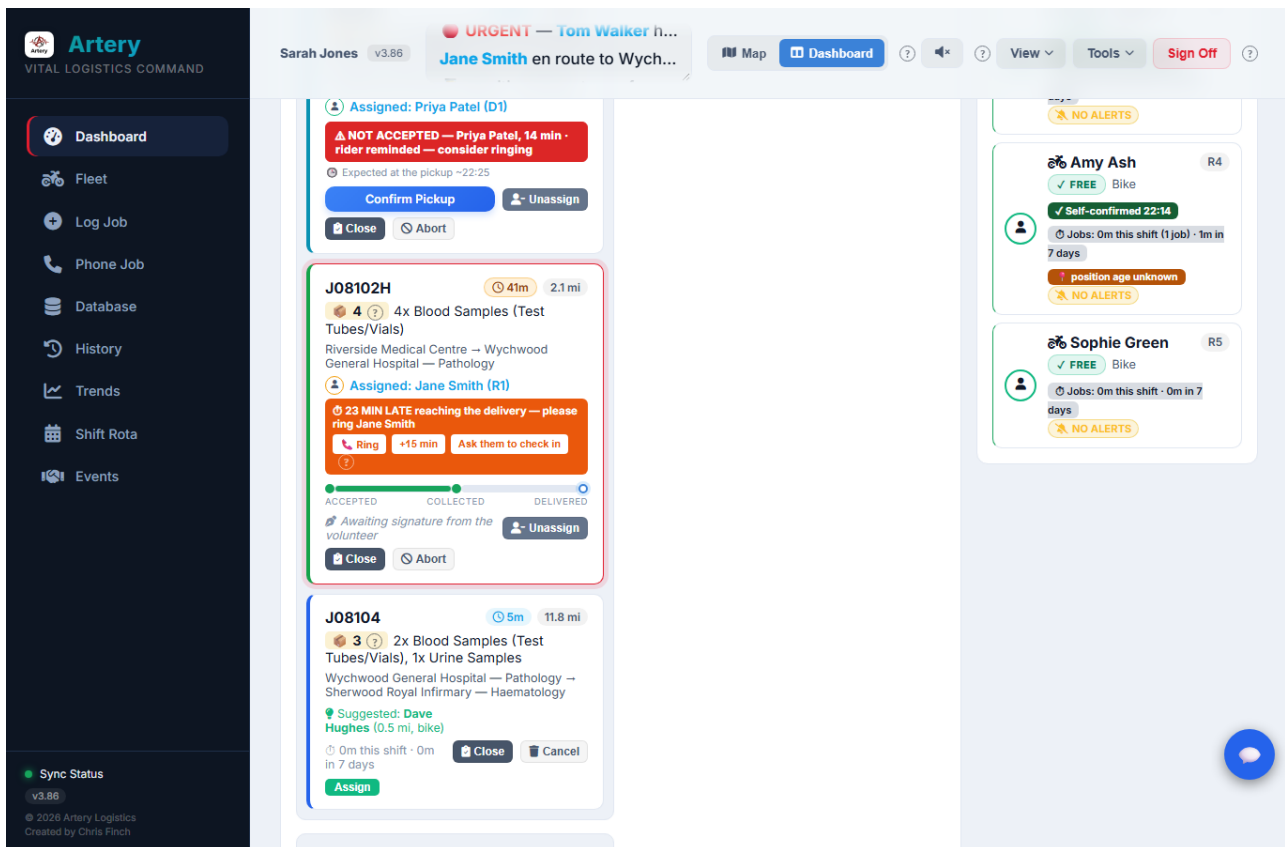
- Volunteers normally **sign themselves on** in their portal. To sign someone on for them, use **Sign On Rider**.
- Click a rider's card for their menu: put them on a break, send them to base or a location, see their next of kin, or sign them off.
- **Vehicle allocation:** give a rider one of the group's bikes or cars for their shift. It is recorded against every job they do and clears when they sign off.



Sign On Rider.

4. Following a job

Once a rider has accepted a job its card shows ✓ **ACCEPTED**, a progress line (accepted → collecting → delivered) and the expected arrival time. Riders sign at collection and delivery on their phone; each step is time-stamped. Click the job number for its details and timeline.



The board after a rider accepts.

5. The rota

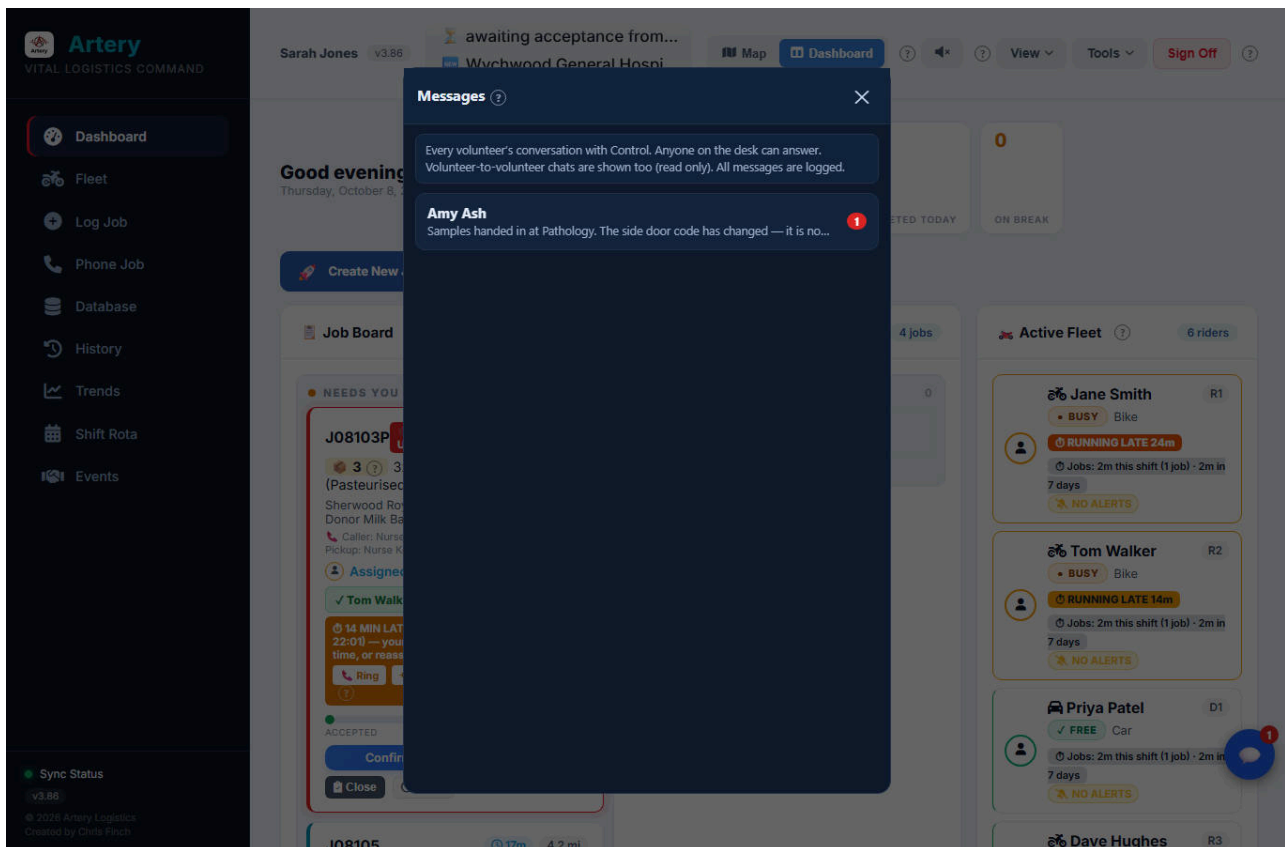
Shift Rota shows four weeks in 4-hour blocks. Click a block to book a rider or driver, **+ add** under Controllers to book a controller. Controllers can book or remove **anyone's** shift; volunteers can only add or remove their **own** in their portal.

The rota. Amber "Needs cover" shows a volunteer who can't make their shift.

- **Can't make it:** a volunteer marks their shift **Needs cover** rather than deleting it. Another volunteer taps **Take it**, or you press **Cover...** and choose someone. A vehicle booked with the shift goes with it.
- **Cover needed** (admins): set how many riders and controllers each block needs. Short blocks then show in red (e.g. 1/2), for you and for volunteers.
- **Short notice:** a shift starting within 24 hours that is removed or put up for cover alerts the duty controller.

6. Messages (💬)

Volunteers can message Control from their portal, with photos. Whoever is on the desk can read and answer any conversation. A red number shows unread messages. Conversations between two volunteers are listed too (marked 👁): you can read them but not post in them. Everything is logged.



Messages on the console.

7. History and reports

- **History:** every completed job. Filter by period or your own From/To dates, search by job number, rider or location, and export a printable report, CSV or Excel. An admin can correct a record or add a past job; the original is never overwritten.
- **Trends & reporting:** how many jobs, how quickly they move, and what the runs cost against a commercial courier (the money your volunteers saved). Each figure says how it was worked out.

Artery

VITAL LOGISTICS COMMAND

Dashboard

Fleet

Log Job

Phone Job

Database

History

Trends

Shift Rota

Events

Sync Status

v3.86

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Created by Chris Finch

Sarah Jones v3.86

Wychwood General Hospi...
URGENT — Tom Walker h...

Map Dashboard

View Tools Sign Off

Job History

Server-archived records from completed shifts

Print Report Export CSV Export Excel

Last 7 Days Last 2 Weeks Last Month All Time dd/mm/yyyy to dd/mm/yyyy Show these dates

Search by job ref, rider, location...

2 jobs 7.2 total miles 1 riders £1.80 running cost £36.12 saved vs courier

Last 7 days — jobs filed by the day each job was completed.

Today — 8 October 2026 2 jobs

J08106

22:15:05

Elmfield Surgery — Wychwood General Hospital — Pathology

Amy Ash Volunteer Portal (Created by Sarah Jones) Volunteer Portal (Created by Sarah Jones)

2x Blood Samples (Test Tubes/Vials), 1x Urgent Prescriptions / Forms Collect from the back office — ring the bell.

3.6 mi

J08101

Unknown

Elmfield Surgery — Wychwood General Hospital — Pathology

Unknown 2x Blood Samples (Test Tubes/Vials)

3.6 mi

Job history.

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v3.86

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Created by Chris Finch

Sarah Jones v3.86

URGENT — Tom Walker h...
Jane Smith en route to Wych...

Map Dashboard

View Tools Sign Off

Trends

Read-only overview for trustee & NABB reporting — from completed job history

Volunteer analytics

Last 3 Months Last 12 Months This Year All Time dd/mm/yyyy to dd/mm/yyyy Show these dates

Last 12 months — jobs counted by the day each job was completed.

2 JOBS 7 MILES £36.12 SAVED VS COURIER £1.80 RUNNING COST 1 VOLUNTEERS

Jobs per month

Busiest days of week

Busiest hours

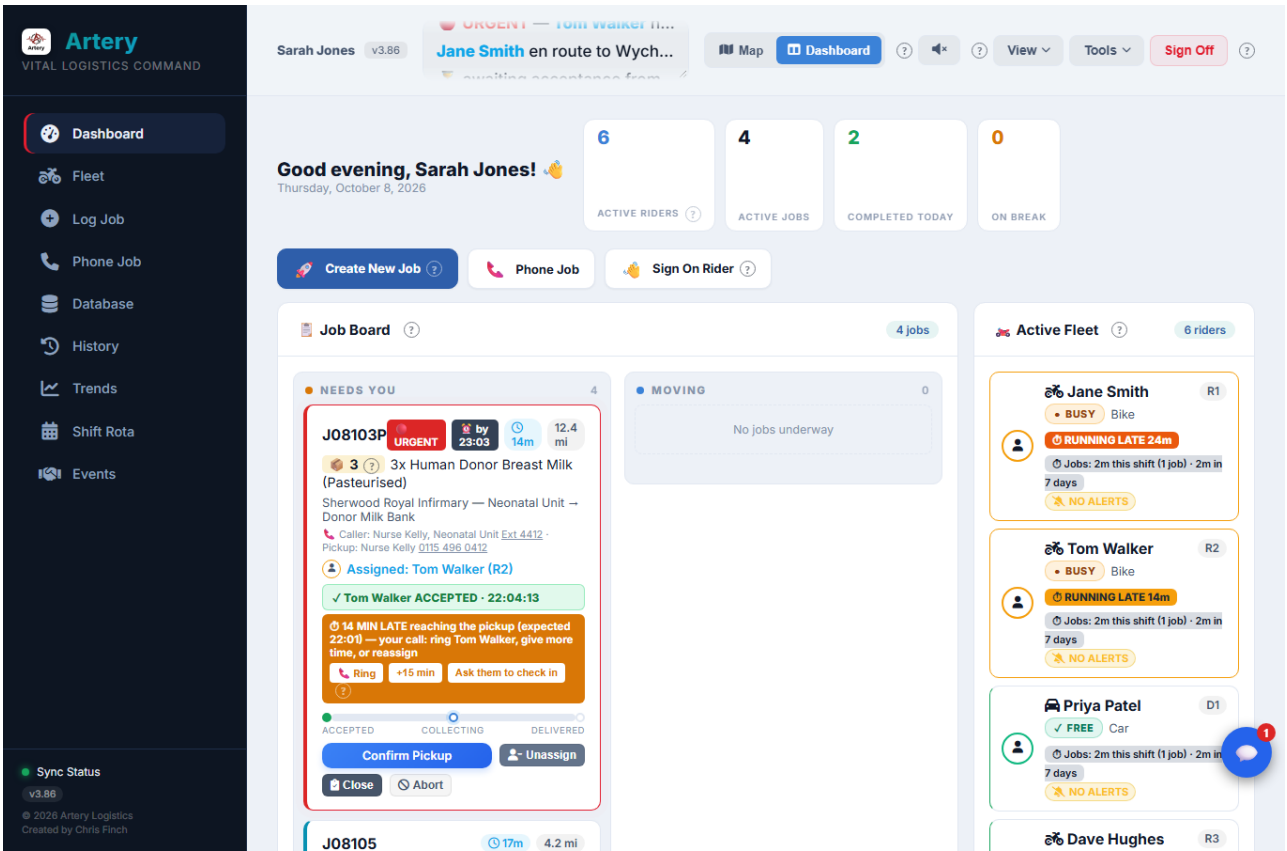
Busiest locations

Volunteer leaderboard

Trends & reporting.

8. Handing over to the next controller

- **Tools → Handover note:** leave a note (e.g. "the fridge on Ward 4 is broken"). It stays pinned on every console until a controller taps **Acknowledge**.
- **Tools → Shift snapshot:** a plain-text summary of right now (riders, active jobs, jobs done today) to paste into a handover message.



A handover note.

9. If Artery is down

Tools → If Artery is down (print) prints a two-page plan for carrying on with phones and paper: who to ring, running jobs on paper, keeping riders safe by hand, and putting the paper jobs back in afterwards. Print it now and keep a copy by every control phone. Your group's data is also copied, encrypted, off the server every night.

10. The Database Manager (admins)

Database holds your volunteers, controllers, locations, vehicles and rates. From here admins add people (portal passwords are issued automatically), print or email volunteer cards, make photo ID cards, issue ward codes, and import or export spreadsheets.

Button on a volunteer's row	Use it when
Reset password	They have forgotten the password they chose. They go back to the code on their card.
New code	Their card is lost, stolen or has been seen. They get a brand-new code, the old card stops working, and every phone they are signed in on is signed out. Artery then offers to email or print them a new card.

Button on a volunteer's row	Use it when
Remove access	They have left the group, or must not use Artery for now. Their password stops working and they are signed out; their records are kept. Give access back undoes it.
Remove	Deletes the record itself. Use Remove access instead for someone who has simply left.

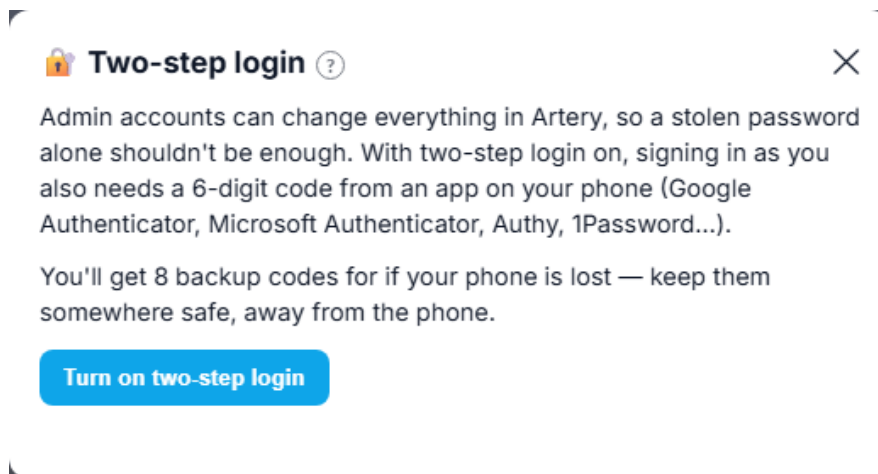
The Database Manager.

Protected accounts

The main **Admin** account cannot be deleted, and other admins cannot change its password. This is deliberate.

11. Two-step login (admins)

An admin account can change everything, so a stolen password alone shouldn't be enough. **Tools** → **Two-step login (admins)** → **Turn on**: scan the code with an authenticator app (Google Authenticator, Microsoft Authenticator, Authy, 1Password), type the 6-digit code it shows, and write down or print the **8 backup codes**.

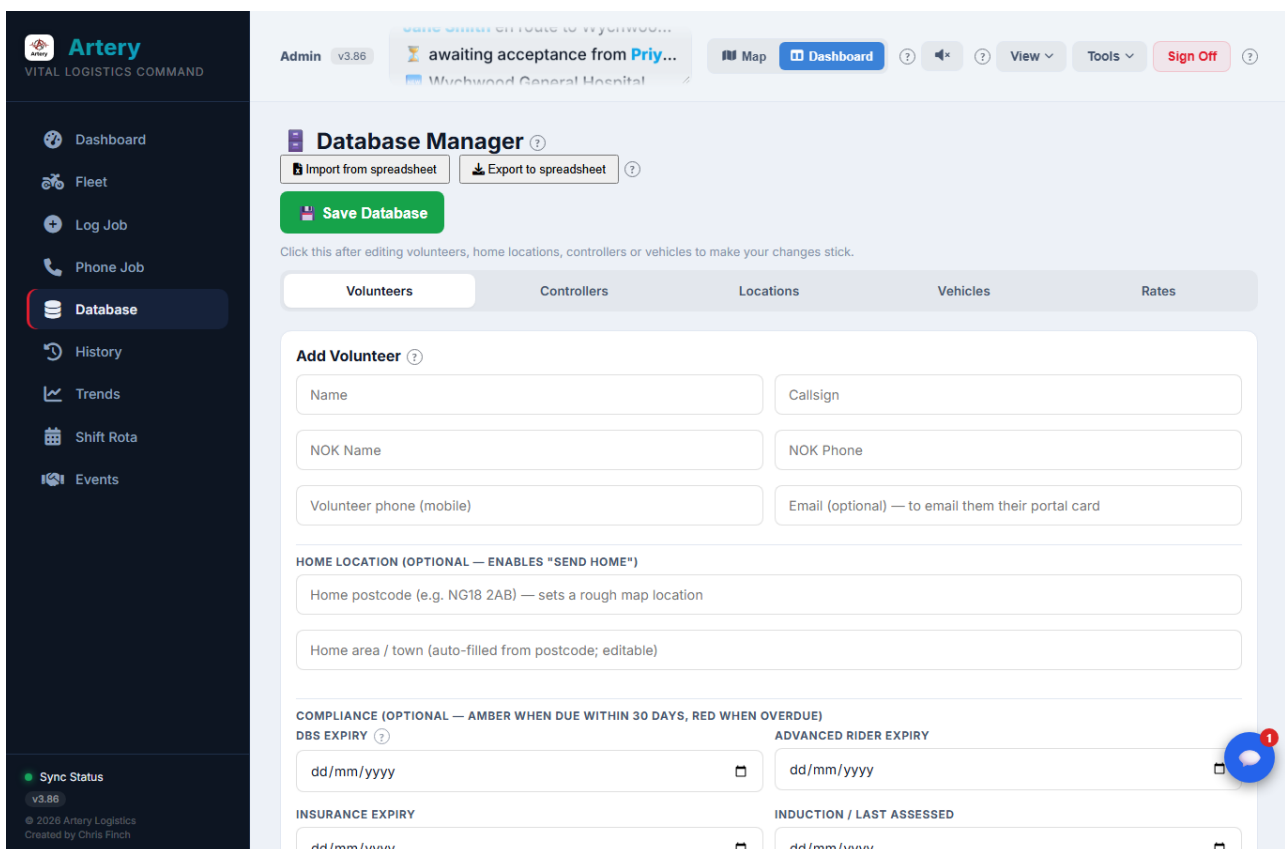


Turning on two-step login.

- Lost your phone? Use a backup code, then make new codes or turn it off and on again with the new phone.
- Another admin who has lost theirs: the main Admin presses **Reset (lost phone)** next to their name.
- If the main Admin is locked out, whoever runs your server uses **reset-admin.sh**, which sets a new password and switches two-step login off.

12. The change log (admins)

A running record of who did what and when: jobs created, assigned, edited, cancelled and closed; riders signed on and off; confirmations and declines; rota changes; database changes; location notices shown. It is your "what happened on that shift?" record.



The change log.

13. The Team window: regular shifts, swaps and time away

The people side of the group is under **Tools** → **Team**. Each part has its own tab.

- **Regular shifts:** for someone who does the same shift every week or every other week. Choose who, the day, the times and when it starts. Artery puts the shifts on the rota eight weeks ahead and keeps it topped up. A single week can still be taken off as normal. **Stop** takes the future ones off; past ones stay in the record.
- **Swaps:** volunteers swap shifts between themselves in the portal, and nothing changes until the other person accepts. Here you see the ones waiting and the recent ones, and can cancel one that is waiting. A swap starting within 24 hours is flagged to the duty controller.
- **Time away:** planned leave. Volunteers add their own, or you add it for them. Their regular shifts are left off the rota for those dates, and one-off shifts in that time are marked as needing cover.

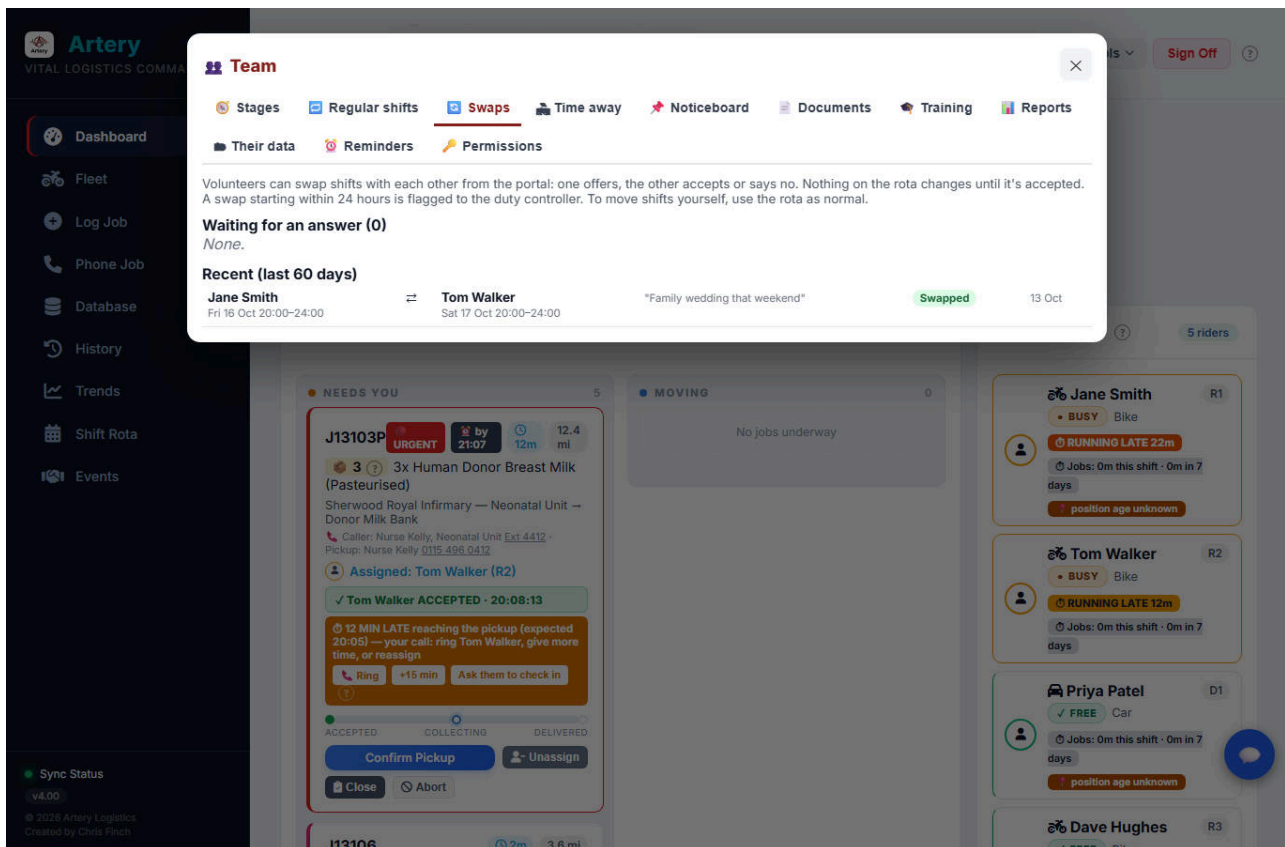
The screenshot shows the Artery Team window with the 'Regular shifts' tab selected. The 'Add a regular shift' form is open, showing fields for Who (Tom Walker), As (Driver), Day (Saturday), How often (Every other week), Starts (08:00), For (8 hours), Starting (13/10/2026), and Ending (optional). A note field contains 'e.g. covers the Tuesday night run to the QE'. The 'Add to the rota' button is visible.

Below the form is a table of existing shifts:

WHO	WHEN	DATES	
Jane Smith Rider	Every Tuesday, 20:00-04:00 Covers the evening run	From 13 Oct 26	Change Stop

The background shows a list of riders and their current status, including Tom Walker (ACCEPTED), Priya Patel (FREE), and Dave Hughes.

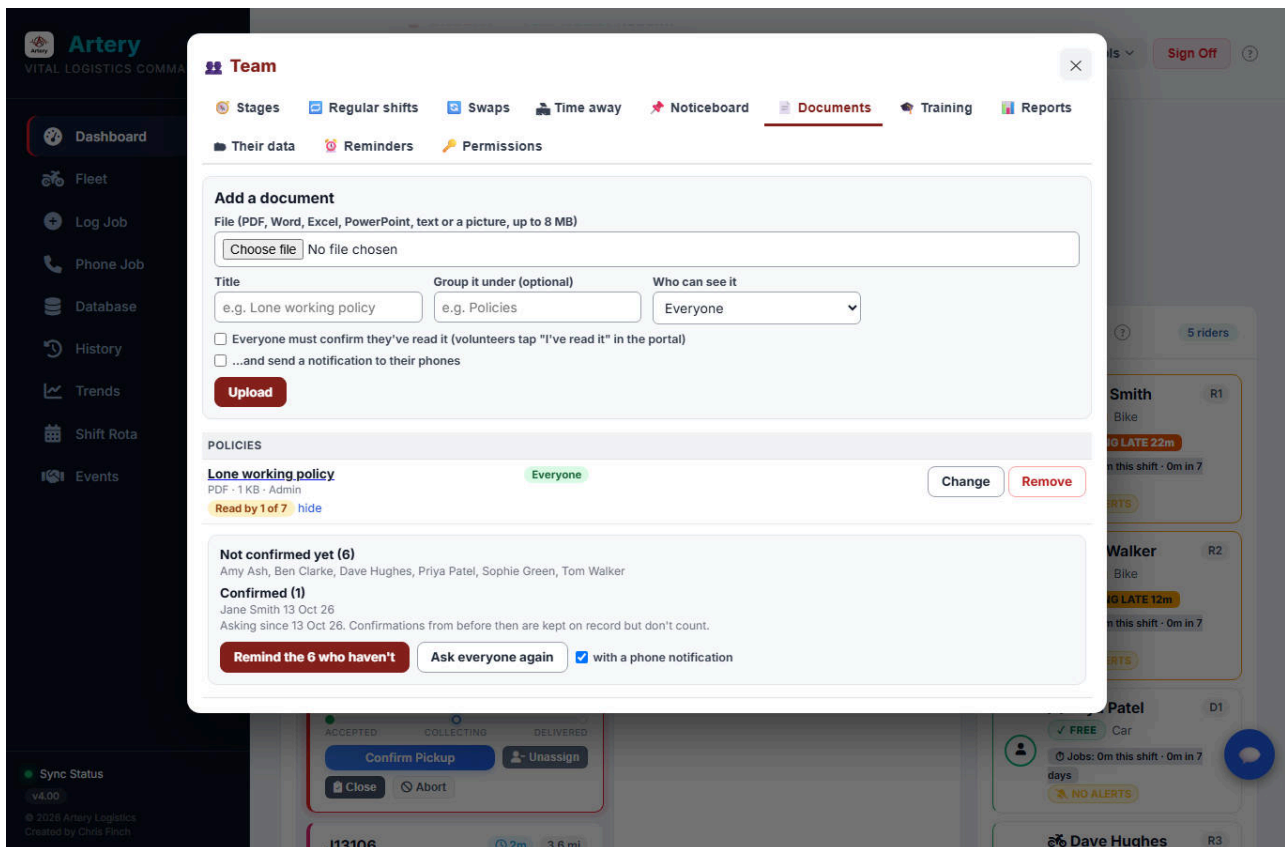
Setting up a regular shift.



Swaps volunteers have arranged.

14. Notices, and documents people must read

- **Noticeboard:** post a notice for everyone, volunteers only or controllers only. Pin important ones, set a date to take them down, and tick the box to send it to people's phones.
- **Documents:** policies, forms and guides, for everyone or controllers only. For a policy people must read, tick **Everyone must confirm they've read it**. Volunteers tap **I've read it** in the portal, and the list shows **Read by 1 of 7**. Click it to see who hasn't.
- **Remind the N who haven't** sends a phone nudge to just those people. Artery also reminds them by itself, every week by default and at most three times (change it on the **Reminders** tab).
- When the policy changes, **Ask everyone again**. Everyone confirms again; the old confirmations stay on record.



A must-read policy: who has confirmed, who hasn't, and the Remind button.

15. Training, stages and reports

- **Training:** an admin or training officer sets the training your group uses, how long it lasts and who needs it. Any controller clicks a volunteer's box to record it. Green is in date, amber runs out within 30 days, red has run out or is missing.
- **Stages:** new people can be **Applicants** (no booking shifts yet), then **Trainees**, then **Active**. **Sign off as active** checks the training their role needs and tells you what is missing. You can still go ahead on purpose; it goes in the change log. Anyone never given a stage counts as active.
- **Reports:** the next two weeks of cover, how well shifts were filled, training running out, and people joining. Each one downloads as a spreadsheet.

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Sync Status

v4.00

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Created by Chris Finch

Team

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Stages

Regular shifts

Swaps

Time away

Noticeboard

Documents

Training

Reports

Their data

Reminders

Permissions

Where each volunteer is in joining. Anyone not given a stage counts as active. Applicants can't book themselves onto the rota until they're trainees. Signing someone off as active checks the training their role needs (set up in the Training tab). To record someone leaving, use **Remove access** in the volunteer list.

Joining (2)

Applicants (1)

Trainees (1)

Active (5)

Amy Ash

Rider

Applicant

since 13 Oct 26

Training 0 of 1

Start training

Sign off as active

Ben Clarke

Rider

Trainee

since 13 Oct 26

Training 0 of 1

Sign off as active

Back to applicant

Training their role needs

Blood handling X not done

History

13 Oct 26 Trainee (Admin)

Sherwood Royal Infirmary — Neonatal Unit → Donor Milk Bank

Caller: Nurse Kelly, Neonatal Unit Ext 4412

Pickup: Nurse Kelly 0115 496 0412

Assigned: Tom Walker (R2)

✓ Tom Walker ACCEPTED - 20:19:25

⚠ 12 MIN LATE reaching the pickup (expected 20:16) → your call: ring Tom Walker, give more time, or reassign

Ring +15 min Ask them to check in

ACCEPTED COLLECTING DELIVERED

Confirm Pickup Unassign

Close Abort

J13106

2m 3.6 mi

5 riders

Smith R1 Bike

NO LATE 22m

this shift - 0m in 7

NO ALERTS

Tom Walker R2 Bike

BUSY

RUNNING LATE 12m

Jobs: 0m this shift - 0m in 7

NO ALERTS

Priya Patel D1 Car

FREE

Jobs: 0m this shift - 0m in 7

NO ALERTS

Dave Hughes R3

Stages: applicants, trainees and active volunteers.

Artery

VITAL LOGISTICS COMMAND

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Phone Job

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History

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Shift Rota

Events

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v4.00

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Team

×

Stages

Regular shifts

Swaps

Time away

Noticeboard

Documents

Training

Reports

Their data

Reminders

Permissions

Worked out from the rota, the cover your group needs (⊖ Cover needed on the rota), training records and volunteers' records. Downloads open in Excel or any spreadsheet.

Cover for the next two weeks

Download (CSV)

68 of 92 blocks are short, 76 more people needed in all.

Wed 14 Oct 08:00-12:00	Riders/drivers	1 of 2
Wed 14 Oct 16:00-20:00	Controllers	0 of 1
Thu 15 Oct 08:00-12:00	Riders/drivers	1 of 2
Thu 15 Oct 16:00-20:00	Controllers	0 of 1
Fri 16 Oct 08:00-12:00	Riders/drivers	1 of 2
Fri 16 Oct 16:00-20:00	Riders/drivers	0 of 1
Fri 16 Oct 16:00-20:00	Controllers	0 of 1
Sat 17 Oct 08:00-12:00	Riders/drivers	1 of 2
Sat 17 Oct 16:00-20:00	Controllers	0 of 1
Sat 17 Oct 20:00-24:00	Riders/drivers	0 of 1
Sun 18 Oct 08:00-12:00	Riders/drivers	1 of 2
Sun 18 Oct 16:00-20:00	Riders/drivers	0 of 1
Sun 18 Oct 16:00-20:00	Controllers	0 of 1
Mon 19 Oct 08:00-12:00	Riders/drivers	0 of 2
Mon 19 Oct 08:00-12:00	Controllers	0 of 1
Mon 19 Oct 12:00-16:00	Riders/drivers	0 of 1
Mon 19 Oct 12:00-16:00	Controllers	0 of 1
Mon 19 Oct 16:00-20:00	Riders/drivers	0 of 1
Mon 19 Oct 16:00-20:00	Controllers	0 of 1

5 riders

Smith R1 Bike

NO LATE 23m

this shift (1 job) - 1m in 7

NO ALERTS

Walker R2 Bike

NO LATE 13m

this shift (1 job) - 1m in 7

NO ALERTS

Patel D1 Car

this shift (1 job) - 1m in 7

NO ALERTS

Hughes R3

Reports: the blocks short of people over the next two weeks.

16. Permissions, subject access and card designs (admins)

- **Tools → Permissions:** give a controller one or more extra jobs without making them an admin: **Rota manager**, **Training officer**, **Volunteer records** or **Reports and audit log**. It works straight away, and so does taking it off.
- **Tools → Their data (GDPR):** when a volunteer asks what you hold about them, choose them and press **Gather their data**. Send them the readable page (it prints or saves as PDF). Passwords and other people's details are left out. Read it before you send it, and delete your copies afterwards.
- **Your own ID card design:** Volunteers → **ID cards** → **Use our own card design**. Upload your card artwork, drag each detail onto its space, preview, and save.

Team

Stages Regular shifts Swaps Time away Noticeboard Documents Training Reports

Their data Reminders **Permissions**

Give a controller one or more extra jobs without making them an admin. Each tick opens only the tasks listed below. Saving the Database Manager, controller logins, ward codes, wiping history and the card design stay with admins. A change works straight away.

	Rota manager	Training officer	Volunteer records	Reports and audit log
Rota manager	Set how many people each shift needs, and the shift reminders.			
Training officer	Change the list of training your group uses. (Every controller can already record training.)			
Volunteer records	Portal codes (reset or new code), remove or give back access, print and email portal cards, and ID cards: photos, member numbers, printing. Not an admin's own record.			
Reports and audit log	The change log, and the setup spreadsheet export (it has personal details in it).			

CONTROLLER	ROTA MANAGER	TRAINING OFFICER	VOLUNTEER RECORDS	REPORTS AND AUDIT LOG
Admin Admin	Admins can already do everything.			
Sarah Jones Controller	☒	☐	☒	☐

Save

Permissions: extra jobs for a controller.

17. End of your shift

1. Leave a **handover note** if the next controller needs to know anything.
2. Optionally **Export CSV** in the Fleet view for a copy of the shift's completed jobs. Everything is archived on the server anyway.
3. **Sign Off**.