



User Manual

For riders, drivers, controllers, admins and hospital staff

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arterybb.uk

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1. About Artery

Artery is the dispatch and logistics system for blood bike groups. It takes a job from the moment a hospital asks for something to be carried, through collection, the journey and any handover between riders, to a signed delivery, and keeps a permanent record of every step. It also looks after the people doing the work: an SOS button, alerts when a rider is running late, a home-safe check, the shift rota and volunteer hours.

Every job has a number from one daily sequence, whichever way it was made: **J08104** is the 4th job on 8 October, a **P** on the end means it was taken over the phone, and an **H** means it came from a hospital request. A ward's request has its own reference, such as **R08103**, until Control accepts it.

Step-by-step guides with screenshots

Six short illustrated guides go with this manual: hospital requests and job numbers, taking a job over the phone, adding a job, controller features, welfare and safety, and the Volunteer Portal. They are in the same folder as this manual (tutorials) and on arterybb.uk.

Artery is free. It runs in a web browser, so there is nothing to install, and volunteers can add it to their phone's home screen so it opens like an app.

The three parts of Artery

Part	Who uses it	What it is for
The controller console	Controllers and admins	Logging and assigning jobs, watching the fleet, safety alerts, the rota, reports, and (for admins) the Database Manager. It comes in two layouts with the same features: the Map view and the Dashboard view .
The Volunteer Portal	Riders and drivers	On your phone: your jobs, signatures, relays and handovers, safety check-ins and SOS, vehicle checks, your shifts and swaps, time away, the noticeboard and documents, your training, messages to Control, and your ID card and Artery card.
The request page	Hospital and ward staff	Asking your group to collect and deliver an item, and following it until it arrives.

Which parts of this manual to read

If you are...	Read
A rider or driver	Sections 2 and 3. Keep the quick-reference card in section 9 handy.
A controller	Sections 2, 4 and 6. Read section 3 too, so you know what volunteers see on their phones.
An admin	Everything, especially section 5 (the Database Manager).
Hospital or ward staff	Section 7 only.

Help is built in

Almost every part of Artery has a small round ? beside it. Tap it for a short explanation of that one thing, and **Open the full guide** for more. The consoles also have **Help** in the Tools menu, and the Volunteer Portal has a **Help** button.

2. Getting started (everyone)

Web addresses

Each group has its own Artery address, for example **https://bb1.arterybb.uk**. Your group will tell you yours. From it:

Page	Address	Who
Controller console (Map view)	your address on its own	Controllers and admins
Controller console (Dashboard view)	your address + /index2.html	Controllers and admins
Volunteer Portal	your address + /rider.html	Riders and drivers
Hospital request page	your address + /r	Hospital and ward staff

The Volunteer Portal address is printed in large type on your volunteer card, and is in the email if your group emailed you your card.

Putting the portal on your phone's home screen

1. Open the Volunteer Portal address in your phone's browser (Safari on an iPhone, Chrome on Android).
2. Open the browser menu (the Share button on an iPhone, the three dots on Android).
3. Choose **Add to Home Screen**.

Artery then opens full-screen from its own icon, like any other app.

Passwords

- **Volunteers** sign in with a password and nothing else. Your first password is the four-letter code on your volunteer card or in your email. The first time you sign in you are asked to choose your own.
- **Controllers** choose their name and type their own password. An admin sets it for you.
- Never share your password, and never write it on your phone.

The version number

A small version number (for example **v4.00**) is shown on every screen. If you report a problem, mention it: it tells whoever is helping you exactly which release you are on.

3. Riders and drivers: the Volunteer Portal

Everything in this section happens on your phone, in the Volunteer Portal. Riders and drivers use exactly the same portal. The only difference is the vehicle check: bikes use the POWDER check, cars use a car checklist.

The three things to remember

SOS is always one tap away, on the main screen and at the top of every job. Use it if you are in danger or need help urgently. A false alarm is never a problem.

You are not asked to check in every half hour. Artery works out roughly when you should arrive and only tells Control if you are running well behind. If they want to know you are OK, the portal asks you: tap **I'm OK** when it is safe to stop.

Get every collection and delivery signed. No signal is fine: signatures are saved on the phone and send themselves later.

3.1 Signing in for the first time

1. Open the Volunteer Portal and tap **Sign in**.
2. Type the four-letter code from your volunteer card or email. There is no name to choose: the password tells Artery who you are.
3. The portal asks you to **choose your own password** (at least 4 letters or numbers). Type it twice and tap **Save**. The SOS button stays on this screen in case you need it.
4. That's it. From now on, use your own password. The four-letter code no longer works.

Forgotten your password? Ask Control or an admin to reset it. That puts you back on the code on your card, and you choose a new one the next time you sign in. You can change your password at any time with **Change password**.

3.2 The main screen

From top to bottom, once you are signed in:

- **Your name**, with Change password.
- **Shift: Sign on shift / Sign off shift**, and the safety buttons (SOS, Arrived, Check in, I'm home safe).
-  **Add your photo for your ID card**, only if your group needs one from you.
- **Your jobs**, as simple cards (see 3.5).
- **Fundraising and events** your group has posted.
- **Where the vehicles are kept**.
- Buttons for **My shifts**, **Vehicle check**, **Places** and **Help**.
- **Log out of the portal**, at the very bottom.

The round  button opens Messages (see 3.9).

3.3 Going on and off shift

Tap **Sign on shift** when you are out and available. This tells Control they can give you jobs. You do not need to wait for anyone to put you on. Being on the rota is the plan; signing on is you confirming you are actually out.

The first time you sign on, the portal shows **how your location is used** by your group: sent to Control while you are on shift, only while you have a job, or not at all, depending on what your group has chosen. Read it and tap **I understand — sign me on**. You can read it again any time from  **How your location is used** on your shift card. Your position goes to Control only, never

to other volunteers, and nothing is sent once you have signed off. Pressing SOS always sends where you are.

If you have not logged today's vehicle check, you are offered it when you sign on. It never stops you going on shift.

When you finish, tap **Sign off shift**. You cannot sign off while you still have a job on the go (finish it or hand it over first) or while an SOS of yours is active.

Signing off is not the same as logging out

Sign off shift tells Control you are off duty but keeps you signed in on the phone, so you can still look at the rota. **Log out of the portal** signs you out completely. Always log out on a phone or computer other people use.

3.4 Vehicle check

1. Tap **Vehicle check** and choose your vehicle.
2. Tick off each item (POWDER for a bike, the car checklist for a car).
3. Note anything that needs attention in the box, then **Submit**.

If the vehicle is **not safe** to ride or drive, tick  **UNFIT for use**. It is taken off the road straight away, every controller is alerted, and nobody can be given it until a controller returns it to service. For a minor fault that is still safe (a small fairing crack, say), just note it and leave UNFIT unticked.

3.5 Your jobs

Each job you have been given shows as a short card: the job reference, and the **one thing it needs next** (Collect, Deliver or Hand over) with the place. An **URGENT** job has a red strip and sits at the top of your list. Please treat it as a priority.

Opening a job

Tap **Open job** on a card. That job fills the screen on its own:

- A two-step progress bar (Collect → Deliver, or Collect → Hand over).
- **Now:** what to do and where, with a  **Navigate** button that opens your maps app. If the place has a ///what3words address, tap it for the exact door.
- One big button for the next step.
- If Control has given a time,  **Needed by 14:30** (orange when close, red if late), and a  **Call** button for the person to ask for at the pickup or the drop-off.
- Control's instructions underneath, and **Show all details** for everything else about the job.
-  **SOS** at the top right, and  **All jobs** to go back to your list.

Confirming a job

When Control gives you a job, let them know you have got it. Open the job and tap  **Confirm**.

They get an alert straight away. If you cannot take it, tap  **Can't do it** and give a short reason; the job goes back to Control to give to someone else. Until you answer, the card says **Not confirmed yet**. With no signal, your answer is saved and sends itself when signal comes back. If you have not answered after 10 minutes your phone gets a reminder and Control is told, so they may ring you. Please answer either way: **Can't do it** is fine, and lets Control give the job to someone else quickly.

Collecting

1. Go to the pickup. When you arrive, tap  **Arrived — all OK** (see 3.8).

2. If the job says the items will be confirmed at collection, tap **Record items collected** and tick what you actually picked up.
3. **Count the items.** The signing screen starts with  **Check the count** and the total, for example 3 in total: 2× Blood Samples, 1× Urine Samples.
4. Tap  **Sign for pickup**. The person handing it over prints their name and signs on your screen with a finger. Tick **Cooler / ice-pack checked** if it applies. **Save Signature**.

Something not right? The wrong number of items, something damaged or leaking, a cooler or temperature problem, labels or paperwork wrong: open  **Something wrong?** on the signing screen, choose what it is and add a short note (for example "2 bags, not 3"), then sign as normal. Control are told straight away and it goes on the job's record. If it is urgent, ring them too.

If Control change the items or anything else on your job, you get a notification to check it.

Turned up and there was nothing to take? Tap **Nothing to collect** before you sign for pickup. It records that you attended and closes the job under its own category. The run still counts.

Delivering

Count the items again, then tap  **Sign for delivery** when you hand them over. The person receiving them prints their name and signs. The job is then complete and leaves your list.

No signal

You can still capture signatures with no signal. They are saved safely on the phone and upload by themselves as soon as you have signal again, even if you close the portal. A small banner tells you how many are waiting. Proof of delivery is never lost.

3.6 Doing several jobs at once

Every job keeps its own card and its own next step, so nothing gets mixed up. You can collect one, leave it open, and finish another first. Do them in whatever order works for you.

- When you finish a job, the screen says **Job done** (or **Handed over**) and lists the jobs still open. Tap the one you are doing next.
- With two or more jobs, the portal may suggest an order:  **Stop 1, Stop 2...**, from the shortest estimated route. It is only a suggestion. You know the roads.
- If a job disappears from your list and you did not expect it, Control has probably given it to someone else. The screen says **No longer on your list**. Ring Control if in doubt.

Prefer everything on one long screen? Tap **Show full job cards instead** under your jobs. **Switch to simple job cards** puts it back.

3.7 Relays and handovers

Sometimes a job is carried by more than one rider: a planned relay, or because you cannot finish it. The job tells you exactly what to do, one numbered step at a time, and names the person you are meeting.

If you are carrying it

1. Collect as normal and **Sign for pickup**.
2. The job shows **This is a relay — you do leg 1 of 2** (for example), where the handover is, and who you are meeting, with a  **Call** button. Tap  **Navigate to handover**.
3. When you meet them, tap the purple  **Hand over to ...** button.
4. Give them the item and **your phone**. They check their name and sign in the box.
5. Tap **Confirm handover**. The job moves to their phone and leaves yours. You do not deliver it.

If it is coming to you

1. You see a  **Coming to you** card. Open it and tap  **Confirm** (or **I'll be there**) so Control knows you will be there. Can't make it? Tap **Can't do it** and Control will find someone else.
2. Go to the handover point.
3. The other rider gives you the item and **their** phone. You sign on it. There is nothing to press on your own phone.
4. The job then appears in your list. Take it on to the next stop, or deliver it and **Sign for delivery**.

Handing over an ordinary job

Broken down, or at the end of your shift with a job still on? Once you have signed for pickup, open the job, tap **Show all details**, then **Hand over to another rider**. Choose who is taking it from the riders on shift, and follow the same steps. Every handover is recorded with a signature, so the chain of custody follows the item.

3.8 Staying safe

Blood bike work is often done alone, and sometimes in the dark. Artery keeps an eye on you without interrupting you while you ride. When a job starts, it works out roughly when you should arrive. If you are running well behind, Control is told and may ring you. Only if you are 30 minutes late, or Control asks, does the portal say **Control are checking you're OK**.

Button	When	What it does
 Arrived — all OK	When you get to a collection	Tells Control you arrived safely, and gives you 30 minutes to collect without anyone worrying. It lights up when you are close, but you can press it any time.
 I'm OK / Check in — I'm OK	When the portal asks, or whenever you like	Tells Control you are fine and resets the clock. Only tap it when it is safe to stop.
 I'm home safe	When you get home after a job	Tells Control you are back. Their duty of care does not end until you are home.
 SOS	Danger or an emergency	Alerts every controller at once with your last position. If nobody answers within four minutes, everyone is alerted again.

Using SOS

- Press **SOS**. Every controller is alerted immediately.
- When a controller acknowledges it, your screen says **Control has seen your SOS**, with their name. Expect a call.
- No signal? Your SOS is saved on the phone and sends itself the moment you have signal. **Ring Control directly as well if you can**, or 999 in a life-threatening emergency.
- If you have been signed out, the portal tells you the SOS was **not** sent and shows buttons to ring the duty controller and 999. Sign in and it sends straight away.
- When you are safe, press **I'm safe now — cancel SOS**.

Never worry about a false alarm

Every SOS is recorded, including false alarms, and nobody minds. If in doubt, press it.

3.9 Messages

Tap the  button to message Control. Whoever is on duty reads it, and their reply comes back here. A red number on the button shows messages you have not read. You can add a photo, such as a damaged box or a locked door.

You can also message another volunteer who is on shift: choose them under **Message a volunteer on shift**.

All messages are logged and controllers can read them. **In an emergency use SOS, not messages.** Never send photos of patients or anything that identifies them.

3.10 My shifts (the rota)

Tap **My shifts** to open the rota. Tap a 4-hour block to book yourself on as a rider or driver. The rota shows the whole team, so you can see who else is on with you. Page through up to four weeks with **Previous** / **Next**, and download it with **CSV**. You can add and remove **your own** shifts only; Control book controllers and can change anyone's.

- **Can't make a shift?** Under it, tap  **Can't make it** (add a note if you like) rather than deleting it. It stays on the rota marked **Needs cover** until someone takes it, and you are told who is covering. Within 24 hours, the duty controller is told straight away. Changed your mind? **Withdraw**.
- **Someone else needs cover?** Tap **Take it** on their shift.
- If your group has set how many people each block needs, short blocks show in red (for example **1/2**): a good place to book yourself in.

3.11 Other things in the portal

Fundraising and other hours

Every hour you give counts, not just riding. Tap  **Sign on fundraising** when you start a fundraising session and **Sign off fundraising** when you finish. This does **not** put you on the board for jobs. Forgot to sign on? Tap **Log hours you've already done** and say what you were doing (fundraising, training, maintenance, events or controlling) with the date and times. These hours are what your group reports to its funders.

Stepping back for a while

Need a break from volunteering? Tap **Need a break? Step back for a while**. Control will not give you jobs until you come back. You can say roughly when you will be back and, if you want to, why (or choose *Rather not say*). Only you and the controllers can see it. Tap **I'm back — mark me available** whenever you are ready.

Events

Fundraising days and events your group has posted appear on the main screen. Tap **I'm in** or **Can't make it**. You can change your answer at any time.

Places

Tap **Places** for every location the group knows, with the doors saved against each one and a tap to navigate. At a door nobody has saved? Tap **Add where I'm standing**. You are the person who actually knows where the right door is, and the next rider will thank you.

Where the vehicles are kept

Shows which volunteer is looking after each of the group's vehicles, so you know who to collect one from.

Job alerts on this phone

If a yellow warning says job alerts are not reaching this phone, you will not hear about a new job unless the portal is open. Follow what it says, which is usually to allow notifications for this site in your browser settings. Until it is fixed, tell your controller so they know to ring you.

3.12 Your ID card photo

If your group makes photo ID cards, you see  **Add your photo for your ID card** until you have one.

1. Tap **Take my photo**.
2. Face the camera against a plain background, with no hat or sunglasses.
3. Drag and zoom the picture so your face fits the guide, then confirm.

The photo goes to Control to approve, and the card says it is *with Control*. If they cannot use it you are asked for another. Once it is approved the card disappears and your photo goes on your ID card.

3.13 Find a shift, swaps and regular shifts

Tap **Find a shift** to see shifts colleagues need covering (tap **Take it**) and, if your group has said how many people each block needs, the gaps on the rota for the next two weeks (tap **Book me**).

Swapping a shift

1. In **Find a shift**, tap **Swap one of my shifts** and choose yours.
2. Choose a colleague's shift you would do instead. Only shifts that work for both of you are shown.
3. They get a notification and can accept or say no. Nothing changes until they accept. Then you are on their shift and they are on yours.

You can withdraw an offer while it is waiting. Control can see every swap, and a swap starting within 24 hours is flagged to the duty controller.

Regular shifts and reminders

If you do the same shift every week, or every other week, Control can set it up once and it appears on the rota by itself, eight weeks ahead. You see it at the top of **My shifts**. Can't make one week? Remove that week's shift, or tap **Can't make it**, as normal. You get a reminder before each shift, by notification and, if your group has your email address, by email.

Your shifts in your phone's calendar

1. In **My shifts**, tap **Put my shifts in my phone's calendar**, then **Make my calendar link**.
2. On an iPhone, tap **Add to calendar** and **Subscribe**. For Google Calendar, copy the link and add it on a computer under **Other calendars** → **From URL**.

Only your own shifts are in it, and it keeps up with the rota. Keep the link to yourself. If you lose it, or think someone else has it, make a new one and the old one stops working. **Stop** turns it off.

New to the group?

While you are an **applicant**, you can use the portal but cannot book shifts, take cover or offer swaps. That opens up once you have started training. The portal shows a short note about where you are, and Control will tell you when you move on.

3.14 Time away

Going on holiday, or away for work? Tap **Time away** and add the dates. Control can see it. Your regular shifts are left off the rota for those dates, and any shift you have booked in that time is marked as needing cover. Remove it if your plans change.

3.15 Noticeboard, documents and training

- **Noticeboard.** News from Control appears as a card at the top of the portal when there is something new. Tap it, or the **Noticeboard** button, to read everything.
- **Documents.** Policies, forms and guides your group has shared. Tap one to download it.
- **Please read.** Some documents say **Please read**: your group needs everyone to read these. Open it, read it, then tap **I've read it**. Control sees that you have confirmed, and when. Until you do, you may get a reminder on your phone. If the document changes, you may be asked to read it again.
- **My training.** What you have done and when it runs out. Green is in date, amber runs out within 30 days, red has run out or is still needed. If something is wrong, tell Control: they keep the records. You get a reminder 30 days before something runs out.

3.16 Your Artery card

Tap **My Artery card** to show your name, photo and group with a QR code. Whoever needs to check you, such as a hospital reception, scans it with their phone's camera and sees **VALID NOW** with your photo if you are a current volunteer.

The code changes every 30 seconds and stops working after two minutes, so a screenshot or a photo of your card will not pass. The clock and the moving stripe show it is live. It needs signal: if you have none, move to where you do and the code refreshes by itself. The QR never contains your password. If Control gives you a new code, or your access ends, any old QR stops working straight away.

4. Controllers: the console

The console is where jobs are logged, assigned and followed. It works best on a computer or tablet.

4.1 Two views, same features

The **Map view** centres on a live map with the fleet, jobs and routes. The **Dashboard view** shows the same things as cards and live numbers, with a side menu (Dashboard, Fleet, Log Job, Database, History, Trends, Shift Rota, Events). Switch with the **Map / Dashboard** buttons in the top bar. Use whichever suits your screen: everything in this section works in both.

4.2 Starting your shift

1. Open the console and click **Sign On** in the top bar.
2. Choose your name and enter your password. Your name then shows in the top bar.
3. At the end of your shift, click your name to sign off.

Controllers left signed on for 12 hours are signed off automatically. 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 who have turned on two-step login are asked for the 6-digit code from the authenticator app on their phone after their password (see 5.5).

The top bar

- **New Job** opens the job form, and  beside it opens the phone job sheet (see 4.4).
- The **speaker** button turns spoken alerts on or off. When on, the console reads out events as they happen: a rider heading to collect, a pickup, a delivery.
- **View** menu: activity feed text size (**A-** / **A+**), **Light / dark theme**, and **Lock console**, which locks the screen while you step away without signing you off.
- **Map view** menu (Map view only): map style, background, which kinds of site to show, and other blood bike groups.
- **Tools** menu: Job history, Trends & reporting, Fundraising & events, Shift rota, Handover note, Shift snapshot, SOS log, Hospital requests, Locations directory, If Artery is down (print), Two-step login (admins), what3words directory, Volunteer Portal, Database Manager and Help.

The **LIVE** strip under the top bar is the activity feed: the current jobs and what is happening with them right now.

4.3 Riders and the fleet

Signing riders on

Volunteers usually sign themselves on from their portal. To bring someone on shift yourself, click **+** **Add** in the Active Fleet panel (on the Dashboard, **Sign On Rider** or the **Fleet** view). They then appear in the fleet and on the map, ready for jobs.

Rider status

Each rider shows a status chip with a symbol as well as a colour, so it reads at a glance and for colour-blind users: ✓ **FREE**, ● **BUSY**, || **BREAK**. A **NO ALERTS** chip means job alerts are not reaching that volunteer's phone, so ring them when you give them a job.

The rider menu

Click a rider to open their menu. From there you can put them on a break, send them to base or another location (**Send to Base/Location**), send them home if they have a home postcode saved, see them on the map, view their next-of-kin details, or sign them off.

Fleet vehicles

The Fleet Vehicles panel lists your bikes and cars. Allocate a vehicle to a rider for their shift; the vehicle is recorded against every job they complete, and the allocation clears when they sign off.

If a rider declares a vehicle **unfit** in their vehicle check, it shows as  **OUT OF SERVICE** with who declared it and why, every console is alerted, and it cannot be allocated or booked. When it has been fixed, any controller presses **Return to service**. Both steps stay in the vehicle's check history for good.

4.4 Logging a job

1. Click **New Job** (Dashboard: **Log Job**).
2. Choose the **Pickup** and **Destination**. Optionally type a ward or department to add to the location name.
3. Click the description box to choose the items, with **+** and **–** for how many of each, or type in **Other**. The board then shows a  **count**, and the rider checks that count at every signature. If you do not know yet, tick **Items unknown** and the rider records the real items at collection.
4. Set **Priority** to  **Urgent** only if it is time-critical. Urgent jobs jump to the top, pulse red, and the rider gets an unmissable alert. Use it sparingly so it keeps its meaning.
5. Optionally add a pickup and/or delivery **///what3words** to pinpoint the exact door.
6. Optionally open  **Caller, contacts & needed-by time**: who asked for the job and their number (for Control only), who the rider should ask for at the pickup and at the destination (the rider gets a Call button for each), and the time it is **needed by** (the board turns amber 30 minutes before and red when it is late). A job accepted from a hospital request fills in the caller and needed-by time for you.
7. Add **Notes** for the rider (access codes, "ring on arrival"). If a site has standing directions saved, they fill in automatically.
8. Press **Generate Job**. It appears on the board as pending, with the next job number for today.

A place that isn't on your list? For a one-off job offered to the group, or a handover with another group, tick **Relay / one-off job** at the top of the form. The location lists become free-text boxes, and a postcode puts it on the map. The job is tagged **RELAY / ONE-OFF** on the board.

Taking a job over the phone

When someone rings in a job, press  next to New Job (Dashboard: **Phone Job**; on a phone, the **Phone** tab). The call sheet opens with the **next job number already on it**, ending in **P**: read it to the caller so they can quote it. Then fill in what they tell you: the time of the call (already set to now), the caller's name, the hospital and ward, their phone number and extension, the item(s) (type them, or  **Pick items**), and where it is to be delivered. If it is not your standard response, tick **VERY URGENT** or give the time it is needed by. Press **Add to the board**.

- A hospital that isn't on the list: choose **Not on the list** and type it.
- Items not known yet: leave them empty and the rider confirms them at collection.
- The call comes to nothing: press **Close without a job**. The change log notes that the number was not used, so a gap in the numbers is always explained.

Job numbers

Every job gets its number from the server, from **one sequence a day** shared by the job form, the phone sheet and accepted hospital requests, so two controllers can never be given the same number. **J08104** is the 4th job on 8 October; **P** on the end means a phone job, **H** a hospital request

(numbered when you accept it). The letter stays with the job everywhere, including History and exports. If the server can't be reached for a moment, the console uses its own count and warns you that the number is provisional.

4.5 Reading the job board

Every live job is a card. Read it top to bottom: where from, where to, what is being carried, and who has it.

- **Badges** flag what changes how a job is run: **URGENT**, **RELAY**, a cooler check, a night run, a long route, and a rough drive time (free-flow with no live traffic, so a planning guide, not a promise).
- **The clock** shows how long the job has been waiting. It turns amber after 30 minutes and red after an hour.
-  **AWAITING ACCEPTANCE** means you have assigned it but the rider has not confirmed. It turns green, ✓ **[rider] ACCEPTED** with the time, when they do. Until then, do not assume they have seen it.
- **Suggested** is the nearest free rider who suits the load (bike or car). Press **Assign** to take the suggestion, or choose anyone else. It is only a hint. Each rider's card shows how much job time they have done this shift and this week, to help share the work out.
-  **3** is the item count.  **by 14:30** is the needed-by time: amber 30 minutes before, red once it is late.
-  **Expected at pickup ~14:20** is when the rider should get there. It turns amber, then red, if they are running late (see 4.10).

4.6 Assigning and following a job

1. Click a free rider in the fleet, then choose a pending job (or use **Assign** on a suggestion). The rider gets it on their phone with a notification, and the route is drawn on the map. Give one rider several jobs and they queue.
2. Wait for the rider to confirm. You get an alert and a chime when they do. If they decline, you get an amber alert with their reason and the job goes back on the board. **If nobody answers**, the AWAITING ACCEPTANCE line counts the minutes: after 10 the rider is reminded and the duty controller alerted (everyone, if nobody is on duty) and it turns red; after 20 every controller is alerted, plus the backup email for an urgent job. The server keeps this clock, so it happens even with every console closed.
3. Follow it: **Pickup** and **Delivery** are time-stamped as the rider signs for each on their phone. When delivery is signed, the job moves into the completed records.

Signatures

Open a job (click its card, or find it in Job History) to see its pickup and delivery signatures and any handover signatures. Signatures captured with no signal arrive once the rider's phone is back online.

Changing a job: Edit job

Open a job and press  **Edit job** to change its items, priority, needed-by time (or **Clear** it), the caller and extension, the contacts at each end, and the notes for the rider. Press **Save changes**. The change log and the job's timeline record what changed, and if a rider has the job they are notified. To change where it goes, or who has it, use the job's own buttons. Once it has been collected and signed for, the items are locked: they are part of the signed record.

The job timeline

A job's details end with its **timeline**: when it was created, assigned and accepted, the rider arriving, collected, each handover, delivered and the rider home safe, with who did each, plus any decline,

reminder, running-late alert or problem reported. Artery's server writes it as things happen, and it is kept with the job's history.

Unassign, Close or Cancel

- **Unassign** takes the rider off the job. It goes back to pending.
- **Close** records a job that will not be completed the normal way, such as "nothing to collect" or "stood down", with a reason. It still appears in the records.
- **Cancel** removes a job entirely. It asks why (cancelled by the hospital, a duplicate, entered in error), and the reason goes in the change log with your name.

4.7 Scheduled jobs

Use **Scheduled Jobs** (under the job board) to set up runs in advance: pickup, destination, items, an optional rider and a time. Set it for one date, or across many at once (choose weekdays and a "repeat until" date, or add individual dates). Artery itself starts each one **2 hours before its time**, with a job number, and offers it to the chosen rider. **Nobody needs to be signed in**. The list then shows **Started as J...** **Start Now** brings one forward. Each one starts once: cancel that job and it does not come back; change its date or time and it starts again at the new time.

4.8 Planning a relay

A relay is one job carried by several of your riders in turn, handing over at points you choose. It is still one job, with one reference, one pickup signature and one delivery signature.

1. Log the job and assign the first rider as normal.
2. Click the job, then **Plan as a relay**.
3. For each handover, choose where it happens (one of your sites, or type a place such as a motorway services) and the rider who takes over there. **Add another handover** for a longer relay.
4. Each rider on a later leg sees it coming in their portal and taps **Confirm** or **Can't do it**. The job card shows the next handover, and says **Needs a rider** if a later leg has nobody on it.
5. At each handover the next rider signs on the carrying rider's phone, and the job moves to the next leg by itself.

You can change the plan at any time, even mid-relay; legs already ridden are kept as they were. Handover points at your own sites are drawn on the Map view as numbered circles.

Relays with other groups. On the Map view, tick **Blood bike groups** in the Map view menu to see every blood bike group in the UK and Ireland. Click a shield to see the group and its three nearest neighbours (straight-line distances; the road is always further). A hollow shield is only a town or registered address, so ring that group to agree where to hand over. This is a map only: it does not contact the other group.

4.9 Hospital requests

Hospital staff can ask for a job on your request page (see section 7). A new request pops up on the console with an alert and a repeating chime, and a  **Requests** button appears bottom-right while any are unanswered.

- Each request has its own reference, such as **R08103**, given to the ward the moment they send it.
- **Accept** → **New Job** puts it on the board as a job with its own **H** number, with the caller, their number and the needed-by time filled in, ready to assign. The ward's page then shows the job number instead of the request reference.
- **Decline** asks for a reason, which the requester sees.

Either way, the ward's page follows the run (accepted, collected, delivered). Once it is accepted they can close it. **Hospital requests** in the Tools menu is the permanent log of every request and

what became of it. If a job made from a request is ever deleted, you can put it back on the board from there in one step.

4.10 Safety alerts

SOS: what to do

1. The alarm fills the screen with the rider and their last position.
2. Press **Acknowledge (silence alarm)**. This records that you have it, and the rider's phone says Control has seen their SOS. It does **not** end the SOS.
3. **Ring the rider**. If they need help, get it.
4. Only once they are safe, press **Stand down — clear SOS**.

An SOS nobody acknowledges re-alerts every controller after four minutes. One still active ten minutes after it was acknowledged alerts everyone again, and the backup email goes out.

Running late

Riders are not asked to check in every half hour. When a job starts for a rider, Artery works out roughly when they should arrive (the road time from where they are, plus a few minutes to get going), and nothing happens unless they are late:

Late by	What happens
10 minutes	The duty controller is alerted (everyone, if nobody is on duty) and the card turns amber.
20 minutes	Every controller is alerted and the alarm fills the screen.
30 minutes	Every controller is alerted and emailed, the card turns red, and the rider is asked to tap I'm OK.

What to do: 📞 **Ring** them; **+15 min** if you know why they are late; **Ask them to check in** to send one notification asking for I'm OK; or reassign. When the rider taps **Arrived — all OK** at the pickup they get 30 minutes to collect before the same alerts follow. **Acknowledge** quiets the alarm on your screen only; if you cannot reach them, treat it as an SOS.

A job nobody accepts

The ⌚ **AWAITING ACCEPTANCE** line counts the minutes. After 10 the rider is reminded and the duty controller alerted, and the line turns red: ⚠️ **NOT ACCEPTED**. After 20, every controller is alerted, plus the backup email for an urgent job. Ring the rider or give the job to someone else.

Problems reported by a rider

When a rider reports **Something wrong?** at a signature (the wrong count, damage, a cooler problem, labels), the duty controller is alerted at once, the job shows ⚠️ **Problem reported**, and it is written into the job's notes, timeline and history. Decide what happens next: ring the rider, or the contact at that end.

All of this runs on the server

These timers run every minute on Artery's server, so alerts go out even when every console is closed.

The SOS log

SOS log in the Tools menu is the permanent record of every alert: who raised it and when, where, who acknowledged it, and who stood it down. Nothing is ever removed from it, including false alarms, because it is safety evidence. It exports to CSV.

4.11 Messages

The  button opens Messages. Volunteers can message Control from their portal, with photos, and any controller 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.

4.12 Handover notes, snapshot, rota and events

- **Handover note** (Tools) leaves a note for the next controller, such as "the fridge on Ward 4 is broken". It stays pinned on every console until someone taps **Acknowledge**.
- **Shift snapshot** (Tools) makes a plain-text summary of today's situation (riders, live jobs, jobs completed today) to copy into a message.
- **Shift rota** (Tools, or Shift Rota on the Dashboard) is the four-week rota. Click a 4-hour block to book a rider or driver, or **+ add** under Controllers to book a controller. Controllers can book or remove anyone's shift; volunteers only their own. Bikes and cars can be booked against a shift too; an out-of-service vehicle cannot be. Export with CSV.
- **Rota cover**: an admin presses  **Cover needed** and sets how many riders and controllers each block needs; short blocks then show in red, for you and for volunteers. A volunteer who can't make a shift marks it **Needs cover** instead of deleting it; another volunteer taps **Take it**, or you press **Cover...** and choose someone. A shift dropped or put up for cover within 24 hours alerts the duty controller.
- **If Artery is down** (Tools) 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 jobs back in afterwards. Keep a copy by every control phone, and print it again when your controllers change.
- **Fundraising & events** (Tools, or Events on the Dashboard): post an event with a title, date, time, place and how many volunteers you need. Volunteers answer in their portal and you see who is coming.

4.13 Reference lists

- **Locations directory** (Tools): every site your group holds, with departments, saved doors and standing directions. Search by site, region or department.
- **what3words directory** (Tools): every site with a ///what3words address. Search, then drop it straight into the pickup or delivery of the job you are logging, or copy it.
- **Map view menu** (Map view only): **Streets**, **Clean** or **Quiet** map styles (Quiet is easiest on a busy shift), hide the street map, always show site names, choose which kinds of site appear, and **Reset map view**. **Fit to fleet** on the map frames your live riders and jobs.

4.14 The Team window

The people side of the group lives in the **Team** window: **Tools** → **Team**, then the tab you want. Some tabs are only shown to admins, or to a controller given that job (see 5.11).

Tab	What it is for
 Regular shifts	Shifts someone does every week or every other week. Choose who, the day, the times and when it starts. Artery puts them on the rota eight weeks ahead and keeps it topped up. A single week can still be taken

Tab	What it is for
	off the rota as normal and won't come back. Stop takes the future shifts off; past ones stay in the record.
 Swaps	Swaps volunteers have arranged between themselves in the portal: the ones waiting for an answer and the recent ones. You 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 can 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 duty controller is told if it is within a week).
 Noticeboard	Notices for everyone, volunteers only or controllers only. Pin important ones, set a date to take them down, and tick the box to send a notification to people's phones.
 Documents	Policies, forms and guides (PDF, Word, Excel, PowerPoint, text or pictures, up to 8 MB), for everyone or controllers only. See Documents people must read below.
 Training	An admin, or a 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 when they did it. Green is in date, amber runs out within 30 days, red has run out or is needed and missing.
 Stages	Applicant, trainee or active (see below).
 Reports	Cover, how well shifts were filled, training running out and people joining (see section 6).
 Their data	A volunteer's subject access request (see 5.12).
 Reminders	Admins and rota managers: how long before a shift people are reminded, by notification and email; training reminders; and how often to remind people about documents they must read.
 Permissions	Admins: give a controller extra jobs (see 5.11).

Documents people must read

When you add or change a document, tick **Everyone must confirm they've read it** for a policy people have to read (only for a document everyone can see). Volunteers see it as **Please read** in the portal and tap **I've read it**. The list then shows **Read by 12 of 30**; click it to see who has and who hasn't.

- **Remind the N who haven't** sends a phone notification to just those people. It can be used once an hour per document.
- Artery also reminds them by itself: every week by default, at most three times. Change it, or turn it off, on the **Reminders** tab.
- When the document changes, **Ask everyone again** starts a fresh round. Everyone has to confirm again; the earlier confirmations stay on record.

Stages: applicant, trainee, active

Anyone not given a stage counts as active, so nothing changes until you use it. Add a new person in the Database Manager, then set them as an applicant or trainee on the Stages tab. Applicants cannot book themselves onto the rota, take cover or offer swaps. **Sign off as active** checks the

training their role needs; if any is missing or out of date it says which, and you can still sign them off on purpose, which goes in the change log. Each person's history of stages is kept. Admins, and controllers given Volunteer records, can change stages. Someone leaving is still **Remove access** (see 5.1).

5. Admins: the Database Manager

The Database Manager holds the group's standing information: people, places, vehicles and rates. Open it from **Tools** → **Database Manager** (Dashboard: **Database**). Most of it is for admins only.

Saving

Changes in the Database Manager are saved when you press the save/update button for that record. Some actions (photos, Next number, Renew, imports, card emails) save straight away, and the screen says so.

5.1 Volunteers

On the **Volunteers** tab, add and edit riders and drivers: name, callsign, mobile, next of kin, an optional **email** (to email them their card), an optional **home postcode** (for Send Home), optional compliance dates, and a small photo shown beside their name. Their portal password is issued automatically when you add them.

- **Find a volunteer:** type in the box above the list to narrow it by name or callsign.
- Each row has **Edit**, **Reset password**, **New code**, **Card**, **Email** (only when they have an email address), **Remove access** and **Remove**.
- Under each name: their issued password (🔑) and whether they have changed it, whether their card has been emailed, any compliance or ID card date that is due, their member number, and any photo waiting for approval.
- Untick **Active volunteer** for someone who has left or is on a long break. Their history is kept.
- Controller and admin access is given on the **Controllers** tab, not here.

When a volunteer leaves the group

Press **Remove access** on their row: when someone has left the group, or must not use Artery for now. Their portal password stops working straight away, any phone they are signed in on is signed out, and they show as **ACCESS REMOVED · NO PORTAL**. Their record and every job, hour, signature and SOS are kept. Use this rather than unticking Active volunteer, which only hides someone from shifts: an inactive volunteer can still sign in, because inactive also means "stepped back for a while". You cannot remove someone's access while they are on shift or holding a job. **Give access back** reverses it; **Remove** deletes the record itself.

Compliance dates

Optional dates for each volunteer: DBS expiry, advanced rider qualification, insurance, and induction or last assessment. Anything due within 30 days turns **amber** and anything overdue turns **red**. Leave a date blank if it does not apply.

5.2 Portal passwords

Every volunteer is issued a four-letter code automatically (letters only, no vowels, so it can never spell a word). Get it to them on a printed or emailed volunteer card.

- **The first time they sign in, the portal makes them choose their own password.** From then on the issued code stops working, so a lost card is not a key to their account.
- The list shows *not changed yet* or *set their own* beside each code.
- If they forget their password, press **Reset password**. They go back to the code on their card and choose a new one when they next sign in.
- **Card lost, stolen or seen by someone else?** Press **New code** instead. It issues a brand-new code, so the old card no longer gets anyone in, and signs them out of every phone they

are signed in on (their shift and jobs are not affected). Artery then offers to email or print them a new card. It goes in the change log.

5.3 Volunteer cards (print or email)

A volunteer card gets someone into the portal. It shows their name, callsign, phone, next of kin, the portal address in large bold type, and their four-letter password with a reminder to change it at first sign-in.

- **Print volunteer cards** (under the list) prints a card for every active volunteer, eight to an A4 page.
- **Card** on a row prints just that volunteer's card. Use the search box to find them first.
- **Email** on a row emails that volunteer their portal address and password. **Email cards to everyone not yet sent one** emails the whole team.

The email contains only the portal address and password, never phone numbers or next of kin. Once a volunteer has chosen their own password, their card says *chosen by the volunteer* instead of a code, and no email is sent. Up to 80 card emails go out a day; if you have more, press the button again the next day and it carries on. If it says email is not set up, ask whoever looks after your server.

5.4 Photo ID cards

Artery makes photo ID cards ready for a card printer: a PDF at real card size (85.6 × 54 mm, with 3 mm bleed), front and back for each volunteer. The front has the group name, the photo, name, role, member number, callsign and the issue and expiry dates. The back explains what the volunteer does and says where to return a lost card.

One volunteer

Press **Edit** on their row. The  **ID card** box in their record has:

- **Member number**: type the number they already have, or press **Next number** for the next free one. Numbers are never reused, even after someone leaves. Press save/update after typing a number.
- **Issued / Expires: Issue card** (or **Renew (+1 year)**) dates the card from today, valid for a year.
-  **Add photo / Change photo**: choose a passport-style photo, then drag and zoom it to fit the frame.
- **↓ ID card PDF**: downloads their card.

Photos sent by volunteers

A volunteer with no photo is asked to take one in their portal. It shows on the list as  **PHOTO TO APPROVE**. Open the volunteer and press **Approve** to put it on their card, or **Reject** to ask them for another.

Lots at once

Press **ID cards** under the volunteer list. From there you can:

- Download cards that are **new or expiring within 30 days** (these are issued or renewed from today first), cards **issued or renewed in the last 14 days**, or **everyone active with a photo**.
- **Give numbers to everyone without one**.
- Set the **group name** and the **"If found, please return to"** line printed on the cards, then **Save card settings**.

Anyone without an approved photo is left out of the PDF. Send the PDF to your card printer.

Your group's own card design

1. In **ID cards**, press **Use our own card design**.

2. Upload a picture of your card (PNG or JPEG, at least 1000 px across) with blank spaces left for the details, and a back if you want one.
3. Add each detail (photo, name, member number, dates, callsign, role, group name, QR) and drag its box onto its space. Drag the corner to resize. Text is sized to fill its box.
4. Press **Preview PDF** to check it, then **Save design**.

From then on every card PDF uses your design. **Go back to Artery's standard design** undoes it. Only admins can change the design.

5.5 Controllers and admins

On the **Controllers** tab, add controllers, give admin rights, and set or reset passwords. Leaving the password blank when editing keeps the current one. A contact phone, if given, is shown to volunteers while that controller is on shift. The main **Admin** account is protected: no other admin can delete it or change its password.

The same tab has **View Change Log**, the record of who did what and when (jobs created, assigned, edited and closed, sign-ons, confirmations and declines, rota changes, handover notes, location notices shown and database changes), and the **SOS Log**.

Two-step login for admins

An admin account can change everything, so a stolen password alone should not be enough.

Tools → **Two-step login (admins)** → **Turn on**: scan the code with an authenticator app on your phone (Google Authenticator, Microsoft Authenticator, Authy, 1Password), type the 6-digit code it shows, and write down or print the **8 backup codes**. Each works once if the phone is lost. From then on, signing in asks for your password and the code. Each admin turns it on for themselves; ordinary controllers sign in as before.

- 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 account 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 the Admin's two-step login off.

5.6 Locations, departments and ward codes

On the **Locations** tab, add hospitals, surgeries, milk banks, blood centres and bases with their position and optional ///what3words. For large sites add **departments** (Pathology, Maternity...) that appear as options when logging a job, and save **standing directions** that fill a job's notes whenever that site is used.

Ward access codes and posters

Give one ward its own four-letter code. When ward staff type it on the request page, or scan the QR code on their poster, their hospital, department and ward are filled in for them.

1. Choose the hospital, and the department and ward if you want them filled in too.
2. Leave the code box empty to have one made, or type four letters of your own.
3. Press **+ Issue code**, then **Print posters** for a poster with the code and its QR code.

A code can never be the same as a volunteer's password or the group's shared code. If a poster goes missing, **Revoke** that code and issue a new one; nothing else changes.

5.7 Vehicles

On the **Vehicles** tab, manage the bikes and cars: name, type, registration and notes. Add **MOT, service and insurance due dates** for amber "due soon" and red "overdue" reminders, and record which volunteer keeps each vehicle.

5.8 Rates

On the **Rates** tab, set the per-mile running cost for bikes and cars, and the courier per-mile and call-out rates. Reports use these to show what the runs cost against what a commercial courier would have charged. Sensible UK defaults are used until you set your own.

5.9 Import and export (spreadsheets)

Import from spreadsheet

1. At the top of the Database Manager, press **Import from spreadsheet**.
2. Choose what the sheet holds: volunteers, controllers, vehicles or locations.
3. Choose the Excel or CSV file.
4. Check how Artery has matched your columns, and the row-by-row preview. Rows that cannot be added say why.
5. Press **Import**.

Nothing is saved until you press Import, and nothing already there is overwritten: a name that already exists is skipped. Volunteers get portal passwords automatically. Controllers get a temporary password that is **shown once**, so press **Copy list** before you close the window. A blank onboarding template is in the docs folder (Artery-Group-Onboarding-Sheet.xlsx).

Export to spreadsheet

Export to spreadsheet downloads volunteers, controllers, vehicles and locations as one Excel file in the same layout, so it can be imported straight back. It contains personal details (phone numbers, next of kin, home postcodes), so store it securely. It never contains passwords, job history, signatures or messages. Every export is recorded in the change log.

5.10 Messages (admins)

An admin can **Wipe messages...** from the bottom of the Messages list: all of them, or everything before a date. It deletes the photos too and cannot be undone. It is recorded in the change log.

5.11 Permissions: extra jobs for a controller

An admin can give an ordinary controller one or more extra jobs without making them an admin. Open **Tools** → **Permissions**, tick the boxes against the controller and press **Save**. It works straight away, and taking a tick off works straight away too.

Permission	What it lets them do
Rota manager	Set how many people each shift needs, and the reminders.
Training officer	Change the list of training your group uses. (Every controller can already record training.)
Volunteer records	Reset password and New code, Remove access and Give access back, printing and emailing portal cards, ID cards (photos, member numbers, printing), stages, and subject access requests. Not an admin's own record.
Reports and audit log	The change log, and the setup spreadsheet export.

Saving the Database Manager, controller logins, ward codes, wiping history and the card design stay with admins. Every change of permission is written in the change log.

5.12 A volunteer's data (subject access requests)

When a volunteer asks what information the group holds about them, open **Tools** → **Their data (GDPR)**, choose them and press **Gather their data**.

- Download the **readable page** (it prints or saves as a PDF) to send them, and the **data file** if they want it in that form.
- It covers their record and photo, shifts, swaps, time away, hours, jobs they carried, SOS records, messages with Control, training, documents they confirmed, stages and change-log lines that name them.
- Passwords and codes, and other people's information, are left out. If any part could not be read, the export says so, so an empty section is never mistaken for "holds nothing".
- Read it before you send it: change-log lines can mention other people too.

Admins, and controllers given Volunteer records, can do this, and each export is written in the change log. Send the files securely and delete your copies afterwards.

6. Records and reporting

Job history

Job history (Tools) holds every completed job archived on the server. Filter by **Last 7 Days**, **Last 2 Weeks**, **Last Month** or **All Time**, or put in your own **From** and **To** dates and press **Show these dates** (jobs are filed by the day they were completed). Search by job number, request reference, rider or location, and export as a printable report, CSV or Excel. Each record has the times created, collected and delivered, the job number, the vehicle used, the priority and the cost and savings figures. Open a record to see its signatures.

An admin can correct a record or add a past job. The original archive is never overwritten, and every edit is logged.

Trends and reporting

Trends & reporting (Tools) shows the shape of your group's work for planning and for trustees and funders. Choose the last 3 months, the last 12, this year or all time to see jobs per month, the busiest days, hours and locations, miles, running cost against courier cost, events, and volunteer hours.

Shifts that nobody signed off are listed for review. A controller can give the real finish time, or accept the 12-hour cap, so the hours are right.

Team reports

The **Reports** tab in the Team window (admins, and controllers given Reports) has four reports, each with **Download (CSV)** for Excel:

- **Cover for the next two weeks:** every block with fewer people than your group needs, and shifts asking for cover.
- **How well shifts were filled** over the last four weeks, week by week.
- **Training and checks running out** in the next 30, 60 or 90 days, already run out, or needed and never recorded (including DBS, insurance and advanced test dates).
- **People joining**, with how long each has been an applicant or trainee.

The cover reports need the cover your group needs to be set first (🔗 **Cover needed** on the rota).

Volunteer stats

Volunteer Stats (on the Volunteers tab) totals each volunteer's completed jobs, miles and rostered hours, and how long since their last job. Anyone not active for 30 days or more is flagged, which is worth a friendly check-in. It exports to Excel.

Vehicle checks in reports

Riders' pre-ride checks show against the day in the reports, and any reported issue is flagged so it can be acted on.

Export CSV and Clear List

On the completed-jobs list, **Export CSV** downloads the current shift's completed jobs, a good end-of-shift backup. **Clear List** only clears the list on screen; everything stays archived on the server.

7. Hospital and ward staff: requesting a blood bike

Not an emergency line

Use the request page for planned and routine requests. For anything that cannot wait for a volunteer to respond, **phone** your blood bike group.

1. Go to the request page your group gave you (their address with **/r** on the end), or scan the QR code on your ward's poster.
2. Enter the **access code**. If your ward has its own code on a poster, your hospital, department and ward are filled in for you. Letters only; capitals do not matter.
3. Give **your name** and a number the controller can reach you on, ideally a ward or bleep number that will be answered if you go off shift. **Never** put patient-identifying information anywhere on the form.
4. Choose where the item is **collected from** and where it is **going**, from the list. The arrows button swaps them round.
5. Tick **what is being transported** and how many. If it is not listed, choose *Other* and describe it.
6. Choose **Routine** or **Urgent** (Urgent only if it is time-critical), and **Specific time** if it has to arrive by a certain time. Add notes for the rider: which door, who to ask for, how to handle it.
7. Check the summary and send.

You get a **reference** straight away, such as **R08103**. Quote it if you ring the group. When a controller accepts the request, the page shows the **job number** instead (for example **J08106H**), and then shows it being collected and delivered. Once it has been accepted you can close the page: if there is a problem, the controller rings the number you gave. If the group cannot take it, the page tells you why.

8. Security and privacy

- **Everything is private to your group.** Job, rider and location information is only shown to someone who is signed in. Each group's Artery is completely separate from every other group's.
- **Volunteers only see what they need.** A volunteer sees their own jobs and details, and the phone numbers of colleagues only while those colleagues are on shift. They never see other volunteers' emails, passwords or ID details.
- **Passwords are never stored in readable form.** Nobody, not even an admin, can look up your password. They can only reset it.
- **Signatures, SOS records and volunteer hours are kept permanently** as evidence and for reporting. The SOS log is never trimmed.
- **Your position.** Depending on your group's setting, the portal shares your position with Control while you are on shift, only while you are on a job, or not at all, and you are told which before you first sign on. It goes to your group's controllers only, **never to other volunteers**, and stops when you sign off. It is used to give you the nearest job and to find you in an emergency.
- **Admins can add two-step login**, so a stolen password alone does not open an admin account.
- **Backups.** Each group's data is backed up on its server and copied, encrypted, off the server every night.
- **Messages are logged** and can be read by controllers. Do not put patient details or photos of patients in messages.
- **Spreadsheet exports contain personal details.** Only admins (and controllers given Reports) can make them, every export is logged, and the file must be stored securely.
- **Extra jobs, not extra keys.** An admin can give a controller a single job, such as rota manager, without making them an admin, and take it away again at once. Every change is logged.
- **Your own data.** You can ask your group for a copy of everything Artery holds about you. They can produce it in a few clicks, without other people's details in it.
- **Your calendar link is private.** It shows only your own shifts. Make a new one if you think someone else has it, and the old one stops working.

If you think someone has seen your password, change it straight away (volunteers: **Change password** in the portal; controllers: ask an admin).

9. Quick reference

Riders and drivers

I want to...	Do this
Start my shift	Sign on shift , then do the Vehicle check
Accept a job	Open it → ✓ Confirm
Turn a job down	Open it → ✗ Can't do it + reason
Get directions	📍 Navigate (or tap the /// link)
Say I've arrived	📍 Arrived — all OK
Collect	📁 Sign for pickup (sender signs)
Nothing there	Nothing to collect
Deliver	📁 Sign for delivery (receiver signs)
Hand a job to another rider	🔄 Hand over to ... → give them your phone → they sign → Confirm handover
Take over a relay leg	✓ Confirm , go to the handover, sign on their phone
Count what I'm given	📦 Check the count on the signing screen; wrong? ⚠ Something wrong?
Answer "are you OK?"	✓ I'm OK when it is safe to stop
Can't make a shift	My shifts → 🚫 Can't make it
Get help NOW	🆘 SOS (and ring Control or 999 if you can)
Message Control	💬
Book a shift	My shifts → tap a block
Pick up a shift that needs cover	Find a shift → Take it
Swap a shift	Find a shift → Swap one of my shifts
Book time away	Time away → add the dates
Confirm I've read a policy	Open it from Please read → I've read it
Show my Artery card	My Artery card
Finish	Sign off shift , then 🏠 I'm home safe

Controllers

I want to...	Do this
Start my shift	Sign On → name → password

I want to...	Do this
Log a job	New Job → pickup, destination, items, priority → Generate Job
Take a job over the phone	 → read the number out → fill in the sheet → Add to the board
Change a job	Click the job →  Edit job → Save changes
A rider is running late	 Ring, +15 min if you know why, or reassign
A job to somewhere not on our list	Tick Relay / one-off job on the job form
Give a rider a job	Click the rider → choose the job, or Assign on the suggestion
Plan a relay	Click the job → Plan as a relay
Answer an SOS	Acknowledge → ring the rider → Stand down once safe
Answer a hospital request	 Requests → Accept or Decline
Leave a note for the next shift	Tools → Handover note
Find an old job	Tools → Job history → search
Report to trustees	Tools → Trends & reporting
Set up someone's regular shift	Tools → Team → Regular shifts
See who hasn't read a policy	Tools → Team → Documents → Read by... → Remind the N who haven't
See the gaps in the next two weeks	Tools → Team → Reports

Admins

I want to...	Do this
Add a volunteer	Database Manager → Volunteers → fill in → + Add
Add a whole team	Import from spreadsheet
Get a volunteer into the portal	Card (print) or Email on their row
Volunteer forgot their password	Reset password on their row
Volunteer lost their card	New code on their row, then email or print a new card
Turn on two-step login	Tools → Two-step login (admins) → Turn on
Make ID cards	Volunteers → ID cards → download the PDF
Approve a volunteer's photo	Open the volunteer → Approve
Give a ward its own code	Locations → ward codes → + Issue code → Print posters
Someone has left the group	Remove access on their row (records kept)
Back up the lists	Export to spreadsheet

I want to...	Do this
Give a controller an extra job	Tools → Permissions → tick → Save
Sign off a new volunteer	Tools → Team → Stages → Sign off as active
Answer a subject access request	Tools → Their data (GDPR) → Gather their data
Use our own ID card design	Volunteers → ID cards → Use our own card design

Something not working?

Problem	Try this
The portal shows an old version or looks wrong	Pull down to refresh. On a computer, press Ctrl+Shift+R.
Not getting job alerts	Follow the yellow warning in the portal; allow notifications for the site. Tell your controller meanwhile.
Signed out unexpectedly	Sign in again. Updates to Artery sign everyone out; nothing is lost.
No signal	Carry on. Signatures, answers and SOS are saved and send themselves later. Ring Control if it matters now.
Forgotten password	Volunteers: ask Control or an admin to reset it. Controllers: ask an admin.
Anything else	Note the version number on screen and tell your group's Artery admin.