TERMS Quick Reference Guide

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Part I

1 Introduction

1.1 Quick Reference Guide

This Quick Reference Guide is designed to be a supplement to the **Main Manual**.

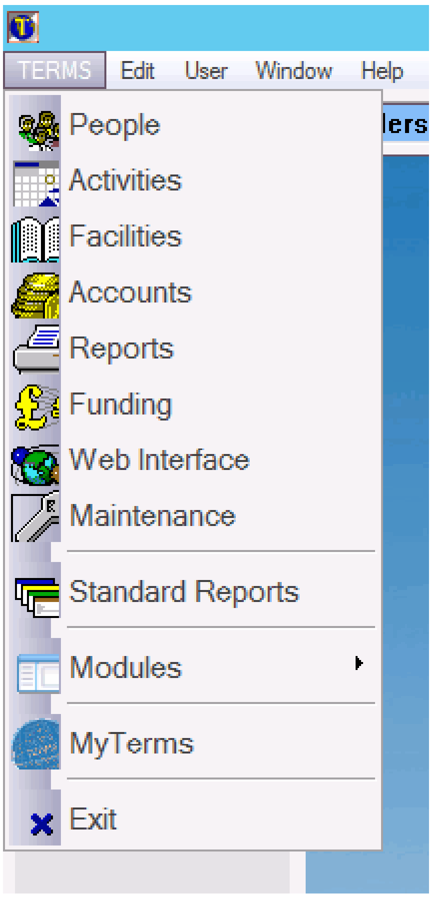
It is not a replacement and only outlines recording people, setting up activities, basic accounting and registering people onto activities.

For details of setting up TERMS, using the Facilities or Reports menus or using and adjusting advanced settings, please see the **Main Manual**.

1.2 Menus

TERMS uses standard Windows drop down menus and buttons.

The main menu that you will use to navigate around the TERMS modules is in the left hand side bar of the TERMS Window. You may also access further modules using the drop down from the TERMS menu in the top left hand corner:



1.3 Display and Quick Key Functions

TERMS uses standard Windows functions. This includes the ways in which the screen is displayed and used and the ways in which the keyboard works.

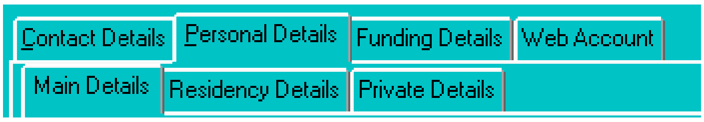
Here we will describe some of those standard functions.

IMPORTANT: Use the TAB key

In Windows pressing Enter (or Return) usually selects whichever button has the thick border around it. *In TERMS you should use the Tab Key (often labeled with two opposite arrows) to move down the screen or toggle between options*. This is **very** important to remember, otherwise you may end up saving or changing work before you are ready. Also, using the TAB key is often quicker than clicking on options with the mouse.

Tabs and Tabs

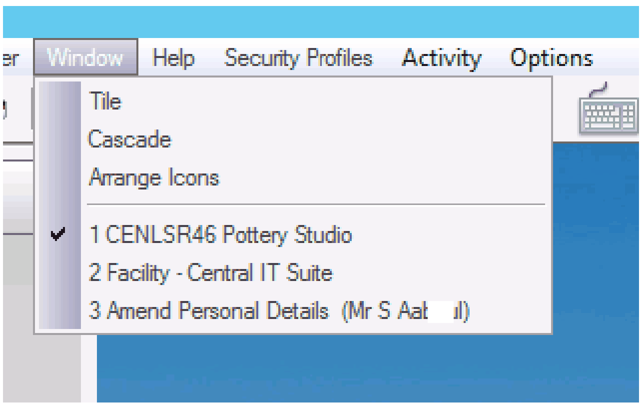
One confusing feature of Windows is that there are two different things called Tabs. The first is the Tab Key (labeled as TAB or using the two opposing arrows symbol), see above, the other is the use of Tabs on a window:



These are meant to represent the tabs on the top of files. Selecting a 'window tab' will present you with a different set of information, or the same information sorted in a different way.

Multiple Windows

You can have many different menu options active at any one time in TERMS for Windows, i.e. you might be in the People section and you could then open the Activity section *without* having to close down the People section. This ability to flip around options should improve your working speed. For a list of opened menus click on the Window button on the top bar.

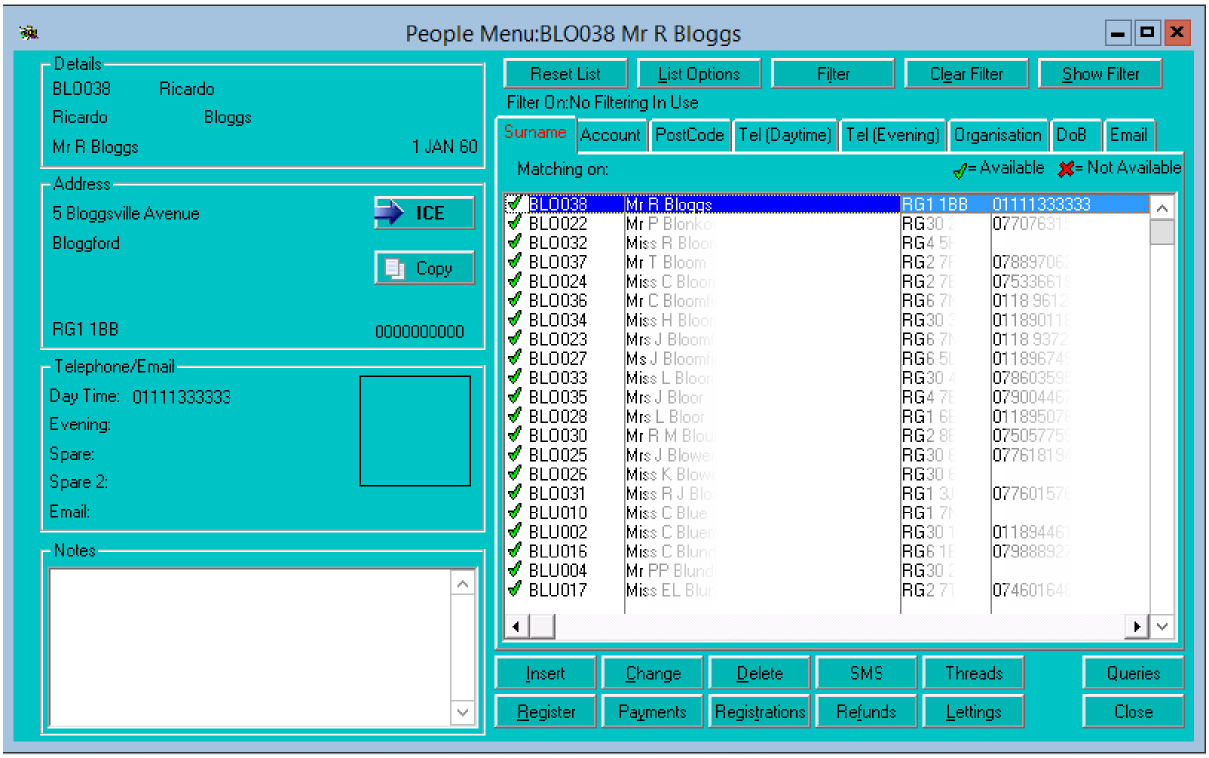


There are also tabs along the bottom of the page for each of the sections you have open, which you may click on to select which menu you'd like to use.

Searching down lists

In many TERMS screens you will be presented with a list of information, e.g. a list of

People:



You can search down these lists in several ways:

Using the Keyboard to Search a List

With the list selected, i.e. a faint dotted box around one of the lines (just visible around the highlighted line, above):

- Up Arrow and Down Arrow Keys will move you up and down a line
- Page Up and Page Down will move you up and down a box-full at a time
- Home will take you to the top of the list
- End will take you to the bottom of the list

Using the Mouse to Search a List

Use the mouse on the scroll bar:

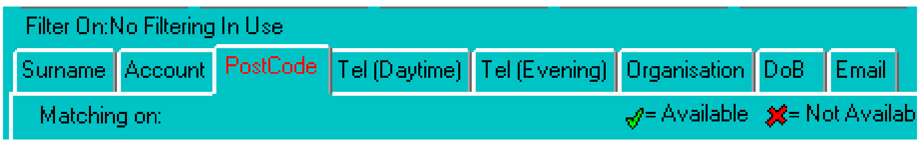
Up arrow

Down arrow

-Move up one line by clicking on the *up arrow* on the scroll bar.
-Move up or down a page by clicking on the shaded area above or below the box.
-Move down one line by clicking on the *down arrow* on the scroll bar.

Changing the list order

Use the tabs at the top of the box to change the order in which the list appears:



For example, this list is sorted in Postcode order, to sort in Surname order select the Surname Tab by clicking onto it.

Typing to get to the information you want

With the list selected start typing and TERMS will automatically move down the list as you type. What you have typed will appear beside the 'Matching On:' entry:

You can use *backspace* to erase what you have typed so far.

This matching method is how you find information, e.g. a particular person, without having to scroll down the whole list manually.

For example, if we were searching on Surname for a person, then:

You Type	**TERMS Displays**	**TERMS Action**
S	Matching On:S	Moves to first person w ho's surname begins w ith S
M	Matching On:SM	Moves to first person w ho's surname begins w ith SM
I	Matching On:SMI	Moves to first person w ho's surname begins w ith SMI
T	Matching On:SMIT	Moves to first person w ho's surname begins w ith SMIT
H	Matching On:SMITH	Moves to first person w ho's surname begins w ith SMITH
X	Matching On:SMITHX	Moves to first person w ho's surname begins w ith SMITHX
Backspace	Matching On:SMITH	Moves to first person w ho's surname begins w ith SMITH

If TERMS does not get a match, such as with SMITHX, then it will move to the next available person in the list. There is also an option which will reduce the number of lines shown on the People list (click on the List Options button to access this).

Drop down list boxes

A Drop down list box displays the current selection of the list it is associated with. Clicking on the box will cause some of the list to be displayed in a window that appears to drop down from the original box. You may have seen this in file selection windows to choose which disk drive to examine.

Summary of Standard Keys

When you are using TERMS certain keys always retain the same function regardless of which part of TERMS you are using – the letter keys A-Z are a good example. Some of the keys are unique to TERMS:

TERMS Key Function

F1	Calls Help Screens
F2	Insert a new record
F4	Amend a record
F5	Continue/Save/OK
F8	Restart Search

While others are standard throughout Windows™ (whichever version you are using):

Windows™ Keys

Tab
Move to the next field on the current window.

Shift-Tab
Move to the previous field on the current window.

Enter
This is the equivalent of pressing the default button on the current window. The default button will be surrounded by a black border and is usually the **OK** button.

Insert
Insert (add) a new record.

Delete
Delete (remove) a record.

Alt + a Letter Key
Many buttons on a displayed window have a letter underlined (eg Next and Finish). Rather than point the mouse at the button to click it, a short-cut that can increase your working speed is to press the Alt key + the corresponding letter key (eg To click on Next press Alt + the N key).

Part II

2 People

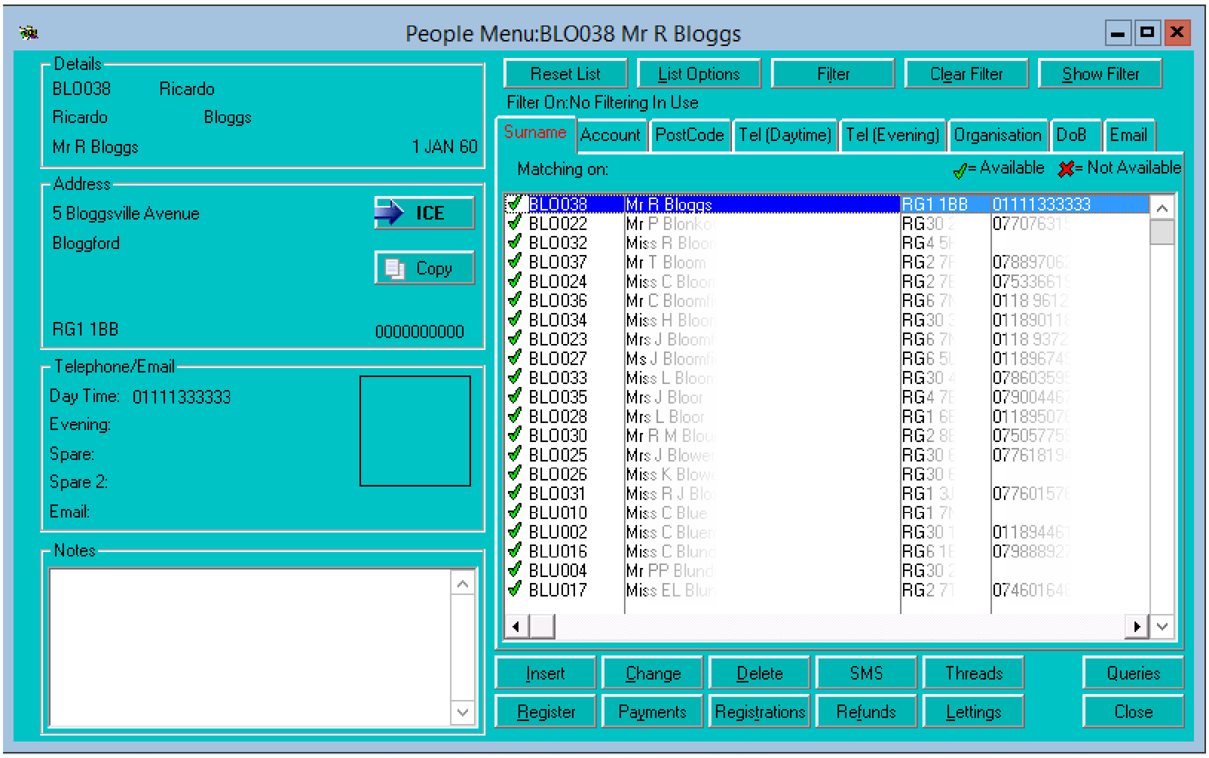
2.1 Searching for People

The **People** area is used as a record of all the students, staff and organisations connected to your institution. Accessing an individual person is simple. In this example we are looking for this imaginary person:

Mr Ricardo Bloggs
5 Bloggsville Avenue
Bloggford
RG1 1BB

(or somebody who actually exists on your copy of TERMS)

1. Click **People** on the **Module** menu bar on the left of the screen and a new display will appear.



2. On the right hand side of the display you will see a list of people. TERMS has given the people their own individual code numbers. The green tick beside the student code indicates that you may register this person onto activities or perform other actions. (To black list people click **Change**, then click **Settings** and un-tick **Can register on activities?** The green tick will turn into a red cross).

3. On the right-hand side of the screen you will see the details of the person highlighted in blue. Use the down arrow key to highlight the next person. On a completed database you will see the information on the left-hand side has changed accordingly.

4. You may also use your mouse to click on anyone on your list of people.

5. Back to looking for Mr R Bloggs. You may of course use the arrow key again, but there is a quicker way. Above the list of people you will see it says **matching on**. Regardless of which person is highlighted start typing Bloggs. It does not matter if you type using lower case or capitals. The blue highlight has found a Mr Bloggs. You can check if this is the right one by looking at the details on the right-hand side. He is also highlighted at the top of the screen.

6. Now press the **Reset List** button at the top of the right hand side. This will clear what you have done so you can start a new search.

   NOTE: A quick way to reset the list is to press F8

7. Now you are ready to search for some more people. Try a few searches.

8. Once you are happy with searching by a person's surname, try searching using the other options at the top of the list of people. For example, to search by Post Code, click the **Post Code** tab and now type in a person's post code.

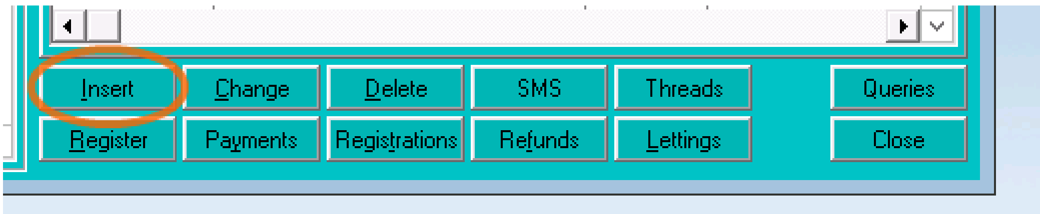
2.2 Adding a Student

Note: We are using the example of adding a person called Mr Bloggs. You should use a real person that needs to be added to your TERMS system.

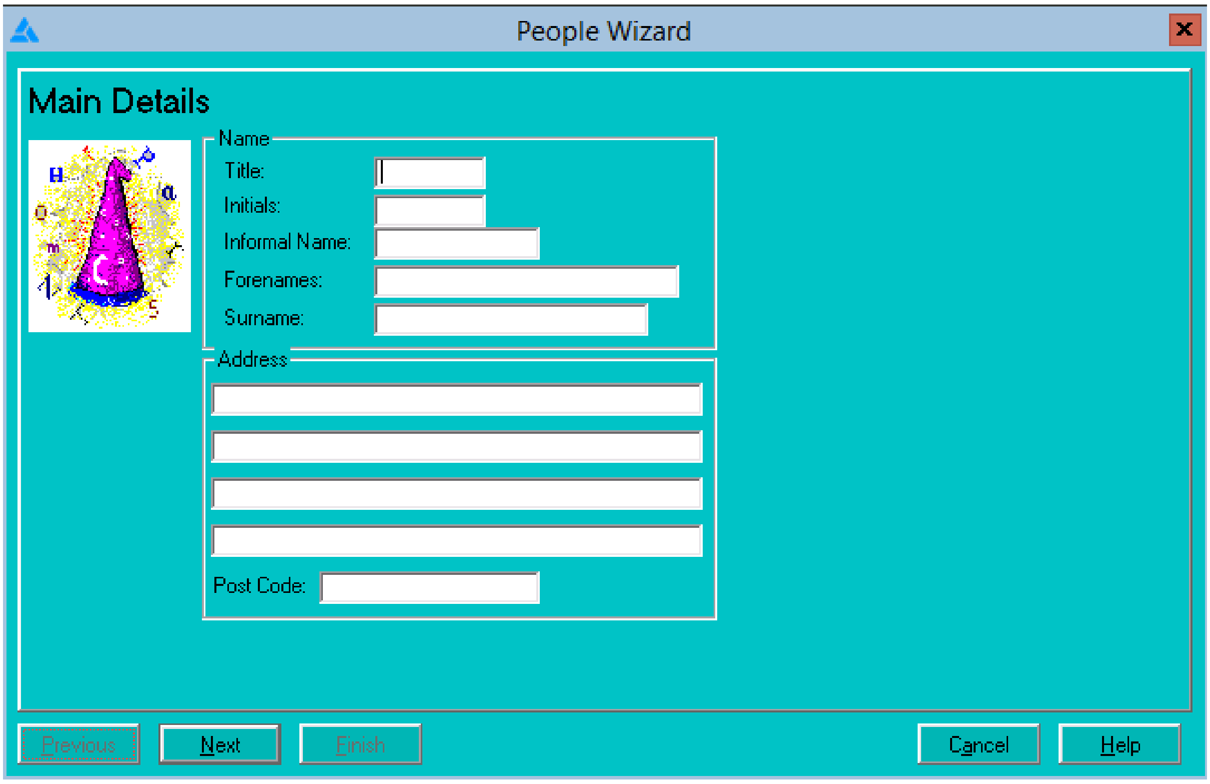
1. Ensure that you are in the **People** section. Now a new learner needs to be added to your current learners.

2. First do a quick check to make sure you haven't entered the learner's details already. Search for Mr Bloggs. (TERMS does have a warning device if you do try and put a learner in twice!) **Remember** - ***you must make sure that you enter data correctly***. If there are differences in detail, like an error in postcode or a missed initial, TERMS may think it is a new person and not flag the duplication.

3. Once you have determined he needs to be added into the list click on the **Insert** button on the bottom right-hand side of the filing card. *Do remember the difference between **Select** and **Insert**. **Insert** means you are going to add a new record, whilst **Select** means you a choosing an existing record or piece of data to consider.*



4. A **People wizard** will appear asking you for his main details.



5. The cursor is automatically ready in **Title**. Type in 'Mr'

6. Use the **tab** key rather than the return key to move down into **Initials**. (It is quicker to do this than use the mouse). If you do press the return key by force of habit, click the **Previous** button to get you back to the right page.

7. Type in his initial 'R'. Press **tab**.

8. Type in his informal name 'Ricardo'. (Use standard case if data is to be used in mail merge later) Press **tab**. This will automatically populate the **Forenames** section for you to the same name, which may be edited if necessary.

9. Type in his surname 'Bloggs'. Press **tab**.

10. Type in his address:

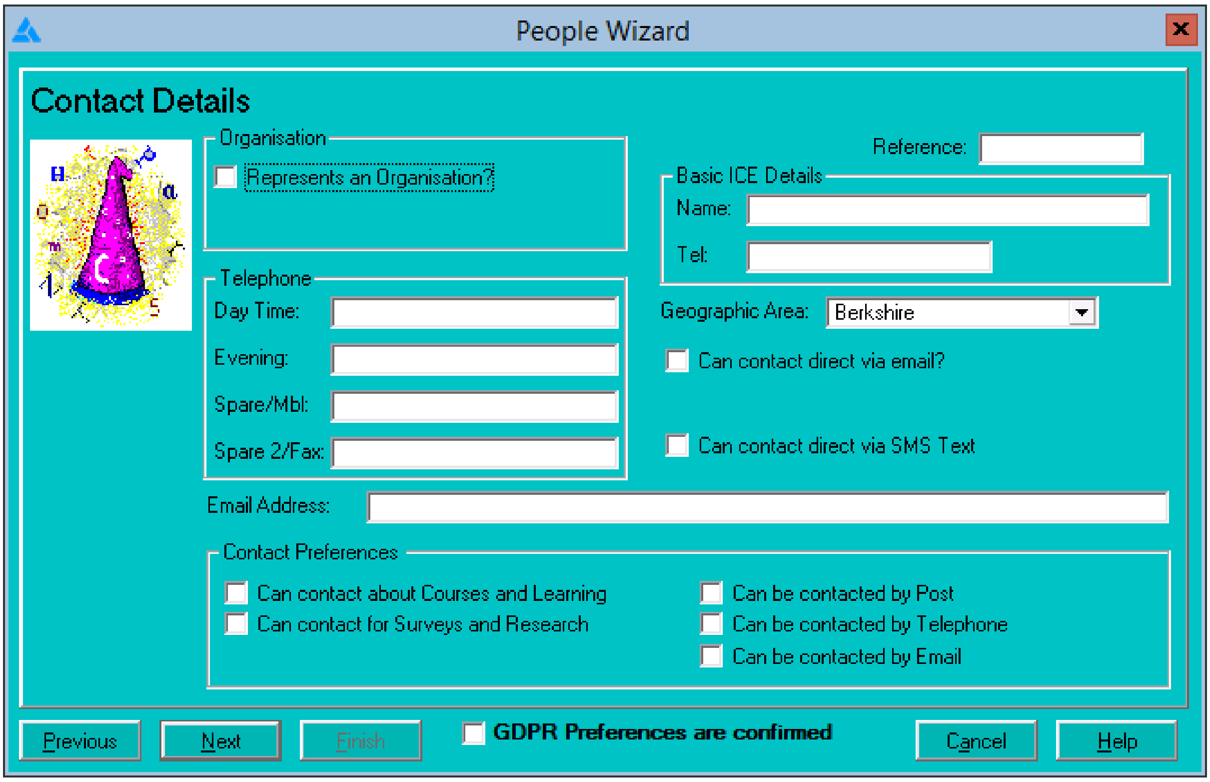
5, Bloggsville Avenue
Bloggford
RG1 1BB

Don't forget you are using the **tab** key to move down to each field

11. You may notice that there is a cancel button on this page. It may be for some reason you decide not to add this person. *If you have made typing errors, etc. correct them by using the mouse to highlight, etc. as you would normally in windows.*

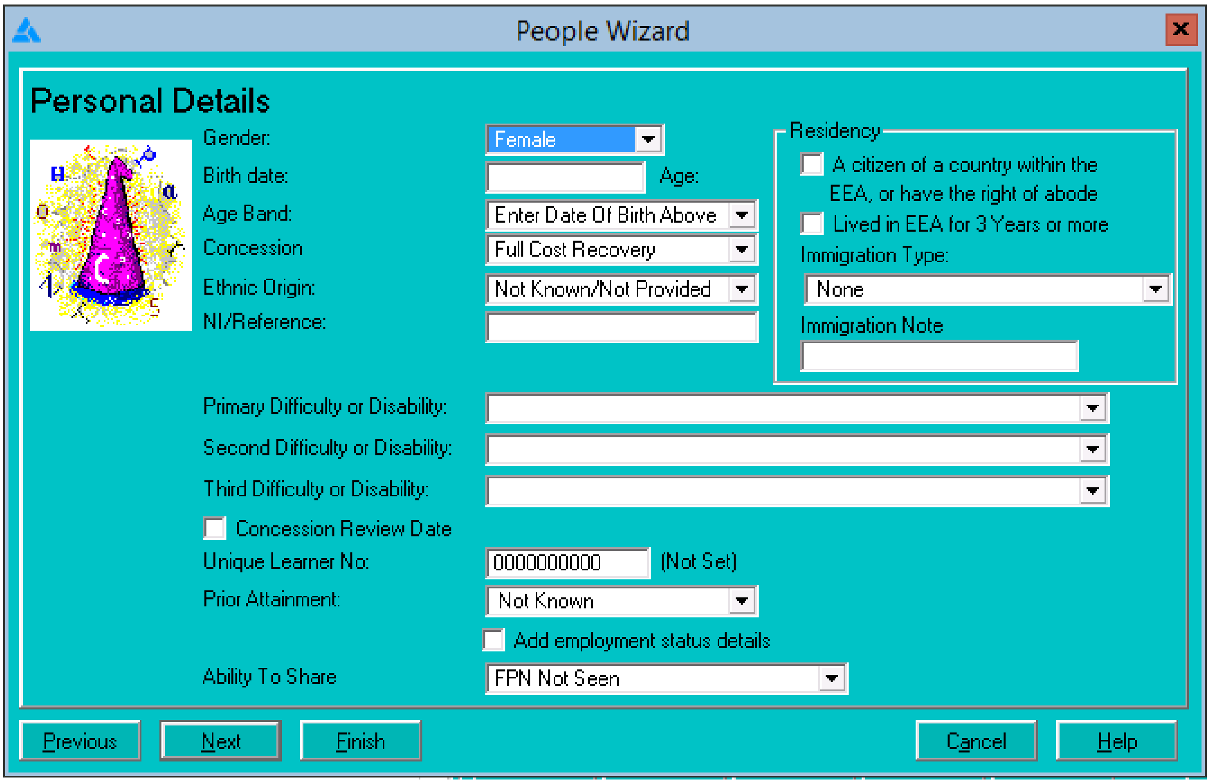
12. Now press **Next**. This takes you to the second page of his record. Leave

represents an organisation unticked (it is useful for booking in groups conferences). Click into **Telephone No. Daytime** and enter 01111 3333333. You can also enter any contact preferences the student has on this page by ticking the relevant boxes.



N.B. Leave the Reference box blank, as TERMS will automatically allocate a student reference number.

13. Click **Next**. The following window will appear:



14. **Gender**. Set this to **male**.

15. Enter the **Birth Date**, this will then automatically populate the **Age** and **Age Band**.

16. If you click the down arrow under **concession** you will see a list of available concessions. It happens that Mr Bloggs is a full fee payer, so change the **concession** band to **Full Fee**.

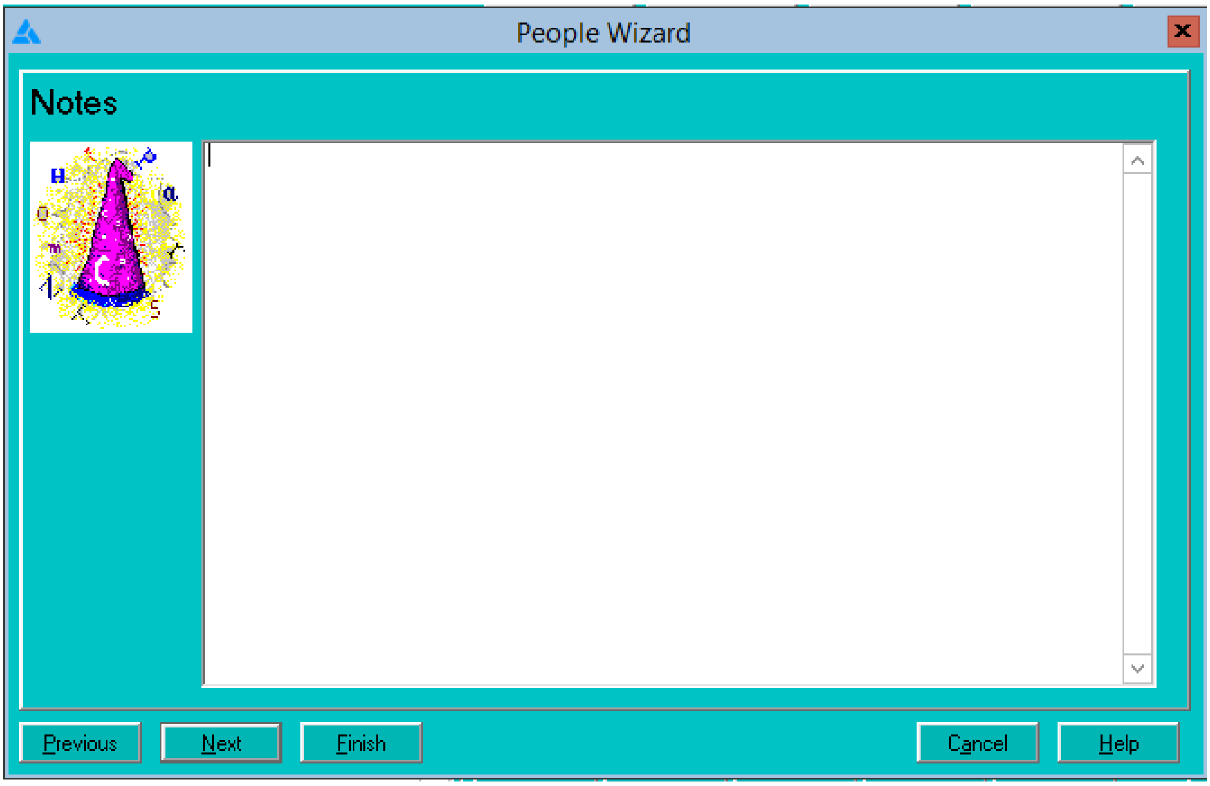
    Important N.B: Concession bands can be changed both at the point of registration and later on.

17. Click onto **ethnicity**. By pressing the down arrow you will see a list of available categories. Mr Bloggs is White British

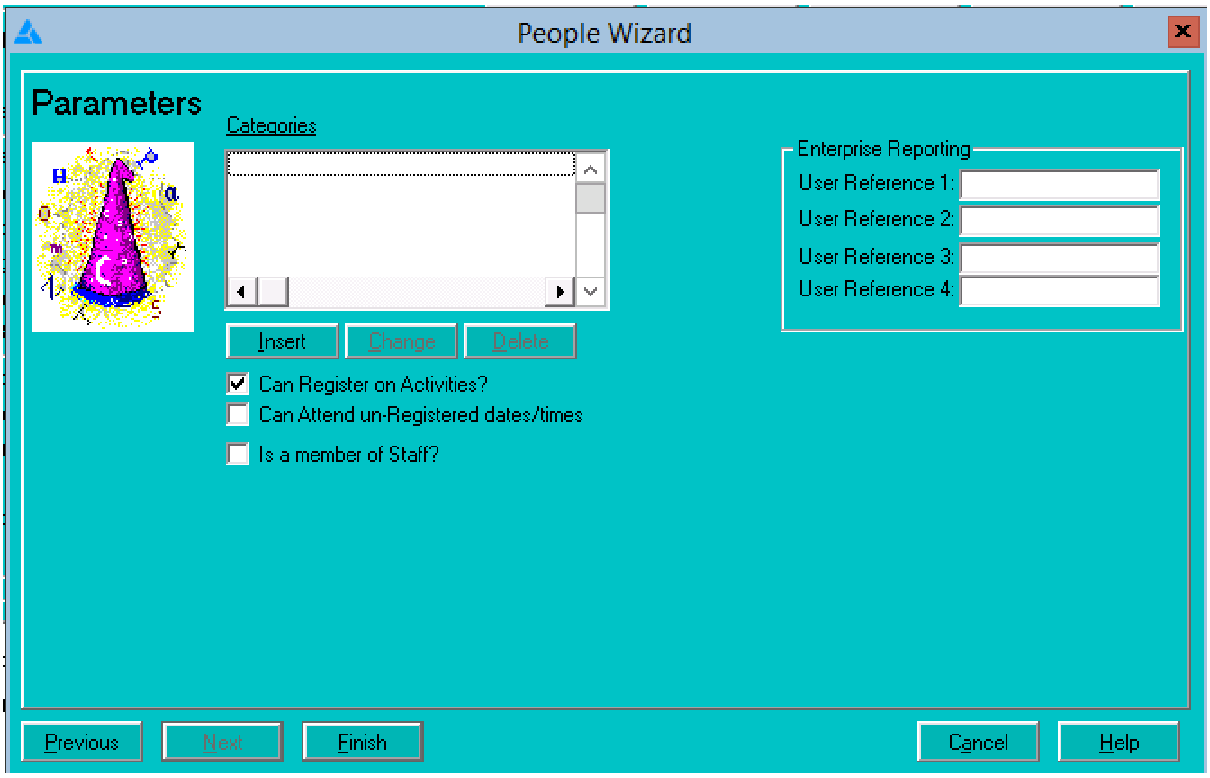
18. Ignore the NI/Reference box for now and click onto **disability**. If you click the down arrow you will see the different categories available. Mr Bloggs is able so you do not need to select a disability.

19. If the **Unique Learner No** is known, enter it here.

20. The **Prior Attainment** box allows you to record the student's previous level of education. Ignore this for now and click **Next**.



21. Notes will appear. This is up to you what goes in here if anything! The information appears under the address details when you are searching for People. Click **Next**.



22. **Parameters**. This is where you can decide to blacklist (see earlier) or it maybe he is also a **member of staff**. For now just ignore and click **Finish**.

23. Mr Bloggs is now on your student list. He is not, however, enrolled on a course yet. That comes later.

2.3 Adding a Member of Staff

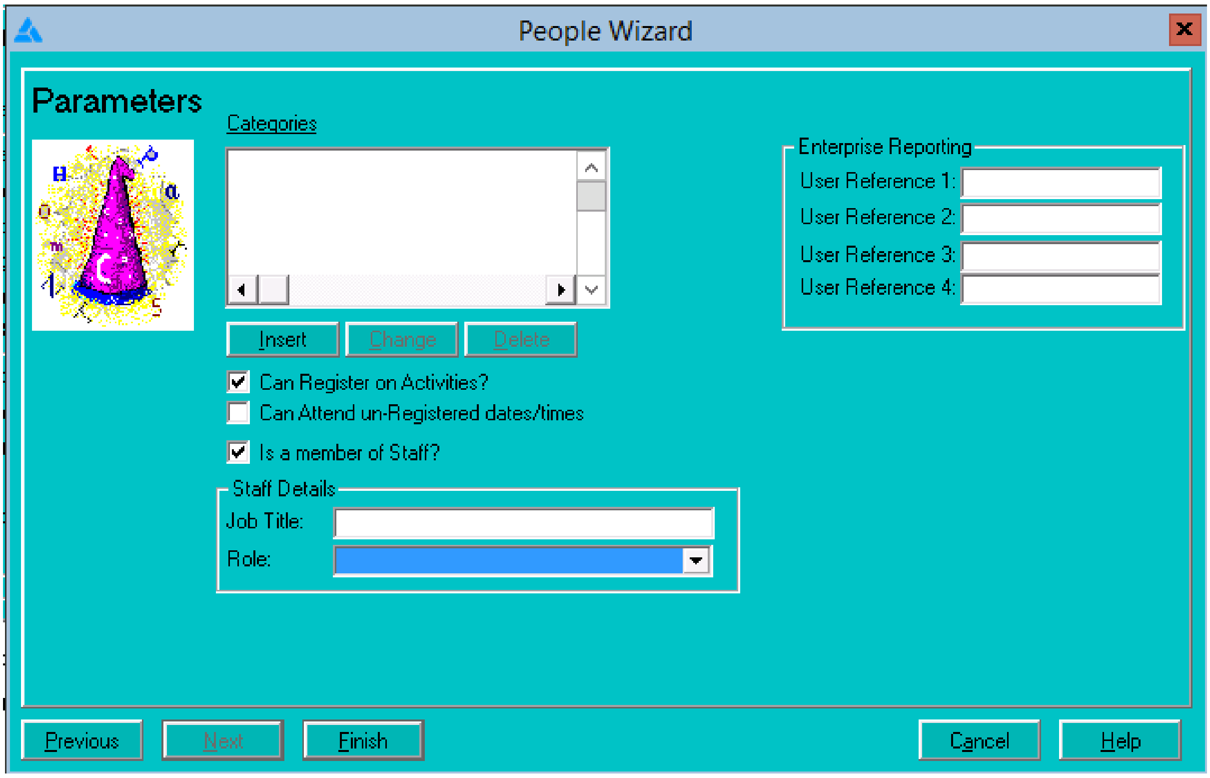
The procedure is practically identical to adding a student .

1. Click **TERMS** on the top menu to get a drop down menu.
2. Highlight and click **People**.
3. On the right hand side of the file card click the button **Insert**.
4. As before a Wizard will start to guide you through adding the new person.
5. On this screen type in your information using upper and lower case (if you use all capitals it will not look correct when doing mail merge). The postcode must also be in the correct box with a space in the middle i.e. CM1 1LD.
6. Once you have entered the details press **Next** to move onto the next screen
7. Leave **Represents an Organisation** *unticked*
8. Enter the Staff contact Telephone numbers
9. Select an area code for the person
10. Put the Payroll number of the member of staff into the **Ref** entry. If you do not know the Payroll number then leave the Ref blank and TERMS will generate a reference for the person automatically - you can amend it later, once you learn the Payroll number.
11. Press ***Next*** to move onto the next page.
12. Select a **Gender** from the drop list
13. Enter the person's **Birth Date**
14. An **Age Band** will be automatically selected by TERMS, select another from the drop list if required.
15. You can normally ignore the **Concession** for members of Staff.
16. Select the person's **Ethnic Origin** from the drop-list
17. Enter any required National Insurance or Reference number in **NI/Reference**.
18. Select the person's **Disability** from the drop-list.
19. Press **Next** to move onto the next page.

20. Enter any notes you wish to record about the person and press **Next.**

21. The list shows all of the categories for the person/organisation. You can add as many categories as required, e.g 'Part Time Staff', 'Vegan', etc.

22. Click **Is a member of Staff** to make this person a member of Staff. This *must* have a tick next to it! A further **Staff Details** section will appear and you may then enter the **Job Title** and select a **Role** from the drop down menu.



23. Now press **Finish** to save the person's details.

24. Repeat this process for each member of Staff to be added.

For further detailed information refer to the TERMS Main Manual.

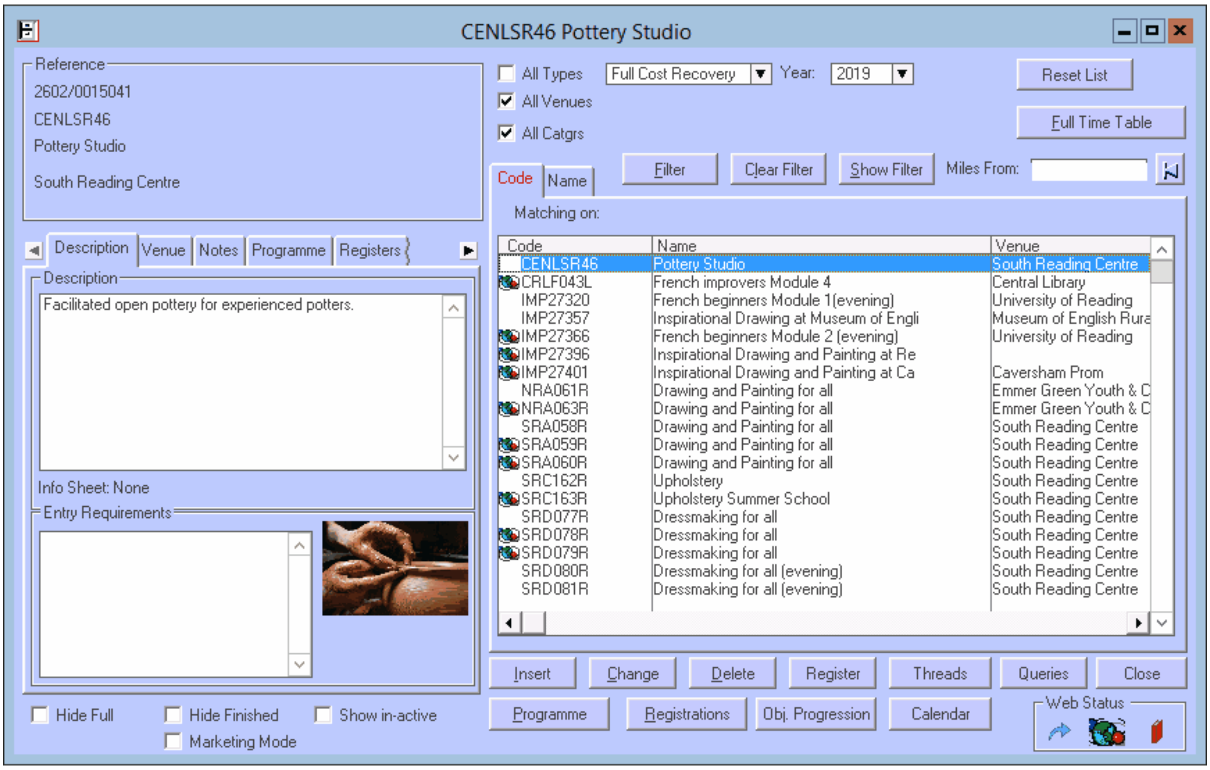
Part III

3 Activities

3.1 Viewing a Course

The **Activities** area is the database for all the courses, projects, conferences, lessons or whatever 'activities' are going on at your organisation or centre. The term is generic. Let's look at how to view a course:

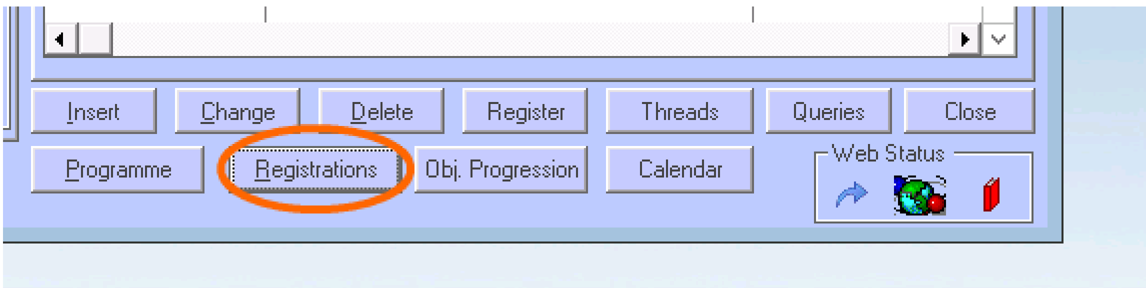
1. Click **Activities** on the **Module** menu bar on the left. Like the people list we have a course list appear.



2. We will assume that you already have some courses on TERMS - use your course details in place of the example details below.

3. Let's have a closer look at a course. For example, you may have CENLSR46 Pottery Sudio, if not, just select a course on the list.

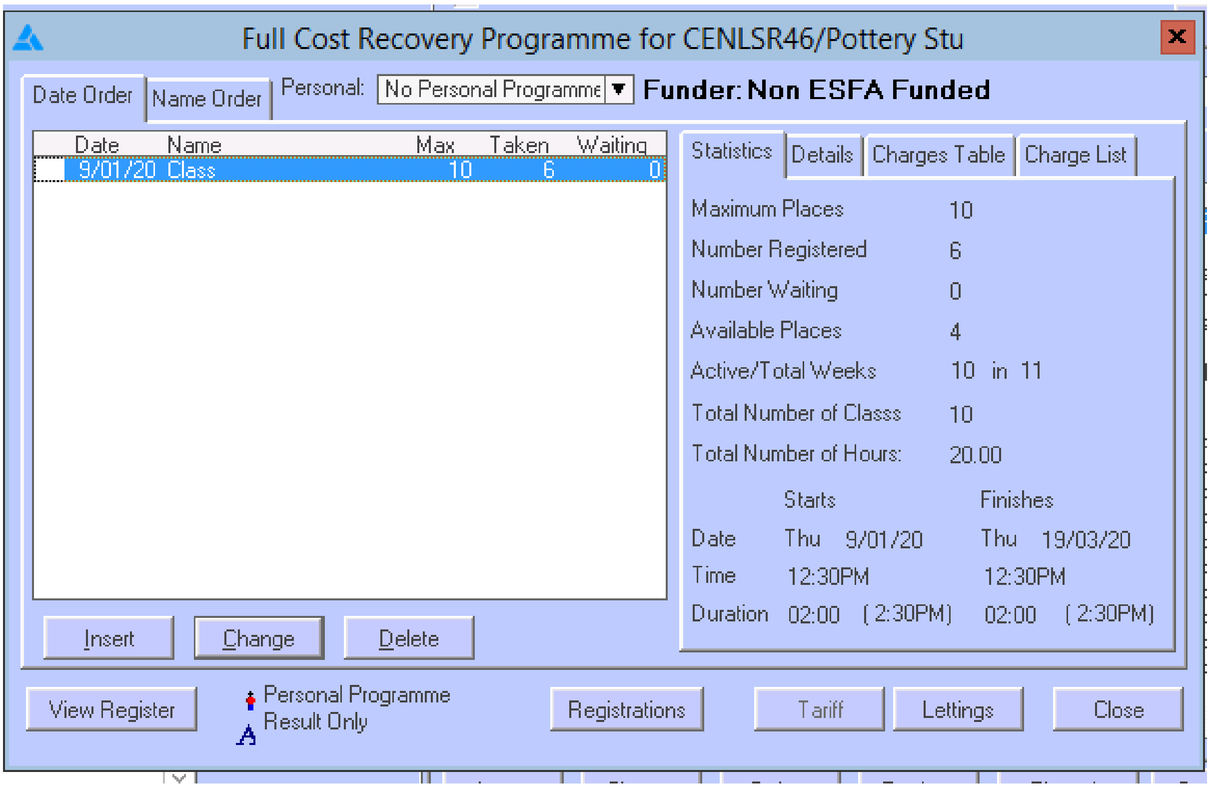
4. Once it is highlighted click on **Registrations**



5. If there are any, you will see any registered students in a list. If you wanted to see more details for a student's registration then you would highlight that registration and use the **Details** button.

6. Try browsing registrations for other courses on your database.

7. To browse more information about a course choose a course. Click **programme** button at the bottom of the main **Activities** window. This screen tells you how many enrolled etc.



8. Press **Close** to escape this and return to the **Activities** Window.

3.2 Adding a Course

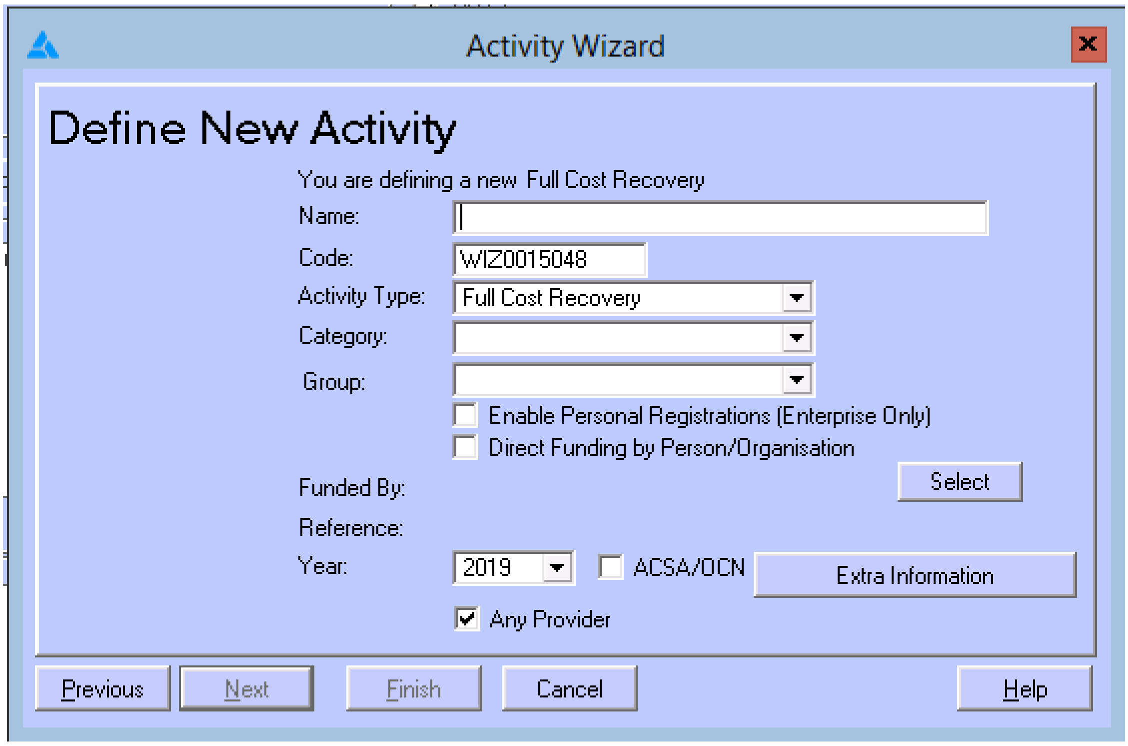
1. Select **Activities** from the **Modules** menu on the left of the screen

2. On the right hand side of the file card click the button **Insert**. (Note if the 'All Types' box is ticked you will get a **Select Activity Type** window will pop up, either select the activity type or close the window and un tick the box)

3. A message will appear asking you if you wish to copy details over from a previous activity. (This is useful if you are copying over courses that are very similar from year to year). If you are not doing this then click the **No** button. A wizard will appear to help you.

4. An **Introduction** Window will appear so click **Next** again.

5. The **Define New Activity** Window will appear.



Type in the name of the course. You may use upper or lower case.

6. **Tab** down to bring you to code.

7. Add your code reference. **Tab** down

8. **Activity Type** is where you define if it is a course or exam etc. **Tab** down.

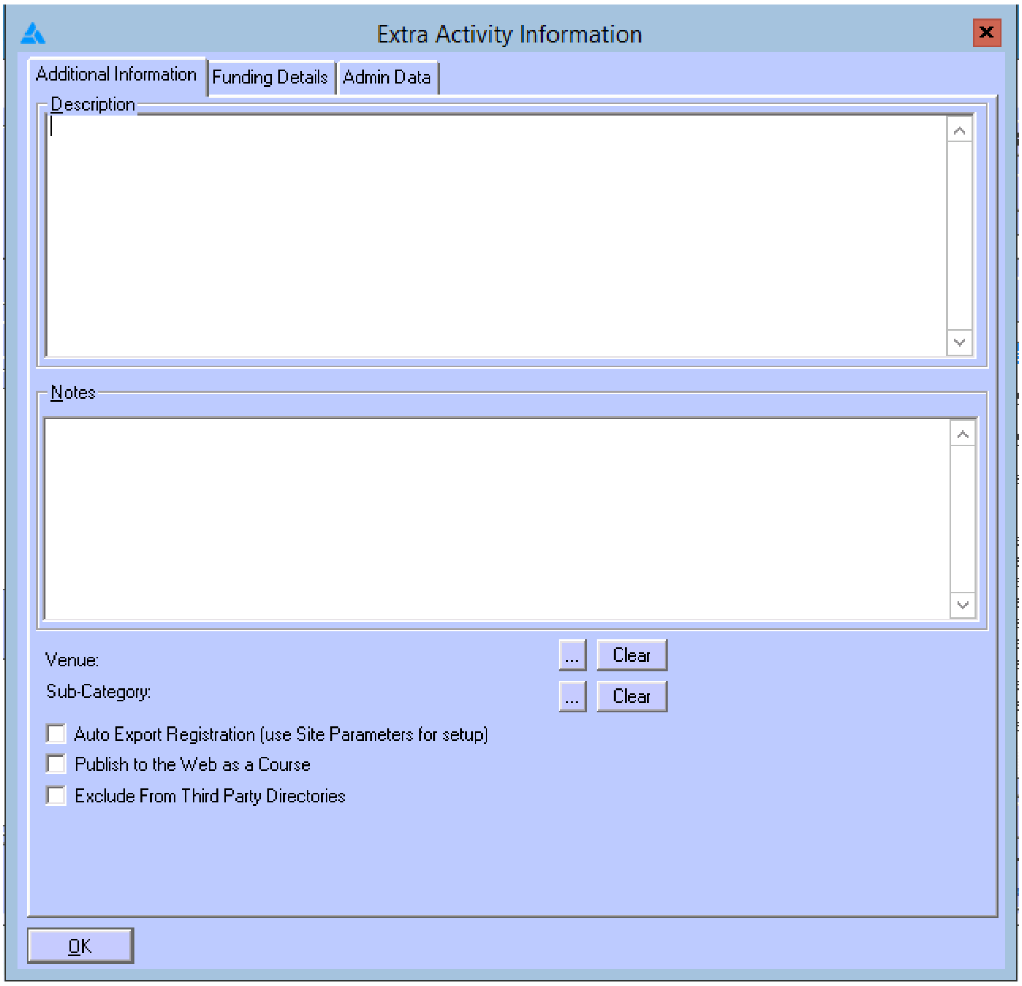
9. In **Category** elect the category most suitable to the course.

10. The **Direct Funding** box can be ticked if the activity is directly funded by an organisation e.g. a closed course. Leave it un-ticked for normal courses.

11. If you wish to identify your funding press the **Select** button. If not, ignore it.

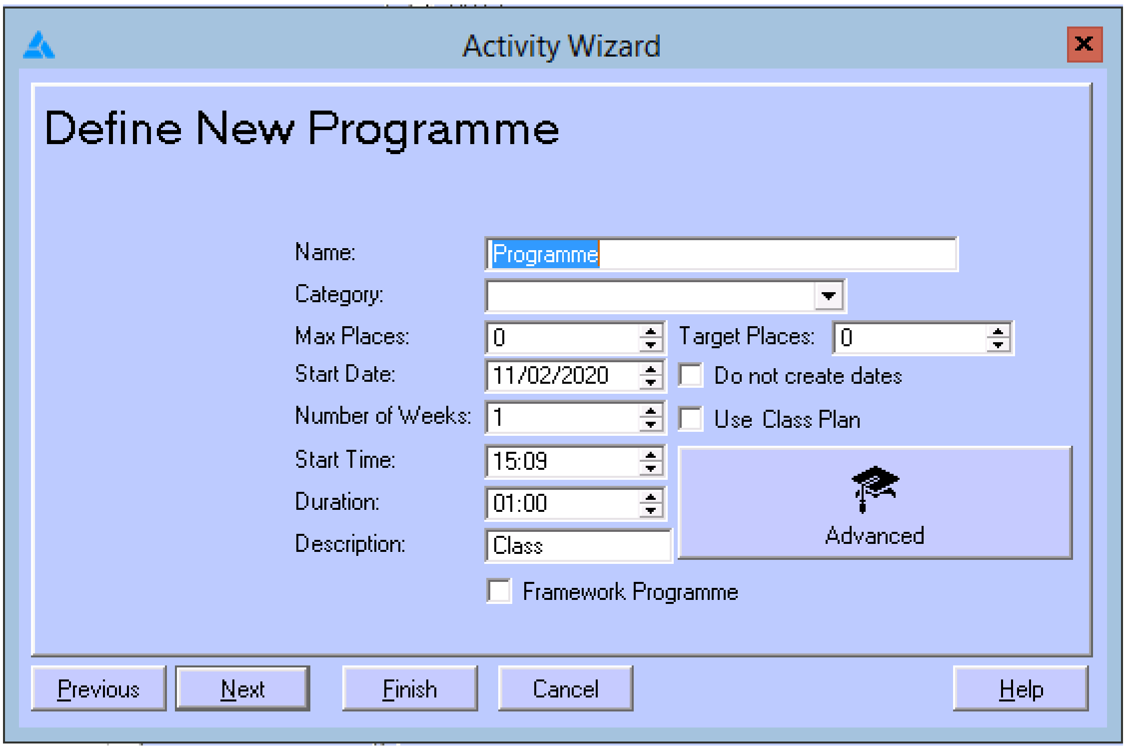
12. Check you have the correct year on screen (remember also when searching for courses that you are looking at the correct year).

13. Select **Extra Information**. Here is where you may add your course description and any other notes.



Having entered these details (including extra funding details - which use TERMS defaults if left blank) click **OK**. These details will appear in the main **Activities** Window when a course is selected. Select **Next** button.

14. **Define New Session** will appear.



This section is for defining when the course will run. If your course has two enrollments in the year (e.g. it is split into two halves in the year) then you require two programmes, one for each half. Normally, however, you will only require one.

15. **Tab** down to **Category**. Normally ignore this.

16. **Tab** down to **Max Places**. This is the maximum number of people allowed on the course.

17. Tab to the next field, **Target**. This is your *ideal* number of people on the course.

18. The next field, **Start Date**, is the first day of the course.

19. Now **Tab** to **Number of Weeks**. This is the number of weeks over which the programme occurs. For one week and weekend courses the number of weeks will be one. TERMS will assume that the session will take place at the same time once each week. If you have more than one lesson in a week you may use your lesson plan. Tick **Use Class Plan**. The lesson plan will appear when you click **Next**, otherwise go to step 21.

    The **Advanced** button can be skipped. It is designed to allow you to add extra information about a course, such as a description of a location and change in defaults for the course (such as holidays).

20. Click **Load Standard Plan**. A list of plans will appear if they have been set up on your copy of TERMS (Ignore this if your centre does not require them or has not had them set up). Select the correct one for the course and it will fill in the details.

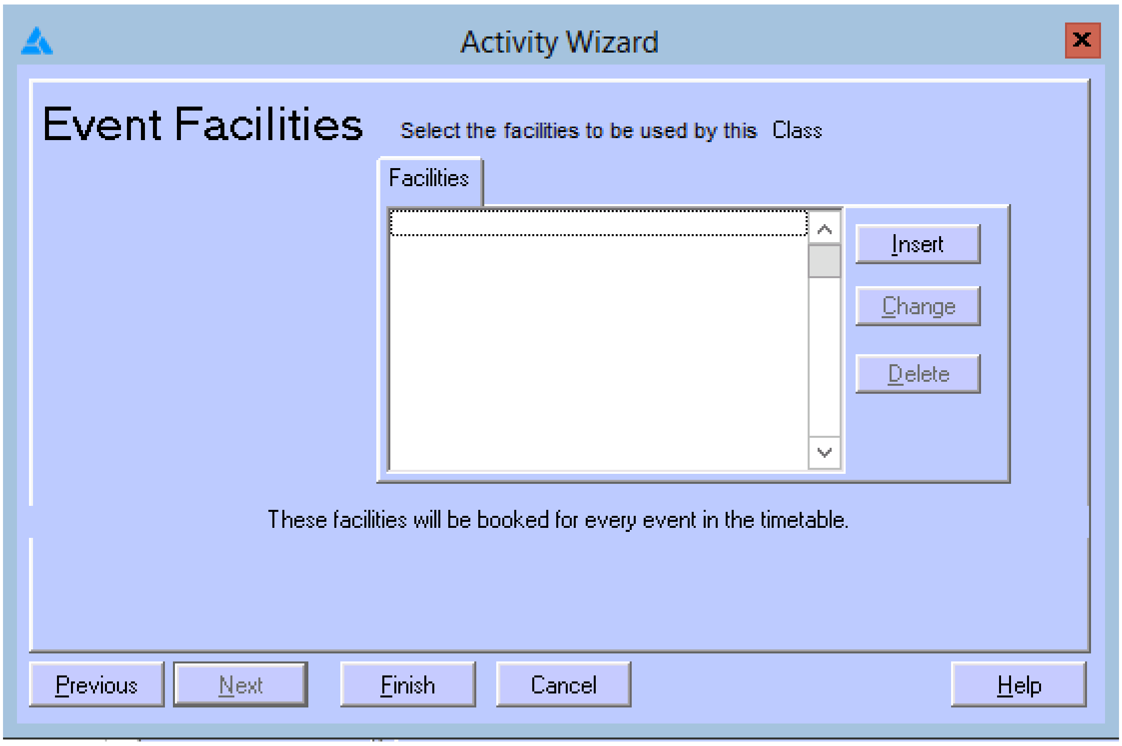
21. Click **Next** for the **Charges** screen where the charge rates are set up.

22. Click **Load Standard Charge List.** A **Charge Category** list will appear. Select the correct one for your course and it will fill in all the possible charges for this course. These can be amended if need be. The Registration Base Rate will be used by TERMS if it cannot find an applicable fee in charge list. The Attendance Base Rate field can generally be ignored. Press **Next**.

23. The **Add Staff for Session** screen will appear.

You may wish to add the member of staff here. Press **Insert** and select the appropriate person from the list (the whole list of people will appear with a tick next to available staff). Fill in the next window about **Work Details** as necessary. Press **Next**.

24. The **Event Facilities** will appear.



This means you can allocate equipment (eg projector, video, television and rooms, etc) to your specific course if desired (*You will not be able to do this if your Centre does not require this facility or it has not yet been set up*).

Press **Finish**. A message will appear asking you if you wish to add another programme or timetable to the course. This refers you back to **Define New Session** at Step 14. If you only allow one period where students may register for the course click **No**, otherwise click **Yes** and go back to step 14.

3.3 Adding a Project

These notes are intended to be read in conjunction with the Adding a Course section as the procedure is nearly identical. A Project is used for Youth-work timetabling only.

1. Click **TERMS** on the top menu to get a drop down menu.

2. Highlight and click **Activities**.

3. On the right hand side of the file card click the button **Insert**.

4. A message will appear asking you if you wish to copy details over from a previous activity. (This is useful if you are copying over Projects that are very similar from year to year). If you are not doing this then click the **No** button. A wizard will appear to help you. Click the **Next** button when the **Introduction** window appears.

5. Next **Define New Activity**. Type in the name of the Project. You may use upper or lower case.

6. **Tab** down to bring you to code.

7. Add your code reference. **Tab** down

8. **Activity Type** is where you define that it is a Project. **Tab** down.

9. In **Category** select the category most suitable to the Project.

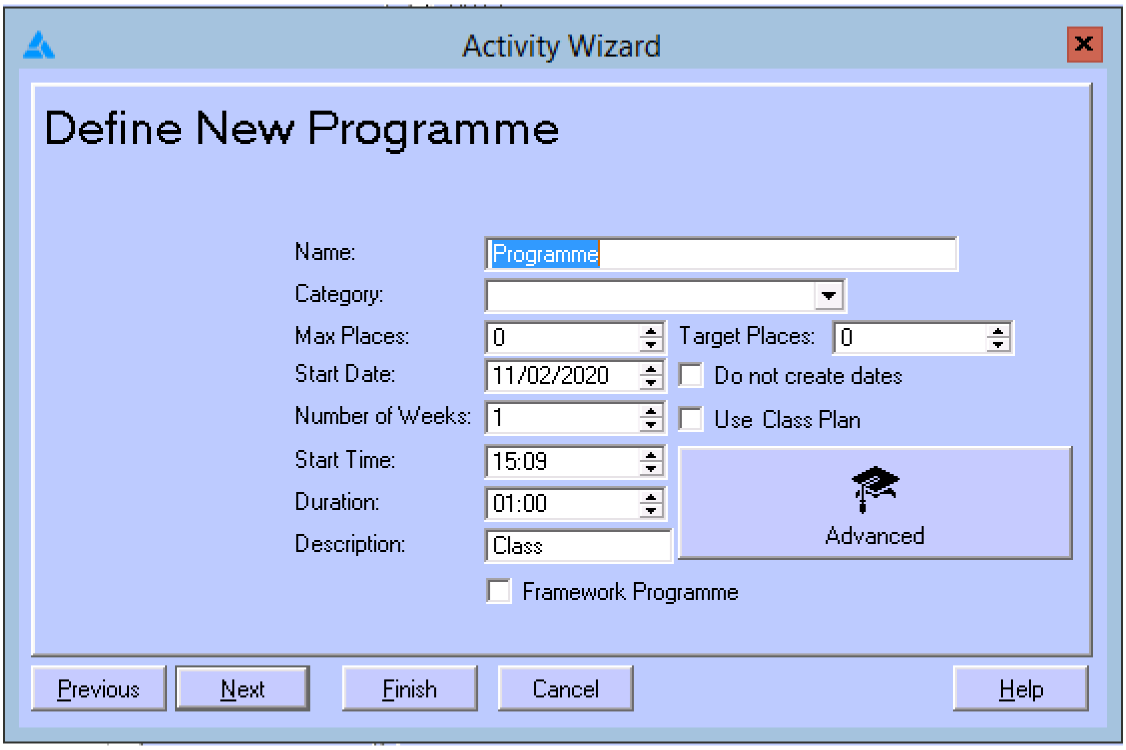
10. The **Direct Funding** box can be ticked if the activity is directly funded by an outside organisation. Leave it unticked for normal Projects.

11. If you wish to identify your funding press the **select** button. If not ignore it.

12. Check you have the correct year on screen.

13. Select **Extra Information**. Here is where you may add your Project description and any other notes.

14. Select **Next** button. The **Define New Programme** window will appear.



This section is for defining the Project timetable. You will normally add several Programmes, one for each type of club or activity ran within the Project. At this stage you are only creating the timetable for one Programme.

15. Normally ignore **Category**.

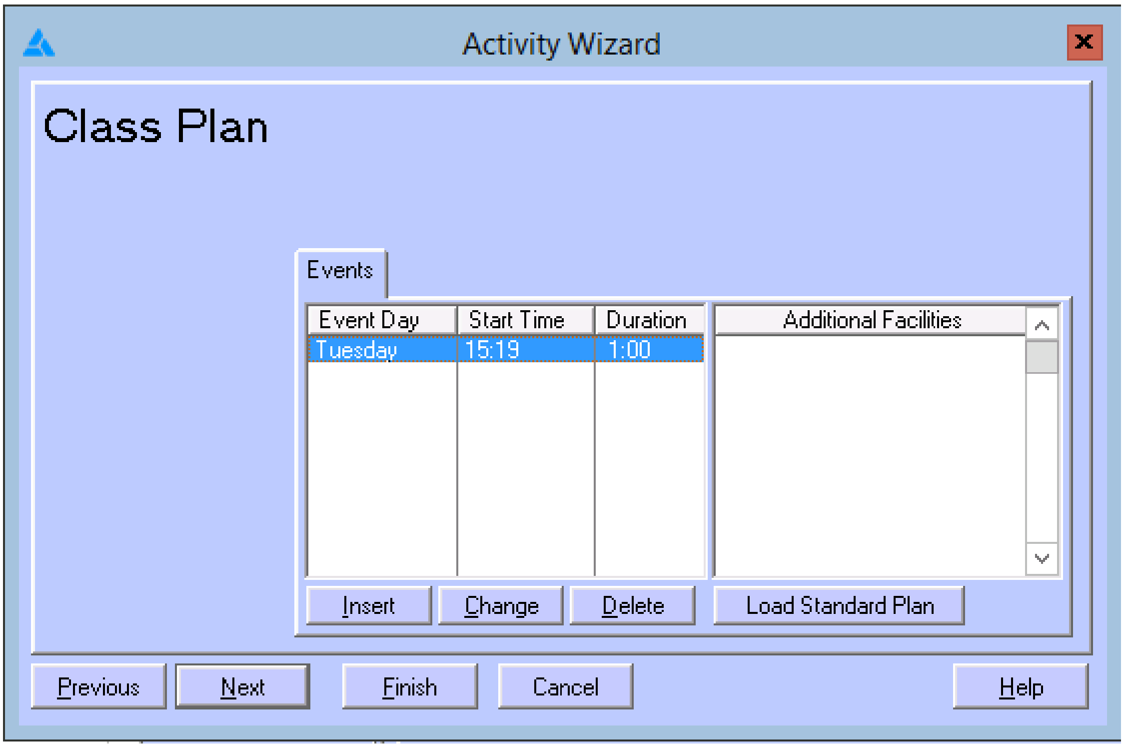
16. **Max Places** is the maximum number of people allowed on the Project.

17. **Target** is your ideal number of people on the Project.

18. **Start Date** is the first day of the Project.

19. **Number of Weeks** is the number of weeks the programme occurs.

20. For Programmes with more than one session per week you might use a pre-defined Lesson Plan. Tick **Use Lesson Plan**. The session plan will appear when you click **Next**.



21. Click **Load Standard Plan**. A list of plans will appear. Select the correct on for the Project and it will fill in the details.

22. Click **Next** for the **charges screen** where the charge rates are set up. Normally you will not be charging against the Project. Delete any charges that may automatically appear. Press **Next**.

23. The staff screen will appear next. You may wish to add the members of staff here in the same manner as adding staff to a course. Press **Next**.

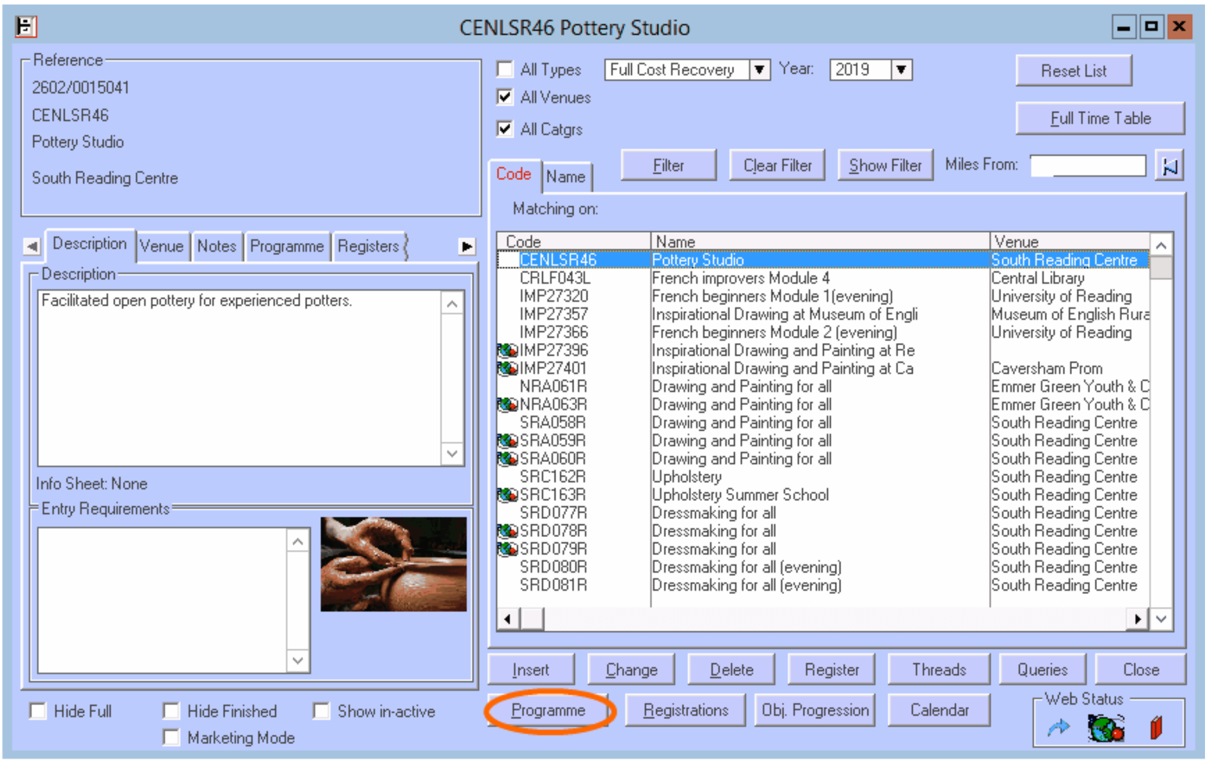
24. Next **Book Facilities**. This means you can allocate equipment etc to your specific Project as with allocating equipment, rooms etc to a course. Press **Finish**.

25. A message will appear asking you if you wish to add another programme. This refers back to **Define New Programme**. Repeat until you have completed the Project details.

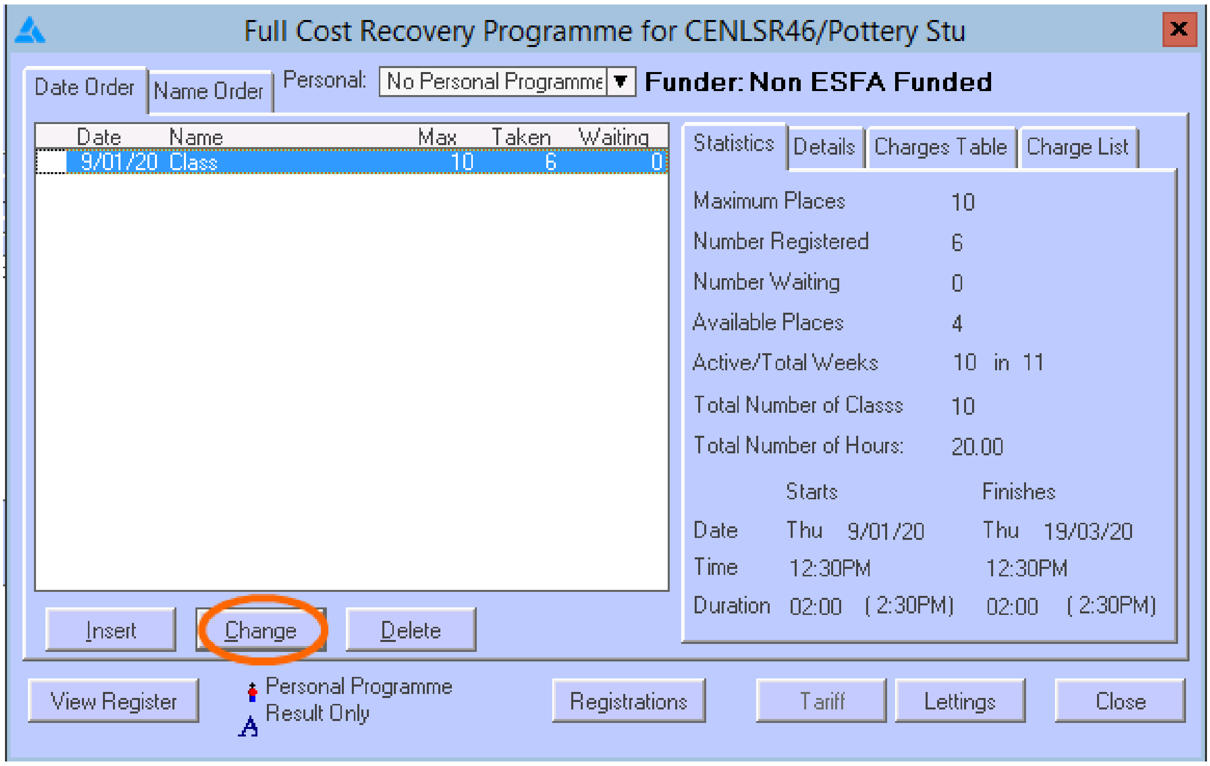
For further detailed information refer to the TERMS main manual.

3.4 Looking at the Timetable

1. In the main **Activities** window select the course you wish to view and click **Programme**



2. Then click on **Change**



3. Select the **Time Table** tab to view the time table

Part IV

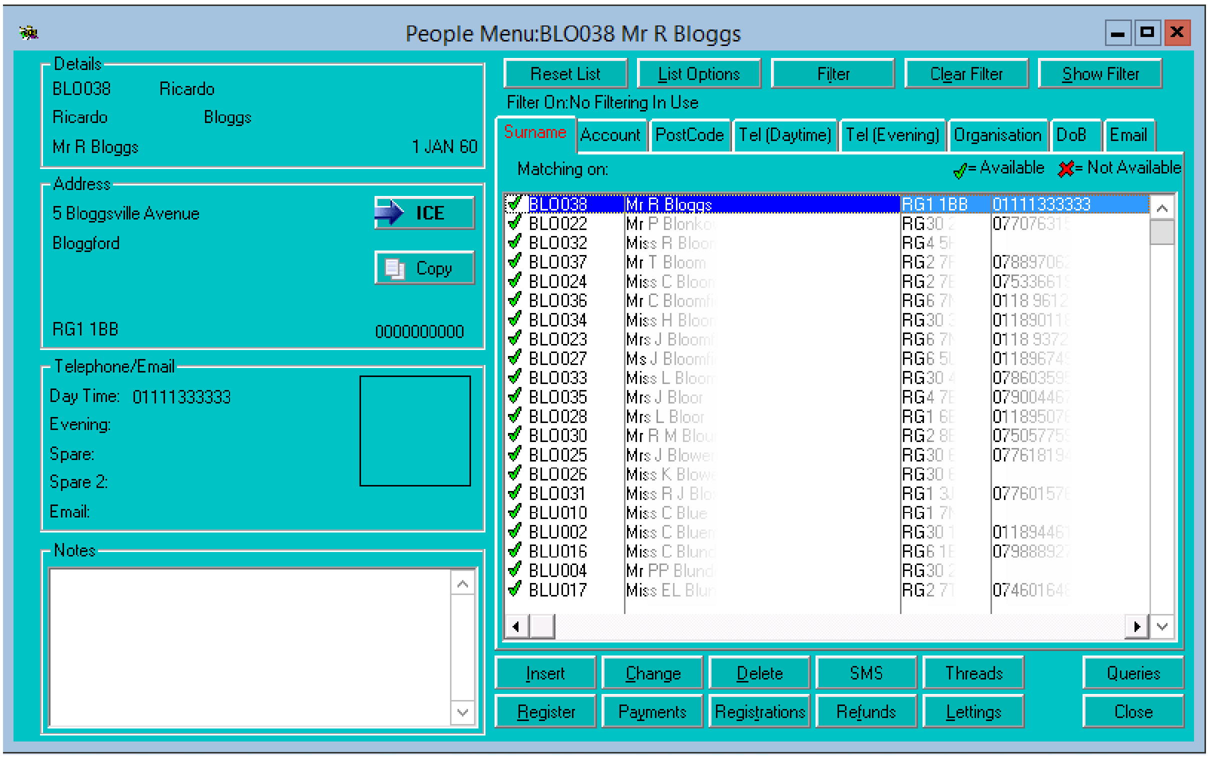
4 Registrations

4.1 Registering a Student onto a Course

Note: We are using the example person called Mr R Bloggs and example course information. You should use real information on your TERMS system.

1. For this example go into the **People** section to get Mr Bloggs, who we are going to register onto a course.

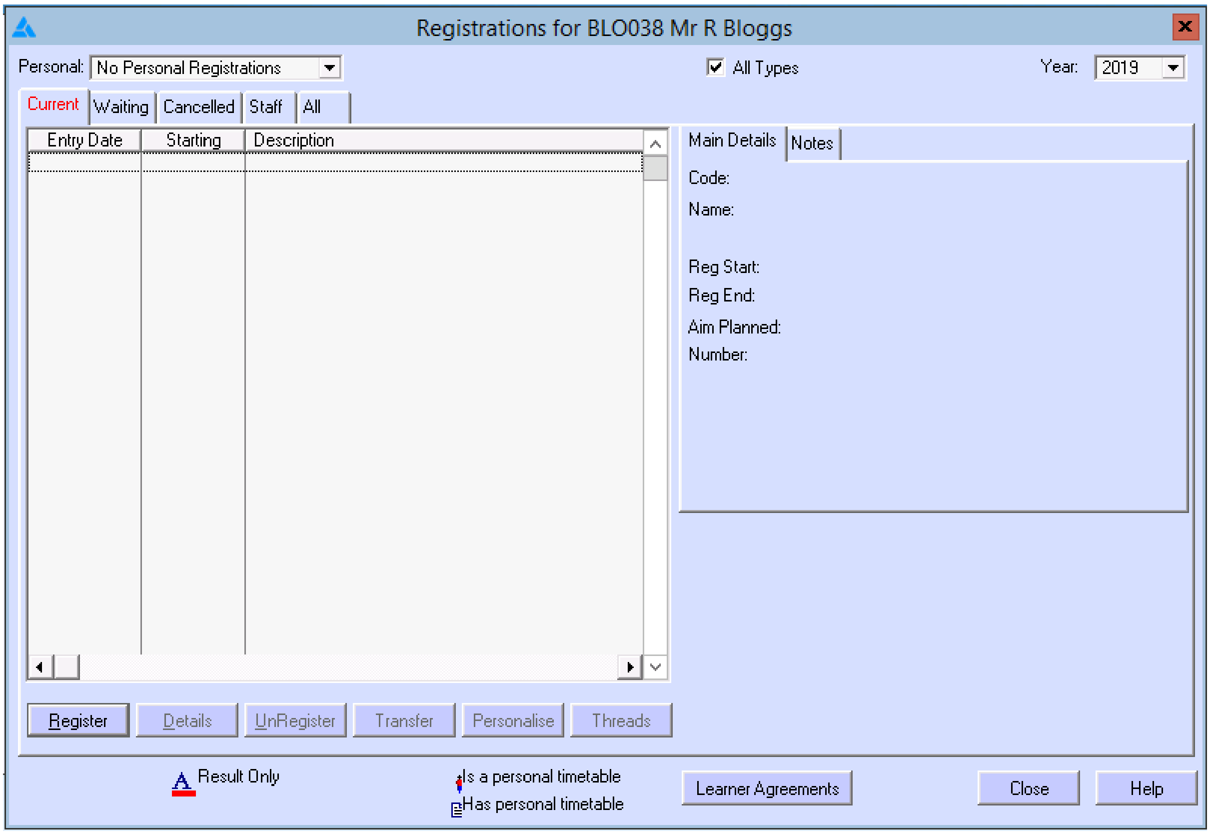
2. First we find Mr Bloggs on the student list. (Have you pressed the reset list button?)



3. After searching he is now highlighted in blue. Mr Bloggs wishes to enrol on a course in Pottery.

4. First you might want to check to see what he is already enrolled on. Keeping his record still highlighted go to the bottom of your screen and click **Registrations**.

5. A new screen will appear:

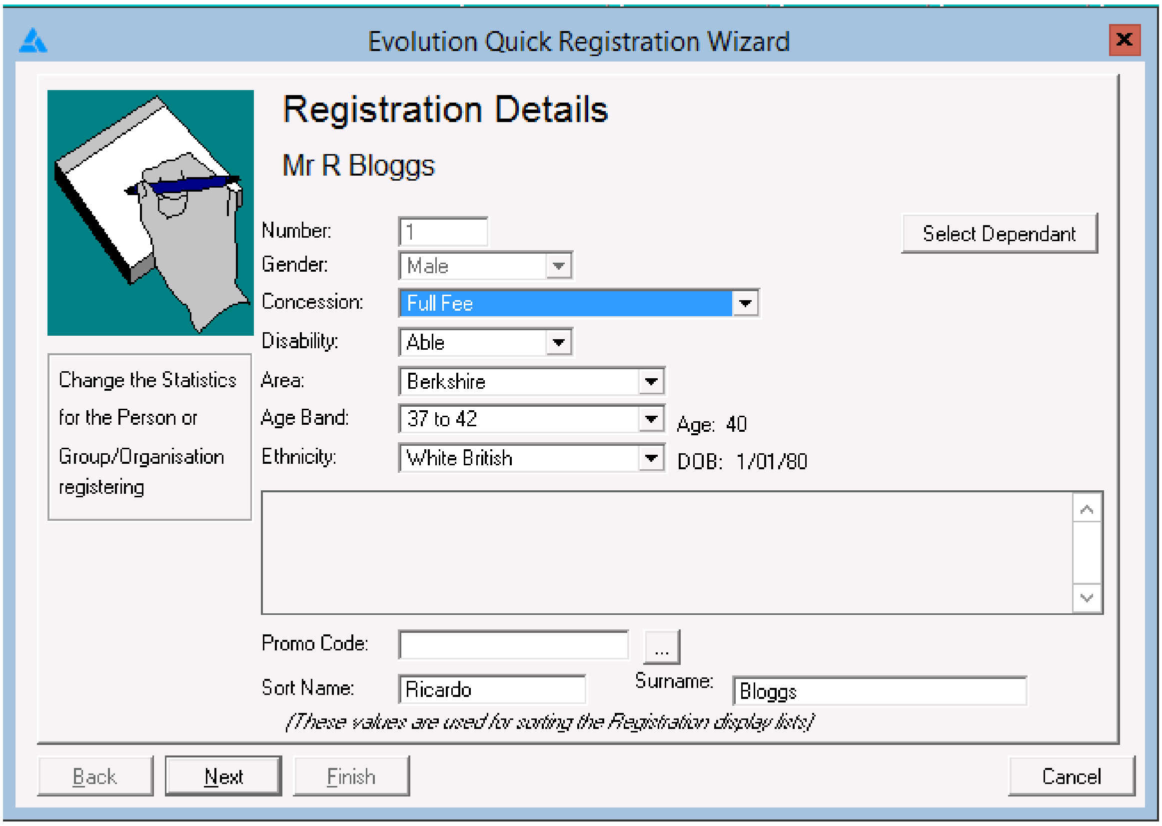


He is not enrolled on any courses yet. *(By clicking the other tabs ie: **Waiting**, **cancelled** you can find out more information).*

6. Right, let's enrol him. Click **Register**.

4.2 Registration Details

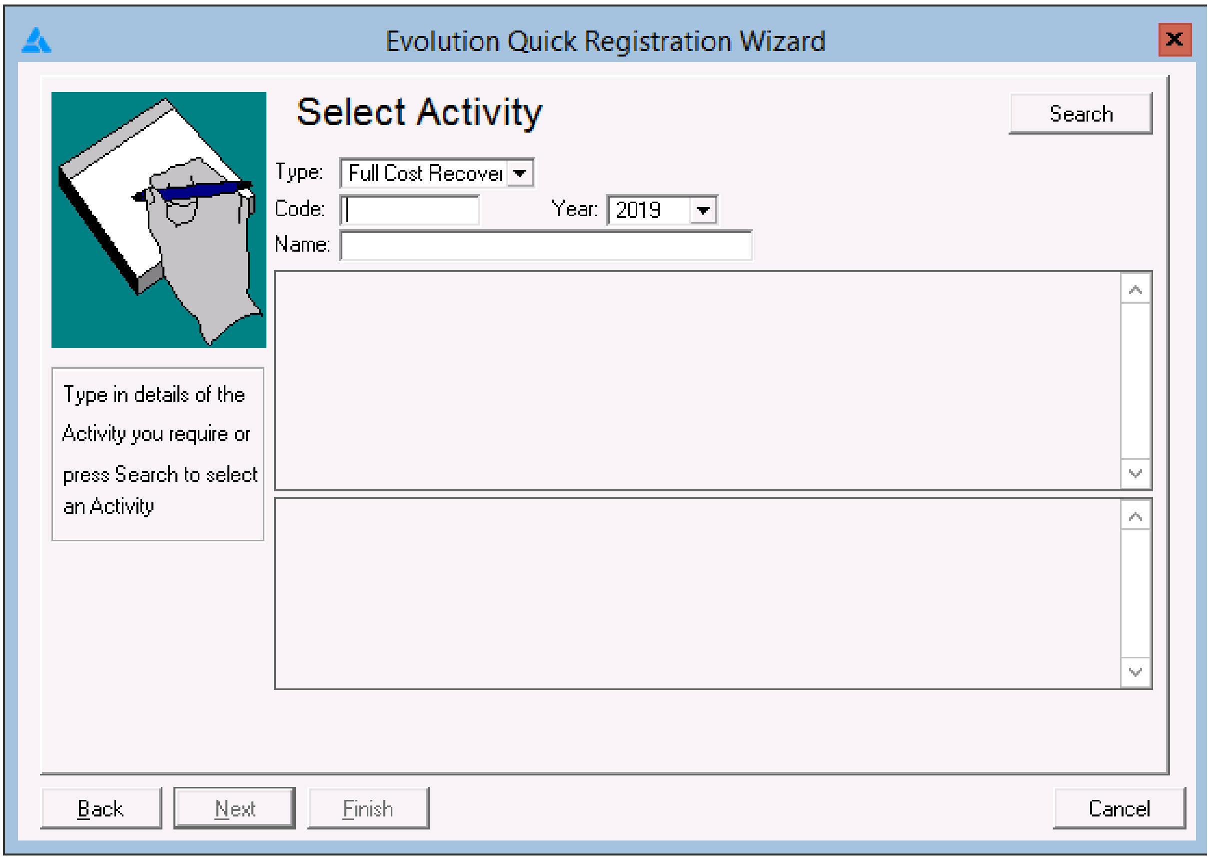
8. Mr Blogg's record appears:



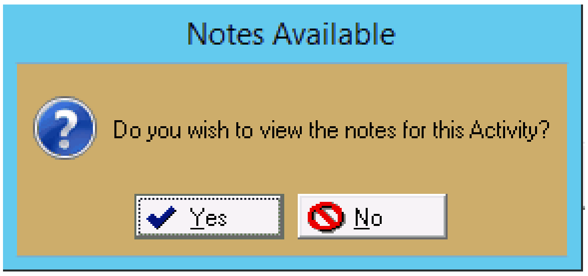
He may have changed e.g. his disability or his concession. This is where you would change or check his details. Let's say they are correct. Click **Next**.

4.3 Select the Activity

9. **Select Activity** is for you to enrol him on a specific course. If you know the course code you can enter it here (If you can't remember the course code skip down to the title and type in the written title. Even if you can't remember the full title TERMS will search the records for you if you type in part of the title. E.g. Pottery). You may also click on Search to search through all courses of the type selected.



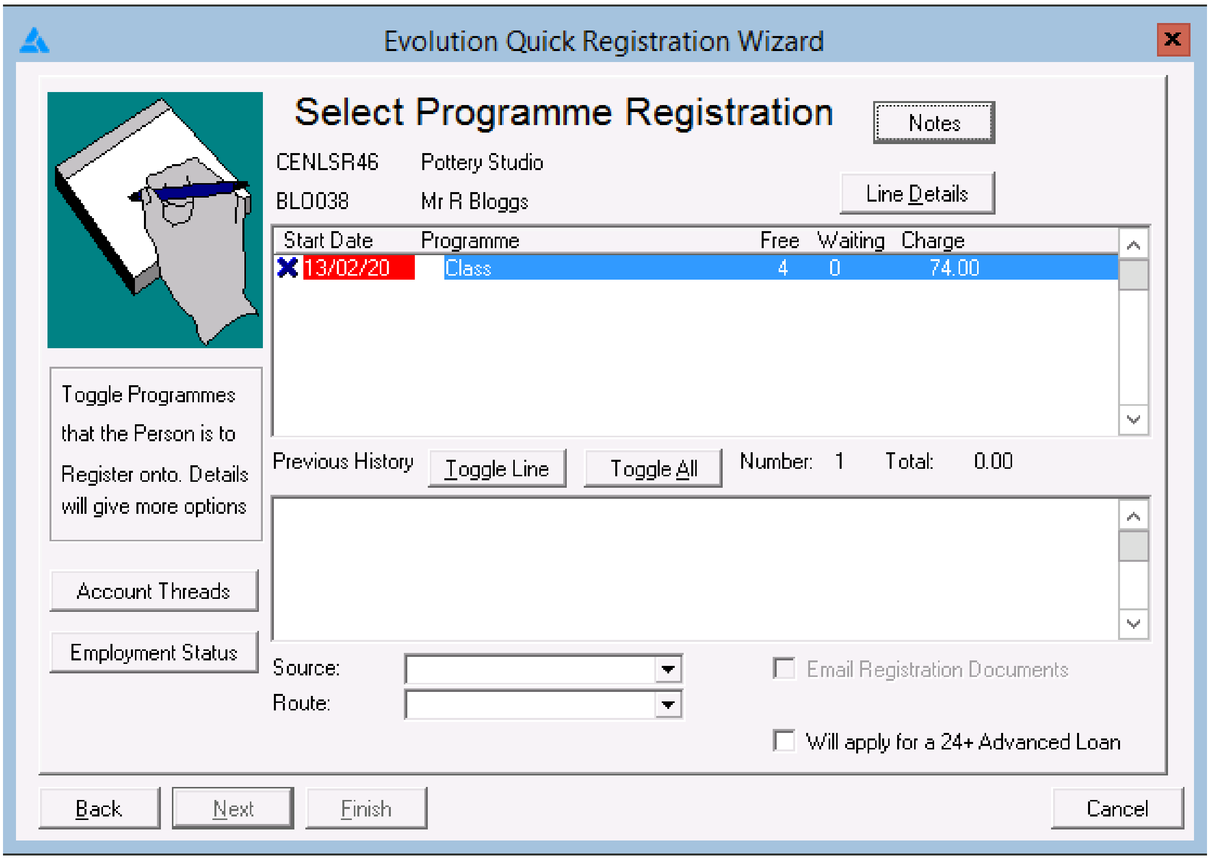
10. After confirmation with Mr Bloggs that this is the course for him Click **Next.** (The following window may appear if notes have been added to the course details.)



11. The computer is asking you if you want to view the notes. Click **Yes**. Click **OK** to close.

4.4 Select Programme Registration

12. The following screen shows us the start date, how many places are free and the charge.



13. Note there is still a chance to cancel this enrolment if Mr Bloggs changes his mind, by clicking **Cancel**.

14. Mr Bloggs wants to go on the course. You must toggle the line. Click the**Toggle Line** button, and the line will be ticked.

15. Click the **Finish** button. The computer asks if he wants to go on to any more courses. He does. Click **Yes**.

16. His details have appeared again for checking. Click **Next**. This will show the course he is already on. Over type the new course code: A2. Details would come up for 'Advanced Database Systems'.
Click **Next**.

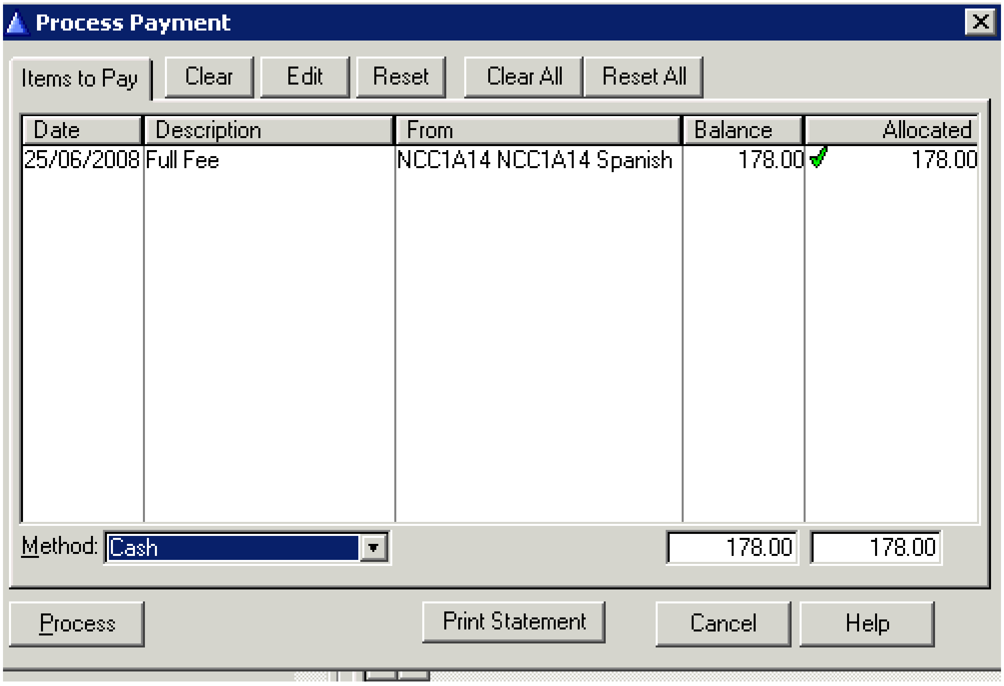
17. Click the **Toggle line** button.

18. Click **Finish**.

19. He doesn't want to go on anymore courses so click **No**.

4.5 Process Payment

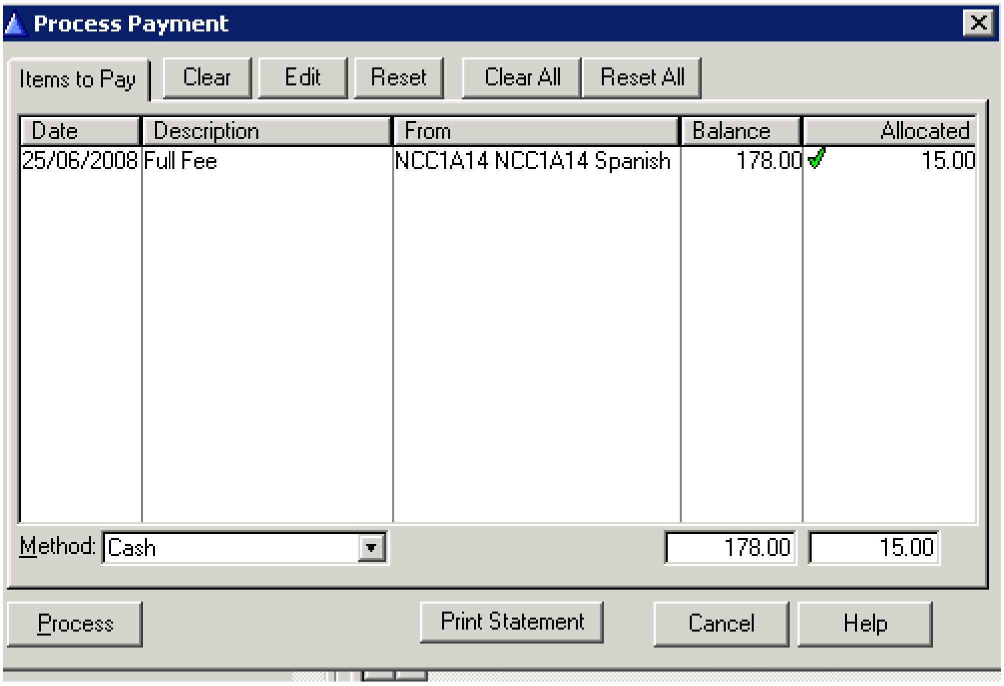
20. The payments will appear. This screen shows all the courses you have enrolled him on and how much he owes.



Mr Bloggs is going to pay a deposit. Highlight course A1 Registration fee and then click **edit**. Now type in £15.

21. Now highlight course Registration fee and then click **edit**. Now type in £15.

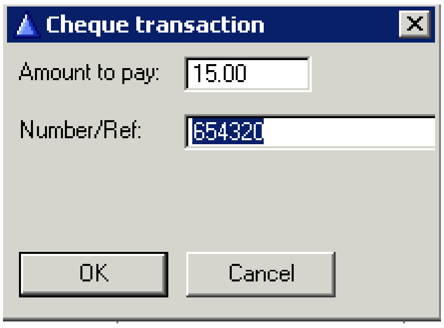
22. The screen now shows the total amount he owes £178 and how much he is going to pay today £15.



23. Mr Bloggs is going to pay by cheque.

24. Click the drop down menu next to the **method** button on the left-hand corner of the screen. Choose **Cheque**. Now click **Process**.

25. A small cheque transaction screen appears. Type in ref 654320 (this is the cheque number).



Click **OK**. In a demonstration, TERMS does not automatically select the payment till. On your system, simply click **Select** on the list of tills displayed.

26. If you are using a demonstration system, TERMS will not automatically select the receipt printer. This means that the first time you use TERMS on a day you will be asked to select a receipt printer. On the blank list just click **Close**. A receipt comes up on the screen. Click **Close**. Mr Bloggs is enrolled.

27. Check this enrolment by going to the top menu bar and clicking **Options**, **Browse Registrations**. The details will appear.

28. Click **Close**.

Part V

5 Accounts

5.1 Banking Reconciliation

1. At the end of the day you want to do a bank reconciliation.
2. Go up to the top menu. Click **TERMS** for your drop down menu again.
3. Click **Accounts**.
4. Click the **Banking Reconciliation** button.
5. Highlight the till drawer required and click **Select**.
6. Now the computer, for accounting reasons, wants to know how much money you have taken today.
7. Just press **OK**.
8. If the banking doesn't balance. Press **OK**.
9. Change the figures to agree by clicking **Change** on the cash and typing in the right amount and clicking **OK**.

11. Now highlight cheques and repeat the process.
12. When it's correct it will file a report which you now see on the screen.

Part VI

6 Reference

6.1 Glossary

Activity
Top level of TERMS timetabling method

Banking
The process of agreeing with TERMS what money should be paid into the bank.

Booking
The terminology used to describe the reservation of a Facility

Event
Third level of TERMS timetabling method used in Activities

Facility
Anything that can be booked for a period of time, e.g. a room or a piece of equipment

People
Any individual or organisation

Programme
Second level of TERMS timetabling method used in Activities

Registration
The method of Registering a Person onto an Activity

TERMS
Total Event and Resource Management System

6.2 Terminology

TERMS for Windows has some different terminology from that used in normal office administration. The following is a list of words that you may find different:

Office Terminology	**TERMS for Windows**
Enrolment	**Registration**

Registering people is the same as enrolling them on courses

Exam Entry	**Registration**

Registering people is the same as entering them for exams

Waiting List	**Registration**

A Registration can be 'Waiting', this does not have any financial consequences

Staff	**People**

People can be marked as being members of staff

Students **People**
People can be marked as able to register, which effectively makes them students

Contacts **People**
People can be marked as being organisations

Courses **Activities**
If a TERMS for Windows Activity allows individual registrations then it is essentially a course. Activity definitions can be used to create Activities of type 'course'

Exams **Activities**
If a TERMS for Windows Activity allows individual registrations and leads to a qualification then it is essentially an exam. Activity definitions can be used to create Activities of type 'exam'

Closed Courses **Activities**
If a TERMS for Windows Activity allows group registrations then it is essentially a course. Activity definitions can be used to create Activities of type 'closed course'

Projects **Activities**
If a TERMS for Windows Activity allows individual or group attendance then it is essentially a project. Activity definitions can be used to create Activities of type 'project'

Session **Programme**
The 'second' level of a Course or Exam has the generic term 'Programme', however you can define your own name and retain the terminology of 'Session' for 'Course' Activities

Series **Programme**
The 'second' level of a Course or Exam has the generic term 'Programme', however you can define your own name and retain the terminology of 'Series' for 'Exam' Activities

Lesson **Event**
The 'third' level of a Course or Exam has the generic term 'Event', however you can define your own name and retain the terminology of 'Lesson' for 'Course' Activities

Paper **Event**
The 'third' level of a Course or Exam has the generic term 'Event', however you can define your own name and retain the terminology of 'Paper' for 'Exam' Activities

Tills **Drawers**
Tills are called Drawers or Till Drawers. Specifically this means a container for money

6.3 Support

If you have a valid support contract then you may use the following support contacts-

TERMS Telephone Support Number:

03303 211707

For e-mail support use:

support@westmarchsystems.co.uk

Our head office postal address is:

West March Systems Ltd.
Suite 4
Carlyle's Court
St Mary's Gate
Carlisle
CA3 8RY

Website:

www.termsevolution.co.uk

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