American Red Cross
Biomedical Services

Training Implementation Plan for New Staff:
SY18 General Surround User

Administrative Information

Registrar Course/Class Name: GENERAL SURROUND USER

Registrar Course Code: 18-4-018--

18-4-018-K

Document Number: 18.4.tc18_tip

Training Plan

Purpose

To train staff on the necessary knowledge and skills required to perform basic Surround tasks.

Prerequisites

There are no prerequisites for this training. However, staff must be able to operate a Windows-based personal computer (PC).

Trainer Criteria

The Director of Education and Training (DET) selects trainers who have the appropriate trainer abilities and the knowledge and skills to conduct the training for the target audience. Selection is based on

- competency, proficiency, and authorization/release to the role
- ability to train staff on the knowledge and/or skills in the assigned area, using the appropriate method (for example, trainer-led or self-paced)
- ability to train individuals or groups, depending on the subject matter

Audience

Designated new staff who will perform or require the knowledge of the general Surround user role.

Materials/Equipment Required

The trainer should have the following documents

- 18.2.12, Directive: Surround*
- 18.3.93, Work Instruction: Changing Your Surround Password*
- 18.3.94, Work Instruction: Closing a Module and Logging Out of Surround*
- 18.3.97, Work Instruction: Generating On-Demand Surround Reports*
- 18.3.99, Work Instruction: Logging into Surround and Opening a Module*
- 18.3.140, Work Instruction: Requesting Surround Access, if used*
- 18.4.frm53, Form: NTL Surround User Access Request, if used*
- 18.4.ja47, Job Aid: Surround User Capabilities *
- 20.4.frm07, Form: Request for User Access to Surround, if used*
- Surround 4.3 User's Manual, Edition 025, applicable sections*
- ARC General Password Policy, November 2001

Prior to assessment, have the learner read and review the documents marked with an asterisk.

Instructional Objectives

The learner will exhibit the skills with 100% accuracy as evaluated by the trainer.

Conditions	Performance
1. Given the Surround application	open a module.
2. Given that you are an active user	change your Surround password.
3. Given a locked workstation	unlock the workstation.
4. Given the Surround application	logout of Surround.
5. Given the Surround application	print a Surround report.

The learner will acquire and demonstrate the knowledge with 100% accuracy as evaluated by the trainer.

Conditions	Performance
6. Given the Surround application	identify the number of unsuccessful login attempts are allowed before the workstation locks.
7. Given a locked workstation	describe the method you should NOT use to unlock a workstation or close a window.
8. Given an active user assignment	identify the number of workstations you can be logged onto at one time.
9. Given a locked workstation	describe what to do if you cannot unlock the workstation.
10. Given a Surround password	identify when the password will expire.
11. Given a Surround report	describe how to print reports that are longer than 28 pages.
12. Given a printed Surround report	describe the caution related to the time/date stamp.
13. Given a printed Surround report	describe the caution related to the reprinting.
14. Given the need to use Surround	describe how to request Surround access.

Instructional Strategy

Presentation and Practice Phase

The trainer will

- use the associated directive to provide the learner with an overview of the process
- present and demonstrate all procedural steps
- refer to the Trainer Guide for talking points
- conduct practice with sufficient repetition to ensure competency

Assessment Phase

Use the assessment criteria to determine whether the learner meets the instructional objectives with 100% accuracy. Observe all steps of the process as they are performed for assessment. Non-routine steps can be simulated as needed. Administer the (oral or written) test and complete the Performance Checklist. If administered orally, the trainer must maintain test integrity by asking the questions as written, and the learner's responses must agree with those in the answer key.

If the learner does not successfully complete the assessment, the DET, supervisor, and trainer will determine appropriate action.

Staff who are only required to have knowledge of the process are not required to complete the performance checklist.

Training Method

☒   Trainer-led

☐   Self-paced

☐   Other, (specify): _____

Assessment Criteria

☒   Test

☒   Performance Checklist

☐   Training Panel

Training Guide

Instructions

Use the items listed below during the discussion, demonstration, and practice phases of this TIP. Staff who are only required to have knowledge of the process are not required to have practice.

Discussion and Demonstration

Provide an overview of the process using the Surround directive. [18.2.12]

Explain the purpose of the Surround application.

Demonstrate logging in and opening modules [18.3.99]

- general layout of the windows, toolbar, menus, and modules
- changing passwords [18.3.93]; the trainer may refer to the ARC Password Policy (located on *CrossNet* or current ARC website)
- workstation lockouts and user lockouts; what NOT to do if the workstation is locked

Demonstrate closing modules and logging out [18.3.94]

Printing reports [18.3.97]

- time/date caution
- reprinting caution
- printing reports longer than 28 pages (the printed report should indicate the number of pages in the report)
- using Reference: Surround Reports Menu Options and Prompts [18.4.ref7]

Requesting Surround Access [18.3.140]

- training on this information is not required if the learner will not be performing 18.3.140
- to request access to the NTL server, use the NTL Surround User Access Request form [18.4.frm53]
- to request access for the Surround Central Repository, use the Request for User Access to Surround form [20.4.frm07]
- refer to Job Aid: Surround User Capabilities, if necessary [18.4.ja47]

Practice

Provide opportunities for the learner to practice the following:

- logging into Surround
- opening and closing modules (using the toolbar and menu)
- changing their password
- logging out of Surround
- printing a report (such as the Sample Exceptions report by date range)

Performance Checklist

The trainer should observe the execution of these processes and compare them with the procedural steps.

Learner Name:_____

Objective/Task	Check if successful
1. Given the Surround application, open a module.	
• Log into Surround.	
• Open a module.	
2. Given that you are an active user, change your Surround password.	
• Change your Surround password.*	
3. Given a locked workstation, unlock the workstation.	
• Unlock a locked workstation.*	
4. Given the Surround application, logout of Surround.	
• Close a module.	
• Logout of Surround.	
• Exit the Surround application.	
5. Given the Surround application, print a Surround report.	
• Print a Sample Exceptions report by date range.	

* Steps can be simulated as necessary

Performance Checklist Successfully Completed: _____

Trainer Signature/Date

Test Answers

1. How many unsuccessful login attempts can you make before the workstation locks?

   Five

   [Objective 6, 18.3.99]

2. Describe two methods you should NOT use to unlock a workstation or close a window.

   - *Do not use <Ctrl><Alt><Delete>*
   - *Do not click ⊠ at the top right of the session window to close it.*

   [Objective 7, 18.3.94, 18.3.99]

3. How many Surround workstations can you be logged into at a time?

   One

   [Objective 8, 18.3.99]

4. What should you do if you are unable to unlock a workstation?

   Contact your local Surround administrator

   [Objective 9, 18.3.99]

5. When will your Surround password expire?

   After 120 days

   [Objective 10, 18.3.93]

6. Describe how to print on-demand reports longer than 28 pages?

   Surround prints on-demand reports in 28-page increments. If the report is more than 28 pages, continue to print the report (28 pages at a time) until the complete report is printed.

   [Objective 11, 18.3.97]

7. What is important to know about the time/date on Surround reports?

   The header for an automatically-generated and printed report reflects Eastern Time (server time). The header for a user-generated and printed a report reflects the workstation time (which may not be Eastern Time)

   [Objective 12, 18.3.97]

8. What is important to know about reprinting reports?

    A reprinted report will give you data that is currently in the database, which may not match what was originally generated.

    [Objective 13, 18.3.97]

9. Describe how to request access to the NTL Surround server.

    (The learner is only required to answer this question if he/she will be performing 18.3.140)

    Initiate 18.4.frm53 and submit to the local Surround Administrator.

    Refer to 18.4.ja47, Surround User Capabilities, if needed.

    [Objective 14, 18.3.140]

10. Describe how to request access to the Surround Central Repository.

    (The learner is only required to answer this question if he/she will be performing 18.3.140)

    Initiate 20.4.frm07 and submit to the Surround Administrator.

    Refer to 18.4.ja47, Surround User Capabilities, if needed.

    [Objective 14, 18.3.140]

Test

Name:_____   **Date:**_____

1. How many unsuccessful login attempts can you make before the workstation locks?

2. Describe two methods you should NOT use to unlock a workstation or close a window.

3. How many Surround workstations can you be logged into at a time?

4. What should you do if you are unable to unlock a workstation?

5. When will your Surround password expire?

6. Describe how to print reports longer than 28 pages?

7. What is important to know about the time/date on Surround reports?

8. What is important to know about reprinting reports?

9. Describe how to request access to the NTL Surround server.

10. Describe how to request access to the Surround Central Repository.

Approval

_____ _____
Education and Training/Date   Quality Assurance/Date

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