



CALM
Course Applications and Letters Management

AT User Manual

Updated: November 2011

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Introduction

This AT User Manual provides an operating guide to the AT CALM system, as used by Assistant Teachers (both referred to in this manual as AT or conducting AT) for all the relevant course administration.

The AT manual contains four chapters:

- 1) Using the Calm system
- 2) Pre-course preparation
- 3) Processing forms during a course
- 4) End of course administration

ATs are welcome to suggest changes or additions to this manual:
info@calm.dhamma.org

1. Using the Calm system

1.1. Logging into AT CALM

You should have received a secure website address or URL, for example:

<https://calm.dhamma-eu.org/at/calm> AT CALM for Europe

<https://dhamma.org.au/at/calm> AT CALM for Australia

Make sure you use **https://** and not **http://** as this is a secure protocol that ensures all data remains confidential in transit on the internet.

Note: Download Firefox as your internet browser. Internet Explorer, Safari and Google Chrome are not recommended for this application.

Username and Password

Use the same username and password that you use to access the Referral List.

In case you don't remember your username and password or feel these may have become insecure, do get in touch with your regional contact who provided you with the Referral List access details. Alternatively you may send an email to info@calm.dhamma.org to help you.

Referral List

An Internet program enables you to add, change and delete entries from the Referral list and the International Special List. For exact use of the Referral List please refer to the AT manual.

Underneath you find the different Referral List addresses:

The Australia/New Zealand ref list:

<https://dhamma.org.au/vaur/live>

The SE Asia ref list:

<https://dhamma.org.au/earl/updates>

The Japanese ref list:

<https://dhamma.org.au/japanr/updates>

The European ref list:

<https://calm.dhamma-eu.org/eursl/updates>

Basic navigation

The screen format and navigation are the same as for the CALM system used by registrars. Please refer to the **CALM User Manual** for details about navigation and various functions, to be found at the Calm webpage <http://www.calm.dhamma.org/index.php?id=2158>.

Same username and password as the international AT website www.at.dhamma.org.

Main Menu

The **Main Menu** at the top of the screen includes two folders: **Courses and Find**. Drop-down sub-folders are displayed when the mouse is held over each folder.



- A. To display a list of courses that have been allocated to you in your region only:
Main Menu, Courses, Current (or use Shift+F2)

The following screen will be displayed:

Date from	Date to	Area	Location	Status	Type	Description	T/AT	Notes	Old students only?	End Time	Languages	Registrars
~ 16Sep11	25Sep	DIPA	PADHAN	EM	4	Satipatthana Sutt...	DMT		Y	6:30am	EN	eva_dieterman,david_lander,...
~ 18Sep11	18Sep	PAJJOTA	BRUSSE	EM	2	1-day course	DMT		Y	17:30	EN	fabio_schinazi
~ 18Oct11	29Oct	PAJJOTA	PAJJOT	NF OF DM	0	10-day course	DMT/ AF	Oct.18-2011-Be...		6:30	EN, DE	christine_herz, veerle_offe...
~ 29Nov11	10Dec	PAJJOTA	PAJJOT	NF OF DM	0	10-day course	DMT	Nov.29-2011-Be...		6:30	EN, FR	christine_herz

- B. To display a list of all courses that have been conducted by you in the past and allocated to you to conduct in the future, in this region only:
Main Menu, Courses, AllCourses (or use Shift+F1)
- C. To display a list of all courses that have been conducted by you in the past, in this region only:
Main Menu, Courses, OldCourses (or use Shift+F3)

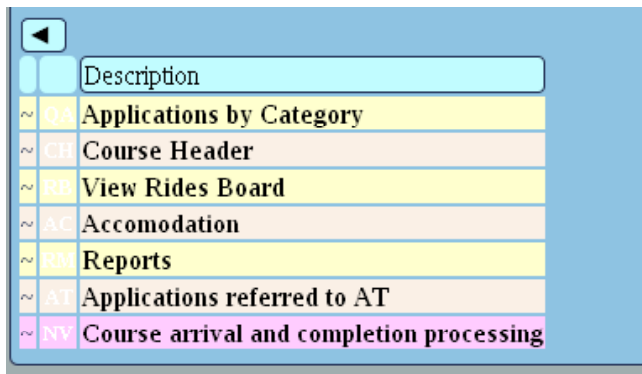
1.2. General course information

Reviewing course information

To review a variety of reports and other specific course information:

Main Menu, Courses, Current (or use Shift+F2)

A list of your courses will be displayed. Click on the course you want to review. The following screen will be displayed:



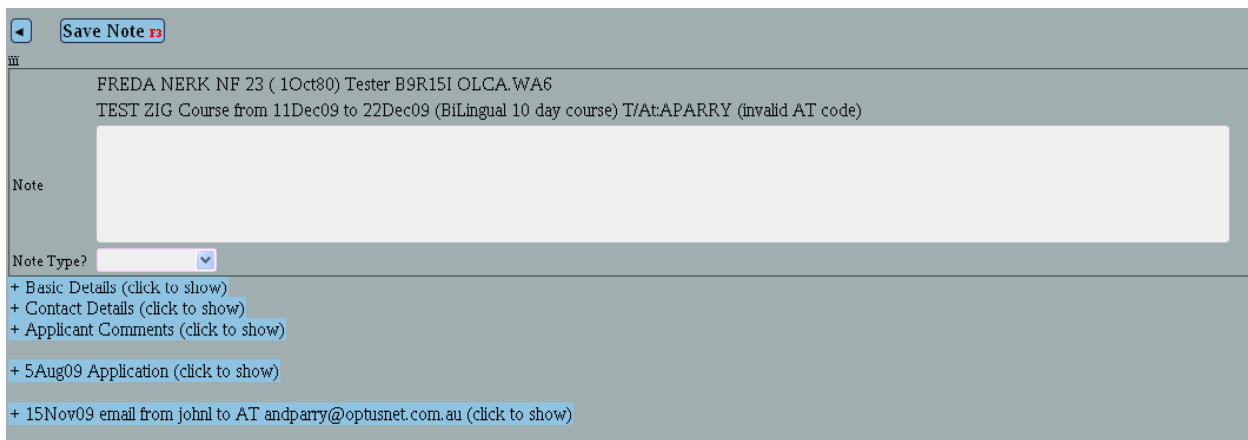
To access any of the above reports, click on the description title. All of these reports are also available for the Registrar in the CALM system, by clicking on **M** for Course Menu. Please refer to the **CALM User Manual** for more details about these reports.

2. Pre-course preparation

Receiving and responding to e-mails from registrars and creating notes

If Registrars have any queries or concerns about individual application forms, they will normally send an e-mail to a local AT who is involved in registration work or to the conducting AT. This e-mail will include brief details about the student and a link to the student's application form located in the AT CALM system. For security and privacy reasons, application forms are not sent via e-mail.

After clicking on this link and logging into the AT CALM system, the following screen will be displayed for the student being reviewed:



Save Note **13**

FREDA NERK NF 23 (1Oct80) Tester B9R15I OLCA.WA6
TEST ZIG Course from 11Dec09 to 22Dec09 (BiLingual 10 day course) T/At:APARRY (invalid AT code)

Note

Note Type?

- + Basic Details (click to show)
- + Contact Details (click to show)
- + Applicant Comments (click to show)
- + 5Aug09 Application (click to show)
- + 15Nov09 email from johnl to AT andparry@optusnet.com.au (click to show)

Reviewing a student's details

Before responding to a Registrar's enquiry, the AT will first need to review the student's details. Located below the Notes box, highlighted in light blue, are a list of student details and a record of any previous notes, as shown in the screen image above or the list below. The + symbol indicates that there are more details available by clicking on the item.

- + Basic Details (click to show)
- + Contact Details (click to show)
- + Applicant Comments (click to show)
- + 5Aug09 Application (click to show)

Click on the item to display additional details. The fourth item is the application form.

Responding to the Registrar

After reviewing the applicant's details and contacting the student if necessary, you are now ready to type a response to the Registrar, for example:

1. In the **Notes** box, type your response, eg: “**OK to confirm**”
2. In the **Note Type?** drop-down box, select “**R - Registrar**”

3. Click on the **Save Note** button at the top of the screen, or use F3.

Your note will now be sent to the Registrar and will also appear in the list of details as:

+ 15Nov09 note added by you (click to show)

Click on this item and your note will be displayed:

<ul style="list-style-type: none"> + Basic Details (click to show) + Contact Details (click to show) + Applicant Comments (click to show) + 5Aug09 Application (click to show) + 15Nov09 email from johnl to AT andparry@optusnet.com.au (click to show) - 15Nov09 note added by you (click to hide)
<p>OK to confirm</p> <p>Edit</p>

Please note that the AT CALM system does not send letters, e-mail responses or confirmations directly to a student. All written correspondence must be made by the Registrar.

Recording notes for the conducting AT only

For this application, you may want to record a note for the conducting AT regarding contact made with the student, as follows:

1. Enter the new note in the **Notes** box;
2. In the **Note Type?** drop-down box, select “**T – AT Only**”.
3. Click on the **Save Note** button at the top of the screen, or use F3.

The following items will now be displayed.

+ Basic Details (click to show)

+ Contact Details (click to show)

+ Applicant Comments (click to show)

+ 5Aug09 Application (click to show)

+15Nov09 note added by you (click to show)

+15Nov09 AT only note added by you (click to show)

Click on this last item and the following screen will be displayed:

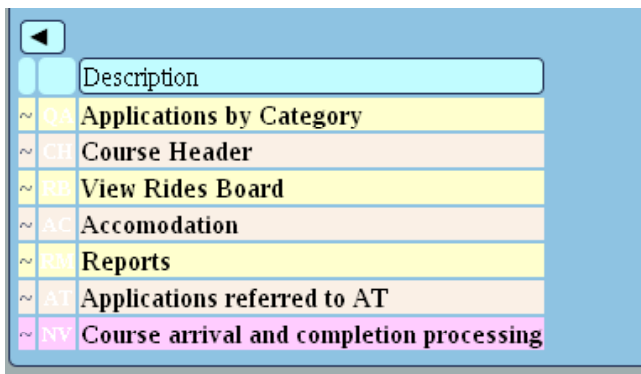
<ul style="list-style-type: none"> + Basic Details (click to show) + Contact Details (click to show) + Applicant Comments (click to show) + 5Aug09 Application (click to show) + 15Nov09 email from johnl to AT andparry@optusnet.com.au (click to show) - 15Nov09 note added by you (click to hide)
<p>OK to confirm</p> <p>Edit</p> <p>- 15Nov09 AT only note added by you (click to hide)</p>
<p>***AT***</p> <p>spoke to applicant Wednesday evening 15 November 2009 and they told me they would stop all alcohol from now until start of course</p> <p>Edit</p>

3. Processing forms during a course

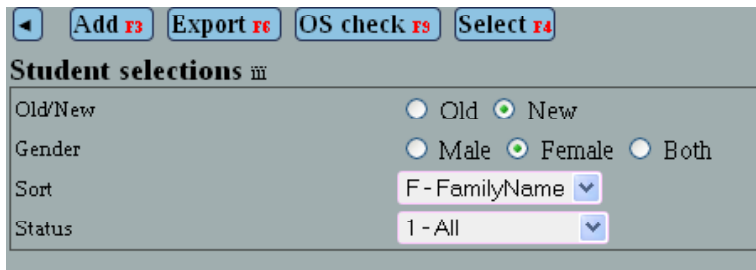
3.1. Adding a student record

If you have any registration forms left over and there are no records of these students in the system, you will need to add student records, as follows:

1. On the following screen, click **Course arrival and completion processing**.

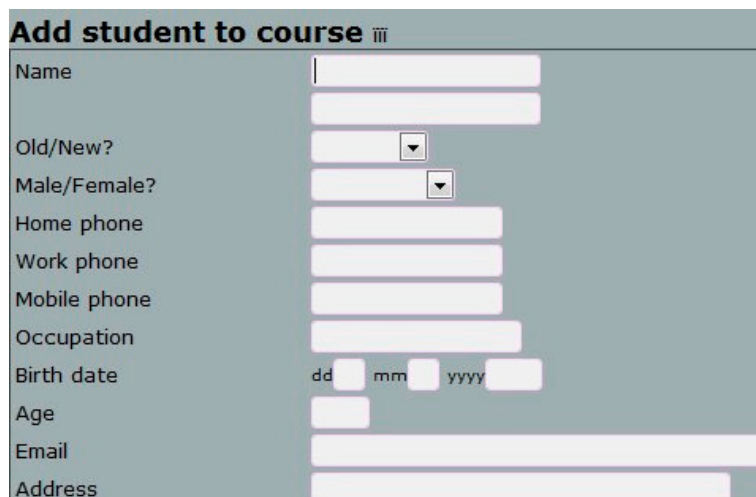


2. Then click **Add**.



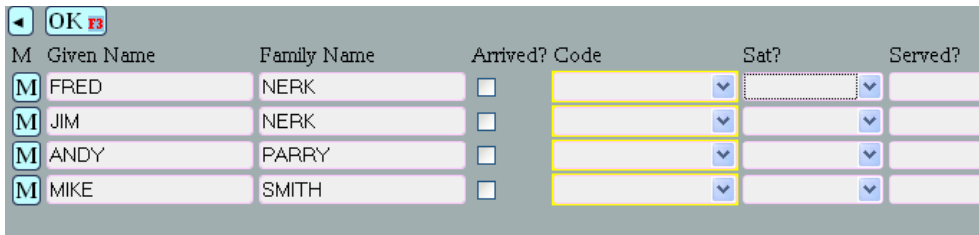
A screenshot of the 'Student selections' form. It includes buttons for 'Add F3', 'Export F6', 'OS check F9', and 'Select F4'. Below the buttons are radio buttons for 'Old/New' (Old, New), 'Gender' (Male, Female, Both), a dropdown for 'Sort' (F - FamilyName), and a dropdown for 'Status' (1 - All).

3. The following screen will appear:



A screenshot of the 'Add student to course' form. It contains input fields for Name, Old/New?, Male/Female?, Home phone, Work phone, Mobile phone, Occupation, Birth date (dd, mm, yyyy), Age, Email, and Address.

4. Enter the students details as per the registration form.
5. Click on **OK**.
6. The following screen will appear:

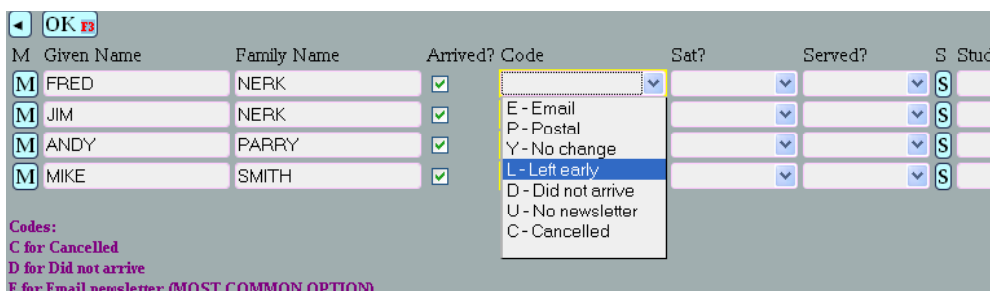


M	Given Name	Family Name	Arrived?	Code	Sat?	Served?
<input type="checkbox"/>	FRED	NERK	<input type="checkbox"/>			
<input type="checkbox"/>	JIM	NERK	<input type="checkbox"/>			
<input type="checkbox"/>	ANDY	PARRY	<input type="checkbox"/>			
<input type="checkbox"/>	MIKE	SMITH	<input type="checkbox"/>			

7. Enter the arrival details, and under the **Sat?** or **Served?** fields, choose **F – Full time** or **P - Part time**.
8. When finished, click on **OK**.

3.2. Updating records when students leave early

- 1) On the **Main Menu**, click on **Courses**, then **Current** (or sF2).
- 2) Click on the relevant course.
- 3) Click on the last report in the list: **Course arrival and completion processing**.
- 4) Choose **New** or **Old** student, and **Male** or **Female**, then click on the **Select** button.
- 5) A list of students will be displayed.
- 6) For any student that leaves early, in the Code field, select **L – Left early**, as shown in the diagram below:



M	Given Name	Family Name	Arrived?	Code	Sat?	Served?	S Stud
<input checked="" type="checkbox"/>	FRED	NERK	<input checked="" type="checkbox"/>				<input type="checkbox"/>
<input checked="" type="checkbox"/>	JIM	NERK	<input checked="" type="checkbox"/>				<input type="checkbox"/>
<input checked="" type="checkbox"/>	ANDY	PARRY	<input checked="" type="checkbox"/>				<input type="checkbox"/>
<input checked="" type="checkbox"/>	MIKE	SMITH	<input checked="" type="checkbox"/>				<input type="checkbox"/>

Codes:
C for Cancelled
D for Did not arrive
E for Email newsletter (MOST COMMON OPTION)

- 7) Click **OK**.
- 8) Repeat these steps for all departures during a course.

4. End of course administration

The conducting teachers are responsible for the course administration at the end of the course.

This administrative work makes it possible to assemble the yearly statistics and to send out Newsletters and other mailings to old students through Calm.

You may choose to do the entering of data gradually during the course, but please make sure it is correct on day 10, for example, update any information about students who leave early.

New students who do not complete the course, should not receive Newsletters or other mailings to old students.

Note: In case you do not have an internet connection at the centre/non-centre location where you are conducting the course, please proceed with this work once back home having taken the following information along with you to complete the work: 1) Name, 2) Gender, 3) Sat/served, 4) Full/part time, 5) Did not arrive, 6) Left early, 7) Change email address.

4.1. Accessing the course completion section in CALM

4.1.1. Enter CALM

Via the following URL:

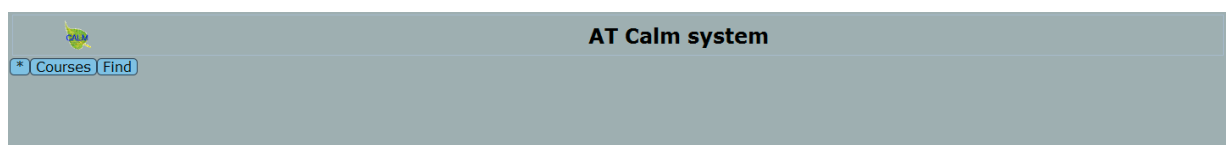
<https://calm.dhamma-eu.org/at/calm> AT CALM for Europe

<https://dhamma.org.au/at/calm> AT CALM for Australia

- Username: (same as you use for the referral list)
- Password: (same as you use for the referral list)

Note: Download Firefox as your internet browser. Internet Explorer, Safari and Google Chrome are not recommended for this application.

4.1.2. Click on “Courses” and “Current”



4.1.3. Click on the course you are conducting now

* Courses Find

Current courses for DMT

Course List

Date from	Date to	Area	Location	Status	Type	Description	T/AT	Notes	Old students only?	End Time	Languages	Registrars
18Feb10	21Feb	PAJJOTA	PAJJOT	FM	3	3-day course	DMT	Feb.18-2010-Be...	Y	16.00h	EN, NL	
23Feb10	06Mar	PAJJOTA	PAJJOT	FM OF DM	0	10-day course	DMT	Feb.23-2010-Be...		9.00h	EN, DE	
12Mar10	21Mar	PAJJOTA	PAJJOT		4	Satipatthana Sutt...	DMT	Mar.12-2010-Be...	Y	9.00h	EN, NL, FR	
18Aug10	29Aug	DIPA	DIPA		0	10 day course	DMT	Aug.18-2010-DD...		7am		
8Dec10	19Dec	NERU	NERU		0	Curso de 10 dias...	DMT			7:30am	ES,EN	carmen

4.1.4. Click on “Course Arrival and Completion Processing”

* Courses Find

PAJJOTA

pajjot PAJJOT Course from 23Feb10 to 6Mar10

- Description
- Applications by Category
- Course Header
- View Rides Board
- Accomodation
- Reports
- Applications referred to AT
- Course arrival and completion processing

4.1.5. Select the student category one at a time and complete the procedure (four categories).

- 1) Old Male and click on “Select”
(Follow instructions below to update each category)
- 2) New Male
- 3) Old Female
- 4) New Female

CALM - NERU - Mozilla Firefox

Archivo Editar Ver Historial Marcadores Herramientas Ayuda

https://calm.dhamma-eu.org/neru/calm

McAfee SiteAdvisor

CALM - NERU

* Courses Folders Find Newsletters Documents Administration Help

Course from :13-Jan-2010 to 24-Jan-2010 NERU

Process each type of student new/old male/female in turn from this screen
(using the Add button below to add any extra students)

← Add Export OS check Select

Student selections

Old/New Old New

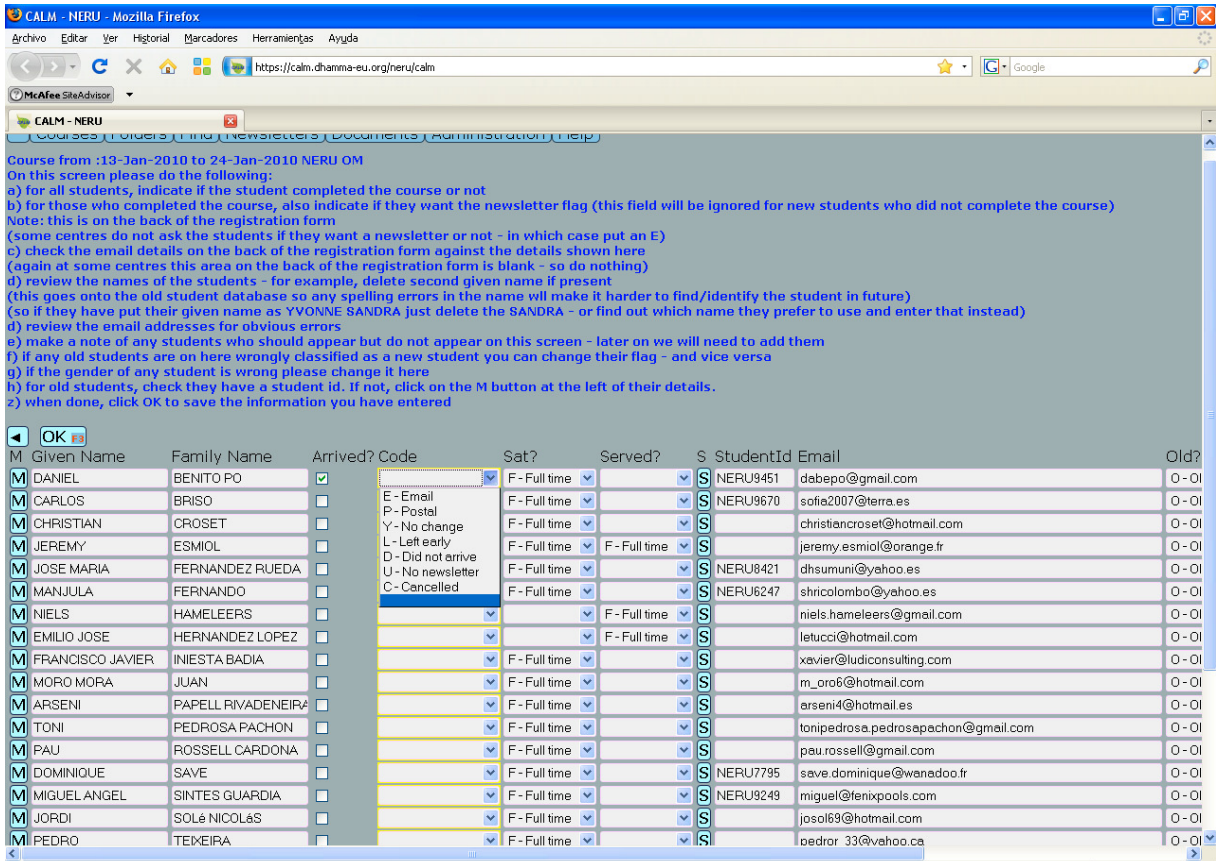
Gender Male Female Both

Sort F - FamilyName

Status 1 - All

4.2. Complete the “Code”, “Sat?” and “Served?” columns

4.2.1. Complete the “Code” column



Course from :13-Jan-2010 to 24-Jan-2010 NERU OM
 On this screen please do the following:
 a) for all students, indicate if the student completed the course or not
 b) for those who completed the course, also indicate if they want the newsletter flag (this field will be ignored for new students who did not complete the course)
 Note: this is on the back of the registration form
 (some centres do not ask the students if they want a newsletter or not - in which case put an E)
 c) check the email details on the back of the registration form against the details shown here (again at some centres this area on the back of the registration form is blank - so do nothing)
 d) review the names of the students - for example, delete second given name if present (this goes onto the old student database so any spelling errors in the name will make it harder to find/identify the student in future) (so if they have put their given name as YVONNE SANDRA just delete the SANDRA - or find out which name they prefer to use and enter that instead)
 d) review the email addresses for obvious errors
 e) make a note of any students who should appear but do not appear on this screen - later on we will need to add them
 f) if any old students are on here wrongly classified as a new student you can change their flag - and vice versa
 g) if the gender of any student is wrong please change it here
 h) for old students, check they have a student id. If not, click on the M button at the left of their details.
 i) when done, click OK to save the information you have entered

M	Given Name	Family Name	Arrived?	Code	Sat?	Served?	S	StudentId	Email	Old?
M	DANIEL	BENITO PO	<input checked="" type="checkbox"/>	E - Email	F - Full time		S	NERU9451	debepo@gmail.com	0-01
M	CARLOS	BRISO	<input type="checkbox"/>	P - Postal	F - Full time		S	NERU9670	sofia2007@terra.es	0-01
M	CHRISTIAN	CROSET	<input type="checkbox"/>	Y - No change	F - Full time		S		christiancroset@hotmail.com	0-01
M	JEREMY	ESMIOL	<input type="checkbox"/>	L - Left early	F - Full time	F - Full time	S		jeremy.esmiol@orange.fr	0-01
M	JOSE MARIA	FERNANDEZ RUEDA	<input type="checkbox"/>	D - Did not arrive	F - Full time		S	NERU8421	dhsuni@yahoo.es	0-01
M	MANJULA	FERNANDO	<input type="checkbox"/>	U - No newsletter	F - Full time		S	NERU6247	shricolombo@yahoo.es	0-01
M	NIELS	HAMELEERS	<input type="checkbox"/>	C - Cancelled	F - Full time		S		niels.hameleers@gmail.com	0-01
M	EMILIO JOSE	HERNANDEZ LOPEZ	<input type="checkbox"/>		F - Full time		S		letucci@hotmail.com	0-01
M	FRANCISCO JAVIER	INIESTA BADIA	<input type="checkbox"/>		F - Full time		S		xavier@ludiconsulting.com	0-01
M	MORO MORA	JUAN	<input type="checkbox"/>		F - Full time		S		m_oro6@hotmail.com	0-01
M	ARSENI	PAPELL RIVADENEIRA	<input type="checkbox"/>		F - Full time		S		arseni4@hotmail.es	0-01
M	TONI	PEDROSA PACHON	<input type="checkbox"/>		F - Full time		S		tonipedrosa.pedrosapachon@gmail.com	0-01
M	PAU	ROSSSELL CARDONA	<input type="checkbox"/>		F - Full time		S		pau.rosssell@gmail.com	0-01
M	DOMINIQUE	SAVE	<input type="checkbox"/>		F - Full time		S	NERU7795	save.dominique@wanadoo.fr	0-01
M	MIGUEL ANGEL	SINTES GUARDIA	<input type="checkbox"/>		F - Full time		S	NERU9249	miguel@tenxpoos.com	0-01
M	JORDI	SOLÉ NICOLÁS	<input type="checkbox"/>		F - Full time		S		jsole69@hotmail.com	0-01
M	PEDRO	TEKEIRA	<input type="checkbox"/>		F - Full time		S		pedror_33@yahoo.ca	0-01

Click on “Code” and select the relevant statement from the drop-down list, as follows:

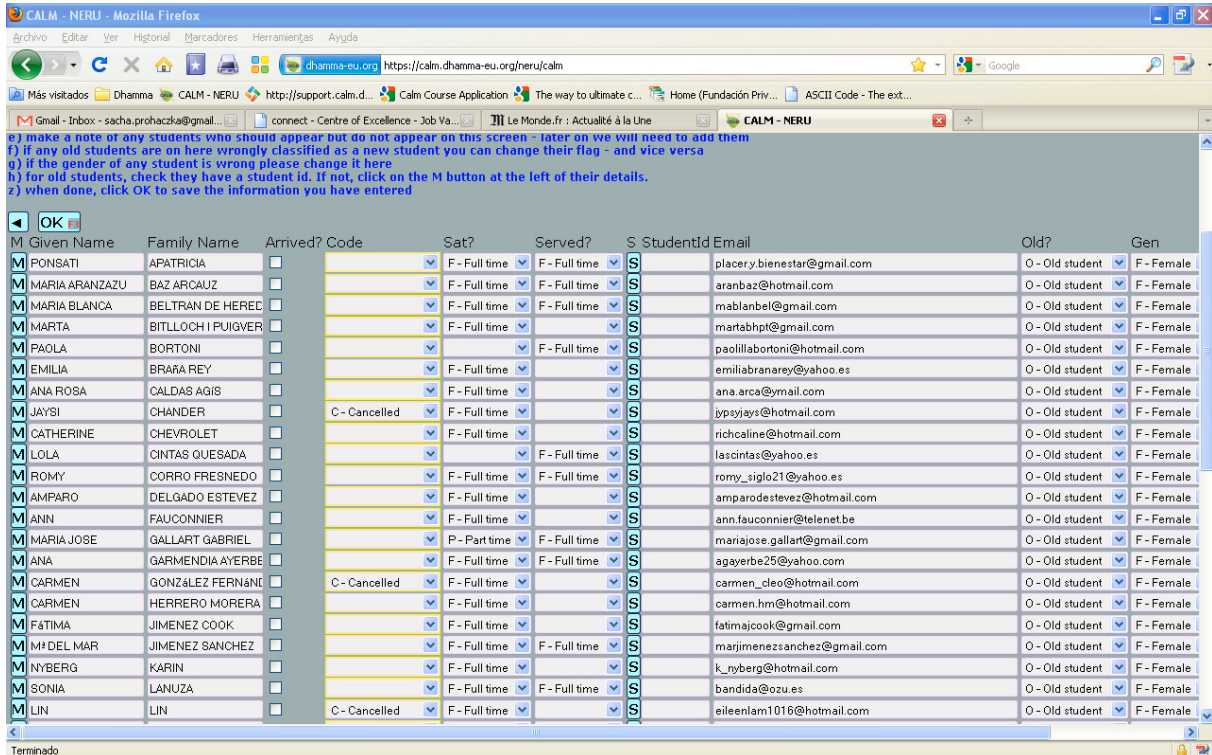
For Old Students:

- **E – Email** (if student has an e-mail address and has completed the course, this is the most common code)
- **P – Postal** (if student does not have an e-mail address and has completed the course)
- **D – Did not arrive** (if student did not arrive)
- **L – Left early** (if student left early)

For new students please select:

- **Y – Completed OK** (if the new student has completed the course)
- **D – Did not arrive** (if student did not arrive)
- **L – Left early** (if student left early)

4.2.2. Revise the “Sat?” and “Served?” column



The screenshot shows a web browser window displaying the CALM - NERU application. At the top, there are instructions in Spanish: 'e) make a note of any students who should appear but do not appear on this screen - later on we will need to add them', 'f) if any old students are on here wrongly classified as a new student you can change their flag - and vice versa', 'g) if the gender of any student is wrong please change it here', 'h) for old students, check they have a student id. If not, click on the M button at the left of their details.', and 'i) when done, click OK to save the information you have entered'. Below the instructions is a table with the following columns: M, Given Name, Family Name, Arrived? Code, Sat?, Served?, S, Studentid, Email, Old?, and Gen. The table contains 20 rows of student data. The 'Sat?' and 'Served?' columns contain dropdown menus with options like 'F - Full time', 'P - Part time', and 'C - Cancelled'. The 'Old?' column has a dropdown with '0 - Old student'. The 'Gen' column has a dropdown with 'F - Female'. The 'M' column contains 'M' for new students and 'S' for old students.

M	Given Name	Family Name	Arrived? Code	Sat?	Served?	S	Studentid	Email	Old?	Gen
M	PONSATI	APATRICIA		F - Full time	F - Full time	S		placery.bienestar@gmail.com	0 - Old student	F - Female
M	MARIA ARANZAZU	BAZ ARCAUZ		F - Full time	F - Full time	S		aranbaz@hotmail.com	0 - Old student	F - Female
M	MARIA BLANCA	BELTRAN DE HERED		F - Full time	F - Full time	S		mablanbel@gmail.com	0 - Old student	F - Female
M	MARTA	BITLLOCH I PUIGVER		F - Full time		S		martabhpt@gmail.com	0 - Old student	F - Female
M	PAOLA	BORTONI			F - Full time	S		paolilabortoni@hotmail.com	0 - Old student	F - Female
M	EMILIA	BRAÑA REY		F - Full time		S		emiliabranarey@yahoo.es	0 - Old student	F - Female
M	ANA ROSA	CALDAS AGIS		F - Full time		S		ana.arca@gmail.com	0 - Old student	F - Female
M	JAYSI	CHANDER	C - Cancelled	F - Full time		S		jypsyjays@hotmail.com	0 - Old student	F - Female
M	CATHERINE	CHEVROLET		F - Full time		S		richcaline@hotmail.com	0 - Old student	F - Female
M	LOLA	CINTAS QUESADA			F - Full time	S		lascintas@yahoo.es	0 - Old student	F - Female
M	ROMY	CORRO FRESNEDO		F - Full time	F - Full time	S		romy_siglo21@yahoo.es	0 - Old student	F - Female
M	AMPARO	DELGADO ESTEVEZ		F - Full time		S		amparodestevez@hotmail.com	0 - Old student	F - Female
M	ANN	FAUCONNIER		F - Full time		S		ann.fauconnier@telenet.be	0 - Old student	F - Female
M	MARIA JOSE	GALLART GABRIEL		P - Part time	F - Full time	S		mariajose.gallart@gmail.com	0 - Old student	F - Female
M	ANA	GARMENDIA AYERBE		F - Full time	F - Full time	S		agayerbe25@yahoo.com	0 - Old student	F - Female
M	CARMEN	GONZÁLEZ FERNÁNDEZ	C - Cancelled	F - Full time		S		carmen_cleo@hotmail.com	0 - Old student	F - Female
M	CARMEN	HERRERO MOREIRA		F - Full time		S		carmen.hm@hotmail.com	0 - Old student	F - Female
M	FATIMA	JIMENEZ COOK		F - Full time		S		fatimajcook@gmail.com	0 - Old student	F - Female
M	M DEL MAR	JIMENEZ SANCHEZ		F - Full time	F - Full time	S		marjimenezsanchez@gmail.com	0 - Old student	F - Female
M	NYBERG	KARIN		F - Full time		S		k_nyberg@hotmail.com	0 - Old student	F - Female
M	SONIA	LANUZA		F - Full time	F - Full time	S		bandida@ozu.es	0 - Old student	F - Female
M	LIN	LIN	C - Cancelled	F - Full time		S		eileenlam1018@hotmail.com	0 - Old student	F - Female

As the above picture shows, many students come with information in both “Sat?” and “Served?” columns.

Only the correct information should be ticked i.e. ‘Sat’ or ‘Served’.

There are 3 options:

- a) F – Full time
- b) P – Part time
- c) Blank – means ‘not applicable’


Note: In principle the only valid case in which both columns may be ticked is when the student sat part time and served part time.

4.3. Match Students with their database entry


4.3.1. New Students

As you complete the new students’ completion status, entries will be created automatically in the database. So no extra step is required for new students.


4.3.2. Old Students

Only for those students that have completed the course, you need to click  on the next to the student's name.

By clicking on this button, CALM will search whether this student already exists in the database. If CALM finds an exact match, then the data base Student ID will be automatically assigned to the student in the Student ID column.

If CALM cannot find the exact match, CALM will show a list of possible matching entries. Select the student by clicking on the  next to the matching student.

Alternatively, if you are confident that the student is not on the list, just click on the button 'Create an old student record'.

However, if you are not sure whether the student is on the list or not, just click  to go back. A local administrator will check your course completion and will finish the work.

4.4. Check email address of each student/server

Compare the address on the day 0 (registration) form with email address in Calm and update the CALM email address with email address on day 0 form if needed.

4.5. Start Again with a new Student category

Once you have completed a student category (i.e. Old Male) click on "OK" and start again with step 2.5 with the next student category, till you have filled in all 4 students categories.

You have then completed the Course Completion status and you can exit Calm.

Well done and thanks for your help.