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/vaurl/live
>
> The SE Asia ref list:
> https://dhamma.org.au/earl/updates
>
> The Japanese ref list:
> https://dhamma.org.au/japanrl/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	F M	4	Satipatthana Sutt...	DMT		Y	6:30am	EN	eva_dieterman,david_lander,...
~	18Sep11	18Sep	PAJJOTA	BRUSSE	F M	2	1-day course	DMT		Y	17:30	EN	fabio_schinazi
~	18Oct11	29Oct	PAJJOTA	PAJJOT	NF NM OF OM	0	10-day course	DMT / AF	Oct.18-2011-Be...		6:30	EN, DE	christine_herz, veerle_offe...
~	29Nov11	10Dec	PAJJOTA	PAJJOT	NF NM OF OM	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:
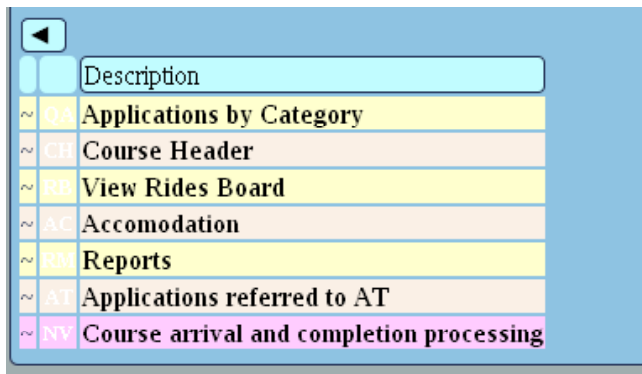
Main Menu, Courses, OldCourses (or use Shift+F3)

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:
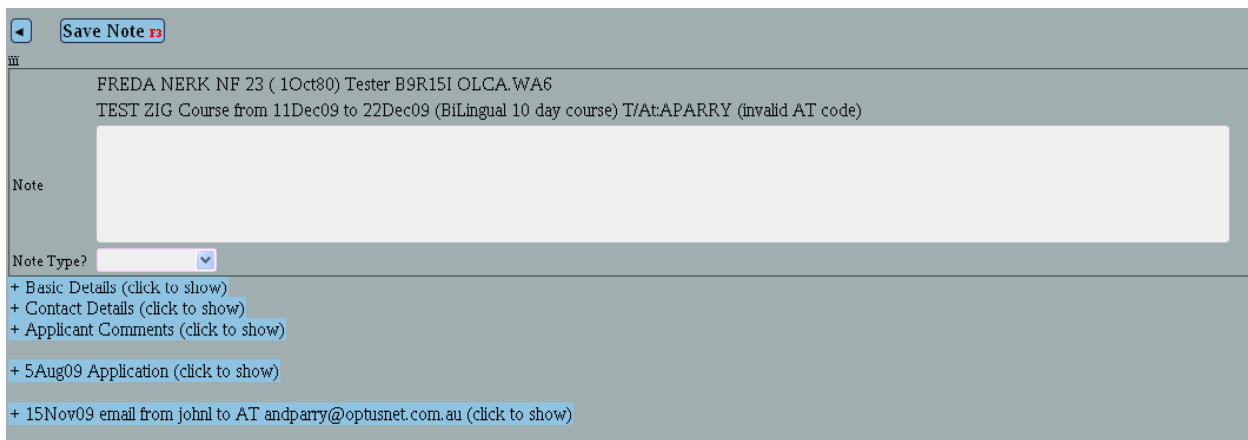

To access any of the above reports, click on the description title. All of these reports are also available for the Registrar in the CALM system, by clicking on **M** for Course Menu. Please refer to the **CALM User Manual** for more details about these reports.

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:

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:

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:

3. Processing forms during a course
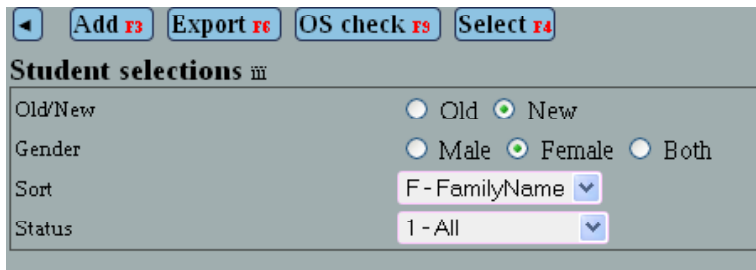
3.1. Adding a student record

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**.
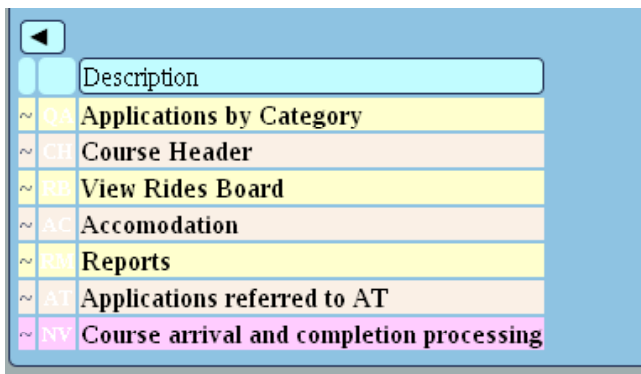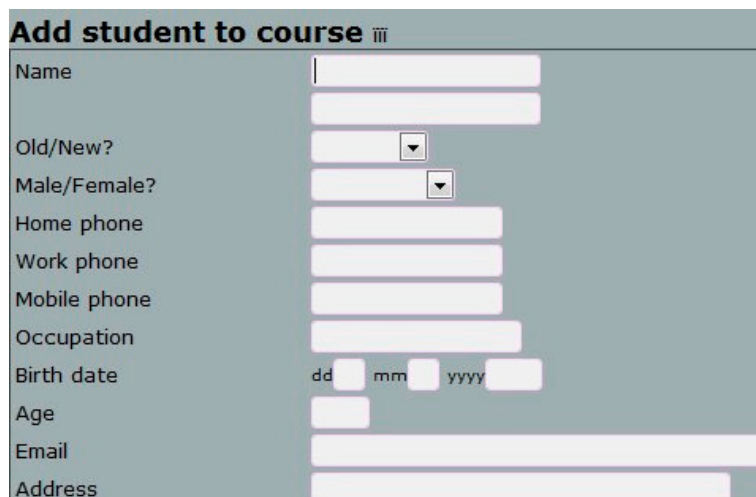
2. Then click **Add**.
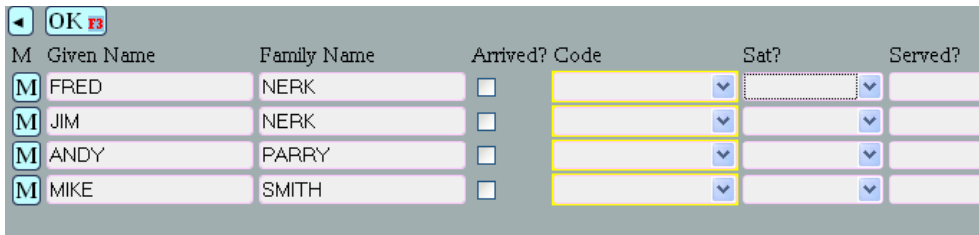
3. The following screen will appear:

4. Enter the students details as per the registration form.

5. Click on **OK**.

6. The following screen will appear:
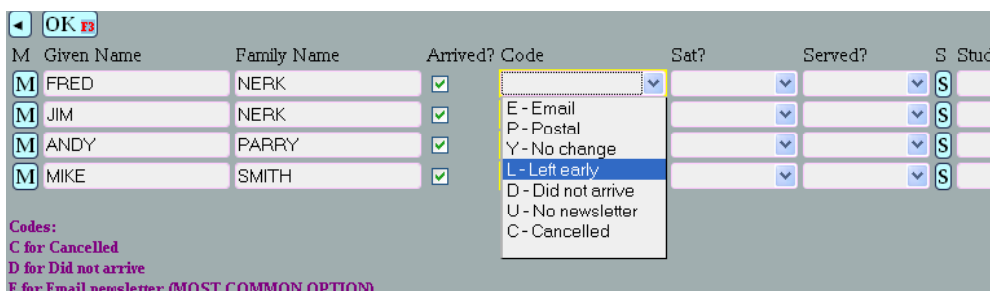
7. Enter the arrival details, and under the **Sat?** or **Served?** fields, choose **F – Full time** or **P - Part time**.

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:

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

4.1.4. Click on "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
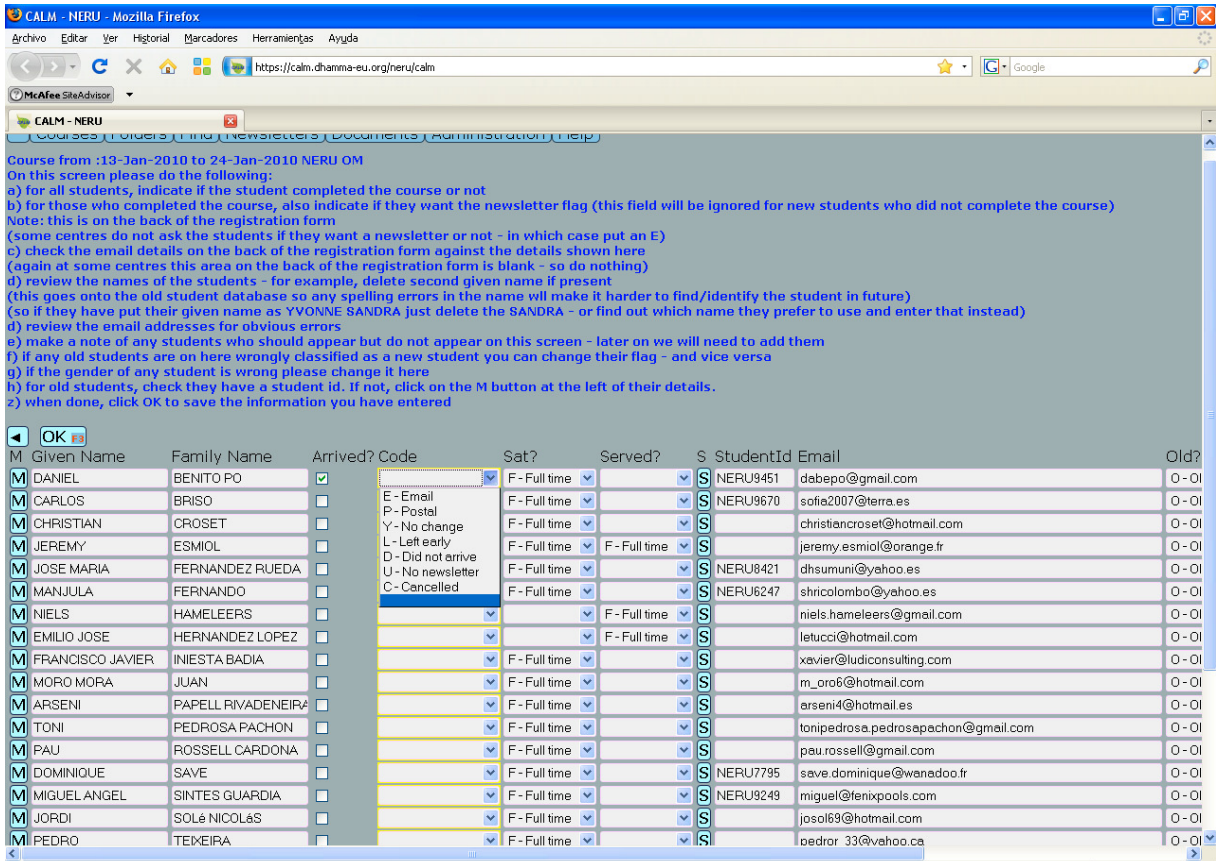
4.2. Complete the "Code", "Sat?" and "Served?" columns

4.2.1. Complete the "Code" column

Click on "Code" and select the relevant statement from the drop-down list, as follows:
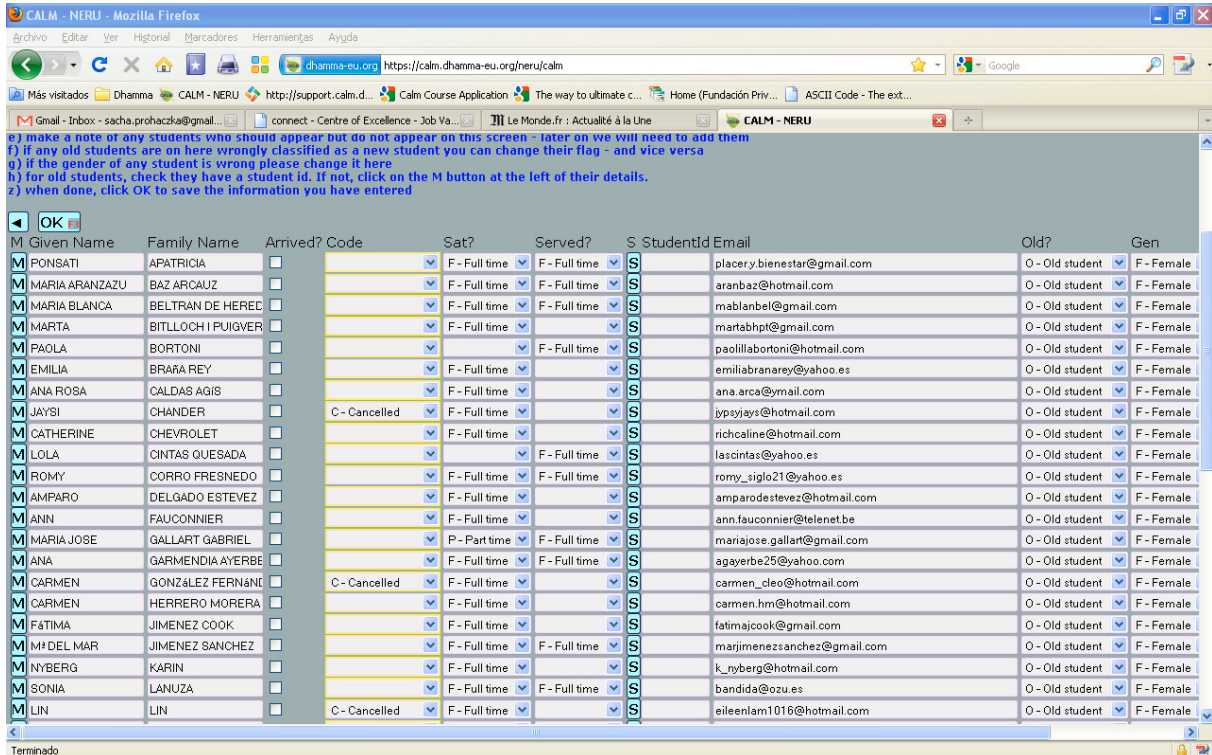
For Old Students:

- **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

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 [M] 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 [C] 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.