

TERMS

GENERAL

USER MANUAL



**PINELLAS COUNTY
SCHOOLS**

MIS

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Chapter 1 : Introduction

INTRODUCTION

Welcome to the **TERMS General User Manual**.

This manual is intended for the general use of **all TERMS** systems. The purpose is to guide all **TERMS** users in the general functions such as: Signing on, Signing off and other Panel functions.

TERMS is the acronym for the **TOTAL EDUCATIONAL RESOURCE MANAGEMENT SYSTEM**. The **TERMS** system consists of the Finance system and the Human Resource (HR) system and other related sub-systems. This system was designed for Florida schools and is currently in use by many school districts.

Typographical Conventions

Before beginning to work with the TERMS System, it is important to understand the terminology and typographical conventions used in this document.

CONVENTION	DESCRIPTION
BOLD CAPS	The name of a panel, or data entry field. For example, A. 15 REQUISITION QUERY
<i>Italic text</i>	Keying instructions. For example, Key in <i>PA05</i> . Unless otherwise noted, characters should be keyed exactly as shown.
<KEYBOARD KEY>	The keyboard key to be pressed is enclosed in brackets. For example, <ENTER>
Key	The word "Key" is used in place of the word "Type".

Sign-On Procedures

You will go through several different panels in order to access the TERMS software. The procedures are arranged in the order you sign-on starting with the Central Florida Regional (CFR) main menu.

Initial Menu: CFR Menu

```

08:21:04 Jan 19 Terminal TPI18480
  C e n t r a l   F l o r i d a   R e g i o n a l   D a t a   C e n t e r
NEED > USF Academic Computing Help Line 974-1222(4-1ACC), FAX 974-1790
HELP?> USF Administrative Computing Help Line 974-1236(4-1ADM)
****> PCSB HELP LINE 588-6060 ****
      BE SURE THAT REPORTS OR DISKETTES CONTAINING CONFIDENTIAL ****
      INFORMATION ARE STORED OR DISPOSED OF IN A SECURE MANNER. ****
* CLM030I - INITIAL DISPLAY.

Select ==>

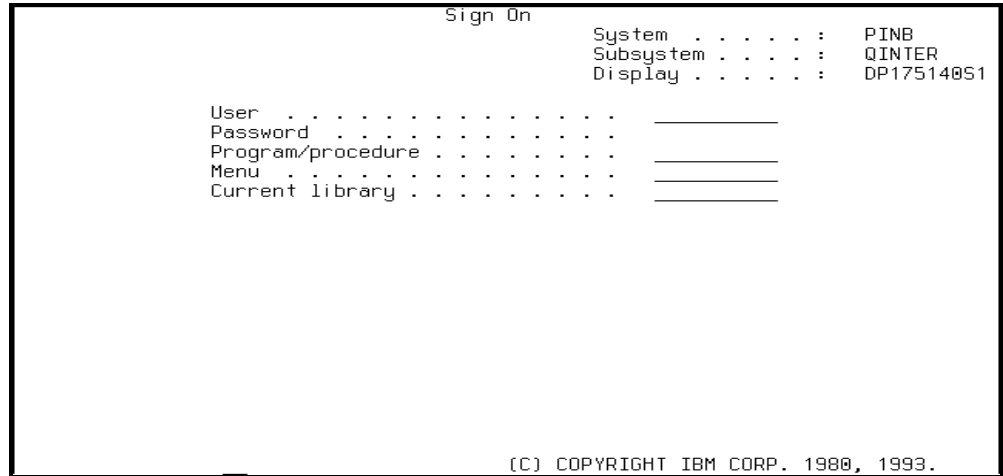
      1 STUDENT - AVAILABLE - PINELLAS COUNTY SCHOOLS STUDENT SYSTEMS
      2 BUSINESS - AVAILABLE - PINELLAS COUNTY SCHOOLS BUSINESS SYSTEMS
      3 PINCICST - AVAILABLE - PINELLAS COUNTY SCHOOLS TEST SYSTEMS
      4 CFRWYL - AVAILABLE - CFRDC WYLBUR, Text edit and submit
      5 CFRTSO - AVA 030/105 - CFRDC Time Sharing Option
      6 CFRVM - AVAILABLE - CFRDC VIRTUAL MACHINE/CMS
      7 PINNEWS - 0800 May 04 -
      E NERMENU - 0800 Oct 26 - NERDC APPLICATIONS MENU
      W NWRMENU - AVAILABLE - DIRECT ACCESS TO THE NWRDC CLMENU

```

TAB> to the **SELECT** field, if your cursor doesn't automatically put you there.

2. Key **PINTERMS** and press <ENTER>.

AS400 Menu



1. Key in your AS/400 User ID.
 - Do not press <ENTER>.
2. <TAB> to **PASSWORD** and key in your secret AS/400 password.
 - For first time users of the system, you will be prompted to change your password.

NOTE: See **Changing Your Password** in this chapter.
 - If you make a mistake keying your password, backspace using the BACKSPACE key to the beginning of the **PASSWORD** field, then rekey your password.

*The AS400 password will be forced by the computer to change every 90 days. The TERMS password is not forced to change, but it may be simpler to keep them the same. See **Changing Your Password** in this chapter.*

- **NOTE:** Make up a six-character system password (alpha and/or numeric) which you will use to sign-on to the AS/400 and to TERMS. DO NOT begin the password with a number and DO NOT key more than six characters.

3. Press <ENTER>.

The TERMS main menu panel should then appear.

TERMS Menu

```

1/24/95          EDUCATIONAL DATA RESOURCES, INC.          8:32:09
                TOTAL EDUCATIONAL RESOURCE MANAGEMENT SYSTEM

TTTTTTTTTTTTT  EEEEEEEEEEE  RRRRRRRRR  MMM      MMM  SSSSSSSSS
TTTTTTTTTTTTT  EEEEEEEEEEE  RRRRRRRRRR  MMMM     MMMM  SSSSSSSSSSS
      TTTT      EEEE          RRRR   RRRR  MMMMM   MMMMM  SSSS   SSSS
      TTTT      EEEE          RRRR   RRRR  MMMMMMMMMMMMMM  SSSS
TTTTT          EEEEEEEEEEE  RRRRRRRRRR  MMMM  MMMM  MMMM  SSSS
TTTTT          EEEEEEEEEEE  RRRRRRRRRR  MMMM  MM  MMMM  SSSS
TTTTT          EEEE          RRRR   RRRR  MMMM     MMMM  SSSS
TTTTT          EEEE          RRRR   RRRR  MMMM     MMMM  SSSS  SSSS
TTTTT          EEEEEEEEEEE  RRRR   RRRR  MMMM     MMMM  SSSSSSSSSSS
TTTTT          EEEEEEEEEEE  RRRR   RRRR  MMMM     MMMM  SSSSSSSSS

-----TO SIGN ON, PLEASE TYPE-----
DISTRICT: 52  CENTER: 5140  YEAR: 95  USERID: DP17  PASSWORD:

----- TYPE THE LETTER OF THE MENU YOU WISH TO USE: █ -----
A. FINANCE      B. HUMAN RESOURCE  C. STUDENT      D. FACILITIES  E. EXTERNAL

NEW PASSWORD:

PF1=HELP 3=EXIT 12=ESCAPE
SIGN ON ACCEPTED.  ENTER REQUEST.          TERML: DP1751
    
```

Your cursor automatically goes to the **PASSWORD** field.

NOTE: The Center and User ID automatically display; however, District users must key in **0000** in the **CENTER:** field.

1. Key in your password and press <ENTER>.
 - For first time users of the system, you are prompted to change your password.

COMPUTER RESPONSE	ACTION
PASSWORD IS SPACES, ENTER NEW PASSWORD	1. Key your new password in the new PASSWORD field and press <ENTER>.
REKEY NEW PASSWORD TO VERIFY CHANGE -OR- PASSWORD IS CHANGED. ENTER REQUEST	1. Re-key your new password and press <ENTER>. 2. Key the letter of the desired menu. You may choose any highlighted

Changing Your Password

NOTE: Make up a six-character system password (alpha and/or numeric) to sign-on both to the AS/400 and to the TERMS system application. DO NOT begin the password with a number and DO NOT key more than six characters. We recommend keeping the AS/400 and TERMS passwords the same.

For the AS400

COMPUTER RESPONSE	ACTION
Password has expired. Password must be changed to continue with sign-on request. Press <ENTER> to change your password.	Press <ENTER>.
Change Password. Password last changed: xx/xx/xx Key choices, press <ENTER>. Current password..... New password..... New password (to verify).....	1. Key your current password in the CURRENR PASSWORD field then press <TAB>. Key your password in NEW PASSWORD field and press <TAB>. Re-key your new password in the NEW PASSWORD field (TO VERIFY) and press <ENTER>.

For TERMS

COMPUTER RESPONSE	ACTION
PLEASE ENTER YOUR PASSWORD	1. Key your OLD password in the PASSWORD field. 2. Key your new password in the NEW PASSWORD field (this field is in the bottom right of the screen).
REKEY NEW PASSWORD TO VERIFY CHANGE	3. Re-key your new password and press <ENTER>.
PASSWORD IS CHANGED. ENTER	If your password verification is not

REQUEST	accepted, repeat steps 1, 2 and 3 until accepted.
---------	---

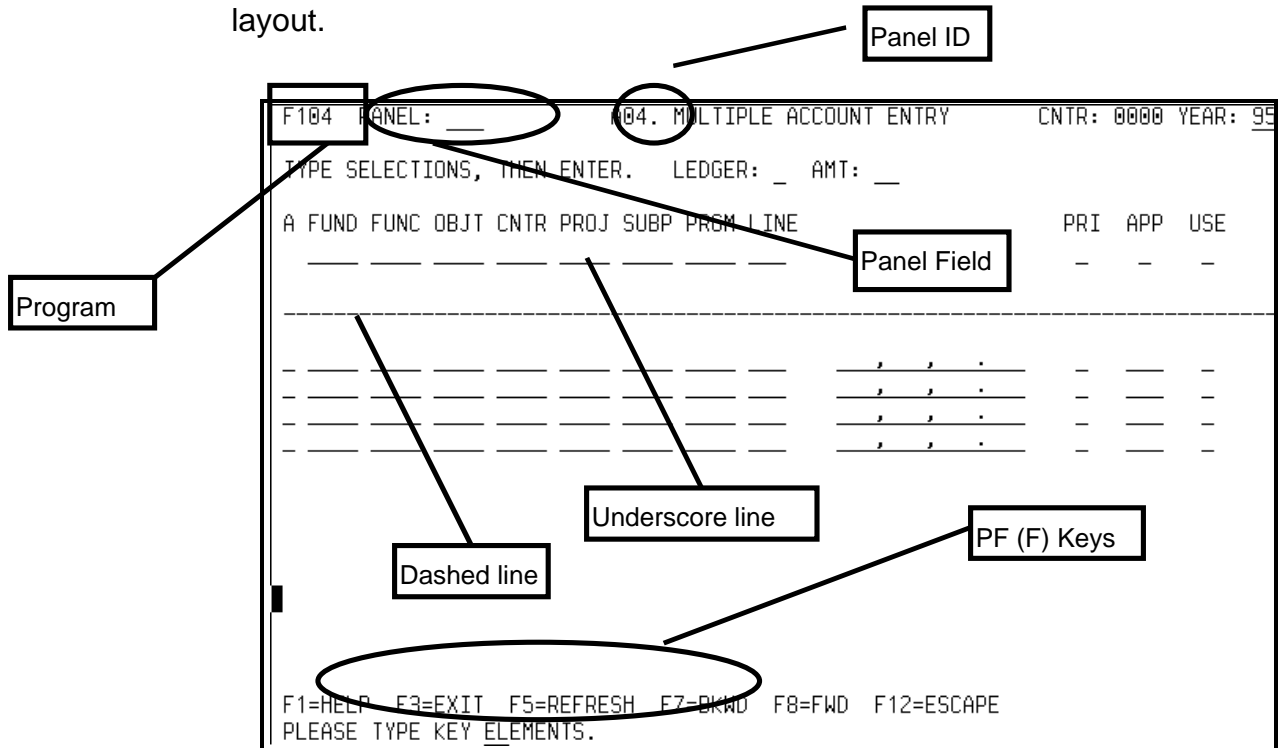
Sign-Off Procedures

1. Press the <PF12> key, until you return to the **AS400 SIGN-ON** panel.
2. Press the <Alt> and System Key <SYS RQ> at the same time.
 - For PC users: Follow your disconnect procedures.
3. Key **LOGOFF** when the blank panel appears and press <ENTER>.

Chapter 2: Getting Started

TERMS Panel Layout

The panel below is used as an example to explain the TERMS panel layout.



TERMS Panel Colors (only for PC's with color; the following colors are for PC COM connections; your color scheme may be different)

White: Information items and what you can access

Blue: Information that is display only

Green: Areas into which you key information

Red: Errors

Program ID

In the Human Resource system, this field is not currently used. In the Finance system, this is the program name which is executed when the panel is used.

In the Finance system, the “F” signifies the Financial component of the TERMS system. The remaining three numbers are the remainder of the program ID.

The Program ID and the Panel ID must be given to the help desk when you call to request help.

Panel Field

The **PANEL** field allows you to jump from panel (screen) to panel. If you know the Panel ID, you do not have to go to a menu.

For example, if you are on panel A02 and you wish to go to panel A04, you must first position your cursor at the **PANEL** field, key **A04** and press <ENTER>.

NOTE: In Finance system, you do not have to key the zero (0) in the panel field. If you remain in the same menu, such as the “A” menu, the “A” does not have to be keyed.

Panel ID

The Panel ID identifies the specific menu selections within the system components.

Security

Your sign-on ID and the security assigned to it determines what menu/panel selections you can access. It also determines if you can access centers other than your own. Normally, you can only view records from your own cost center.

Dashed and Underscore Lines

The dashed line is a broken line indicating division between the key data elements (or demand fields) above the dashed line and records of information fields shown below the dashed line.

- On a data entry panel, you must complete the fields above the dashed line and press <ENTER> before completing the fields below the dashed line; if not, all responses you keyed below the dashed line will be lost.

Underscores are solid lines indicating key data element fields; the length of the line indicates the size of the field.

- Always key information on the underscore line in a data field., then press <ENTER> to process the updates.

Panel Messages

Messages from the computer program appear at the bottom of the panel stating things such as a record cannot be found, an action is completed, or if the system is unable to complete your command.

On query panels, the message RECORD LIMIT MET...PRESS <PF7> or <PF8> displays because the system can only read so many records at a time. Press <PF7> to continue the search backward or <PF8> to continue the search forward in the records. It is recommended that you limit your search by keying specific selection information above the dashed lines.

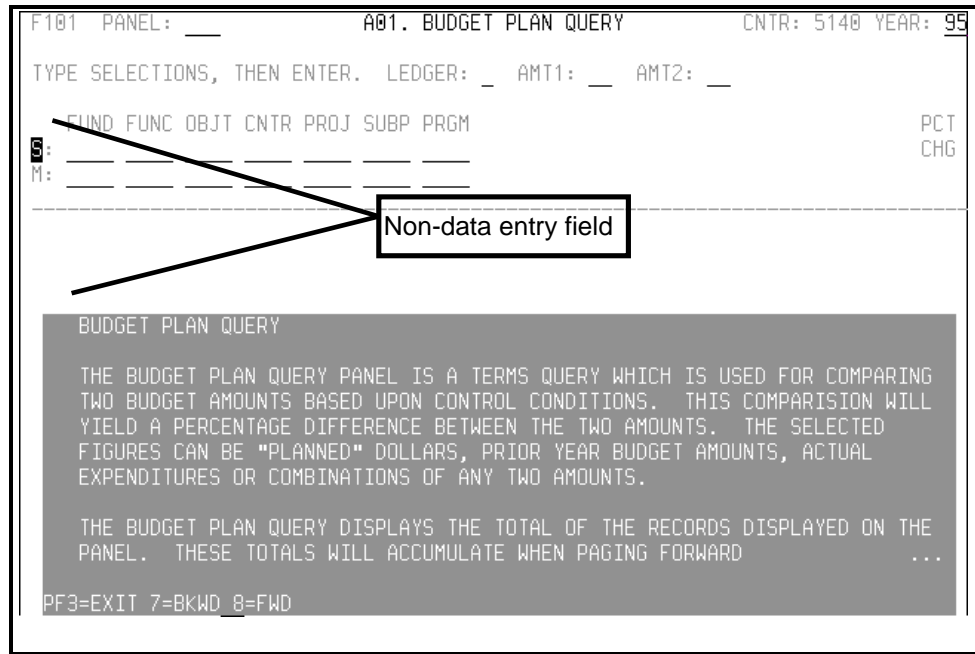
PF (F) Keys

Presented in the table below are the actions and/or functions assigned to the PF (F) keys by TERMS. Only the PF Keys specified at the bottom of a panel are available and active for that particular panel.

KEY	ABBREVIATION	ACTION
F1	HELP	Displays the HELP panel that corresponds to the cursor's current position.
F2	EXT HELP	(Only active from a HELP panel.) Displays an EXTENDED HELP panel.
F3	EXIT	Returns to a menu, or exits a HELP panel.
F5	REFRESH	Clears a Data Entry panel to allow entry of new records or restarts the same query.
F7	BKWD	Pages backward one page.
F8	FWD	Pages forward one page.
F9	NXT PAGE	1. Displays the next page of a multiple page panel. 2. In some instances, the F9 key can be used to display the next logical panel to be used for data entry.
F12	ESCAPE	Steps you back through the major menus to AS/400 sign-on panel.

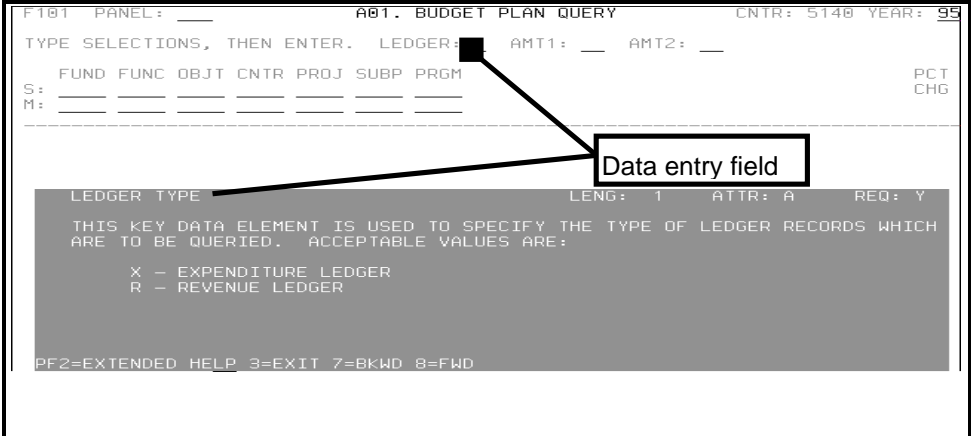
Using HELP <F1>

Pressing <F1>, when you are on a non-data entry field, displays general information about the panel or if you are in between fields, the message “No help available” might display.



Pressing <F1>, when you are on a data entry field, displays specific information about that field, including the field **LENGTH**, if it is required (demand field **REQUIRING** keying information), and if the field is alpha and/or numeric (**ATTRIBUTE**). If the panel is a multi-line entry panel, you must be on the first line to receive specific field information; otherwise, you will get general panel information.

```
F101  PANEL: _____  A01. BUDGET PLAN QUERY  CNTR: 5140 YEAR: 99
TYPE SELECTIONS, THEN ENTER.  LEDGER: █  AMT1:  _  AMT2:  _
      FUND FUNC OBJT CNTR PROJ SUBP PRGM  PCT
S:  _____  _____  _____  _____  _____  _____  _____  _____
M:  _____  _____  _____  _____  _____  _____  _____  _____
-----
LEDGER TYPE  LENG: 1  ATTR: A  REQ: Y
THIS KEY DATA ELEMENT IS USED TO SPECIFY THE TYPE OF LEDGER RECORDS WHICH
ARE TO BE QUERIED.  ACCEPTABLE VALUES ARE:
      X - EXPENDITURE LEDGER
      R - REVENUE LEDGER
PF2=EXTENDED HELP  3=EXIT  7=BKWD  8=FWD
```

**E****Exiting <F3> the HELP panel**

You must press <F3> to exit the help panel mode.

Note: If the help text in the help box is not clear, and this manual does not clarify it for you, contact the Help Desk.