

Cycle Training Database

A bespoke Microsoft Access database offering a complete solution to the management of a complex programme of cycle training. Features include:

- ◆ **Client booking** system including automatic generation of confirmation information to trainees and client organisations,
- ◆ **Instructor booking** system, with features for monitoring the training and development of your instructor body. Includes a Conflict Calculator to eliminate the possibility of double bookings, and automatic emails to instructors.
- ◆ **Budget management** system, offering detailed reporting for funders, and invoicing of paying clients. Capable of handling matched funding.
- ◆ Underlying **double-entry accounting** system enabling the tracking of all costs, calculating payments for instructors, including mileage payments

Developed for Cycle Training UK (London), Britain's leading supplier of cycle training, it is licensed for sale to other cycle training organisations, and is now also in use by:

- ◆ Luton City Council
- ◆ Royal Borough of Kingston
- ◆ Bike for Life (Brighton)
- ◆ Sandwell Primary Care Trust

...and others.

The image displays several screenshots of the Cycle Training Database software interface:

- Budget Viewer:** Shows a summary of budgeted amounts, including 'Total allocated' (£48,130.57) and 'Total invoiced' (£38,955.25).
- Transactions List:** A table listing financial transactions with columns for Date, Description, Amount, Credit Account, and Debit Account.
- Trainees:** A form for entering trainee details such as name, address, age, and contact information.
- Sessions list:** A table listing training sessions with columns for Date and duration, Course or trainee, and Canceled.
- Financial Summary Table:** A table with columns for Cash from trainees, Cash advances, Total for month, Bank Paid, Running Bal to pay, and Error from prev month.

For more information please contact
 Simeon Bamford on 07941 054837 sim@sim.me.uk
 Demonstrations can be arranged in **London** or **Edinburgh**

Further details

Enter details of **trainees**, the sessions they are taking, the instructors who are running the sessions, and financial details, all in the same easy-to-use screen:

Trainees

Search by: First name Surname

Entered by: SAB Address1: 32 Carden Road What type(s) of training are they interested in?
 Date first contacted: 29/10/03 Address2: Nunhead Complete beginner
 First name: Mr Fake Postcode: SE15 3UD Beginner
 Surname: Trainee Borough: Southwark Height if no bike: On road
 Children (names and ages): Donald, 8 Tel Work: 020 7582 3535 Journey accompaniment
 How did they find out? Flyer Tel Home: Maintenance
 "Found out" notes: Peckham Library Mobile: 07941 054837 Notes: This trainee is in here so we can do a screen print of the system
 Email: info@cycletraining.co.uk

Entered by: SAB Cancel, reschedule or spawn new No of instructors: 1 Ext Observer: Instructors Conflicts Sessions
 Date+duration: Sat 12/12/98 00:00 1 No of trainees: 1 Pos [d]g, [t]r, [f]dx Offers [f]dx.
 Child's name(s): Donald Session notes: Instructor Position Payment Feedback Assessment
 CB Sites: Peckham Rye Common, A fake lesson so I can do a screen print of the database for quote. SAB Lead £12.00
 Location if not trainee's: Peckham SE15 XTRN Mentor 1 £14.50
 Location notes: Tarmac etc. Session booking notes: £0.00
 Cancelled date: Reason:
 They owe for this session: Invoice £25.00 Trainee feedback Level at start 1.a Covered by end 1.b1
 Cash taken £0.00 Success! Riding within 15 minutes. Proceeded to gears. Father and son both really, really happy.
 Cheque(s) taken: Received £0.00 Need bike:
 Budget: Confirmation: ..<defa
 Funder owes: £0.00

Form View NUM

Use a similar interface for group **courses**, for **schools** and other organisations:

Courses

Search by: Name Start date

Entered by: MSA Course name (this consists of an organisation and a number): Adamsrill 1
 Basics Finance Booking Contacts
 Start Date: 09/03/05 Course notes, e.g. Max number of trainees? Age range? Equipment needed? Special arrangements?
 End Date: 23/03/05 12 trainees to be picked from year 5. Two form entry.
 Type: IRR 3 Day Course Lunch from 12.15 - 13.15.
 Independent course - i.e. we are taking the bookings and payments directly Plenty of playgrounds so no need to stop for break in morning.
 Cancelled date:
 Cancellation notes:

Entered by: MSA Cancel, reschedule or spawn new No of instructors: 2 Ext Obs'r: Instructors Conflicts Sessions 2 of 7
 Date+duration: Wed 09/03/05 10:15 2 Session notes: Cancellation date: Possible:
 Type: Group Bike checks and Control skills with 6 trainees. Reason: Offers:
 Location if different from course: Location notes: Session booking notes:
 No of trainees: 0 Cost override:
 Stt lvl: Cvr'd by end:

Initials	Position	Basic Admin Mile	Other	Pay	Fdb'ck	Tr'n'ng
Caso	ETG Lead	25.20		25.20		Email
Caso	WBW Support 1	16.80		16.80		Email
Caso				0.00		Email

Max number of trainees? Age range? Equipment needed? Special arrangements?

Manage your **contacts** - potential clients, funders, suppliers:

Generate **automatic confirmation letters** to schools about courses:

83 Lambeth Walk
London
SE11 6DX
Tel: 020 7582 3535
info@cycletraining.co.uk
www.cycletraining.co.uk

CYCLE TRAINING UK

Ms Marple
Adamsrill Primary
Adamsrill Road
Lower Sydenham
SE26 4AQ

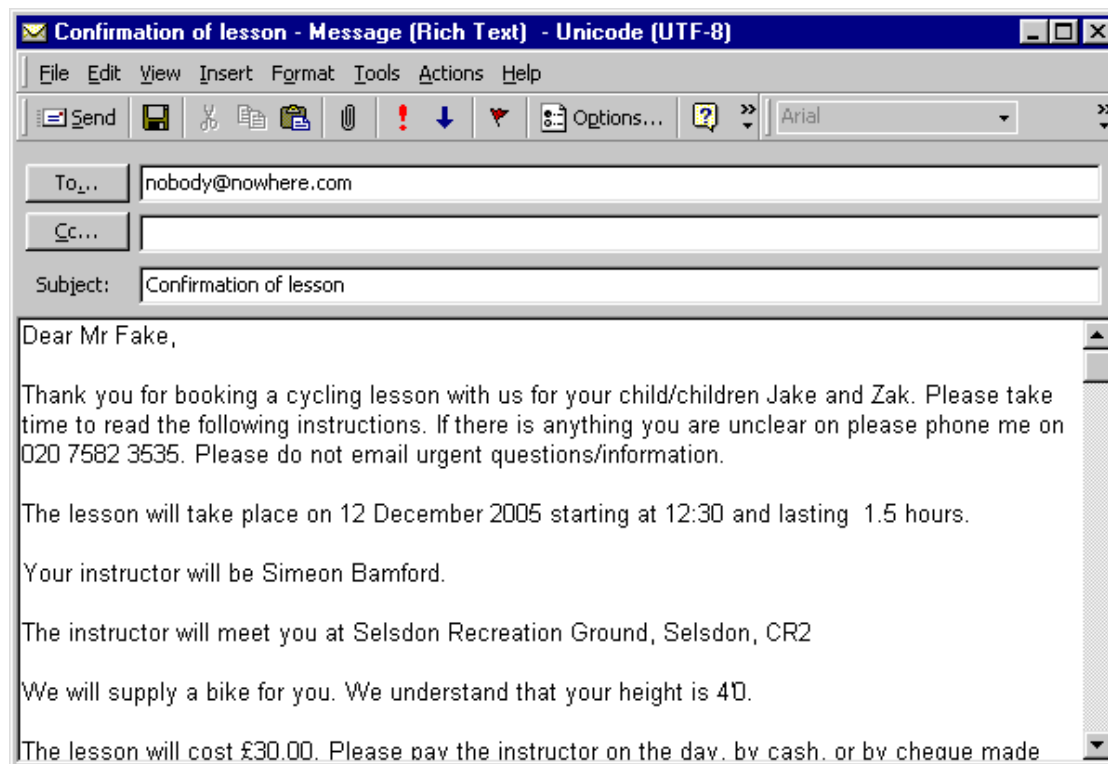
20/02/05

Dear Ms Marple,

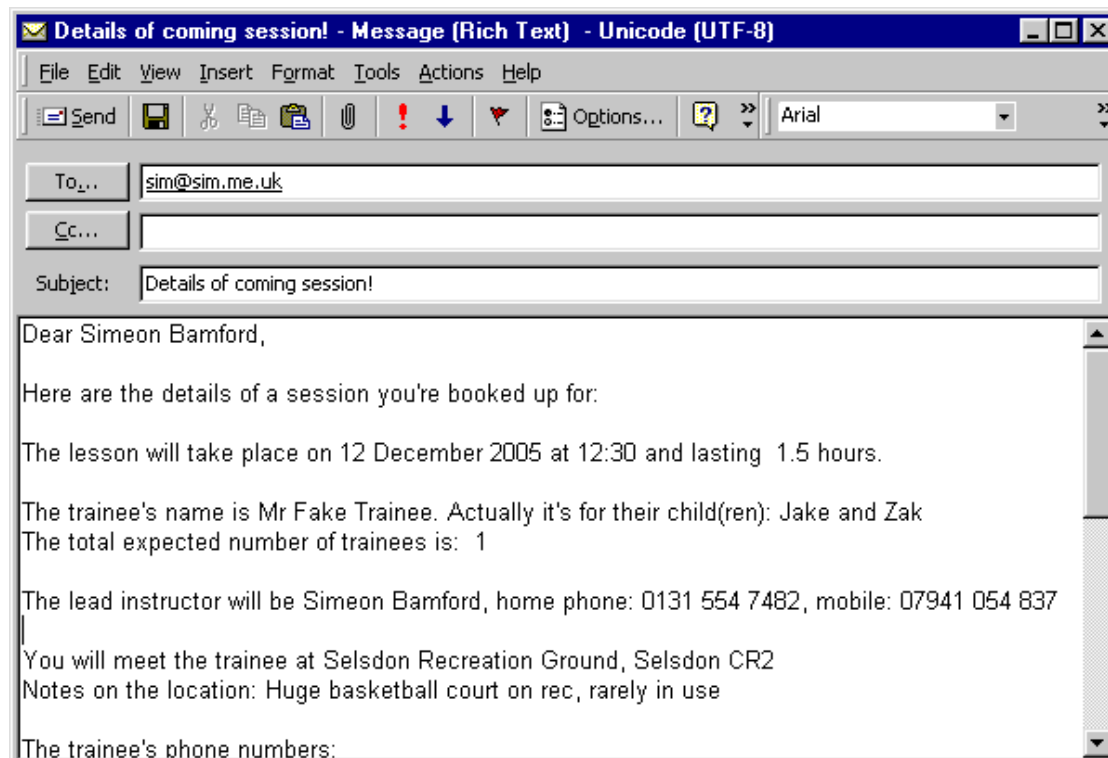
Thank you for booking us to run some cycle training at your school. This is to confirm that we will be with you on the following dates:

Date and start time	Duration	No of instructors	Special notes
Wed 23 Feb 2005 13:30	2 hours	1	Assembly / Client admin...two classroom sessions with year 5.
Wed 09 Mar 2005 10:15	2 hours	2	Bike checks and Control skills with 6 trainees.

Generate **automatic email confirmation** or letters to individual trainees:



Generate automatic **emails to your instructors** giving details of sessions:



Take **feedback** from your instructors session by session:

The screenshot shows the 'Instructors' window in the Cycle Training Database. The window title is 'Cycle Training Database - [Instructors]'. The menu bar includes File, Edit, View, Insert, Format, Records, Tools, Window, and Help. The toolbar contains various icons for file operations and editing. The main area is divided into several sections:

- Search and Navigation:** Search field with 'SAB', buttons for 'Offers', 'Detailed account', 'Account by month', 'Pay! (use with caution)', 'Statement', and 'New instructor'.
- Tabs:** General, Training, Sessions, Other Labour, Other Transactions.
- Session Management:** Buttons for 'Enter admin for this course', 'Enter purchase for this session', 'Enter incident for this session', 'Refresh', 'All sessions coming up', and 'Trainee feedback'.
- Session Details:**
 - Date and duration: Mon 12/12/05 00:00, 1
 - Name: Mr Fake Trainee
 - Type of session: Indiv
 - Type of course: [dropdown]
 - Level at start: 1.a0
 - Cancelled date: [field]
 - Reason: [dropdown]
 - Course or trainee notes: For screenshot
 - Session notes: [field]
 - Session booking notes: [field]
- Financials:**
 - Number of trainees: 1
 - Individuals: No Bike [checked]
 - Kids' names: Jake
 - They owe: £30.00
 - Cash taken: £0.00
 - Cheque(s) taken: £0.00
 - Credit card: £0.00
 - Budget: Ealing 2004-5 Individuals
 - Funder paid: £30.00
- Location:** Selsdon Recreation Ground, Selsdon CR2. Note: Huge basketball court on rec, rarely in use.
- Feedback Table:**

Who	Position	Basic	Admin	Mil's	Other	Pay	Feedback
SAB	Lead	12.00	2.50	2.00		16.50	Excellent session. Got him riding in 20 mins. Spent the rest of the time drilling him on better braking and steering.
						0.00	

Track all other payments and expenses for your instructors, then print them **statements of account**:

The screenshot shows the 'Statement for an instructor' window in the Cycle Training Database. The window title is 'Cycle Training Database - [Statement for an instructor]'. The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains various icons for printing and navigation. The main area displays a financial statement for Simeon Bamford:

For: Simeon Bamford
1F2 6 Trafalgar Street
EH6 4DH
Between 1/1/02 and 1/1/03

Sales to instructor

Date	Description	Amount
04/10/02	Sale of goods: Madison	44.94
28/10/02	Sale of goods: Madison	12.00
Total Sales to instructor for Simeon Bamford		£56.94

Salary

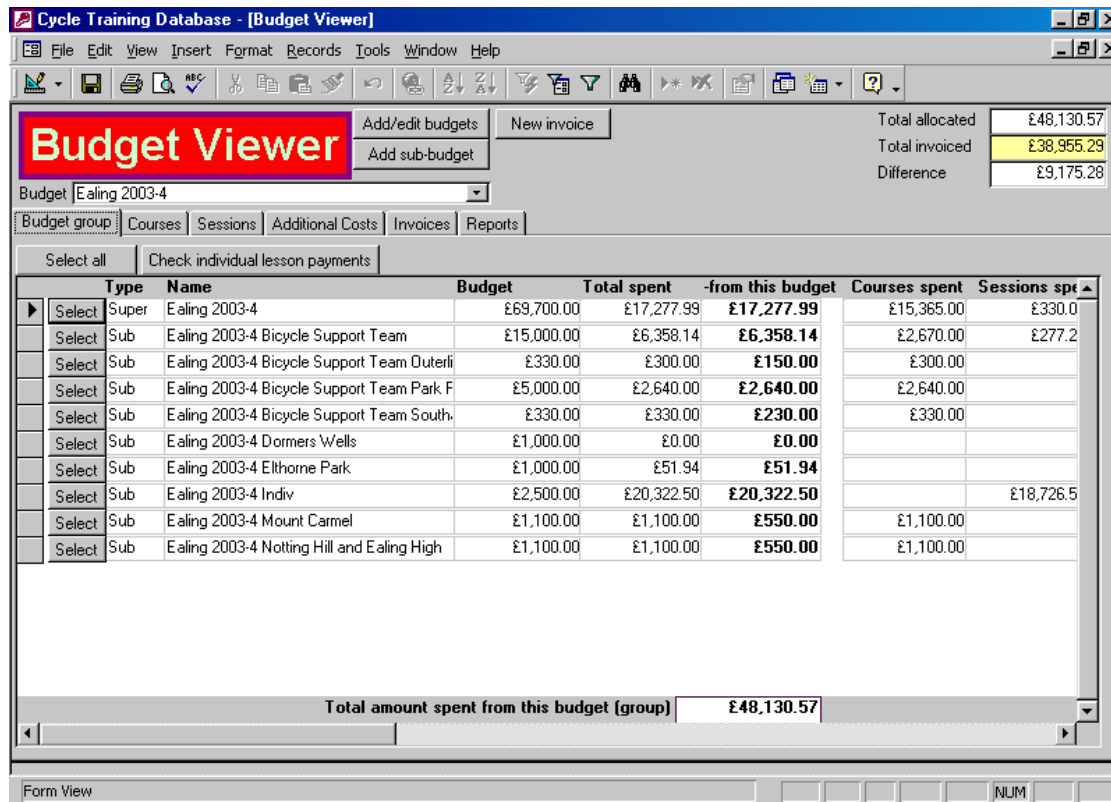
Date	Description	Amount
30/04/02	Labour: SAB Salary	(764.66)
31/05/02	Labour: SAB salary	(935.26)
30/06/02	Labour: SAB salary	(857.02)
31/07/02	Labour: SAB Salary	(935.88)
31/08/02	Labour: SAB Salary	(1,251.86)
30/09/02	Labour: SAB Salary	(1,044.48)
31/10/02	Labour: SAB Salary	(935.66)
Total Salary for Simeon Bamford		(£6,724.79)

Purchases for company

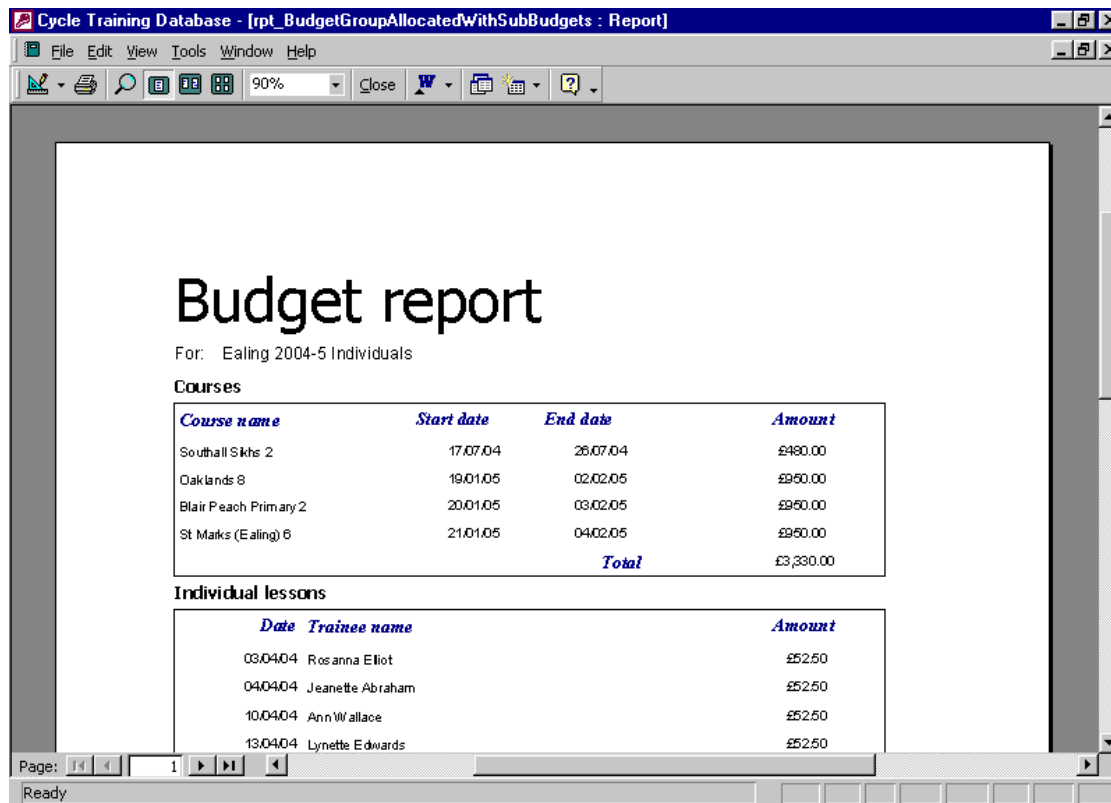
Date	Description	Amount
03/04/02	Purchase: Train to Bristol to meet Cycle West	(32.00)
05/04/02	Purchase: labels	(1.09)
13/04/02	Purchase: stationery	(5.90)
15/04/02	Purchase: stationery	(38.46)

Page: 1 of 1

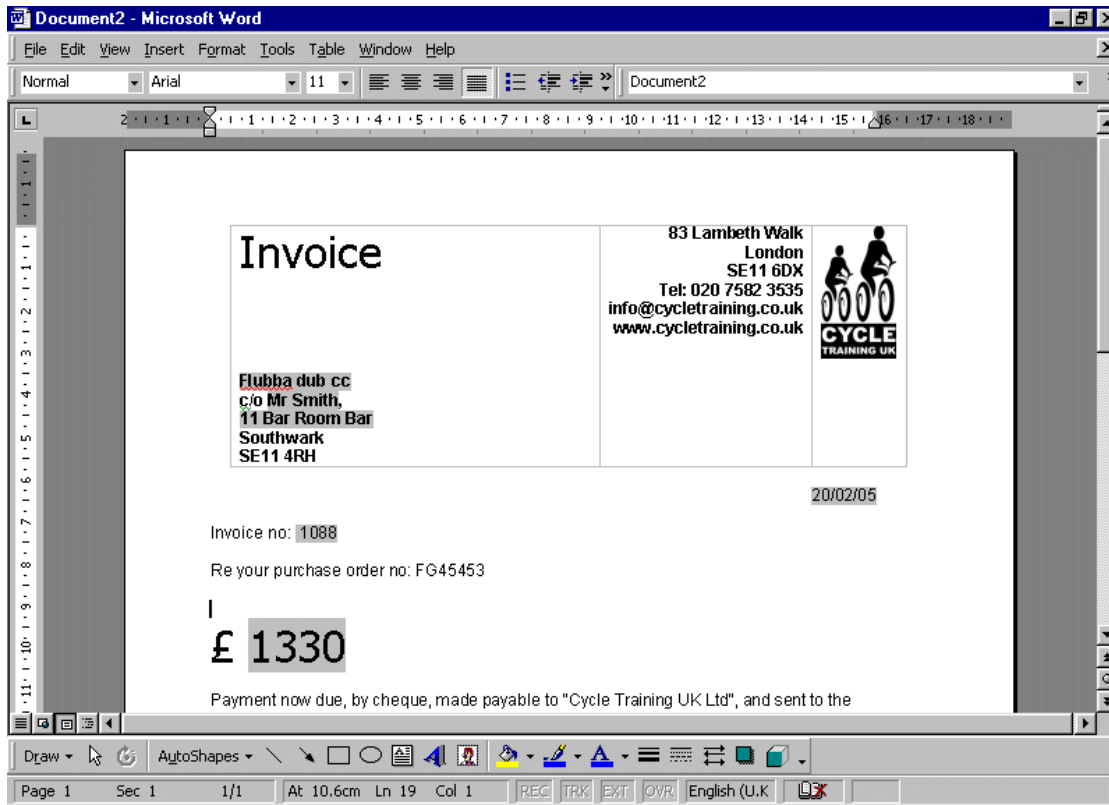
The **Budget Viewer** calculates running totals for monies allocated and spent on budgets and sub-budgets, allowing you to drill down into the details of each course or session.



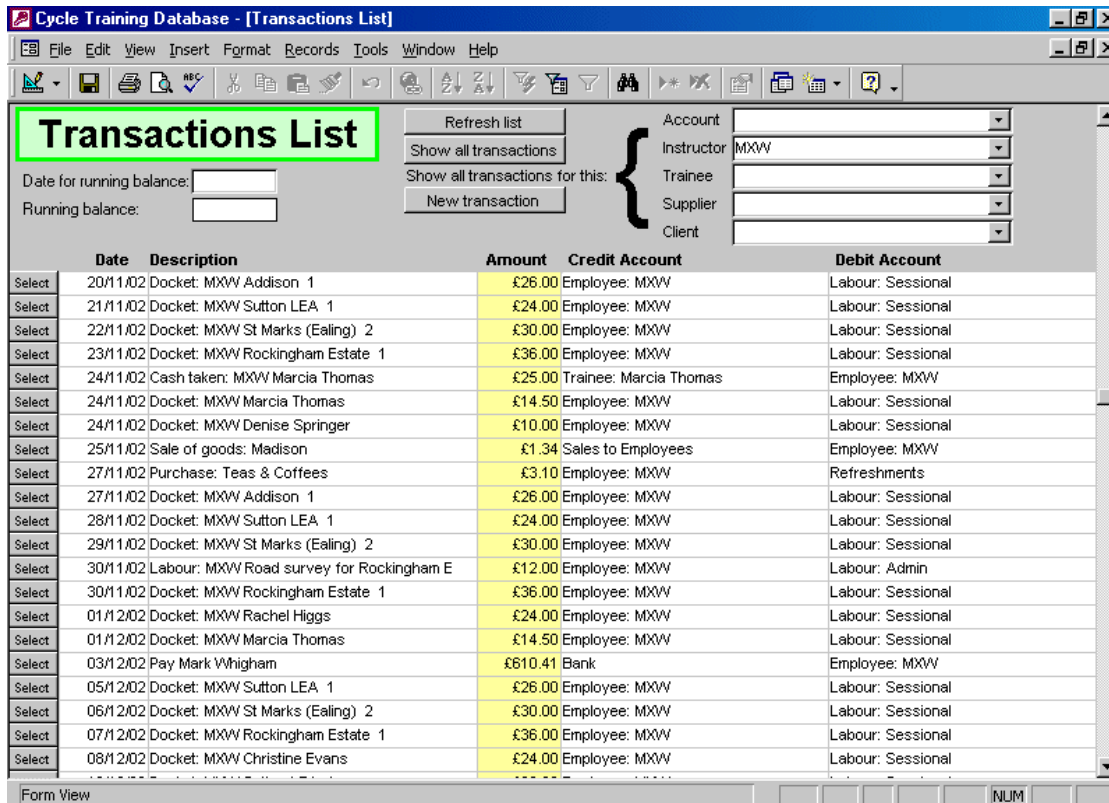
Then you can get a range of **budget reports** for each budget or sub-budget:



Generate **automatic invoices** to clients:



Log all other expenses and transactions in the integrated **double-entry accounting system**. This can form the basis of your annual accounts, or department's accounts.



Track the progress of your instructors as you train them:

Cycle Training Database - [Instructors]

Search: MAA | Offers | Detailed account | Account by month | **Pay! (use with caution)** | Statement | New instructor

General | **Training** | Sessions | Other Labour | Other Transactions

Select	Date	Time	Duration	Instructor	Level	Start	End
6	Sat 18/10/03 09:00			Mark de Pina Perou	First Aid training		
1.5	Sun 19/10/03 15:00			Judy Lonsdale	Indiv Level 1A	1.a0	1.a2
2	Thu 23/10/03 09:00			Noel Park 1	Group Level 2	2.05	2.07
2	Sat 08/11/03 14:30			Patricia Britain	Indiv Level 2	2.00	3.00
2	Sun 08/02/04 14:00			Jane Newman	Observer 1	1.b0	

Comments: Good. Needs chasing for feedback. Mentor.

Level: Advanced

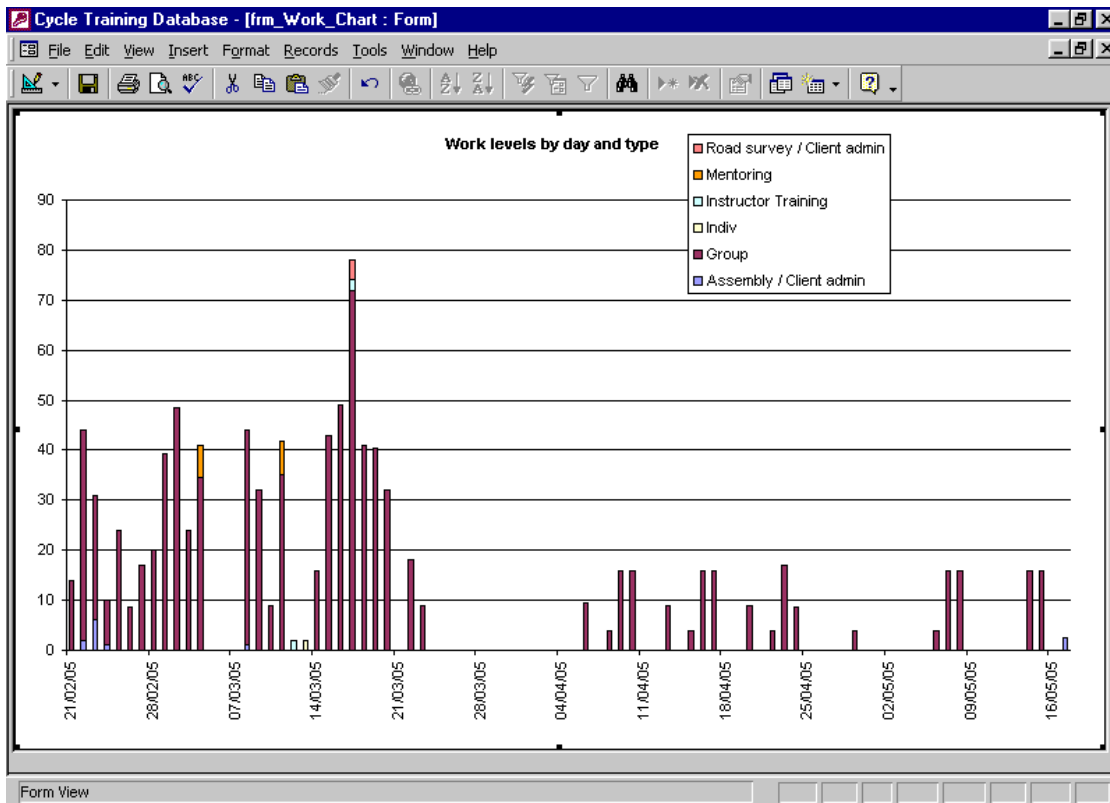
Training progress notes: 29/7/03 Sent info + pack by email 14/8/03
Appl returned 1/9/03 Sent official invitation

Can do:

- Individual Level 1
- Individual Level 2
- Individual Level 3 JA
- Classroom
- Assembly
- Maintenance Advanced
- Maintenance Intermediate**
- Spare 2
- Spare 3
- Group On Road**
- Paired Riding
- Mentoring

Form View

Monitor your work levels:



And many, many other features!