

Tenders Bible

Version Number	1.0
Data Classification	Internal

	Name	Title	Signature	Date
Author	Emil Reisser-Weston	Managing Director / Data Controller		05/11/2021
Autoriser	As above			05/11/2021

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Version History

Previous version	Significant changes from previous version	Author	Date

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Manager

- Management Interfaces
- View own and teams training records

- View by Programme
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- View by User
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- Intelligent Learning Technology
- Adding Training Data
- Print off Registers
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- Module-building functionality
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- Assigning Learners to Events
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- Waitlist sign-up functionality for face-to-face learning interventions
- Track Student Attendance
- Marking Attendance (automated)
- Deselecting employees from training event
- Writing absence notes

Automated Attendance Reminders
Approval Process
Mandatory training
Impersonating a user's account

Administrator

Administrator Tasks Dashboard
Multi-client Capability
Permissions
Add learners from a separate data source
Merging Training Records of Leavers/Starters/ Duplicates
Linking multiple accounts
Staff Upload
Setting up Learners
Adding Managers
Access level for Users
External Staff Registration
Integrations
Automated integration
Importing Legacy Learning Content
Import Totara Learner Data
Data is then exported from Totara with the following fields:

- Username
- Learning Resource Name
- Created Date
- Last Access
- Status
- Score

Transfer of Data - HR System
Venue Database
Team Structures (7 Levels Total)
Configurability
Updating Branding
Automated emails
Follow up Emails and Reminders
Outlook Calendar Syncing
Dashboard Customisation
Personalised Visually-rich Dashboard
Editable roles and functions
Organisational Structure
Employee ID Number
Retaining Current Reference Numbers
Push Learning Aligned to hierarchy changes
Automate user accounts
Import Learning Records

Curriculum Developer

Terms used

Certification

Open eLMS Catalogue Overview

Create Course Content (without need for authoring tool)

Building a Catalogue of Learning

Embedded eLearning Repositories

Document Repositories

YouTube Playlists

Uploading PowerPoints, videos etc

Learning Audits

Delegated assigning of learning

Platform hosts capabilities framework with diagnostic assessment tools

Self-assessments create a development plan

Accessing Secure Content

360 feedback

Skills Matrix

Identifying Demand for Corporate Wide Learning

Ongoing Tracking for L&D team

Learning for Groups

Talent Programmes & Associated Qualifications

LXP will feature a 'suggested for you' learning plan.

Learning Pathways i.e., Induction and Job Profile Pathway

Refresher Learning

Archived Courses

File Removal

Content Creation

Content Partnerships

Open LMS Catalogue

Onboarding eLearning

Quality Assurer

Evaluations

Evaluation Reports (RAG)

Evaluations, surveys and polls

Learning Library

Short Courses

Health & Safety eLearning

Pre-Course Training Needs

Range of Learning Types

Speed of setup

Approval On/Off

Request approval for learning events, where approval is required

Schedule learning events, where approval is not required

Prerequisites Functionality

PDFs
Videos
Blended Approach (Seamless)
Webinars
Observational Tasks
eLearning SCORMS
Capacity to 'tag' skills/subject areas/areas of interest
External Suppliers
Authoring Capability
eLearning Authoring Tools
Open eLMS Creator
Lockable content facility
Online Catalogue Duplication
Elearning library including external suppliers
eLMS Course Library
e-learning, augmented reality, webinars, gamification, blogging, etc.
e-learning and face-to-face both from external suppliers
Discussion Forums
Online pre- & post- course evaluation (Kirkpatrick)
Course Feedback
Evaluation Comments Report
Evaluation Tools
Standards
Qualifications
 Programme management
 Skills and competencies
 Skill Scans
 Skills and Competencies
 As the learner progresses through the learning the learner will gain skill points which can lead to the gaining of that skill once a predefined threshold is met.
 Skills Matrix

Reporting

Extract Training Records and Resources
User Enrolment Status Report
Intuitive report building functionality for non-technical users
Individual Reports
Single-click, live reporting – easy extraction of data and simple to use
Real Time Performance Reporting
Compliance Reporting
Team overview reporting for line managers
Reports
Interface with the Authority's Microsoft 365 suite of Application
Drill down reports
Importing data from third party system for reporting

Training Records/Certificates
Recording Certificates etc.
Comprehensive Authority Reports
Data Graphics
Power BI Further Information
Infographic style reports in different formats

Quality Assurance Role

QA Staff Role

Accessibility

Make things accessible and inclusive
Visually Impaired Users
Customising Look and Feel of LMS
3 Click Rule etc
Assistive technology
Adaptive Interface
Access the system via a mobile app
Manual/External Login
SSO
Accessibility Summary

Introduction

Compliance Features of Open eLMS
Browser compliance

Additional Accessibility Steps

Summary

Smart Classroom/Blended Learning

Instructor Led Events
Scheduling and Delivering Live and Virtual Instructor Led Courses
Smart Classroom Technology for Classroom Based Learning
Blended Learning

Forms

Open eLMS Forms

Social Media Learning

Social Connections and Internal Talent
Social Learning Tools
Blog Posting
ePortfolios
Social Learning Spaces

Learning Communities

Live chat

Payments Engine

Charging On/Off Per Course
Variable Charging Per Course
Online Charging/Invoicing/Internal Journals
Custom Charging

Online Payment Options
Automated Server-Side Tasks
Type of Process

Aesthetics

The LXP platform will feature highly customizable capabilities
The platform will feature an individual learner dashboard for each user

Security

ISO 27001 (general IT security) and 27034
Information Security Management System
Independent annual vulnerability assessment
Vetting of staff
Subcontractors
Development standards/ISO standards
1. CSC (National Cyber Security Centre) Security Principle - Governance Framework
Cloud Security Network
GDPR Measures
Data Protection Impact Assessment (DPIA)
Public Sector Accessibility Regulations 2018 (PSAR)
Data retention and destruction
Data Retention
Data Cleansing and Anonymisation

Technical Considerations

Data Flow
Cross Browser/Cross Platform Compatibility
Storage Capacity
Storage
Flexibility
Data Storage Expiry
Language Versions
Disaster Recovery/Business Continuity
Minimum Client PC Specification
Disaster Recovery Timings
Azure SSO/AD and Hosting
API Integration
Technical Codes as issued by NCSC and Cabinet Office
Data Sharing
Use of Javascript
User Volume
Windows Server or Linux operating systems
Database will be based on Oracle, SQL Server or MySQL architecture
Web services will be based on Apache or IIS
Plug-in dependencies
RESTful API preferred
Dependent software cost is free

Functionality to export to MS Outlook calendar

CSV Export

Hosted Infrastructure

Introduction

Hosting Type

Subcontracting

Backups

Storage

Flexibility

Support

Support Communication channels

Support management processes

Account Manager Meetings

Implementation and Testing

Testing

Standard support operating times

Numbers of Support Staff

Alert Systems

Enhanced Support

Third-Party Complaints

Warranty

Updates and Upgrades

Contractor to provide a 'how to guide' for the system

Design Documentation

Training Resources

Training Content

Shadow Support

Training Location

Trainers accreditation

Refresher courses

Walkthrough Videos

Training Resources

Support Materials (guidance documents and resources)

Helpdesk penalty payments

Response/Resolution Plan for Support

Resolution management system

Target response and Resolution Times

Support for the launch

Data Migration

Marketing and PR support

Uptime

Upgrades

Closed Issues

Reporting and Trend Analysis

- Support KPIs
- Known errors and permanent resolutions
- Informing of Outages
- User satisfaction
- Testing
- Service Reviews
- Alpha and Beta testing for Launch
- Suitable training for nominated testers
- Clear escalation and resolution
- Contract Management Reviews
- Issue reporting including exception reporting
- Progress Tracking of Recorded Issues
- Invoicing
- Customer satisfaction

Flexibility

Complaints

99.9% System availability

- 24/7 System Availability
- Support Materials (guidance documents and resources)
- Performance monitoring
- Proposed Remedies
- Support Model
 - Support Model

Server Administrative

- Easy to Maintain
- Low Maintenance
- Configurable Roles

Integration and Extension Capabilities

Introduction

Type of integration provided; full two-way, real time or other

Opportunities

Web-conferencing

Content Repositories

Live Integrations

Contract Termination

Exit Strategy

- Safety and Wellbeing
- Data Transfer
- Exit or Terminate any Sub-Contracting
- Tasks and Timescales
- Staff
- Continuing Service
- Data security and privacy
- Cost of migration = £0

How data will be transferred to an incoming provider

Method of data migration to a new System

How the Exit Management Strategy will be tested and maintained throughout the life of the contract

Roadmap Innovation and Customer Leverage

Introduction to Innovation

Project Management of System Implementation

Project Management

Nature of work

Project Plan

Project management system

The project team

RACI

Milestones & Payments

Implementation Risks

Project Risks

Key Stages:

Resources allocated

Project Team Members (Extended)

Client Resources

Roles and responsibilities of the supplier

Risk Identification and management

Risk Assessment

Risk Assumptions

Data Migration

Dual running period prior to 1 April 2022

6-week intensive support post go live

Implementation Timescales

Contact and Teamwork

Service Management

Pricing

Introduction

Implementation Costs

Annual Costs

Optional Costs

Payment Profile

A single fixed cost

Not just the LMS

Social Value

Summary of Social value

Economic benefits (Social Values Skills)

Environmental benefits (Climate Change)

Social Benefits

TOMS Framework Value

Free the client Customer Portal

Free eLearning Courses

Increasing Social Inclusion through using Open eLMS

Environmental Benefits of Open eLMS Classroom

Sustainability Training

Fair Work Practices

Employees own the business

Modern Slavery

Sustainability Overview

Hosting

Community Benefits

Carbon reduction

Climate Change

Mitigation Measures

Sustainability measures

ED&I Policy

ED&I Data Monitoring

EDI, Accessibility and Neurodiversity and system development/design

EDI in the company

ED&I & the Supply Chain

Wellbeing

Legal Information

Organisation Details

This must be completed by each Relevant Organisation (please see definitions above)

Question Number	Question	Response
1	Full name of the Relevant Organisation:	Open eLMS Ltd
	Office address (NB: This must be the Registered Office address if applicable)	Kemp House 124 City Rd London EC1V 2NX
	County	Greater London
	Telephone Number:	+44 (0)203 929 2051 / 07771 785 755 (mobile)
	Email Address:	emilrw@openelms.com
	Registered website address (if applicable):	www.openelms.com
2	Trading status	a) public limited company b) limited company (x) c) limited liability partnership d) other partnership e) sole trader f) third sector g) other (please specify your trading status)
	Tax Details	Tax details are as follow: Employer PAYE Ref: 507/JA04791 Accounts Ref: 507PM00194368 HMRC UTR: 94300 17854
3	If you selected 'other' for question 2 please specify your trading status here	
4	Date of registration in country of origin	2 March 2003
5	Company registration number (if applicable)	04682876
6	Charity registration number (if applicable)	
7	Organisation DUNS number (if applicable)	734096642
8	Registered VAT number	830169935
9	If applicable, is your organisation registered	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> (Please indicate as

	with the appropriate professional or trade register(s) in the member state where it is established?	applicable)
10	If you responded 'Yes' to question 9, please provide the relevant details, including the registration number(s).	AELP Patron CPD Certification IMS Certified Provider (IMSD2C6C25C26C27eb2020W1) ISO 27001 (372382021) Cyber Essentials Plus (IASME-CEP-007941) ISO 9001 (003046) ISO 20000 (003047)
11	Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> (Please indicate as applicable)
12	If you responded 'Yes' to question 11, please provide additional details of what is required and confirmation that you have complied with this.	
13	Trading name(s) that will be used if successful in this procurement	Open eLMS
14	Relevant classifications (state whether you fall within one of these, and if so which one)	<input type="checkbox"/> a) Voluntary Community Social Enterprise <input type="checkbox"/> b) Sheltered Workshop <input type="checkbox"/> c) Public Service mutual <input checked="" type="checkbox"/> d) Not applicable
15	Are you a Small, Medium or Micro Enterprise (SME)? See EU definition of SME. Enter this URL into your web browser; https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Small Enterprise
16	Details of Persons of Significant Control (PSC), where appropriate: - Name; - Date of birth; - Nationality; - Country, state or part of the UK where the PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used); - Which conditions for being a PSC are met; - Over 25% up to (and including)	Emil Reisser-Weston (MSc – MEng) DOB: 01/03/1971 Nationality: British Lives in: Maidenhead, Berkshire, UK Service address: 27 Rutland Place, Maidenhead SL6 4JA County: Berkshire Date became PSC: 6 April 2016 PSC Conditions: 75% or more

	<p>50%, - More than 50% and less than 75%, - 75% or more.</p> <p>UK companies, Societates European (SEs) and limited liability partnerships (LLPs) will be required to identify and record the people who own or control their company. Companies, SEs and LLPs will need to keep a PSC register, and must file the PSC information with the central public register at Companies House. See PSC guidance. Enter this URL into your web browser;</p> <p>https://www.gov.uk/government/publications/guidance-to-the-people-with-significant-control-requirements-for-companies-and-limited-liability-partnerships</p> <p>Please note: A criminal record check for relevant convictions may be undertaken for the preferred suppliers and the persons of significant in control of them.</p>	
17	<p>Details of immediate parent company, where appropriate</p> <ul style="list-style-type: none"> - Full name of the immediate parent company - Registered office address (if applicable) - Registration number (if applicable) - Organisation DUNS number (if applicable) - Head office VAT number (if applicable) 	NA
18	<p>Details of ultimate parent company, where appropriate</p> <ul style="list-style-type: none"> - Full name of the ultimate parent company - Registered office address (if applicable) - Registration number (if applicable) - Organisation DUNS number (if applicable) - Head office VAT number (if applicable) 	NA
19	<p>Operational address (if different from above at Q1)</p> <p>Address: Postcode: Telephone Number: Email Address: Website:</p>	NA
20	<p>Contract Management Name of the Proposed Contractor's Authorised Representative:</p>	<p>Andrew Howie Director / Senior Account Manager Kemp House</p>

	Job Title: Postal Address: Telephone Number: Email Address:	152 - 160 City Rd London EC1V 2NX 07484 298528
21	Accounts Payable to (if different from above): Postal Address: Telephone Number: Email Address:	Clive Barker Finance Director Kemp House 152 - 160 City Rd London EC1V 2NX 07484 298528
22	Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")? Further details concerning the Modern Slavery Act can be found on https://www.gov.uk/government/uploads/Transparency_in_Supply_Chains_etc_A_practical_guide_final.pdf	No
23	Please provide your registration reference with the Information Commissioners Office. https://ico.org.uk/for-organisations/data-protection-fee/	ZB031013 (link to certificate: https://drive.google.com/drive/folders/1deanwDbgXxy8RIwXQNxKvyxBYG3BEqtg)
24	Contact Details and Declaration I declare that to the best of my knowledge the answers submitted and information contained in this Response Document are correct and accurate. I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this Response Document. I understand that the information will be used in the procurement process to evaluate my organisation's suitability and to participate further in this procurement. I understand that the client may reject this tender submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section. I am aware of the consequences of serious misrepresentation.	

Contact Details and Declaration	
Question	Response

	Contact name:	Emil Reisser-Weston
	Name of organisation:	Open eLMS Ltd
	Role in organisation:	Managing Director
	Phone number:	07771 785 755
	E-mail address:	emilrw@openelms.com
	Postal address	Open eLMS, Kemp House 124 City Rd London EC1V 2NX
	Signature (electronic is acceptable):	
	Date:	13/07/2021

Service Credits for Not Meeting Service Levels

Service credits are usually negotiated with the client. Open eLMS would be happy to issue service credits for a 5% refund equating to each 0.1% downtime outside the SLA, limited to 50% of the total service fee (e.g if availability in any one month is 99.4%, then the client will get service credits equal to 25% of the total service cost for Open eLMS - not including modular add-ons such as Open eLMS Catalogue, Open eLMS Creator, Open eLMS Forms, or Open eLMS Classroom).

This can be added as an addendum to the EULA.

Continuous Improvement

Open eLMS is subject to continuous improvement. The product feeds into the needs of its clients offering solutions that can be 'switched on' for the benefits of all. This feedback process is a result of regular user groups and weekly account management meetings with clients. Open eLMS share the product road map on a quarterly basis to provide benchmarks against which improvement can be measured.

25% of the licence fee contributes to this improvement activity. Therefore the client will pay the proportion of this charge compared with the number of improvements listed annually on the roadmap (e.g. 20 improvements promised and 10 delivered, then only 50% of 25% of the licence fee is discounted for the current year - a service credit will be issued accordingly.)

This can be added as an addendum to the EULA.

Restrictions for commissioning Content

Yes, there will be no restrictions on your organisation for commissioning other companies to design new content to be hosted on the LXP platform.

Ownership of content

Yes, all content and resources designed by you and hosted on the LXP will be owned by

your organisation as standard.

Free 'point' system upgrades

Yes, all free 'point' system upgrades for the LXP platform are included in software maintenance payment.

Notice of Upgrades

Your organisation is in total control as to which upgrades to turn on/off at any time. Any functional changes made to Open eLMS are provided as configuration options which need to be 'switched on' by clients. All clients are informed of each release and a user group session is held for each release to inform clients of the new features and how to turn them on. Information is also held on the website - as an example this is the information accompanying the latest Aphrodite release - <https://www.e-learningwmb.com/page/latest-changes>.

This means that the power of approval of upgrades will always remain in the hands of your organisation by changing the configuration options accordingly. Note that the account manager will consult with your organisation and can turn on options in configuration on their behest.

Patches, on the other hand, will be applied to all systems as and when needed. Any maintenance tasks which require server downtime are carried out from 11pm to 1am Monday to Friday and from 8pm to 3am Saturday and Sunday.

Continuous Improvement & Compensation

Target

A development roadmap is set on a quarterly basis with targets for the following quarter.

Method of Measurement

These targets are set as tasks in Jira and followed through to completion.

Compensation

25% of the licence fee contributes to this improvement activity. Therefore the client will pay the proportion of this charge compared with the number of improvements listed annually on the roadmap (e.g. 20 improvements promised and 10 delivered, then only 50% of 25% of the licence fee is discounted for the current year - a service credit will be issued accordingly.)

Compensation

Compensation will be issued as a credit note against the next invoice or paid directly to the client should the contract terminate.

Compensation will be capped at 25% of the licence fee for any given year.

Reference

Name of customer organisation

Kirklees Borough Council

•**Point of contact in customer organisation**

Jason Rylatt

•**Position in the organisation**

Project Manager

•**E-mail address**

Jason.Rylatt@kirklees.gov.uk

•**Description of contract**

This contract involves providing a cloud-based Learning Management System which delivers and tracks training for internal staff and external partners. The provision of Open eLMS includes a booking system for staff to book on any classroom or virtual training event. Open eLMS ensures the Council can meet its demands around compliance and mandatory training whilst also monitoring the development of skills and knowledge across the workforce. Open eLMS represents a responsive and flexible system which can meet their requirements. Open eLMS not only manages and tracks training compliance but also encourages a culture of engagement with learning through self-directed developmental learning.

•**Contract start date**

01/03/2022

•**Contract completion date**

01/03/2025

•**Estimated contract value**

320,000

Customer organisation name	Suffolk County Council
Customer contact name, position in organisation, phone number and email address	Ben Singleton Project Manager Adult and Community Services Suffolk County Council Ben.Singleton@suffolk.gov.uk 0345 606 6067
Contract start date	15/10/2021
Contract completion date	Ongoing (expected completion 31/03/2025)
Estimated Contract Value	£120,000
Brief description of contract (max 150 words)	<p>This project is extremely similar to the current project. the client wanted a blended learning platform for delivering safeguarding training, both via face to face and elearning/video. The delivered system allows Suffolk to make both types of learning available on a learning portfolio for the learner.</p> <p>During the implementation phase, Open eLMS</p>

	<p>has been extremely flexible to the client's needs and has added features for the benefit of implementing such a service. These features have included:</p> <ul style="list-style-type: none">● A single search for elearning and upcoming events.● The ability to link events so signing up to one event will sign up to all.● Schedule repeat events over the space of a calendar year.● Changes to buttons, certification, etc. to suit council needs. <p>Weekly project meetings have fostered a collaborative environment where both parties have striven to find the best possible design solutions for the benefits of all Open eLMS's clients.</p>
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About Open eLMS and Open eLMS

Description of Business (419 characters - 64 words)

Open eLMS - makers of Open eLMS - help organisations to improve the knowledge and skills of their learners both in business and education.

The Open eLMS systems and services adopt a user centred design which makes it possible to deliver powerful learning solutions from Information Management Systems to learning creation without any fuss. Open eLMS is the most comprehensive and user-friendly approach to learning!

Open eLMS Executive Summary

The success of Open eLMS is usually attributable to two factors: comprehensiveness of our solutions and ease of use.

Comprehensiveness

The Open eLMS suite of services provides everything you will need to produce, run, and manage learning. The Open eLMS system provides an unparalleled service covering:

- Learning Management
- Performance Management
- ePortfolios
- Library of Learning
- Online Authoring Software
- Bespoke Development
- Digital Form Builder
- Video Conferencing Learning
- Booking system
- AI generated learning
- Chat feature

Ease of Use

Any mention of the Open eLMS suite of services must include its user-friendly design. Open eLMS has been designed by an award winning ergonomist to be the ultimate in ease of use. This is characterised by:

- Learner interfaces easy to use like video on demand services
- Management interfaces role specific (no need for training - just follow prompts)
- elearning creation more sophisticated than Storyline and Captivate but easier to use than PowerPoint

Testament to the success of this approach

The success of the Open eLMS Platform has been recently seen with the system winning competitive tenders - **Open eLMS has been awarded the last 4 open tenders it has presented for.**

In a recent survey a client, Estio Training, spent a year researching the market and outlined 42 functions necessary for a smart classroom/eportfolio solution. **Open eLMS ticked 39 of the 42 boxes (it now ticks 42)** - the next best solution ticked 19!

Executive Summary

KEY FEATURES

This proposal centres around the Open eLMS suite of products and services provided by Open eLMS. The elements provided are outlined below:

Software or Service	Description
Open eLMS	Data Management: LMS/LXP, TMS, e-Portfolio.
Open eLMS - Classroom	Smart classrooms for business training and education.
Open eLMS Catalogue	Over 200 courses available for immediate purchase, covering the most important issues in business and education.
Open eLMS Creator	Powerful and easy to use online authoring.
Open eLMS Forms	eForms for Performance Management and on-boarding.
openelms.ai	Creation of elearning using AI from a single line of text.

This gives the Client the tools needed to implement a hugely successful training and learning management system within your organisation.

STRENGTHS

The key strengths of Open eLMS can be laid out in 6key areas:

Comprehensiveness

Open eLMS has been developed for a number of different areas whilst following a focussed development path since 2003. As a result of this journey, Open eLMS has functionality that meets (and surpasses) all requirements in this tender. No new customisation or configuration work is needed.

This will lead to a swift and frictionless roll-out of the product.

Ease of Use

Open eLMS has been designed by an award winning ergonomist to be the ultimate in ease of use. This is characterised by:

- Learner interfaces easy to use like video on demand services
- Management interfaces role specific (no need for training - just follow prompts)
- elearning creation more sophisticated than Storyline and Captivate but easier to use than PowerPoint

This will lead to easy and enthusiastic adoption by the learning population.

Value for Money

Open eLMS is giving away access to three of its systems, Open eLMS Catalogue, Open eLMS Forms and Open eLMS Creator (media courses), at no cost to the RTS. Both systems are 100% owned by Open eLMS, and the retail cost of Open eLMS Catalogue is £18,528.75 per year while the retail cost of Open eLMS Creator is £6,000 per year.

This brings unbeatable value for money to the proposal.

Customer Service

The account manager and project manager are both members of the senior management team with almost 50 years experience between them. We welcome weekly project meetings during the implementation phase and 3 months after it (prolonged to monthly) to ensure the client can maximise the benefits of Open eLMS.

This ensures the Client gets assistance to maximise the learning opportunities inherent within the system.

Openness

We welcome the opportunity to demonstrate the system in person and would be glad to set up a demonstration site for the Client to utilise prior to making a decision (e.g. https://lms.e-learningwmb.co.uk/demo_business).

This ensures that the Client is able to try before they buy to have additional confidence in their decision before signing.

Ethical Partner

Open eLMS is run for the benefit of its employees, where half the staff have significant shares in the business and all staff share in the profits of the business. Outside these numeration schemes, ALL staff get paid well in excess of the UK National Living Wage rates. This leads to high staff retention rates of good employees, with most employees having

worked for the company in excess of 5 years. This ethical approach to business is also seen with the company's ethical supply chain and [code of conduct](#).

The Client can be sure that their supplier is someone who can be trusted to act fairly at all times.

Quality

Open eLMS has recently gained ISO 27001 status and has started competing for competitive tenders. Since then, Open eLMS has been awarded the 3 open tenders it has presented for. Furthermore, in a recent survey of the market, a client - Estio Training - spent a year measuring eLMS providers against the 42 functions necessary for a smart classroom/eportfolio/LMS solution. Open eLMS ticked 39 of the 42 boxes (it now ticks 42) - the next best solution ticked 19!

This brings assurance that Open eLMS will meet and exceed expectations.

Future Vision

Open eLMS is at the cutting edge of what is possible in eLearning, being pioneers in a number of learning technologies including the world's first LXP and the first cloud based drag and drop authoring system for eLearning. Open eLMS is currently breaking new ground in the world of AI, perfecting text generated eLearning creation (openelms.ai) and custom Chat GTP learning system for disseminating company information.

With Open eLMS you can be sure that the latest innovations will be used in your learning solution.

SUMMARY

Open eLMS has everything you need 'out of the box' for this tender; no new development is needed. Furthermore, the system is offering so much more, including free software and services valued at £24,500 per year.

We believe we will be the best partner for the Client, as the Open eLMS suite continues to advance in line with technological advances and changes in work practices.

Open eLMS Final Word

We hope you agree that Open eLMS is comprehensive and easy to use. It has taken us 20 years of continuous development to achieve this.

We have responded to each point to Appendix Z (see Appendix Z - LXP Specification Matrix at the end of this document) as "Fully Comply". In the main section of this document, we have expanded upon each answer referencing each point Appendix Z. This document includes screenshots to illustrate how Open eLMS meets the project goals. 99.9% of functionality is already in the system, the 0.1% to be developed has been highlighted in yellow as in the development road map to be completed by mid-Q4 2021.

In short, Open eLMS will meet 100% of the requirements of the tender on delivery of the system.

Order Management Procedures

There is a structured ordering process through each stage from:

- Placement
- Legals
- Fulfillment
- Invoicing
- and Payment

This is documented in the Order Management Policy (supplied as e-LearningCompanyInformationAT20191012OrderManagementPolicy.pdf).

Incident/Complaint Management Procedures

See the company's Complaints Handling policy utilizing the Jira incident log (e-LearningCompanyInformationAT20200301ComplaintsHandlingPolicy.pdf).

Incidents which affect security are governed by the e-LearningWMBCompanyInformation20190619InformationSecurityIncidentManagementPolicy (1).pdf.

Change Management Procedures

Change Management details are laid out in the provided Change Management Policy - e-LearningCompanyInformationERW20190918ChangeManagementPolicy (1).pdf

Escalation Procedures

Open eLMS provides 2nd and 3rd line support for the Open eLMS Suite of products. 1st line support can also be purchased as an additional 24/7 365 day service but not included within this proposal.

If the client cannot rectify an issue then it is reported to Open eLMS through the usual channels. Normally a resolution can be found by the account manager (changing a setting, providing instruction etc.) at the 2nd line support level. If no resolution can be found then it is escalated via the Jira system to the product manager and head of IT as a potential 3rd line support task. Such escalations are considered within the design structure of the Open System and a resolution is found. This resolution is set at a priority level (which affects

delivery time) and a link can be shared if required with the client to monitor completion.

The account manager oversees this process and will keep the client informed on progress during the weekly/monthly client meetings and by email.

Further details on the company's project management techniques is documented in e-LearningCompanyInformationERW20200224Project Management4_0 (3).pdf.

Business Continuity Plan

The BCP is a tracked document in line with ISO 9001 document management procedures and makes up a core part of the company's ISO 27001 certification.

BCP Testing

Annual testing and the BCP

A recovery test report for will be supplied annually with details of recovery times, etc. These tests are run on Sundays around 3pm.

Please note that Open eLMS tests the Business Continuity Plan (BCP) annually, which involves the recovery of all Open eLMS client systems. A copy of the latest BCP plan with the latest test carried out on the 20/05/2021 (see section 4.4) is included as part of this tender

(
https://docs.google.com/document/d/1uGwhwf_PIFy2FsK1mxfdO4Zab6YfbIWmg5lhSO_tNQ8/edit?usp=sharing) .

Quarterly testing

Open eLMS also executes a recovery test of a mirrored environment on a quarterly basis, this is scheduled by (and documented within) the company's asset register.

Live Site Testing

Testing of the BCP on the Client's site will be carried out annually only with the full prior knowledge and approval from the Client.

Staff Development

Open eLMS nurture an environment of continuous improvement to enable staff development through its internal training system at
<https://openelms.e-learningwmb.co.uk/internaltraining/login>.

Learner

Self registering

The self-registration process is highly configurable, any number of fields can be included in the registration form (around 200 define the learner) and fields can be selected which will be required to be completed later (learners will get alerts when they log in and emails informing them to do so.)

Courses can be assigned to certain jobs and groups (e.g. childminder) so that relevant training is immediately available.

If the client wants to insert an approval process prior to the childminder gaining access, then this can be done with any users who self register notified as “In Progress” - such users are waiting to have access Accepted or Denied. The administrator sees a list of these people in their dashboard, and can grant access accordingly.

Single Sign on

SSO is available via SAML by default, other authentication methods available if required to handle all cases.

Open eLMS by default uses SAML for SSO but can work with any standard to enable single sign-on. SSO login can integrate the data to ‘lock out’ any users with certain characteristics, redirecting them to log in via a password.*1.19

Two Factor Authentication

Open eLMS can implement 2 Factor Authentication (via Google/Microsoft etc. Authenticator), out of the box (i.e. a standard configuration option) to allow parties external to Defra to log in via the standard Authenticator app.

Custom authentication

Different users can be authenticated in different ways. This can be carried out on a company/department level or limited to allowing access to certain locations (IP whitelists/blacklists). **1.A.4.4**

Basic Search

Learner Search

Open eLMS has quick and advanced search capabilities. The search box searches across metadata (description, name, keywords, etc.) for each learning resource.

The learner can filter this information by learning type (e.g. elearning, videos, course type etc.)

Ease of use and advanced search

The platform will be easy to use and navigate; it should be quick and have advanced search functionality.

Ergonomics and ease of use is core to Open eLMS's principles - the company was founded by an ergonomist and human factors expert.

The learner interface is similar to video on demand sites such as Netflix, browsing, searching, and activating learning is intuitive. Ergonomic principles such as consistency of design, image sizing, and functional grouping ensure that no learning is required to immediately start using the system - even from the most infrequent of computer users.

The Open eLMS credo is ease of use aligned with comprehensive functionality. To this end, the system has quick and advanced search capabilities. The search box searches across metadata (description, name, keywords, etc.) for each learning resource.

In addition, the information displayed can be filtered by programme criteria (if the learning resources are attached to a programme of learning) or filtered by:

- Training that is not part of a learning programme
- Status (Not Started, In Progress, Completed)
- Requires precursor training to access
- Learning available for enrollment (i.e. not directly assigned)
- Refresher training
- Mandatory training
- Favourite learning resources

The screenshot below shows how these selections are made from the learner interface.

The system is regularly tested (and passed) for speed against a criterion of completion time of 2 seconds.

Categories

Courses are categorised. These affect how information is displayed to the learner.

Configuration options allow administrators to position the categories front and center when learners first login.

When is learning due

Courses can be “due” under a number of circumstances:

- they are part of a learning programme which has an upcoming due date
- the learning has been set as homework for a set date
- the learning is assigned directly to the learner which has a default due date when it should be completed
- a learning event has been scheduled in the calendar

Under any of these circumstances the learner (and manager if desired) will get a warning email outlining courses which are due. This learning will also appear to the learner via a pop-up window when they log in. This is alerted to the user via a ringing bell on the interface.

Open eLMS can be set up so that courses are suggested to learners once they finish a learning event. This is known as constructing ‘learning pathways’ and can rely on many additional factors in addition to the completion of learning such as the department, skills, location, prior knowledge, etc. of the learner. This is defined using queries attached to courses.

Below is an example of a query which can be added to determine behaviour within a learning programme.

Self-service course booking system

Curriculum developers and managers can set up courses which learners can select to enroll on to. The self-service booking system can be set up with a venue, numbers of attending, cost, user discounts, management approval for bookings, etc.

Trainee's can select bookings to enrol on to, these can be in-person events or webinars.

Self-Service Training

Any learning resource, lesson or event can be a self service item - i.e. it is not assigned but rather appears on the learner's interface as an enrollable item which can be searched for and selected (using the standard learner search tools and filters highlighted below).

Rules governing the cost (client discount), whether management approval is needed, which departments, groups or individuals can enrol and what prerequisite training is required can all be defined. There is even a query builder which allows administrators to combine conditions to allow enrolling (e.g. if person x is in department y AND it has more than CPD points for leadership etc.

Booking Reminder Emails

When bookings are made, reminders are sent to all parties (managers and learners).

The system is provided with a default list of emails which 'push' users through the system and send automated reminders when needed. These emails can be customised, turned on/off, and copied into managers.

These emails with joining instructions are sent when the meetings are made, and an hour before the event is about to start.

Events can also be set up to be exported to MS Outlook/GSuite calendars.

All invites automatically include Teams instructions if selected by the manager or curriculum developer setting up the event (the session is also automatically recorded and accessed on the individual's e-portfolio at any time)

Experience API tracking

xAPI is available, it is used by default to track video from Vimeo and YouTube.

Learning tracked record with metrics

Individual learner record for each user with tracked details of all CPD undertaken, activity, pages visited, time spent, in person activity, external programmes, professional qualifications.

Managers and learners have access to the individual learner record for each user. These details include details of all CPD undertaken (there is the option to gamify the awarding of CPD points and encourage positive competition amongst peers)...

...activity, pages visited, time spent (resource, criteria, and time are all measured), in person activity, external programmes, and professional qualifications can be discovered by drilling down into the data held on each learner.

Note the system also supports the Open Badges standard, which allows for awarded badges to be shared on social media sites such as LinkedIn and Facebook.

Tracking Offline Learning

Classroom training and blended training (classroom training using electronic media such as elearning and video) can be scheduled, homework set and registers taken.

Open eLMS also has the capacity to schedule and track:

- Books/CDs/DVDs
- Meetings, telephone calls, 360 reviews, etc.
- Face to face training
- Observational tasks (videos, documents, etc)
- On the job training
- Submitted work (for marking)
- Uploads (by learners)

Learning Offline

Offline completion of learning is possible with many learning types but not those that require a direct internet connection to the content (e.g. Vimeo or YouTube.)

Open eLMS is producing an App that will be made available for the project launch which will allow students to record data for elearning offline.*1.36

Upload Certificates and external Learning

There is self-service functionality to self-record external development, formal qualifications (uploads certificates) and experiential learning not completed via the LXP. This is backed up with authorised approval/verification/endorsement features.

The functionality described for recording non-platform development can be used for learners to self-record external development, formal qualifications (uploads certificates), and experiential learning.

Any learning uploaded will go through a formal approval process which requires sign-off from the learner...

...the line manager is then alerted via email and the issue resides on the line manager's list of "Sign off Training" items.

The item can then be signed off by the manager.

Building User Profiles

Users can upload any content to their eportfolio to build their own profile. Metrics on their profile can be reviewed using the progress tab.

Data stored includes:

- Qualification/Programme Status
- Qualification Progress (by time spent and criteria completed)
-
-
-
- Learning Resource Status (uploaded documentation and assigned learning)
-
- Earned badges
-
- Gamification Table
-
- Competencies required for the job role
-
- Skills scans *4.4

Upload Qualification with renewal date

Log and Store Qualifications

Open eLMS has the functionality to log and store learner's qualification including awarding body, date achieved, and renewal period. These can be uploaded by learners or their managers on their behalf.

Renewals and automatic notifications

Automatic email notifications are sent to appropriate learners to book onto a renewal qualification (this will continue to be sent out until renewed). This "Days till refresher training" parameter is available to the learner and manager of the system so the reminder period can be set.

Gamification

Badges, points and leader boards are all included [within the system to allow for friendly competition](#).

Badges are awarded via competencies. Badges can reside on third party websites (Linkedin, Teams etc.) via the Open Badges framework used by Open eLMS.) In this case badges are linked in Open eLMS using the Badgr app.

Manager

Management Interfaces

Open eLMS follows user-centred design principles - this means that it customises the interface around the unique needs of each role. This is as opposed to data centred design, which places a dashboard interface over data and trusts that each user will 'work out' what to do.

User-centred design means that each user simply needs to read the interface, from left to right, to carry out their desired operations. For instance a line manager may need to:

1. Set Training
2. Respond to QA feedback
3. Sign off Training

Whilst a curriculum developer will need to:

1. Add Learning Resources
2. Add Lessons
3. Schedule Events
4. Define programmes of learning
5. Assign Supervision
6. Set up Learning defaults
7. Respond to Feedback

As is shown in these examples, the interface aligns to the primary needs of each user type. This leads to faster adoption of the system and minimal training needs.

Standards

Open eLMS conforms to the UK Government's Digital Service Standards and the Technology Code of Practice. These documents are aligned to the company's user-centred design approach.

Machine Learning

Machine Learning (ML) is included in the system to recommend learning to users based on their characteristics and previous learning.

View own and teams training records

Managers can view the results of their own training records and those of their team

members. On the manager's dashboard there are three options for viewing those employees for whom they have responsibility.

View by Programme

This shows progress by each learner on each programme, including time spent, days since last met, percentage of the learning resources completed and the percentage of time spent when compared with the expected time spent learning.

Filters allow for viewing performance by programme, programme status etc.

This data can be printed, used as a filter to email those people in the table (e.g. email all people who have not started the 'Health and Safety Induction' programme) and downloaded to Excel.

View by Learning Resource

This view allows managers to review data by learning resource (e.g. review all personnel who have completed their Bribery Training).

The usual data sorting, filtering and report/email/export functionality are present.

View by User

This shows the total data across all assigned programmes, including total learning resources assigned, those not started/in progress/completed, the total time spent learning and percentage of learning completed. It also shows the number of days since that learner was last contacted, allowing managers to ensure learners are regularly spoken to.

The usual data sorting, filtering and report/email/export functionality are present.

View Learner Details

Learners can access their own comprehensive individual development report by selecting the Progress button in the top right hand corner of their interface ...

... Managers can review similar details by drilling down into each learner's record.

This system displays the learner's progress details including:

- Programme Status
- Leader board (CPD points)
- Earned Badges
- Competencies required for their role v's competencies achieved
- Learning Programme progress (progress by resources, criteria and time)

- Learning Resources (progress outside of programmes)
- Comments from management/trainers.
- Review and 360 forms completed (not shown)
- Pathways (not shown)

Added Value

The system shows the results of skills scans which are automatically displayed graphically to show improvement in underlying performance over time.

Intelligent Learning Technology

Machine learning (ML) is available within the system and can be enabled at any time ...

... this functionality recommends learning, by examining the learning the learner has completed and comparing this with the learning other learners have completed with similar jobs, departments, groups, learning experience, etc. This learning is recommended to the learner rather than directly assigned.

Intelligent learning technology to get smarter about learners and automatically provide course recommendations to them that relate to their current role, and their aspirations (trending courses, interventions triggered by the interaction of the User, pre-requisite learning requirements)*1.37

Adding Training Data

Training data can be added by learners and management either individually or as a bulk process.

Learners and managers can add training events to individual training records by adding details including certificates etc.

External training can also be added as a bulk process (via CSV import) or entered manually and applied to a group of people.

Print off Registers

Tutors are able to print off registers (via the reporting functionality) and can sign them off online as a bulk process or individually (see above).

Push Notifications

Push notifications automated by the system. These appear as emails and pop-up alerts when logging into the system.

Email templates are fully customisable.

There are 30 such standard notifications in the system covering tasks such as:

- to review a course which is upcoming relevant to their current learning programme
- complete learning that is overdue
- attend a learning event (online/offline lesson), workplace training, review meeting etc.
- complete any online evaluation after the event

There is also the option of creating your own automated email alerts which can use any of nearly 100 fields to filter intended recipients. These emails can be repeatedly sent at a predetermined frequency and any email can be automatically copied to management if desired.

Emails can contain links that take learners directly to learning resources, rather than logging in and having to find the resource.

Module-building functionality

The system allows for the building of modules (Open eLMS uses the term 'lessons' but this can be changed.) Any number of learning resources can be assigned to a module.

These modules can be assigned directly to learners, be used as the basis for webinar/face to face learning, be part of a pathway, or be attached to a learning programme (as shown).

Repeat/Refresher training

Supports content which needs to be completed more than once, such as mandatory training which needs to be completed every 3 years. Platform should allow an 'expiration date' to be set for individual completion records relating to such content.

Learning resources can be defined so that they are periodically repeated (a new record is created and the old one is archived). In the example below the GDPR course is carried out every year, for a maximum of 3 years. A customised email is sent out when the course should be retaken (further emails are sent out after a defined period of days if the course is not completed).

Open eLMS has been designed to minimise the need for management intervention wherever possible.

Track Compliance of Mandatory Training

Administrators can set training as mandatory or optional (i.e. browsable learning to which the learner needs to enrol). This feature can also be applied to an entire training category (e.g. all compliance training is mandatory).

Any mandatory training can be filtered by the learner. Mandatory training is denoted by the icon on the training thumbnail.*1.39

Surveys

Functionality to build, send, receive, and collate user surveys

Open eLMS Creator enables the building of surveys which can audit the user population to find out valuable information.

Calls, Meetings and Development Pathways

LXP will include features for hosting and recording development and review conversations and have facilities for creating aligned plans and development pathways

Open eLMS is provided with Open eLMS Forms which allows your organisation to insert their own existing feedback and review forms into Open eLMS. The data is then fed directly into the LMS for reporting purposes against each employee record.

Competencies/skills can be assigned to the employee's job - this gives the employee a goal to reach which can be achieved via completing an assigned learning pathway.

Pathways can be created by combining learning resources, modules, or even programmes. These learning units are linked together by queries which determine which pathway(s) are adopted by the learner. **Note this pathway functionality is in development but will not be released till mid-2021 Q4.**

In order not to overload the learner - access to all learning (learning resources, modules, programmes, and pathways) can be controlled by queries. So in this example, access to the Manual Handling course is only possible if the Health and Safety Induction course is completed.

Managers Initiate Learning

Any individual initiated training requests can be set up (on a case by case basis) to require management approval.

Here a collection of training requests are selected to apply for bulk approval.

Automated emails alert managers and learners alike of the status of such requests.

Selecting Group of Learners

Open eLMS has a single point of entry which will allow each user to undertake the desired modular functionality assigned to each role. The desired role can be selected from the menu bar.

Note that these roles are customisable and have a unique interface assigned to each (which in turn can be customised).

A user can be assigned any number of roles, customised in the system settings. For example, a System Administrator would usually have access to all other roles as shown.

1.A.4.17

Pathways

Pathways for certain roles (e.g. Social Work Induction) can be set up with a breakdown of the skills, knowledge and behaviour needed for the entire learning programme.

Progress is conveyed to the learner by the gauge in the top left hand corner of the screen ...

Looking to the left of the learner's interface, a breakdown of progress against the role criteria is visible. This can also be used to filter the eportfolio ...

Clicking on the Progress link (see first screenshot in this section) will give a more detailed breakdown of progress, measured against the programme's criteria (this view is shared with management).

Note that there are a myriad of ways to set up training for roles and automate rules surrounding the assignment of learning. Some training may not be appropriate for certain job roles, some learning can be assigned only to people with a certain level of attainment and some learning may only be assigned after a set period of time or once other more basic learning has been completed. These options exist in the system and can be embraced to deliver a solution which dramatically reduces the management time needed to deliver a learning management solution.

Below is an example of a query which can be added to determine behavior within a learning

programme.

Query builder

Hierarchies within the organisational structure allow for the definition of hierarchies (Teams, sub-teams) groups, departments, job roles, etc.

This allows Open eLMS to target learning to complex system 'audiences', dependent upon user characteristics.

For instance, a learning plan (or pathway) will can be suggested to the learner via a query, assigning learning dependent upon features of the learner such as their:

- Job
- Location
- Skills
- Previous learning
- Group
- Department

This is achieved by the system's in-built query builder which can be applied to any learning resource, lesson, or learning programme. These queries automate the entire learning management process.

Group Employees

Ability to 'group' employees in to multiple groups to target learning and to map content dependent upon learner need

Employees can be grouped together across locations (e.g. sales, new hires, etc.). Any learner can belong to multiple groups.

Groups can be used to target learning and to map content dependent upon learner need. Here the 'New Hires' group is being assigned the Health and Safety induction module etc.

Programme management

Open eLMS has the option to assign entire programmes of learning to an employee; some examples of programmes include:

- A professional standard
- A qualification
- An apprenticeship programme

The learner needs to complete learning, respond to set projects and upload evidence of learning to demonstrate skills, knowledge and behaviours expected from that programme.

The advantage of utilising a programme of learning is that there is no need to set learning objectives, assign elearning and classroom training since the programme automatically releases and assigns the learning when it's needed in accordance with the programme's time table.

Since the programme monitors the completion status of each unit of learning, this gives managers the metrics to examine how they are progressing against expectations and where knowledge/skill gaps may exist against any Professional Standard. This data is visible to the learner and manager; the RAG system alerts the user where the learner is falling short.

Learner feedback

Performance Review and Development (PRD) Discussion

Performance review forms can be created which allow management to periodically get feedback from each employee regarding their development.

These forms are 100% customisable to reflect the processes with each Council.

This information is stored on each learner's e-portfolio and can be accessed at any time or reported on.

Audits and Surveys

Using Open eLMS Creator surveys and audits can be created to find out specific questions from the learner population

Added Value

- The recording of skills can lead to the awarding of Badges. Badges allow you to use awards won in Open eLMS to be transferred out of the Open eLMS infrastructure and remain with learners on social media channels (Linked In, Facebook, etc.) and CVs.
- Employees who have left the client will still need to make a submission. Open eLMS' pack and go functionality will allow such personnel to take their records with them to evidence on-going development.

Skills Matrices

Capacity to host skills matrices and align to mapped content and professional standards

Open eLMS is able to host a skills matrix mapped to learning content and professional standards. Any skill (aka competency) can be defined as meeting a threshold of CPD points...

CPD points for each skill/competency can be 'earned' by completing learning. This allows for the accumulation of points until a skill is met. A gamification option allows learners to compete against each other when earning CPD.

Note that the system also accommodates skillsets - which allows for the collation of skills to accomplish the skillset.

Jobs can be defined as having required skills.

This gives the learner the ability to measure if they are meeting the competency requirements for their job or professional standards.

Badges can be awarded on the awarding of skills/skillsets which can be shared on LinkedIn, etc.

View Learner Profiles

Learner profiles will be easily visible and archived on the LXP.

Learner profiles can be archived (individually, as a bulk process, or via importing a leavers list - this can be automated). Archived profiles are stored in a Disabled list prior to final deletion (conforming to GDPR requirements).

In addition, different types of data can be archived at different times depending upon the category of data.

Flags not completed training

Flags when mandatory training has not been completed and details dates due for renewal

All mandatory training, when assigned, has a set number of days to be completed prior to it becoming overdue. Automated emails are sent out at each step to encourage the learner to complete the process.

Mandatory training can be filtered for using the exclamation mark icon as shown...

Details as to when it is due is displayed to the user.

When the elearning is completed, a new renewal date is set, if applicable (i.e. it is learning due to be refreshed every x number of days).

Hierarchical flagging system

Hierarchical flagging system (line manager > next higher manager) when mandatory training remains incomplete

All managers assigned to each learner in the hierarchy can get email alerts and are flagged when training is incomplete.

Open eLMS does have the capacity to set up a management hierarchy.

Should your organisation wish to insert rules for sending selective emails to the hierarchy if

conditions are met (manager is away, x number of emails sent etc.), then this can be arranged once confirmation of design is achieved. Note this will entail no charge but is not currently in the system.

All email alerts in the system can be copied to managers if desired.

The manager interface flags mandatory training as incomplete when looking at learning resources. Learning resources can be searched for and the results filtered by status. This can form the basis for an email alert to contact all people falling behind on a particular piece of learning (e.g. send a weekly chaser email to all people who have not started their induction).

Returning to Incompleted Courses

All elearning and videos (YouTube and Vimeo) are book marked. This means that learners are taken back to the same topic, time stamp etc. that they left the learning at. Any such learning is tracked as 'In Progress'.

Measures are taken with the elearning to not allow learners to access further topics in the menu until they are completed.

With videos the menu is hidden (again a configuration setting sets this) which prevents the controls being seen until the course is completed.*1.67

Access to team Information

Each CPD leader gets assigned learners for their own team. Administrators have wider access to the data so they can see data across teams.

Note that permissions and access levels are all highly configurable and can adapt to the business model chosen.

Rule based authorisation

Automatic authorisation flag to line managers when users 'sign up' to development – especially for development which triggers a salary increase or comes at a cost.

Any learning resource, module, or learning programme can be set up to automatically require line manager authorisation (e.g. development which triggers a salary increase or comes at a cost.) This manager's interface shows 3 developments which require authorisation; the system is accompanied by email alerts to all interested parties.

Bulk Confirmations

There are many bulk confirmations in the system (e.g. signing off multiple training approvals as below.)

Further bulk operations include (but are not limited to):

- Bulk confirmation of a place on a course
- Bulk move to reserve list (this will need to be developed prior to implementation)
- Bulk transfer to another event
- Bulk email to all
- Bulk download list of attendees

Nudge learning

System can automatically nudge learning to individuals and groups based on trends and preference and need

There are two main methods of nudging learning to individuals and groups based on trends and preference and need. The first is to set up a query which assigns learning resources, modules, and programmes of learning to groups or individuals based on characteristics of the query. For instance, a programme of learning can be set up aimed at improving the leadership skills of accountants in your organisation. This course can be set up to be 'nudged' to 'new starters' (group), from 'accounts' (department) who have not achieved the 'Leadership' skill.

This 'nudged' learning will appear on the learner dashboard available for enrollment and can be further nudged by the use of automated emails.

Another method of nudging learning is to employ a questionnaire using the Open eLMS Creator question maker. Answers to any questions can then lead to the nudging of new training to the learner. For instance, if the question is 'Do you need leadership training?' and the answer is "yes", then a relevant programme can be automatically nudged to the learner.

Using these techniques, a business wide artificial intelligence can be created to run learning within the organisation with minimum input from management.

Plans do exist to create an automated AI to make this process even easier to set up and maintain using the AWS Machine Learning engine - SageMaker, learning pathways could be created automatically based on user behaviour, business needs, etc.

There is no firm release date on this as yet, but Open eLMS is planning for Q2 2022 as a release date. This would be an add-on costed module since this will be utilising third-party tools which are provided at a cost.

Machine Learning (ML)

Machine learning (ML) is available within the system and can be enabled at any time ...

... this functionality recommends learning by examining the learning the learner has completed and comparing this with the learning other learners have completed with similar jobs, departments, groups, learning experience, etc. This learning is recommended to the learner rather than directly assigned.

Overdue Course Alerts

Overdue courses are escalated to line managers, thereby allowing them to intervene if necessary. This escalated learning is available to line managers from their management dashboards and via email.

Course reminders

The system sends reminders through every step of the course process (learning being assigned, learning due for completion, line manager gives feedback, line manager signs off work, status change etc.).

All email templates are editable and can be copied to line managers.

Refresher Reminders

Refresher training can be set at a specific interval so that the training record is archived and a new training record is set which requires completion.

Reminders are sent by a predefined number of days in advance when the training is due (set via the configuration options in the system) so learners can remain compliant.

Learners are also notified via a pop up alert system when they first log in to the system to retake training.

Tracking/Filtering Fields

LXP tracks usage based upon individuals, roles, teams, levels, job groups, courses, etc.

Tracking information can be attributed to individuals, roles, teams, levels, job groups, courses, etc. Custom reports can be created to utilise any of nearly 100 fields against which LXP usage can be filtered for or reported on.

Manager Statistics Dashboard

LXP will feature a customised user dashboard displaying each individual's learning statistics and team overviews for those with line management responsibilities.

Data dashboards can be created by the system and added to roles and selected jobs. The widgets selected and their layout are configurable.

The dashboard can be configured to load in automatically or be activated by the dashboard icon in the top left corner of the screen.

Assigning Learners to Events

Managers (and Curriculum Developers) can assign team members on to any event. The manager selects people for whom they have responsibility ...

Learners will then be assigned to the event (or waiting list if applicable.)

Substitution on Events

Substitutions are easy to make for events by selecting a different person from the team for that event if they are unavailable. People, teams and whole departments can be substituted using an easy to use interface available to curriculum managers.

Waitlist sign-up functionality for face-to-face learning interventions

Face-to-face learning interventions are governed by the Open eLMS Smart Classroom module: Open eLMS Classroom. The functionality contained therein allows for waiting lists. Notifications are automatically sent out and if there are any cancellations, then the person at the top of the waiting list will move on to the face to-face session.

Track Student Attendance

Open eLMS Classroom allows trainers to track face-to-face or webinar learning sessions. Registers can be marked for the whole class as a bulk process or individually.

Absences can also be recorded and reported on.

Progress is tracked automatically where appropriate for online learning resources which are attached to the session (e.g. pre-learning, in-lesson resources or homework). The trainer can also import a register to track progress if required.

Registers can also be imported into the system.

Marking Attendance (automated)

Data can be imported into the system from a CSV template file which will mark all attendees' names on the register.

These 'registers' are stored online. Line Managers can review data in accordance with Data and Destruction Policy (every two years) and remove attendance records from personnel files.

Deselecting employees from training event

Personnel can be deselected from mandatory training sessions as a bulk process or one by one.

Writing absence notes

The system has the ability to write notes regarding their absence and authorise it accordingly.

Automated Attendance Reminders

Emails are sent out (using customisable email templates) warning learners and trainers in advance of each learning event/webinar (e.g. smart classrooms) and when the event is enrolled on.

Approval Process

Any requested training (if it requires approval - this is configurable) then appropriate CPD leaders will get an email AND it will be alerted on their dashboard as shown.

Mandatory training

Administrators and CPD Leaders can set training as mandatory or optional (i.e. browsable learning to which the learner needs to enrol). This feature can also be applied to a training category (e.g. all compliance training is mandatory).

Any training can be set for individual personnel and/or teams and/or departments as a bulk process.

Impersonating a user's account

Administrators can log in, access any user account, and launch learning from that account.

Administrator

Administrator Tasks Dashboard

Each role in the system has a dashboard which follows a user-centered design (the interface is constructed around the most urgent tasks highlighting where work is needed.)

The default administrator's interface concentrates on setting up learners - showing where learners need approval, learning programmes which need developing, CPD Leaders which need learners assigned to them, bookings which need managing and any training which needs signing off.

The default CPD Leader's interface deals with scheduling lessons, marking registers, reviewing progress of learners (% completion of programmes, hours since last met, hours spent learning etc.), responding to quality reviews, training that needs signing off and training bookings that need approval.

In each case red numbers on the dashboard notify the user how many of such tasks are required. These tasks are also alerted to the CPD Leader and administrator via emails.

Note that roles are customisable and there are several other roles (curriculum developer, financial controller, quality assurer and elearning creator) which have unique interfaces.

Personnel can be assigned more than one role.

Multi-client Capability

Open eLMS allows multi-client capabilities. This functionality includes:

- Functionality to manage learners by group (company, department, team, etc.).
- Isolation of data between companies – access restricted to 'see' only data within a group.
- Branding on the system can be unique to each group (logos, accessibility features, etc.), enabling multiple clients on a single portal.

Permissions

There is a work flow system which alerts CPD Leaders of issues which require their attention (this is backed up by email alerts). These alerts are clearly flagged up on the CPD Leader's interface, allowing them to go directly to the issue to apply a resolution.

Any issues are also clearly flagged up on the learning and learning programmes.

When an issue is dealt with, the QA is alerted so that they can apply a final sign-off or send it back to management for further work.

The default system allows any issue to be accepted or rejected. This can be configured with an associated colour to use a rag system (interface available below) instead to order priorities and report on them.

QAs/inspectors have their own system for managing the QA process which involves sampling work and monitoring feedback submitted as well as tutors in response to QA comments. QAs can add feedback to work or entire modules/criteria/subcriteria of any learning programme.

QA reports are available in the system (editable to include filters and reporting fields) which highlight areas of improvement and allow the identification of trends (failings in subject areas, across departments, locations, managers etc.)

Add learners from a separate data source

Open eLMS can keep up to date with relevant employee data (employee/personnel number/new starters/leavers/change of line manager) by setting up a CRON task to look for employee export data from SAP and import it.

Once the update has been successful, Open eLMS will delete the file. The CRON task is run again (usually overnight) and the data is updated again. This process will continue to remove the need for manually importing the data. Open eLMS has a default interface for activating this procedure.

Any changes to each user details will affect queries assigned to the learner and add/remove learning opportunities as required (e.g if a user is moved to a new department, department specific orientation learning will automatically be applied to that new user).

Merging Training Records of Leavers/Starters/ Duplicates

Open eLMS has an interface for transferring and storing training records from other systems, including those currently in-use.

This is usually carried out as a one off task, but should the data still be 'live' then a CRON task can be organised to periodically import data as a back-end process. 1.69

Linking multiple accounts

Open eLMS allows an alternative ID which enables training data from multiple accounts to be brought together whilst still maintaining separate logins.

Staff Upload

Automatic site registration of the client staff (via regular upload from Oracle Fusion).

This can be carried out using the server side import functionality (imports staff file via a CRON process from Open eLMS).

Setting up Learners

Learners can be integrated into the LMS via a stand-alone administration process. Admin/Managers can add/edit Manually Maintained Users.

In addition, such users can register manually online and be automatically assigned a role; there is also an approval process for registrants which can be activated if required.

Learning will be assigned to the learner dependent upon any combinations of job, company, location, skills, past learning, etc. carried out by the learner. This is set up by the Curriculum Developer (as illustrated below) by creating queries which assign learning dependent upon a combination of any learner characteristic.

Adding Managers

Facilities for matching coaches, mentors, advisors, or observers and providing statistical reportage on such, is preferred

Coaches, mentors, advisors, or observers can be assigned to individuals, departments, groups, subject categories, etc. using a manual process as shown.

Managers can also be attached to learners via an import.

Default reports (Manager progress, Managers falling behind) give data for statistical analysis. This includes the number of employees assigned, average % of time behind and average percentage completion of any learning undertaken.

Custom reports can also be created and data can be exported to Excel or Power BI for instant analysis.

Access level for Users

The four different access levels (Users, Trainer, Supervisor and System Administrator) are set up within the system by default.

Additional role types can also be created with customisable permissions.

External Staff Registration

All registered staff can be entered into the system with an 'In Progress' status which requires management approval prior to using the system.

Integrations

Automated integration

Live data integrations can be set up in a number of ways using standard interfaces within the system. The most common approach is to set up an automated FTP transfer which imports a snapshot of the database every night, archiving any leavers and adding new hires.

Open eLMS has an interface for accepting third party metadata to allow Single Sign-On (SSO). This can be adapted to other methodologies other than SAML.

SSO will detect new hires and add them as soon as they access the system.

Should a live synchronisation of the data be needed, then any third party system can utilise the Open eLMS API to add or remove learners as soon as changes are made external to Open eLMS. Details of the API calls available can be found on the company website at [Open eLMS API - Open eLMS presents Open eLMS](#) .

Manual data integration

Initial HR data import

At the start of any implementation process, a full import of the As-Is HR system data is usually necessary in order to assign learning and managerial tasks to the organisational structure.

Existing interfaces allow for the import of such data, but can be used at any time in the system's life cycle.

Data import functionality is embedded throughout the system when it is needed.

Taking Registers

For example, managers and trainers can import a register as a CSV template file which will mark attendee attendance...

Importing learning data

Historical learning information from legacy systems can also be imported via existing interfaces.

Uploading evidence

And line managers can also use bulk import processes to upload evidence of learning.

Importing Legacy Learning Content

Step 1: Import Legacy Courses

The first step in this process is to import learning content from the Totara system. SCORM zip files need to be sourced from the respective suppliers (or the Agency if self-built) and uploaded into the system.

Step 2: Map old courses to New Course IDs in Open eLMS

A template spreadsheet is populated which maps the old imported courses to the new IDs in Open eLMS.

This spreadsheet services as a lookup table when importing the legacy data from Totara.

Import Totara Learner Data

Data is then exported from Totara with the following fields:

- Username
- Learning Resource Name
- Created Date
- Last Access
- Status
- Score

Platform Agnostic

Note Open eLMS is platform agnostic when it comes to importing third party learning data. Any LMS system can export data into the required format and it does not require Open eLMS to have direct access to the Totara system.

This import can be run concurrently with the new site launch via a CRON task. This can be useful if the Agency requires both systems to run concurrently during a phased switch to the new system. **1.A.4.18**

Transfer of Data - HR System

LMS shall interface with the Authority's HR system (Origin) with the following data being pushed back into HR system from LMS - course completions to be pushed back into the HR system as this will remain as the Authority's one true record of all learning completed.

Open eLMS will interface with the Origin HR system using either the Origin API (if access to it is permissible), give the Origin system access to the Open eLMS API ([Open eLMS API - Open eLMS presents Open eLMS](#)) or provide a CRON task (automated server side process) to synchronise the two data sources.

The approach taken will be in accordance with the IT team's wishes at West Mercia Police. The company has done this before and has batch processes for synchronizing learning data in this way.*6.2

Platform should be able to host talent and management development tools from third-party suppliers.

Open eLMS as the names suggests and has a wealth of API integrations out of the box:

- Anders Pink AI
- Badgr
- Go1
- Google Analytics
- H5P
- Olark
- Moodle
- MS Power BI
- MS Teams
- Multi-Factor Authentication
- Salesforce
- Turnitin
- YouTube
- Zoom

Custom integrations can also be added, either by using third party APIs, LTI hooks or by third party developers utilising the Open eLMS API - <https://openelms.com/support/open-elms-api/>.

Note that since Open eLMS are owner-authors of the Open eLMS system, any custom integrations can be done swiftly by the team and at a low cost.

Venue Database

Locations/venues can be populated into the system and added to events.

Venues information includes name, manager contact details, rating (1 to 5 stars), and maximum capacity.

Team Structures (7 Levels Total)

Yes Open eLMS can be configured to manage a 7 level organisational structure as per 2021-07-07 Attachment 1 Anonymised Oracle team upload SAMPLE.xlsx.

Any number of levels can be added.

Configurability

Open eLMS is completely configurable. No two instances of Open eLMS are the same, with over 200 different options available. this includes:

- Appearance (branding, font, look and feel etc.)
- Labels (customisation of all wording used throughout the system)
- Dashboards (select widgets to appear on data dashboards)
- Management dashboards (select functionality to add/remove from each dashboard)
- Permissions (each role permission is 100% customisable).
- elearning (all configurable via Open eLMS Creator - including video presenters and voiceover)
- Microlearning

Updating Branding

Look and feel and branding is customisable via the administration settings in Open eLMS. Any changes made automatically propagate around the Open eLMS infrastructure from LMS or course catalogue.

The system can be completely 'white labelled' for the Client. Just some of the changes include:

- Logos

- Colours
- Buttons, captions, instructions
- Organisational structure labels
- elearning (including voiced welsh accents for English and Welsh content)
- Background imagery
- Landing page

Automated emails

Automated email service to manage course registration, flag reminders, promote new resources, etc.

A series of default emails are sent out to learners in the system when alerts are due (e.g. welcome emails when registered, emails to enter missing registration data, alerts when learning is being assigned, alerts to managers which require sign-off for work, promoting new learning resources, etc.). Each email can be customised and disabled if desired.

Further custom email alerts can also be added to supplement these automated emails. An audit trail is saved of these emails which are sent via the system.

Follow up Emails and Reminders

Default email reminders

There are almost 50 email reminders that can be sent to users to complete courses that have been built into the system to push people through the system. These reminder emails are customisable by the system administrator and are used as placeholders to add familiarity to the emails (i.e. insert user names etc.)

Custom email reminders

Managers can also create custom reminders on a just-in-time basis for certain courses.

On screen alerts

In addition to emails, reminders are shown to learners via the animated ringing bell icon on the learner's interface. The system can be configured to open these reminders automatically when logging in (as opposed to clicking on the icon).

Outlook Calendar Syncing

Tutor led training dates/times are by default added to learner and tutor's Outlook calendars via the Outlook API.

Dashboard Customisation

Open eLMS adopts user centred design which allows for customisable interfaces for each role which brings out the main tasks on the dashboard (this is as opposed to data driven design which leaves the user to decide upon what to do.)

Personalised Visually-rich Dashboard

LMS shall offer a personalised visually-rich dashboard, based on varying dependencies (i.e. role specific)?

Open eLMS has been designed by ergonomists to be the ultimate in ease of use, this approach to user centred design differs widely from the traditional data drive design approach, which relies on the learner to 'work out' how to use the software. Interfaces are designed specifically for each role, this eliminates the need for training as the user of the system simply needs to read the screen from left to right.

For instance this interface is designed specifically for Quality Assurers. The interface invites QAA staff to sample > feedback > and create a workflow of actions for management to improve the quality of learning resources submitted by learners.

This is a Curriculum Developers interface for comparison.

Customizable interfaces exist for a number of roles including:

- Super Administrator
- Administrator
- Manager/Coach/Trainer
- Quality Assurer
- Curriculum Developer
- Financial Auditor

Any user can have a number of different roles assigned to them with 570 different options to add/remove functionality from each role, thus giving the administrator complete flexibility in implementing roles within the system.

The learner interface is slightly different as this uses visual cues from video-on-demand sites to give the learner an immediate sense of understanding in how to use the interface. There has never been a training program for how to use Netflix's system, and the same holds true for Open eLMS users, it's intuitive!

Editable roles and functions

Role profiles can be added and edited with +250 different options.

Role dependent interfaces

Open eLMS's design is shaped by user-centred design principles which allow for customisable interfaces for each role. This means that the main tasks for each role are positioned in a logical order on the dashboard (this is as opposed to data-driven design which leaves the user to decide upon what to do).

This is core to the ergonomic design of Open eLMS which increases system update and removes the need for intensive (if any) training as the learner simply 'reads' the interface from left to right;

Customisable dashboards include, but are not limited to, the following:

Administrators:

Managers:

Event

Administrators: Quality Assurers/Inspectors:

Any user can have more than one role assigned to them and new roles/permissions can be defined (with over 250 customisable permissions) and dashboard elements can be added/removed.

Learner interface design

Whereas the learner intrinsically knows how the interface works, and receives cues from similar video on-demand services such as Netflix and Amazon Prime...
... which leads to instant take up of the system.

Organisational Structure

Users are structured on the platform reflective of the organisation structure.

The organisational structure (levels, nomenclature, etc.) can all be customised to suit the

Client's structure.

Labels can be swapped and then the name changes propagated throughout the system.

Further sub-divisions of departments etc. can be created if desired.

Employee ID Number

Must include the existing employee reference number as a unique identifier which is within SAP, to allow us to join it back up with SAP data.

Standard functionality currently existing within the proposed solution.

Retaining Current Reference Numbers

LMS Contractor shall ensure the retention of current reference numbers and structures within the proposed solution from Origin interface

Users are structured on the platform reflective of the organisation structure within the Origin Interface including current reference numbers and structures. The organisational structure (levels, nomenclature, etc.) can all be customised to suit the Client's structure

Labels can be swapped and then the name changes propagated throughout the system. An unlimited number of sub-divisions of departments etc. can also be created if desired.*3.1

Push Learning Aligned to hierarchy changes

The LXP platform must automatically suggest or push content changes to users aligned to any hierarchy changes (pulled from HR system – iTrent). The system must make adaptations to user profiles when changes occur and adjust learning content as appropriate, including changes to name, job role, structure changes, reporting manager, etc.

Adapting the user experience in response to changes in name, job role, structure changes, reporting manager will be done by setting up a periodic export from iTrent of user data. Open eLMS will set up a CRON task to look for that file and import it; this will update all personnel data in the system including changes to name, job role, structure changes, reporting manager, etc.

Once the update has been successful, Open eLMS will delete the file. The CRON task is run again (usually overnight) and the data is updated again. This process will continue to remove the need for manually importing the data. Open eLMS has a default interface for activating this procedure.

Any changes to each user details will affect queries assigned to the learner and add/remove learning opportunities as required (e.g if a user is moved to a new department, department specific orientation learning will automatically be applied to that new user.)

Automate user accounts

The LXP will automate the creation and archiving of user profiles based on active employment status (pulled from HR system iTrent using Unique Identifier).

The same process will be run as described in the previous question. This procedure will however import a leavers list. This does not update personnel, instead it archives or deletes (configurable) users from the system.

Import Learning Records

The supplier must be able to support the transfer and storage of historical development information from systems currently in-use

Open eLMS has an interface for transferring and storing historical development information from systems currently in-use.

This is usually carried out as a one off task, but should the historical data still be 'live' then a CRON task can be organised to regularly import data as described earlier in this section.

Curriculum Developer

Terms used

Different systems use different terminology. Open eLMS allows system users to translate terminology to reflect the terminology used by the client. The default terminology used by Open eLMS is:

Learning resource

This is a single learning object e.g. a YouTube video, elearning module etc.

Lesson

This is a collection of learning resources - they can be completed in a set order or not. Lessons can be run in a classroom or designed for asynchronous learning (i.e. self learning).

Event

This is any event associated with learning so can be a classroom session, a Tutor Meeting, a Phone Call etc. Events can reuse lessons and learning resources for attached learning content.

Learning Programme

This would be an extended learning event (usually lasting from 3 months to 3 years.) An example would be an apprenticeship, a university degree or a qualification. In such cases the learning resources, lessons and events can be scheduled months in advance and mapped to learning outcomes, criteria and subcriteria. In this way learners and trainers have a good view as to how close each learner is to meeting their underlying learning goals.

Categories

These are simply categories of learning and can be used to group any learning or lessons on the learner's ePortfolio.

The use of learning programmes, events and lessons is not mandatory and very much up to each client whether to structure their learning in that way. Open eLMS has over 200 configuration options which allows systems to switch on/off any of these features.

Certification

Administrators of Open eLMS have complete control over the certification process, allowing certificates to be switched on/off.

Certificates can default to use the client's logo and standard messaging else it can be customised using certification logos, messaging etc.

Open eLMS Catalogue Overview

The Open eLMS suite of products and services offers a range of functionality found in some systems but not combined into a single offering. Benefits to course delivery and other business benefits are listed below ...

Editable Library of Content

eLearning content can be so generic that it does not reflect an organisation's learning goals and therefore serves no real purpose. Open eLMS Catalogue of learning is different as it is 100% editable, to change a message simply click on text within Open eLMS and edit.

Create your own elearning in minutes

Creating an Open eLMS Creator elearning course is as easy as creating a PowerPoint presentation (only far more engaging!). Using this system, you can rapidly create an elearning library of new content, aimed specifically at your organisation.

N.B. The standard cost for this for a corporate licence would be £28,000 per annum. Open eLMS will offer this for free.

Create elearning that actually works!

Open eLMS elearning is based on the concept of building virtual environments and then placing learning objects (presenters, animation, text, etc.) into that space.

As a result it looks different (aka salient), which tends to be remembered better (98% of 250 respondents claimed to have understood the subject matter). This has been evidenced in an independent study found on our website - <https://openelms.com/easy-to-use-and-comprehensive-lms/products/open-elms-lxp/case-studies/>.

Build a single learning programme for all

Using queries within a learning programme, you can ensure a unique experience is given to each learner. For instance, an induction programme could send people down a different path for health and safety depending upon their department (chemistry, more emphasis on fire training, etc.).

Queries can be added to any Learning Resource, Lesson, or Programme to allow pathways of learning between these elements.

This approach will greatly decrease the amount of time managing individual learners.

Create Course Content (without need for authoring tool)

Users can create course content in a number of ways without resorting to external authoring software. Options include:

- Utilising the elearning supplied with Open eLMS via the Open eLMS Catalogue

- Adding learning from document repositories (e.g. Word, PowerPoint, websites etc.)
- Importing YouTube
- Importing elearning scripts (Word/Google Docs) directly into Open eLMS

These options are described further below 1.70

Building a Catalogue of Learning

LMS will allow a Catalogue of Learning to be built by identifying courses that must be completed for any role as needed internally.

Embedded eLearning Repositories

The content repositories (Open eLMS Catalogue (included with tender), Go1, and Anders Pink) are available out of the box. This elearning can be drawn down directly from within the system via the Learning Library.

Moodle learning objects can be linked directly with the embedded Moodle integration in Open eLMS (items can be launched from Open eLMS within Moodle and tracked back to Open eLMS).

Document Repositories

Integration with other third party repositories (e.g Google Docs, Sharepoint documents) can be inserted as web links or bulk imported via a spreadsheet.

YouTube Playlists

A very popular way of adding a lot of learning resources very quickly to the system is to import YouTube playlists. This has the benefit that metadata (images, description, author, name, etc.) are taken from YouTube, so all the curator needs to do is add YouTube videos to a playlist and then import that playlist.

YouTube videos are tracked in Open eLMS using xAPI.

Uploading PowerPoints, videos etc

Open eLMS can host a range of learning resources including PowerPoint files with integrated video. PowerPoint files are uploaded and metadata (keywords, description, promo images, etc. are added to make it searchable.

These PowerPoint files can be added to the system directly, else they can be blended together with other types of learning and used for either asynchronous learning (online study appearing on the learning portfolio when needed), or synchronous learning (e.g. face to face tutorials, online lectures, etc.) which learners enrol on and feature a blend of these learning

resource types ...

Any learning lesson resources in the lesson can be set for pre- (background knowledge) or post-session study (assigned as homework).

Learning Audits

Learning progress is tracked and auditable, and audit reports are available for continuing refresher training.

All inputs and outputs are also saved by the system, providing a complete log of all system activity. This can be used in the case of any nefarious activity to discover the perpetrator or to demonstrate GDPR compliance.

Delegated assigning of learning

Facilities for delegated or assigned learning e.g. from course organiser/leader and/or line manager

Course organiser/leader (AKA 'Curriculum Developers') and line managers can assign learning to people, groups, departments, etc. via the learning library button (this functionality can be added to any role by editing role permissions).

Platform hosts capabilities framework with diagnostic assessment tools

Open eLMS can host capabilities frameworks as a framework programme, with associated skills, knowledge, and behaviours. Curriculum developers can edit these frameworks and set work times and associated learning against the criteria.

Such frameworks require evidence to be uploaded against the outcomes and criteria of the framework. This can be done by managers and the learners themselves.

When uploading content, learners need to map the uploaded file(s) against the criteria of the framework as shown (number of evidence types are defined within the framework).

Management has functionality to check and sign-off the framework for the learner.

Self-assessments create a development plan

Open eLMS Creator enables the building of surveys which can ask the learner a series of questions. In accordance with their answers a series of learning resources, modules, and learning programmes can be assigned to learners automatically.

These assessment questionnaires are ideal for initiating learning pathways that create a learning plan for the user. The graphic display of learning pathways to the user (shown below) will be released mid-Q4 2021.

Learning resources, modules, and learning programmes can be linked together to create suitable pathways customised to the unique characteristics of each learner (location, existing skills, learning completed etc.) This is currently achieved using queries, the graphical user interface shown below will be released soon.

With learning programmes, certain sections of each programme can be blocked off or opened - again in accordance with the characteristics of each learner.

This produces a highly customised development plan from the initiation point of a single survey.

Accessing Secure Content

Access to the system can be restricted via an IP range. This is set up as a system configuration option.

As part of the system integration similar functionality will be developed to block access to certain content outside of a secure network. Open eLMS will work with West Mercia Police to obtain the secure network parameters and make the system behave accordingly. *1.59

360 feedback

LXP is integrated with 360-degree feedback (peer observations) which produces a tailored suggested development map as a standard output

A 360 degree feedback containing peer observations will be created using Open eLMS Forms to replicate any existing process. The standard output would utilize existing formatting and contain digital signatures as required.

The functionality is described in greater detail in response to the 'Functionality to carry out online 360° appraisal (peer observations)' earlier in this response.

Skills Matrix

A skills matrix is produced which will allow L&D team to review skills in the company and where learning is required.

These skills matrix also show which skills are required by learners to effectively carry out their jobs and where additional training is needed to meet requirements.

This information can be printed out as a report.

Identifying Demand for Corporate Wide Learning

A skills matrix, as identified by employee development plans/1:1s (linked to Manage Performance & Development) is produced which will allow L&D team to review skills in the company and where learning is required.

These skills matrix also show which skills are required by learners to effectively carry out their jobs and where additional training is needed to meet requirements.

This information can be printed out as a report or used as the basis for an email alert to encourage further training. *1.58

Ongoing Tracking for L&D team

The L&D team will be able to track, report and issue notifications for any recurring certification, training requirements, so that the Authority can ensure compliance requirements are met.

Learning resources can be defined so that they are periodically repeated (a new record is created and the old one is archived). In the example below the GDPR course is carried out every year, for a maximum of 3 years. A customised email is sent out when the course should be retaken (further emails are sent out after a defined period of days if the course is not completed).

This data can be reported on for the most recent training requirement as well as an audit of all training carried out in the past. *1.66

Learning for Groups

Development specifically for certain groups (i.e. line managers, academic staff, others) should be mapped and easily identifiable

All learning (Learning Resources, Modules, Learning Programmes, Learning Pathways) can be applied to certain job types (e.g. Leadership, Managers, and FOH).

The system has additional functionality to create learning pathways dependent upon any learner characteristic (including job types). These additional parameters include:

- City
- Company
- Country
- Department
- Location
- Role
- CPD Points achieved
- Date Registered (after or before the date)
- Days since registering (targets new starters etc.)
- Learning resource/lesson status (e.g. if completed another course)
- Learning time spent
- Percentage of learning completed

These parameters can be combined (e.g. apply courses for New Starters at a certain department(s) etc).

Talent Programmes & Associated Qualifications

LMS shall have the ability to capture, monitor and report on both Officers and Staff /apprentices who are undertaking specific Talent Programmes or associated qualifications, at what stage they are at, capture feedback, comments and progress reports

Open eLMS is able to deal with all the requirements for the tracking, reporting and managing apprentices. Open eLMS contains all the standard functionality of Open eLMS for Apprenticeships. This includes:

- MIS for managing the ILR
- ePortfolio with 'Netflix style' interface
- ePortfolio of learning for Performance and Learning Management
- Includes any learning (elearning, YouTube, classroom etc.)
- Map learning to curriculums and schedule learning accordingly
- Smart Classroom integration including Zoom, Teams and many more....
- Gamification: competencies, leaderboards, badges etc.
- Universal compatibility: works on any system, any browser, any OS
- Social and collaborative learning
- White labelled system branded to your organisation
- Integration within your own VLE environment
- Open eLMS Catalogue Integration: +200 CPD accredited customisable elearning

courses

- Open eLMS Creator: integrated elearning authoring system
- Access to over 60,000 learning items
- Data Reporting (incl. Power BI)
- Integrated learner calendar with email alert system

For further information see [Open eLMS for Apprenticeships - Open eLMS presents Open eLMS](#). *1.75

LXP will feature a 'suggested for you' learning plan.

A learning plan (or pathway) will can be suggested to the learner by the use of a diagnostic assessment (questions will attach learning to each learner's record) or via a query - assigning learning dependent upon features of the learner such as their:

- Job
- Location
- Skills
- Previous learning
- Group
- Department

The learning pathway(s) can be accessed directly by the learner from their dashboard and activated by enrolling on the pathway (note the pathway has been automatically edited for the learner with options removed that do not apply to this learner).

Learning Pathways i.e., Induction and Job Profile Pathway

Learning Pathways

Pathways are created by combining the three units of learning in Open eLMS:

- Learning resources
- Modules (collection of learning resources)
- Programmes (a scheduled learning programme last months/years mapped against learning goals)

New Starter Example

Anyone recently registered on the system can be automatically added to a New Hires group which has some standard induction modules added. The learning of each learner can be tailored to their unique needs depending upon their department, location, job, group (they

can be in more than one group), skills, etc. All learning can be assigned based on queries which will automatically assign learning dependent upon these characteristics.

For instance, in the example of this learning resource below, it will be assigned to any new hires in the account department OR any library assistants.

Questionnaires can also be added to the system (using Open eLMS Creator) which will assign learning dependent upon answers to questions (e.g. in the example below “Do you have aspirations to become a management accountant?” If “yes” then appropriate learning is added).

Gas Fitter Example

Queries can be added together to form a pathway. This allows the construction of a training AI which dictates which parts of any learning programme each learner receives.

For instance at a juncture the system analyses job characteristics, experience, job role, and grouping (e.g. gas fitter vs office workers).

Different learning will then be assigned to each (e.g. ‘manual handling’, ‘lone working’ for the gas fitter vs ‘Office Safety’, ‘Display Screen Equipment Safety’ for the office worker).

Refresher Learning

All Learning in the system (Learning Resources, Lessons (collections of learning resources usable in events), learning events and learning programmes (aka ‘pathways’ or ‘warrants’) can be refreshed after a certain period of time. This time period will automatically assign the learner events ...

.. and other learning (e.g. learning resources) - in this case the refresher email is customised specifically for this learning resource.

Archived Courses

Courses can be archived by selecting to disable them (they can be restored at any time).

Courses can also be:

- Duplicated (if new courses are needed based on the old content); and

Versioned (copies of any version of a course is saved and the version taken is recorded against each learner's record.)

File Removal

Automate File Removal

There is the option to automate the destruction of documentation. This process is linked to the "Type" of each upload added to the system.

The administrator can set up these types so they behave in accordance with the Client's document retention and destruction policy. For instance, if the upload was related to the defined category "S2.6 Probationary procedure" (as shown below), then any resource in this category would be automatically destroyed two years from the date of upload. Note alternative parameters could set the timing for after the employee has left the organisation.

Selected removal by line managers

Line managers can selectively remove documents, registers, etc. by drilling down into the employees record and removing any uploaded or assigned documentation.

This will be necessary for compliance with the policy, since some resources are required to be removed manually in this way.

Batch Removal

Open eLMS (in accordance with GDPR and its ISO 27001 accreditation) also enables the removal of all uploaded documentation from selected users via the import of a leavers list.

Content Creation

Demonstrate creation of individualised content based on needs, search preferences, and group interests

Open eLMS Creator enables the building of surveys which can ask the learner a series of questions. In accordance with their answers a series of learning resources, modules, and learning programmes can be assigned to learners automatically.

These assessment questionnaires are ideal for initiating learning pathways that create a learning plan for the user.

Learning resources, modules, and learning programmes can be linked together to create suitable pathways customised to the unique characteristics of each learner (location, existing skills, learning completed, etc.). This is currently achieved using queries on the learning

resource/lesson/learning programme. The user interface shown below will be released soon which will give a graphical representation of this relationship.

With learning programmes, certain sections of each programme can be blocked off or opened - again, in accordance with the characteristics of each learner.

Content Partnerships

Current or Future partnerships with learning content providers, including whether the Bidder provides the full account management of any recommended web-conferencing tool(s) on behalf of Client

Open eLMS Catalogue

Open eLMS Catalogue contains elearning modules that are built to be engaging and interactive; with video presenters, they look like video documentaries but work like elearning. This unique methodology produces elearning which is uniquely engaging with a 99% approval rate in independent studies.

All these courses are editable using Open eLMS Creator, this includes audio narration which can be substituted with Amazon Polly's voice engine (as used in Amazon Alexa).

The standard cost for this for 1400 users is £ 20,495.53 per annum. Open eLMS will offer this for free.

Open eLMS Classroom

The Open eLMS smart classroom/webinar conferencing platform is included in the Open eLMS Suite of products and services. As with all Open eLMS products and services, the provision of Open eLMS Classroom includes full account management services.

The cost of Open Classroom for 1400 learners is £5,667.90 per year. Open eLMS will offer this for free. Note this does not include the cost of Zoom, Teams, etc.

GO1 Catalogue

Open eLMS has a partnership with GO1 to offer elearning content through the Open eLMS system. This is a completely integrated offering.

Open eLMS will use its long standing relationship with GO1 to negotiate the best price possible and will commit to take no commission for this sale.

Anders Pink Newsfeeds

Anders Pink gives Open eLMS the ability to integrate the very latest articles on topics related to subjects of your choice. These are curated using the Anders Pink AI engine, which are displayed seamlessly at the top of searches within Open eLMS.

Open eLMS will similarly take no commission for this sale to keep costs to a minimum.

Open LMS Catalogue

Open eLMS offers at ZERO cost a suite of over 200 CPD accredited elearning courses ideally suited for the Client. This involves significant discounts from the standard price list rate when purchased as part of a wider LMS solution.

All courses can be translated into up to 29 languages and freely customised using **Open**

eLMS Creator.

Course content is included below which includes GDPR, Fire Safety Training, Food Hygiene Level 2, Display Screen Awareness, Manual Handling, Working at Height, amongst others. Note this list also includes a small number of foreign language courses by way of example as to how translated languages will look and feel. A full list with links to demo versions of each course is available [in this spreadsheet](#) or download the complete course [brochure here](#).

- Alcohol and Drug Awareness
- Alcohol Awareness for Managers
- Amphetamine Awareness for Managers
- An Introduction to Section 20
- Anti Money Laundering Introduction for Housing Associations
- Anti Money Laundering Regulated Activities
- Anti Social Behaviour for Community Safety Officers
- Anti Social Behaviour for General Employees
- Applying for Universal Credit
- Asbestos Awareness
- Asbestos Awareness for Social Housing
- Assistive Technology
- Bespoke Business Documents
- Bid Writing
- Black Lives Matter
- Black Lives Matter for Business
- Bribery Act
- Bribery Act for Social Housing
- Business Innovation and Growth
- Cannabis Awareness for Managers
- CDM Contractor Management
- CDM for Client and Managing Agents
- Chair Lead and Manage Meetings
- Cocaine Awareness for Managers
- Coding in the Digital Marketplace
- Complaints Handling
- Coronavirus and Working from Home
- Coronavirus and Working in the Hotel Sector
- Coronavirus and Working in the Office Environment
- Coronavirus and Working in the Restaurant Sector
- Coronavirus and Working in the Retail Sector
- Coronavirus Awareness
- Coronavirus Awareness International Version
- COSHH
- Credit Brokerage Accreditation
- CRM an Introduction
- Customer Service for Housing Associations
- Customer Service General
- Customer Service Techniques
- Data Protection
- Dealing with Grievance Issues
- Dealing with Performance Issues
- Delivering a Media Pitch
- Digital and Social Media Strategies
- Digital Etiquette and Citizenship
- Driver Safety

- Drugs and Young People
- e-Office Safety Mobile Pro
- e-Office Safety Pro No Assessment
- e-Office Safety Pro No Assessment
- e-Start
- Ecstasy Awareness for Managers
- Effective Communication
- Equality and Diversity
- Equality and Diversity Foundation
- Estate Management
- Ethical Values and Code of Conduct
- File Naming Conventions
- Financial Management and Budgeting
- Fire Safety
- First Aid
- Food Safety - An Introduction
- Food Safety - Chilling
- Food Safety - Cleaning
- Food Safety - Cooking
- Food Safety - Cross Contamination
- Food Safety - Final Quiz
- Functional Skills Maths 2D Shapes
- Functional Skills Maths 3D Shapes
- Functional Skills Maths Charts
- Functional Skills Maths Data
- Functional Skills Maths Decimals
- Functional Skills Maths Fractions
- Functional Skills Maths Probability
- Functional Skills Maths Ratios
- Functional Skills Maths Scale
- GDPR Awareness
- GDPR Customer Service
- General Security
- Gestión del tiempo
- Gestion du temps
- Gestione del tempo
- Guest Complaints
- Guest Name Usage
- Health and Safety for Managers
- Health and Safety Induction
- Heroin Awareness for Managers
- Home and Mobile Working
- Home Ownership
- Housing Associations
- How to Manage an Office Facility
- How to Write an Effective CV
- Implementing the GDPR
- Induction for Social Housing
- Information Systems
- Internal Training Coach Trainer
- Internal Training Curriculum Developer
- Internal Training Distributor
- Internal Training Financial Auditor
- Internal Training Quality Assurer
- Internal Training Super Admin

- Introduction to CDM
- Introduction to Fundraising
- Introduction to Governance
- Introduction to Governance for SHPs
- Introduction to Marketing
- Introduction to Project Management
- Introduction to Regulatory Framework
- ISO 14001 Environmental Management Systems
- ISO 27001 Information Security Management Systems
- ISO 9001 Quality Management Systems
- ISO Advanced
- ISO Beginners
- ISO50001 Energy Management Systems
- IT Security
- Laboratory Safety and Ergonomics
- Law and Journalism
- Learning Techniques
- Legal High Awareness for Managers
- Legal Issues Concerning Media Assets
- Legionella Awareness
- LGBT Awareness
- Lone Working
- Managing Attendance
- Managing Conflict and Resilience In Action
- Managing Conflict and Resilience Introduction
- Managing Disciplinary Issues
- Managing Performance
- Managing your Digital Footprint
- Manejo manual
- Manual Handling
- Mental Health Refresher
- Mental Wellbeing and Mindfulness
- Microaggressions in the Workplace
- Microsoft Excel in 30 Minutes
- Microsoft PowerPoint in 15 Minutes
- Microsoft Word in 15 Minutes
- Modern Slavery
- Money Laundering
- Money Management and Responsibilities
- Negotiating Skills Quiz
- Note Taking at Interviews
- Open eLMS Creator Session 1 Understanding what makes great e-learning
- Open eLMS Creator Session 2 Scripting and the information design of an e-learning project
- Open eLMS Creator Session 3 Search and edit images to the correct size
- Open eLMS Creator Session 4 Start to Create an e-Learning Session
- Open eLMS Creator Session 5 Create buttons and interactivity in e-learning
- Open eLMS Creator Session 6 Process videos using Adobe Media Encoder
- Open eLMS Creator Session 7 Exporting the e-Learning
- Organisational Structures
- Organising Events
- People Management
- Preparing a Media Proposal
- Preparing a Media Proposal Workbook
- Preparing for a Job Interview

- Presenting Skills Final Quiz
- Prevent Strategy
- Problem Solving in Business
- Psychologically Informed Environments
- Public Relations Tools and Activities
- Risk Assessment
- Safeguarding Adults
- Safeguarding Children
- Scriptwriting for e-Learning
- Search Engine Optimisation
- Section 20 Intro for Leaseholder Staff
- Social Media and Journalism
- Social Media Usage
- Storyboarding for Media Creation
- Stress
- Team Supervision
- Telephone Courtesy
- Tenancy Management
- Time Management
- Treating Customers Fairly - Finance
- Unbewusste Voreingenommenheit
- Unconscious Bias
- Understanding Business Markets
- Understanding Financial Controls
- Understanding the Payment Card Industry Data Security Standard
- Universal Credit - Children and Childcare
- Universal Credit Health Conditions and Disabilities
- Universal Credit Housing
- Universal Credit How Do I Claim?
- Universal Credit Self Employment
- Universal Credit Working
- Value for Money in Social Housing
- Volatile Substances Awareness for Managers
- Welfare Reform Landlords
- Welfare Reform Tenants
- What is Universal Credit
- Working at Heights
- Writing a Good Story
- Writing a Proposal
- Writing an Effective Press Release
- Written Communication

Different format ...

1 Introduction to StepChange Debt Charity, 2 StepChange About Debt, 3 Stepchange Referring a Tenant Released, 4 Case Studies Step Change Released, Adult and child obesity, Alcohol and Drug Awareness, Alcohol Awareness for Managers, Amphetamine Awareness for Managers, An Introduction to Section 20, Anti Money Laundering Introduction for Housing Associations, Anti Money Laundering Regulated Activities, Anti Social Behaviour for Community Safety Officers, Anti Social Behaviour for General Employees, Applying for Universal Credit, Armed Forces Covenant, Asbestos Awareness, Asbestos Awareness for Social Housing, Assistive Technology, Bespoke Business Documents, Bid Writing, Black Lives Matter, Black Lives Matter for Business, Bribery Act, Bribery Act for Social Housing, Business Innovation and Growth, Cannabis Awareness for Managers, Care Act, Care Certificate, CDM Contractor Management, CDM for Client and Managing Agents,

Chair Lead and Manage Meetings, Climate Change, Cocaine Awareness for Managers, Coding in the Digital Marketplace, Complaints Handling, Coronavirus and Working from Home, Coronavirus and Working in the Hotel Sector, Coronavirus and Working in the Office Environment, Coronavirus and Working in the Restaurant Sector, Coronavirus and Working in the Retail Sector, Coronavirus Awareness, COSHH, Credit Brokerage Accreditation, CRM an Introduction, Customer Service for Housing Associations, Customer Service General, Customer Service Techniques, Data Protection, Dealing with Grievance Issues, Dealing with Performance Issues, Delivering a Media Pitch, Dementia Awareness, Deprivation of Liberty Safeguards, Difficult Conversations, Digital and Social Media Strategies, Digital Etiquette and Citizenship, Dignity at Work, Driver Safety, Drugs and Young People, e-Office Safety Mobile Pro, e-Office Safety Pro, e-Office Safety Pro No Assessment, e-Start, Ecstasy Awareness for Managers, Effective Communication, Emotional Intelligence, Epilepsy, Equality and Diversity, Equality and Diversity Foundation, Estate Management, Ethical Values and Code of Conduct, FGM and honour based violence, File Naming Conventions, Financial Management and Budgeting, Fire Safety, First Aid, Food Safety - An Introduction, Food Safety - Chilling, Food Safety - Cleaning, Food Safety - Cooking, Food Safety - Cross Contamination, Food Safety - Final Quiz, Functional Skills Maths 2D Shapes, Functional Skills Maths 3D Shapes, Functional Skills Maths Charts, Functional Skills Maths Data, Functional Skills Maths Decimals, Functional Skills Maths Fractions, Functional Skills Maths Probability, Functional Skills Maths Ratios, Functional Skills Maths Scale, GDPR Awareness, GDPR Customer Service, General Security, Guest Complaints, Guest Name Usage, HACCP, Health and Safety for Managers, Health and Safety Induction, Heroin Awareness for Managers, Home and Mobile Working, Home Ownership, Housing Associations, How to Manage an Office Facility, How to Write an Effective CV, Human Rights, Implementing the GDPR, Induction for Social Housing, Information Systems, Internal Training Coach Trainer, Internal Training Curriculum Developer, Internal Training Distributor, Internal Training Financial Auditor, Internal Training Quality Assurer, Internal Training Super Admin, Introduction to CDM, Introduction to Fundraising, Introduction to Governance, Introduction to Governance for SHPs, Introduction to Local Government, Introduction to Marketing, Introduction to Project Management, Introduction to Regulatory Framework, ISO 14001 Environmental Management Systems, ISO 27001 Information Security Management Systems, ISO 50001 Energy Management Systems, ISO 9001 Quality Management Systems, ISO Advanced, ISO Beginners, IT Security, Laboratory Safety and Ergonomics, Law and Journalism, Learning Techniques, Legal High Awareness for Managers, Legal Issues Concerning Media Assets, Legionella Awareness, LGBT Awareness, Life story work, Life Transitions, Lone Working, Love Food Hate Waste, Managing Attendance, Managing Conflict and Resilience In Action, Managing Conflict and Resilience Introduction, Managing Disciplinary Issues, Managing Medicines, Managing Performance, Managing your Digital Footprint, Manual Handling, Mental Capacity Act, Mental Health Refresher, Mental Wellbeing and Mindfulness, Microaggressions in the Workplace, Microsoft Excel in 30 Minutes, Microsoft PowerPoint in 15 Minutes, Microsoft Word in 15 Minutes, Modern Slavery, Money Laundering, Money Management and Responsibilities, Negotiating Skills Quiz, Note Taking at Interviews, Nutrition Awareness, Open eLMS Creator Session 1 Understanding what makes great e-learning, Open eLMS Creator Session 2 Scripting and the information design of an e-learning project, Open eLMS Creator Session 3 Search and edit images to the correct size, Open eLMS Creator Session 4 Start to Create an e-Learning Session, Open eLMS Creator Session 5 Create buttons and interactivity in e-learning, Open eLMS Creator Session 6 Process videos using Adobe Media Encoder, Open eLMS Creator Session 7 Exporting the e-Learning, Organisational Structures, Organising Events, People Management, Preparing a Media Proposal, Preparing a Media Proposal Workbook, Preparing for a Job Interview, Presenting Skills Final Quiz, Prevent Strategy, Problem Solving in Business, Psychologically Informed Environments, Public Relations Tools and Activities, Risk Assessment, Safe Working from Home and Office, Safeguarding Adults, Safeguarding Children, Scriptwriting for e-Learning, Search Engine Optimisation, Section 20 Intro for Leaseholder Staff, Social Media and Journalism, Social Media Usage,

Storyboarding for Media Creation, Stress, Team Supervision, Telephone Courtesy, Tenancy Management, Time Management, Treating Customers Fairly - Finance, Unconscious Bias, Understanding Business Markets, Understanding Financial Controls, Understanding the Payment Card Industry Data Security Standard, Universal Credit - Children and Childcare, Universal Credit Health Conditions and Disabilities, Universal Credit Housing, Universal Credit How Do I Claim?, Universal Credit Self Employment, Universal Credit Working, Value for Money in Social Housing, Volatile Substances Awareness for Managers, Welfare Reform Landlords, Welfare Reform Tenants, What is Universal Credit, Working at Heights, Writing a Good Story, Writing a Proposal, Writing an Effective Press Release, Written Communication

Onboarding eLearning

The Open eLMS Catalogue includes a course called “e-start” which is a company onboarding elearning template. Customise the working, images, and any animation to produce an employee induction course ideally suited to the Client. This learning can be supplemented by elearning created by the Client using Open eLMS Creator or an alternative.

Quality Assurer

Evaluations

The Quality Assurer interface allows QAs (internal inspectors and/or outside bodies - e.g. Ofsted, ESFA etc.) to evaluate learning programmes, rate learning at any level and add comments etc. These evaluations can be made to a learning resource(s) or attached to the programme itself.

Feedback can be marked as private or fed back to tutors for a response. A workflow process is implemented to ensure continuous improvement is implemented.

Evaluation Reports (RAG)

There is a work flow system which alerts CPD Leaders of issues which require their attention (this is backed up by email alerts). These alerts are clearly flagged up on the CPD Leader's interface, allowing them to go directly to the issue to apply a resolution.

Any issues are also clearly flagged up on the learning and learning programmes.

When an issue is dealt with, the QA is alerted so that they can apply a final sign-off or send it back to management for further work.

The default system allows any issue to be accepted or rejected. This can be configured with an associated colour to use a rag system (interface available below) instead to order priorities and report on them.

QAs/inspectors have their own system for managing the QA process which involves sampling work and monitoring feedback submitted as well as tutors in response to QA comments. QAs can add feedback to work or entire modules/criteria/subcriteria of any learning programme.

QA reports are available in the system (editable to include filters and reporting fields) which highlight areas of improvement and allow the identification of trends (failings in subject areas, across departments, locations, managers etc.)

Evaluations, surveys and polls

Open eLMS Creator (embedded elearning creation tool) enables the building of surveys which can audit the user population to find out valuable information. This includes open, closed, and scaling question options.

These surveys will be configured by Open eLMS initially but can be created by the Client at any time. Open eLMS Creator survey maker shown below.

Different surveys for different learning

Open eLMS can assign different surveys depending on the learning event. The survey can be 'attached' to the learning module so it must be completed to complete the entire module.

Customised evaluation emails

Upon completion of the learning activity, Open eLMS will automatically send a customised evaluation email.

Learning Library

Short Courses

The following course content is available in the short course format. Open eLMS have put together further details and examples at <https://www.e-learningwmb.com/page/short-courses>

...

- Armed forces covenant
- HACCP
- Dignity at work
- Emotional intelligence
- Life story work
- Managing in a political environment
- Difficult conversations
- Promoting positive attendance
- Climate change
- intro to local government
- Love food hate waste
- Nutrition awareness
- Life transitions,
- The Care Act
- Mental capacity act
- Deprivation of liberty safeguards
- Adult and child Obesity
- Managing medicines
- Human rights
- Carers awareness
- Epilepsy
- Care certificate
- Dementia awareness
- Autism awareness

- Learning disabilities awareness
- Personal resilience for health and social care workers
- Supervision for supervisors suite
- FGM and honour based violence

Health & Safety eLearning

Functionality to adhere to statutory regulations

Open eLMS is supplied with the Open eLMS catalogue of learning.

Open eLMS Catalogue is a library of nearly 250 elearning modules which can complement the management approach as well as directly provide training to managers. Relevant courses are:

1. Health and Safety for Managers
2. Asbestos Awareness
3. CDM Contractor Management
4. CDM for Client and Managing Agents
5. Coronavirus and Working in the Office Environment
6. COSHH
7. Driver Safety
8. e-Office Safety Mobile Pro
9. e-Office Safety Pro No Assessment
10. e-Office Safety Pro No Assessment
11. Fire Safety
12. First Aid
13. Food Safety - An Introduction
14. Food Safety - Chilling
15. Food Safety - Cleaning
16. Food Safety - Cooking
17. Food Safety - Cross Contamination
18. Food Safety - Final Quiz
19. Health and Safety Induction
20. Home and Mobile Working

- 21. Introduction to CDM
- 22. Laboratory Safety and Ergonomics
- 23. Legionella Awareness
- 24. Lone Working
- 25. Manual Handling
- 26. Risk Assessment
- 27. Working at Heights

In addition to this Open eLMS is supplied with Open eLMS Creator. This system allows its users to create health and safety audits and risk assessment.

These audits can be integrated into learning or act as a stand alone checklist.

These audits activate a workflow system which can be used for the management of health and safety in your organisation. The designer of Open eLMS won an ISOH Award for general safety product of the year for an earlier version of this functionality.

Pre-Course Training Needs

Learning resources can be compiled together into 'lessons'. This allows the inclusion of training needs analysis questionnaires before and after the core.

This data can be analysed via the reporting functionality across teams, roles and individuals.

Training needs analysis can be examined in a more macro sense (i.e. improvement in underlying skills, knowledge and behaviours when undertaking an entire learning programme) by issuing periodic skill scans (answering audit questions every 3 months.) This gives a quantifiable measure on improvement over time.

Range of Learning Types

Platform is capable of hosting a range of blended learning opportunities, including but not limited to: social learning, online learning, pre- and post-course learning, rich multimedia learning, micro learning.

Open eLMS can host a range of learning resources:

- Books/CDs/DVDs
- Blogs

- Customised learning resource types
- Elearning (SCORM 1.2, 2004)
- Events (meetings, telephone calls, 360 reviews etc.)
- Face to face training
- File uploads (pdfOpen s, docs, xls, ppt)
- H5P (microlearning - optional)
- On the job training
- Newsfeeds
- Video (mp4 etc.)
- Vimeo
- Websites
- Webinars (Zoom, Teams etc.)
- YouTube

These can be blended together and used for either asynchronous learning (online study appearing on the learning portfolio when needed) or synchronous learning (e.g. face to face tutorials, online lectures etc.) which learners enrol on and feature a blend of these learning resource types ...

Any learning lesson resources in the lesson can be set for pre- or post-session study (assigned as homework).

Speed of setup

Setting up any new event (smart classroom lesson, logging a meeting or call etc.) takes less than 5 minutes to set up. The system uses a library of lesson templates to make this process easier over time.

Learning resources (e.g. Books/CDs/DVDs, Blogs, elearning, Face to face training, File uploads, H5P (microlearning), On the job training, Newsfeeds, Vimeo and YouTube) are similarly easy to add. Features such as importing YouTube playlists (with associated metadata) make the bulk creation of learning resources even quicker

Approval On/Off

Management approval for course enrollments can be set for all employees. Certain departments, groups and employees can have this setting switched off for them.

Request approval for learning events, where approval is required

Any learning (learning resource or events) can be set up so management approval is required before the learner can book onto the learning; note certain departments, groups and employees can have this approval process switched off for them as required.

The approval process can be switched on/off for any learning event here ...

... if management approval is required, then the manager gets notified by email and an approval notice which needs actioning will appear on the manager's interface as shown.

Schedule learning events, where approval is not required

Approval by default is not required for learning events and learning resources. The interface below shows a learning resource (elearning, video etc.) which is enrollable and does not require management sign-off.

Prerequisites Functionality

A list of prerequisite courses (which can be made mandatory) can be set up before an event such as a tutor

This process can also be enhanced by using a query builder to add further prerequisite requirements such a

PDFs

A standard file upload format. Note files can be submitted in response to set projects, uploaded to the learner's e-portfolio for reference or added as blog posts for sharing with colleagues.

Videos

Note videos can be uploaded or linked to as YouTube or Vimeo options. YouTube and Vimeo videos are automatically tracked to completion using xAPI (similar to SCORM tracking with elearning).

Blended Approach (Seamless)

All file types mentioned and more (listed below) can be combined into a blended learning lesson.

- Books/CDs/DVDs
- Blogs
- elearning
- Events (meetings, telephone calls, 360 reviews etc.)
- Face to face training
- File uploads (pdfs, docs, xls, ppt, mp4 etc.)
- H5P (microlearning)
- Observational tasks
- On the job training
- Newsfeeds
- Submitted work (for marking)
- Webinars (Teams, Zoom etc.)
- Vimeo
- YouTube

Open eLMS Classroom is smart classroom technology which enables the inclusion of webinar and whiteboard technology into the online or face to face learning experience. These lessons can be run synchronously (delivered by the trainer in front of the class) or asynchronously (set as project work to be completed after the lesson).

Webinars

Zoom, Teams, Cisco are all be integrated into Smart classrooms. This has the benefits of:

- a) being able to run the lesson remotely
- b) offer a students the option of running the lesson online AND in a classroom setting
- c) lessons are recorded for access later and remain on each student's eportfolio.

When these webinars are set up then they are automatically linked to learner and teacher's calendars and email alerts are set out. Curriculum developers can also do this on behalf of trainers as a bulk process.

Observational Tasks

Observational tasks can be added either by the teacher (project work) or added as evidence of learning by the learner. There are various types of observational tasks which can be recorded including:

- Observations in the workplace
- Professional discussion
- Witness testimony
- Case Study
- Evidence of prior learning
- Workplace project
- Examples of work gathered

These options are configurable.

eLearning SCORMS

Compatible with SCORM format - can import external suppliers SCORM packages and can create SCORM packages using Open eLMS Creator (see below for Open eLMS Creator drag and drop elearning authoring in action.)

Capacity to 'tag' skills/subject areas/areas of interest

Learning can be 'tagged' with competencies/skills, subject areas/areas of interest (known as categories and keywords within Open eLMS). These are searchable to the learner.

External Suppliers

Platform is capable of hosting e-learning content libraries from a multitude of suppliers

The system can import SCORM/xAPI content from any third party supplier. This has no effect on the licensing/costings etc.

Authoring Capability

Platform has e-learning authoring capability or can be used with authoring content tools

Open eLMS has an integrated authoring system called **Open eLMS Creator**.

Learning can be created from templates:

The system's simple to use drag and drop interface is accompanied by vast media libraries containing 20 years of company development (media can also be imported).

Open eLMS can in addition be used with third party authoring tools. Open eLMS has the third party system - **H5P** integrated into the system. This allows for the production of microlearning games and virtual reality tours which can be fully integrated into live sessions.

eLearning Authoring Tools

Open eLMS is supplied with two tools for creating elearning:

- Open eLMS Creator - for creating interactive elearning courses
- H5P - for creating microlearning events - ideal for blended learning classroom events

Open eLMS Creator is a totally visual development environment which allows users to drag and drop media (videos, images etc.) directly onto the screen to create highly professional elearning in minutes. An independent review of the system is available [here](#).

There is no need to import SCORM zip files into the LMS because the creation tool is completely integrated into Open eLMS.

H5P allows for the inclusion of Microlearning resources. The use of microlearning is a growing area in the elearning field and H5P is the major system for achieving this.

Microlearning includes interactive videos, quizzes and presentations which can be inserted into a synchronous learning event. An example would be as a smart classroom activity, which a trainer can lead and share with the attendant students.

Open eLMS Creator

Open eLMS Creator is Open eLMS authoring tool which is completely integrated into Open eLMS (there is no need for importing SCORM files etc.)

The system has been designed by an ergonomist to be the ultimate in ease of use authoring without making any sacrifices for quality of the end product. If required, elearning scripts can be written in MS Word, Google Docs ...

...and then imported directly into Open eLMS Creator ...

... to form the basis of any elearning course.

Click on any screen element to drag and drop to move it around or double click to edit.

Voiceover can be uploaded else it can be recorded automatically by selecting a checkbox.

Learning can be added via templates/wizards/imports using the Open eLMS Creator system:

And accompanied by vast media libraries containing 20 years of company development (media can also be imported.) This includes animated graphics, video and photos.

Courses can also be duplicated and copied from one course to another ...

The same principles of templating and duplication can be applied to lesson definition as well as entire programmes of learning often spanning several months and containing dozens of learning resources.

Lockable content facility

Learning content can be 'locked' for a number of reasons:

- Precursor training needs to be completed first
- Management approval is required for the learning
- The training needs to be purchased

Any such locked training can be made visible on the learner's interface and filtered for accordingly.

Online Catalogue Duplication

A set of courses can be grouped together and assigned to staff on any parameter (e.g. job title such as Response Officers or groups such as Operational Control Centre staff). Queries in the system will look at differences such as jobs, location, department, skills, previous learning etc. and assign learning accordingly.

These queries can be used to build pathways of learning which assign new learning dependent upon previously completed learning and learner characteristics.

Assigned programmes of learning can also offer a differing experience depending on queries embedded into the learning programme.

For instance an entire programme of learning on crowd control may have different modules for an officer based in the city as opposed to one based in more rural areas.

Elearning library including external suppliers

Supplier to provide a range of off the shelf e-learning content, on topics such as (but not limited to) leadership & strategy, managing people, adult learning and teaching, compliance, and personal skills.

Open eLMS is packaged with a library of content called **Open eLMS Catalogue**. This contains 250 elearning modules which cover a range of leadership & strategy, managing people, adult learning and teaching, compliance, and personal skills. A full list is available on the company website: <https://www.e-learningwmb.com/page/open-elms-catalogue>.

API links can also integrate third party course catalogues (e.g. Go1 integration in Open eLMS.) Open eLMS has a seamless integration with the Go1 library which contains over 1,000,000 learning items. This is available but again not costed as part of this solution.

eLMS Course Library

Open eLMS is provided with the Open eLMS Catalogue of over 250 courses.

All courses are highly engaging and interactive, with video presenters they look like video documentaries but work like elearning which has garnered a 99% approval rate in independent studies ([White Paper Housing E-Learning Network Effectiveness of Salient](#)

[E-Learning e-LearningWMB \(1\).pdf](#)).

All courses are CPD accredited and editable using the Open eLMS Creator software also provided with this tender. For more information [see all courses in this spreadsheet](#) or download the complete course [brochure here](#).

All courses are CPD accredited and checked accordingly on an annual basis. Open eLMS also gets alerts when connected legislation changes so course content can be updated on a just in time basis. The company also relies on clients to inform the company of any changes in best practice so the learning can be updated.

e-learning, augmented reality, webinars, gamification, blogging, etc.

Capacity to host a range of learning tools, including e-learning, augmented reality, webinars, gamification, blogging, etc.

Open eLMS features elearning (from external suppliers or can be constructed using Open eLMS Creator)...

...augmented reality/virtual reality/gamification with H5P...

...webinar lessons with blended learning...

...and blogging.

e-learning and face-to-face both from external suppliers

Capacity to host a catalogue of learning resources (both e-learning and face-to-face, some commonly-used external learning suppliers, external learning resources), which is fully searchable.

Open eLMS hosts a catalogue of learning resources in the Learning Library. These learning resources include the aforementioned resource types (elearning, webinars etc.).

Content from catalogues of learning can be drawn down into the system...

...else resources can be added manually (including Books/CDs/DVDs, blogs, elearning, events - meetings, telephone calls, 360 reviews etc., face-to-face training, file uploads - pdfs, docs, xls, ppt, mp4 etc., H5P - microlearning, on the job training, newsfeeds, Vimeo,

webinars - Zoom, Teams etc., YouTube)...

... or imported as a batch process from YouTube playlists.

The resource library is fully searchable and can be filtered by type, category, company, etc.

Learning resources are arranged into lessons (a collection of learning resources aka 'modules').

Note all learning has a query builder with which you can automatically assign/remove learning from any learner with the appropriate skills, job, location, prior learning, etc.

Learning resources and lessons (aka modules) can be arranged by learning programmes. These programmes schedule the release of learning to the learner over time and allow for the creation of pathways and dependencies by embedding queries inside the programmes (e.g. if doing job A then assign Criteria Y, if doing job B then complete Criteria Z, etc.).

Learning can also be arranged into stand alone pathways, these automate the assigning of Learning Resources dependent upon learner characteristics. **This functionality will be released in Q4 2021 and is not available in the current release.**

Discussion Forums

Supports social discussion forums and has moderated functions for these forums

There are discussion boards set up around key events.

The system also integrates with MS Teams/Yammer and Jamboards.

Online pre- & post- course evaluation (Kirkpatrick)

All learning resources/lessons allow the option of entering feedback and a quantifiable rating.

This information is fed back to course creators to allow interactive modifications.

Should more in-depth analysis be required, then a pre- and post-training questionnaire

(following Kirkpatrick's model etc.) can be given to learners. These questionnaires can be edited by Open eLMS Creator.

Course Feedback

All learning resources can be rated on a simple 5 star rating system with comments.

This information is fed back to management and content developers.

Open eLMS also has an embedded authoring system (Open eLMS Creator). Using this system you can create separate surveys to ask the learner . *1.25

Evaluation Comments Report

Evaluation comments from performance reviews are available within the system and are available by drilling down into each learner's record.

This report data can also be produced via the reporting engine.

These reports can be produced that are customisable via frequency. Reports to be customisable via frequency i.e. weekly, quarterly and yearly

And data dashboards can be created within Open eLMS (in preference over Power BI). The widgets are selected and the layout is configurable, to be both raw data (excel format) as well as dashboard/graph format). *2.12

Evaluation Tools

Open eLMS is included with Open eLMS Creator's quiz maker which allows for the evaluation in one of four ways:

Quizzes

Quizzes test the knowledge levels of learners. The quiz maker features:

- pass marks

- question selector (multiple choice, multiple select, fill in the blank, word bank, matching drag and drop, and sequence drag and drop)
- feedback per question
- pathways
- assign further training depending upon answers

Skill Scans

Skill scans allow management to examine the underlying skills necessary for their jobs. These assessments can be scheduled periodically and used to show overall improvement over time.

Assessments/Audits

Assessment questions can be used to ask questions which are not necessarily right or wrong, but instead create tasks as a result of each answer.

For instance, a new starter might get asked if they have had a welcome interview with their line manager (saying “no” will create a task needing such a meeting).

Surveys

Surveys answer a series of questions to get an overview of feedback on any number of subject areas.

Reporting

Scores on all these question types can be used to create management reports.

Standards

Incorporation of Professional Standards for Lecturers in Scotland's College criteria

Open eLMS has been designed to manage and deliver standards. To this end standards can be modeled within the system; the Professional Standard for Lecturers in Scotland is shown below:

To each criteria/subcriteria of the standard, learning tasks can be assigned with associated delivery and expected completion dates; in the example below ED&I learning appears on the 10th day and is expected to be completed by the 20th day from commencing the standard.

These standards can have queries added, so different lecturers have different experiences (e.g. different learning materials will be displayed dependent upon each learner's department). Setting up queries on the standard, ensures that one standard will deliver a unique tailored learning experience for each lecturer in your organisation.

Note that such queries can be added at a more micro level (lessons and learning resources) as well as a macro level (to entire qualifications).

Once a standard has been set up and applied to a lecturer, that lecturer can also evidence learning by uploading documents, videos, presentations etc against that standard; in the example below, the lecturer is uploading an example of work against the standard.

Managers will get email notifications and can sign-off/reject this work from their manager dashboard; the example below shows 103 such work submissions ready for sign-off.

Qualifications

Open eLMS has been designed to manage and deliver qualifications. To this end qualifications can be modelled within the system as is shown below:

To each criteria/subcriteria of the qualification, learning tasks can be assigned with associated delivery and expected completion dates; in the example below, the requirement to upload against the qualification criteria starts on the 10th day and is expected to be completed by the 20th day from commencing the standard. Supporting documentation appears in the system as and when required.

These qualifications can have queries added, so different learners have different experiences (e.g. different learning materials will be displayed dependent upon each learner's department) Setting up queries on the qualification, ensures that one standard will deliver a unique tailored learning experience for each learner in your organisation.

Note that such queries can be added at a more micro level (lessons and learning resources) as well as a macro level (to standards/programmes).

Once a qualification has been set up and applied to a learner, that learner can evidence learning by uploading documents, videos, presentations etc against that qualification criteria; in the example below, the learner is uploading an example of work against a number of such criteria at the same time.

Managers will get email notifications and can sign-off/reject this work from their manager dashboard; the example below shows 11 such work submissions ready for sign-off.

Programme management

Open eLMS has the option to assign entire programmes of learning to an employee; some examples of programmes include:

- A professional standard
- A qualification
- An apprenticeship programme

The learner needs to complete learning, respond to set projects and upload evidence of learning to demonstrate skills, knowledge and behaviours expected from that programme.

The advantage of utilising a programme of learning is that there is no need to set learning objectives, assign elearning and classroom training since the programme automatically releases and assigns the learning when it's needed in accordance with the programme's time table.

Since the programme monitors the completion status of each unit of learning, this gives managers the metrics to examine how they are progressing against expectations and where knowledge/skill gaps may exist against any Professional Standard. This data is visible to the learner and manager; the RAG system alerts the user where the learner is falling short.

Skills and competencies

Skill Scans

Regular skill scans can also be used to examine how underlying skills are improving, and highlight areas for improvement. Skill scans are customisable surveys which examine a series of skills on a 4 point scale.

Skill scans are typically run every 3 months to demonstrate this improvement.

Skills and Competencies

Learning can be 'tagged' with competencies/skills (shall call these 'skills' but the two are interchangeable for this purpose).

As the learner progresses through the learning the learner will gain skill points which can lead to the gaining of that skill once a predefined threshold is met.

Skills Matrix

A skills matrix is produced which will allow L&D team to review skills in the company and where learning is required.

This skills matrix also shows which skills are required by learners to effectively carry out their jobs and where additional training is needed to meet requirements.

This information can be printed out as a report and used to identify demand for organization wide learning.

Reporting

Extract Training Records and Resources

The LXP must have functionality to easily extract training records and learning resources from the platform

C

User Enrolment Status Report

Enrollments (and enrollment sign-off) are recorded by the system and can be included on custom reports. In this case the filter simply shows enrolled users.

These reports can be produced that are customisable via frequency. (reports to be customisable via frequency i.e. weekly, quarterly, yearly and to be both raw data (excel format) as well as dashboard/graph format)

Data dashboards can be created within Open eLMS (in preference over Power BI). The widgets selected and their layout are configurable.*2.10

Intuitive report building functionality for non-technical users

Report building is as easy as selecting fields (for filters and the report body) and saving the results.

This adds a new custom report to the list.

Individual Reports

Users have access to their own comprehensive individual development report

Learners can access their own comprehensive individual development report by selecting the Progress button in the top right hand corner of the screen.

This displays their own progress report including:

- Programme Status
- Learnerboard (CPD points)
- Earned Badges
- Competencies require for their role v's competencies achieved
- Learning Programme progress (progress by resources, criteria and time)
- Learning Resources (progress outside of programmes)
- Review and 360 forms completed (not shown)
- Pathways (not shown)
- Comments made by management

Single-click, live reporting – easy extraction of data and simple to use

Single click reporting is enabled by judicious use of print buttons as and where they are needed. Learners can print and download data by clicking these buttons.

Similarly, managers can filter and print off or export data from their management dashboard.

This is a feature common throughout the system. This also ensures that management gets to report only on the learners they are responsible for.

Real Time Performance Reporting

User role types such as system admin/performance role, can be given access to the built in report wizard that can be customised, as well as being able to build reports from scratch. This can be done via the 'Review' link on the top right hand corner of the screen.

Note that data access can be controlled so that certain users (e.g. line managers) will only get access to personnel data for which they have responsibility, whilst super users will have access to all personnel data. Permission levels can also be assigned per report, which

allows strict control over access to specific reports.

These reports can be printed, used as a filter for sending emails, or exported to Excel or a management information system (e.g. Power BI).

The system can also build customized reports with nearly a 100 reports and filter fields to select from.*2.1

Compliance Reporting

Compliance reporting can be set up to consider mandatory training (as shown below) or otherwise.

A filter can be used to see performance on a single individual (note the data in the attached screenshots is randomly generated dummy data and contains no PII). 2.4*

Team overview reporting for line managers

Team overview reporting is available from the Review option in the top right of the screen. Here more sophisticated default and customised reports can be created, forming the basis for exporting or creating emails or reports.

Reports

Comprehensive reporting suite available, including a range of standard pre-built reports.

Open eLMS features default reporting for Learning Programmes and Learning Resources.

Default Reports

Learning Programme Default reports include:

- Cost analysis
- Manager progress
- Managers falling behind
- Learner progress
- Learners falling behind
- Training impact

Learning Resource Default Reports

- Feedback
- Learning performance
- Skill scans
- Skills matrix
- Task assessment reports
- Training impact
- Training schedule

The report data when run, appears on screen (as shown). This data can be filtered using the filters at the top of the screen and is then printed out, exported to Excel or used to create an email list to send a bulk email.

Bespoke Report

Custom reports can be built from a choice of nearly 100 different fields (applied to both filters and report fields). These reports can be edited at any time.

Power BI, Dashboards, Dashlets

Live feeds can be set up to give a live view of the data. These dashboards display key metrics and graphs directly within Open eLMS. Reports can also be generated, exporting the data to MS Power BI or other business information systems (example report below).

Scheduling Reports

Reports can be run as scheduled reports so performance can be examined over time. These reports remain in the system and can be emailed to recipients.

Interface with the Authority's Microsoft 365 suite of Application

LMS shall interface with the Authority's Microsoft 365 suite of application and features e.g. outlook, teams etc.

Open eLMS interfaces with the Microsoft 365 suite of applications and Azure Power applications.

Learners have instant access to their trainers and colleagues (assigned to similar learning programmes) for direct contact via Teams (should users have suitable Teams IDs).

Teams is integrated into live lessons when using Open eLMS Classroom.

Individual events can be exported into MS Outlook calendar, or it can be applied system wide (as a backend setting so no user action is needed).

Such events generate outlook invites via email (along with Teams webinar invites if selected).

Finally Office 365 documents can be tracked as weblinks within the system.

Drill down reports

Automated reporting which can drill down on roles or levels not engaging with training

Reports can be set up to drill down on roles or levels not engaging with training. Open

eLMS can measure the 'Last Learning Access Date', 'Criteria Completion', 'Time Falling Behind', etc. which can be used to filter for learners not engaging with the training.

The data can be set up to run as an automated report and be sent out to management personnel on a periodic basis if required. Reports are also stored on the system for access at any time so trends can be detected (shown below).

Importing data from third party system for reporting

For statutory purposes reporting should be available to find out who has completed training based on certain characteristics, including but not limited to: demographic characteristics, role-specific characteristics, hierarchy, employment start date (these should feed to the LXP directly from HR system (iTrent) via Unique Identifier)

Open eLMS follows the UK Government's ILR standard (Individualised Learner Record) which records demographic characteristics, role-specific characteristics, hierarchy, employment start date, and much more. There are over 200 fields which are recorded, just some of these are shown below.

A CRON task (automated server side processing) will be created to periodically synchronise the data *with chosen system with that recorded in Open eLMS. This includes: new employees, Leavers, name changes, job title changes, structure changes, Line manager changes, demographic information, and qualification information.

All fields described can be used as filters in custom reports or selected for use within the report itself.

Training Records/Certificates

The entire learning portfolio record is available to each learner and CPD Leader.

This includes:

- Learning resource performance (status and certificates)
- Lesson performance
- Progress with learning programmes (in terms of assets completed, criteria covered and time spent)
- Gamification (leaderboard compared with peers)
- Badges - badges awarded using the Open Badges standard.

Recording Certificates etc.

Self-service features for recording development and uploading and storing copies of certificates of qualification

Learners can upload any certificates etc. into the system. These can be uploaded as files (pdfs etc.) or weblinks.

Learners can contribute work examples and certificates to their ePortfolio of learning throughout their learning lifetime by uploading projects, example work, documents in any format.

The 'pack and go' functionality allows learners to take any work with them after leaving your organisation, which can henceforth be shown to employers etc.

Comprehensive Authority Reports

LMS shall be able to show report for the entire organisation as well as per directorate and individual teams / functions and individuals. For West Mercia Officer Hierarchical structure, please refer to Appendix 6 attached.

Open eLMS can model any hierarchical structure with an unlimited number of levels, sub levels, sub-sub levels etc. Data imports will import data up to 8 sub levels from the top of the hierarchical structure and will handle the West Meria Officer organisational structure..

Note all labels can be customised to suit this structure as the system as an in-built translator which will label 'departments' as 'directorates', 'groups' as 'teams' etc.*2.18

Data Graphics

Graphs and data widgets are also available from inside Open eLMS via a configurable data dashboard.

The above data is created via a server side task which can be configured to run every minute.

True live business information capability (this brings together data from a number of sources) is available via an integration with Power BI (Open eLMS feeds data directly into any client's Power BI dataset.) This allows for the combination with other data sources and drilling down into the data for further analysis thus giving true Business Analytics.

Power BI Further Information

A client has the option to export all data to Microsoft Power BI; this is an 'out of the box' integration which just needs the Authority's credentials stored in the system and then all data is automatically updated. For more details on how to integrate Microsoft Services see the knowledge base article - <https://emil-reisser-weston.atlassian.net/wiki/spaces/OE/pages/46989323/Microsoft+Services+Integration>

Once a connection to this management information system is set up there is no need to log into and export the data from inside Open eLMS. The linked Power BI datasets can be used to generate any reports from the data. The system can even be linked with other data sources for further meta-analysis.

The following are sample Power BI reports:

- Example Report: - <https://app.powerbi.com/groups/me/reports/7fd787bc-9987-4941-89e9-f8c96f291434/ReportSection> - note a PowerBI licence may be needed to access the data
- Example export - https://drupal.e-learningwmb.com/downloads/Example_PowerBI_Export.pdf

This report is generated using random data and as such will show no data patterns etc; it is useful however to see the type of metrics the system can produce:

These reports can be accessed either via a computer terminal or via the Power BI app.

Alternative Management Reporting Systems can be integrated and Open eLMS would be happy to integrate them as part of the implementation process.

Infographic style reports in different formats

The Client has the option to export reports using the Power BI (no license needed), which produces a highly configurable infographic style report.

These reports can be configured to the Client requirements and use AI to mine the data and produce a report with management conclusions.

PDF Reports

All reports can be exported to PowerPoint (and from there as pdfs), else system reports can be printed directly to pdf.

Excel

All reports can be exported as Excel files (from Power BI and Open eLMS directly).

Exports

XML

Open eLMS does export to XML where it is necessary (i.e. where linked information is exported). This can be seen in the case of exporting the Individualised Learner Record (the Export ILR button in the screenshot above).

Reports

Quality Assurance Role

QA Staff Role

A Quality Assurance role, enables the QA staff to sample, feed back, and create a workflow of actions for management to improve the quality of learning resources submitted by learners.

The interface is built specifically for the Quality Assurers, this eliminates the need for training, as the use of the system is as simple as reading from left to right. Open eLMS has been designed by ergonomists to be the ultimate in ease of use, this approach to user centered design differs widely from the traditional data drive design approach, which relies on the learner to 'work out' how to use the software.

A complete list of default roles defined in the system include:

- Super Administrator
- Administrator
- Manager/Coach/Trainer
- Quality Assurer
- Curriculum Developer
- Financial Auditor
- Learner

Any user can have a number of different roles assigned to them with 570 different options to add/remove functionality from each role, thus giving the administrator complete flexibility in implementing roles within the system.

In addition to this there are 190 different configuration options which affect the way each role behaves.

Accessibility

Make things accessible and inclusive

Accessibility i.e.W3C is a core ergonomics principle Open eLMS adheres to. A copy of the latest accessibility audit - [OpeneLMSERW20210403ERWAccessibilityAudit.pdf](#) - has been supplied. The audit is biannual and addresses any issues concerning WCAG 2.1 at conformance level AA.

Accessibility by design is also part of the core engineering principles which are inherent as a core engineering principle in the company's Secure Engineering Policy manual (CompanyInformationERW20191106ISO27001SecureEngineeringPrinciplesPolicy (2).pdf) to which all coders attest and are trained on.

The company continuously strives to add accessibility features and plugins, such accessibility features built into the Open eLMS product since the beginning of 2020 include:

- AI to add voice to text
- The use of AI to translate audio to one of 27 different languages
- The implementation of the Recite accessibility toolbar as an option via an API link

For more details see the company's accessibility statement here <https://openelms.com/accessibility-statement/>

Open Source

Open eLMS is built exclusively with Open Source technologies and platforms. This includes all systems supplied:

- Open eLMS (MySQL, PHP, Javascript)
- Open eLMS Creator (Haxe 4, HTML5, Javascript)
- Open eLMS Classroom (MySQL, PHP, Javascript)
- Open eLMS Catalogue (MySQL, HTML5, Javascript)
- Open eLMS Forms (MySQL, PHP, Javascript)

Open Standards

Open Standards are used exclusively throughout the system. These include:

- SCORM
- xAPI
- LTI
- LRS (Learner Record Service XML structure)

Visually Impaired Users

The LXP will support accessibility for visually impaired users including ability to change colours and themes, and will support the use of screen magnifiers and readers.

Open eLMS supports accessibility for visually impaired users including ability to change colours and themes. There are over 250 configuration options available including changing the theme and colours of the learner interface.

Versus

Open eLMS also uses an accessible framework which supports the use of screen magnifiers and readers.

Customising Look and Feel of LMS

Open eLMS uses an adaptive PHP framework which adapts text size etc. dependent upon system settings and the device to aid legibility.

The colour of the screen can be customised from a dark to light interface.

Accessibility is a core ergonomics principle Open eLMS adheres to. A copy of the latest accessibility audit - [OpeneLMSERW20210403ERWAccessibilityAudit.pdf](#) - has been supplied. The audit is biannual and addresses any issues concerning WCAG 2.1 at conformance level AA.

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For more details see the company's accessibility statement here <https://www.e-learningwmb.com/page/accessibility-statement-open-elms>. *4.1

3 Click Rule etc

Content will be easily accessible for users on the LXP, aligning to best practice guidance such as the 3 Click Rule

All content can be accessed by the 3 click rule, with most content being accessible via 2 clicks to run the learning. The consistency of button positioning and colours (regardless of the learning content e.g. elearning, videos, uploads, etc.) makes this process easy to carry out.

For instance, activating an elearning resource...

... is the same process (i.e. pressing the blue button) as opening a website or any other learning resource.

Hence the 'knowledge' as to where to activate any learning in the system only has to be learned once.

Assistive technology

The platform and content must be fully accessible and work with assistive technologies (including closed captions and ReciteMe)

The platform and content is fully accessible and works with assistive technologies (including closed captions and ReciteMe). Open eLMS uses accessible frameworks and is regularly audited for accessibility.

Adaptive Interface

The platform and content must provide a good user experience across different modalities and devices.

The learning system works independently of Operating System (e.g. iOS, Android, Windows (7 onwards)).

The interface is adapted to mobile devices with minimal interface changes (e.g. toolbar functionality is brought into a hamburger menu and selection tiles are made larger, etc.).

Note that elearning use works the same way on a mobile as a large screen since the Open eLMS Creator is designed to produce elearning that complies with IOS design guidelines for mobile devices.

Access the system via a mobile app

Users can access Open eLMS via a web app. Open eLMS are currently developing a new native app and will make this ready for release for this current project's go live date.

See the [Latest Changes - Open eLMS presents Open eLMS](#) and the development history on the company's website for history of the app development. *1.40

Manual/External Login

Users must be able to log in from external locations

Yes, manual login from any location (including using Facebook or Google IDs) is possible (in combination with SSO).

SSO

Open eLMS by default uses SAML for SSO but can work with any standard to enable single sign-on.

Accessibility Summary

Introduction

Bidders must provide a summary of their proposed solution to cover the following areas of functionality, outlining the overall features and distinctive value-added benefits of the solution. Answers should address, without limitation to:

Design and enhanced accessibility with reference to how this exceeds compliance with The Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018, and WCAG 2.1.

Open eLMS adheres to the Public Sector Bodies (Websites and Mobile Applications) (No. 2), Accessibility Regulations 2018, and AA standards of the WCAG 2.1 through the regular auditing of the system (results of the last audit have been attached at the back of this document in the appendix).

These standards put emphasis on physical disabilities such as:

- impaired vision

- motor difficulties
- deafness or impaired hearing

Where Open eLMS adds real value is in its user-centred design approach which has great benefits for both those with cognitive impairments or learning disabilities as well as for those without such disabilities.

This document will summarise measures taken to adhere to the The Public Sector Bodies (Websites and Mobile Applications) (No. 2), Accessibility Regulations 2018, and WCAG 2.1 regulations and then give some detail as to the distinctive value-added benefits of the solution. Please also reference section 7 of the eLearningWMBERW2021109LXPTQ3CLXPF.pdf document on accessibility which has also been attached to this document.

Compliance Features of Open eLMS

Open eLMS is regularly audited (every 6 months) against AA accessibility standards. The system is designed with accessibility in mind, measures taken include:

- Use of accessible frameworks - enable adaptive interfaces and mobile interoperability.
- Assistive navigation/controls, the learning system does not rely on drag and drop etc.
- Use of alt text and labels throughout the system for screen readers.
- Contrast colours are used with background and foreground images.
- Mobile adaptive interfaces - use of hamburger menu etc for the learner on smartphones.

Browser compliance

Open eLMS uses open technologies (PHP - Laravel Framework, Javascript, and My SQL) which support all the latest web browsers as covered in [Designing for different browsers and devices - Service Manual - GOV.UK \(www.gov.uk\)](#) .

Additional Accessibility Steps

The science of cognitive ergonomics was originally focussed on accessibility - the goal was to level the playing field for those with cognitive disabilities. User-friendly design does, and should, have benefits for all; this is seen throughout the Open eLMS system.

Benefits of ergonomic design goes beyond the standard accessibility advantages in that:

No training is needed

Users can simply read the interface or understand it intuitively - this is a core feature of taking a user-centered design approach.

This is particularly the case with learners - has anyone sold training in how to use Netflix?

Uptake is greater

Learners enjoy using the interface, with its high contrast colours and low reliance on a text heavy interface.

Learning management quicker

User centred design promotes commonly used tasks so they are close at hand (the 3 click rule) removing the need to search a system to determine how it works. Other design features such as the consistency of button locations (see example below) and functional grouping also contribute to more rapid user experiences for learners and managers.

Consistency of Button Locations: Example

Activating an elearning resource ...

... is the same process as opening a website (or any other learning resource).

Hence the 'knowledge' as to where to activate any learning in the system only has to be learned once.

Help is everywhere

Open eLMS has interactive help throughout the system, click on the help button anywhere and the user gets video/audio assistance in understanding the system.

Configurable

Individual and group differences means that an interface designed around one role type (e.g. line managers) may not be suitable if the company does not have risk assessments or wish to implement an approval process for bookings, etc. Open eLMS can be configured, removing options which are not suitable for each role; there are over 200 configuration options available which ensures the Open eLMS is designed around your requirements.

elearning is not ereading

Open eLMS have pioneered the use of green screen presenters in elearning. Since 2003 Open eLMS has used this technology to ensure that video and audio learning is the norm in its systems. Learning which relies on audio and video has clear advantages over text based learning for those with accessibility issues.

Comprehensive and consistent approach to accessibility

Since Open eLMS is the owner/author of all systems supplied for this proposal, the approach to accessibility is applied across the product range. This applies to the Open eLMS Learning management system as much as it applies to the easy to use (but sophisticated) elearning authoring software Open eLMS Creator and to accessible elearning content from Open eLMS Catalogue.

Latest release

Details on Open eLMS's roadmap and an analysis of quarterly releases can be monitored via the latest updates page on the company's website - <https://openelms.com/easy-to-use-and->

[comprehensive-lms/elearning-wmb/latest-changes-2/](#) (this details the Artemis release).

These releases are presented to clients at online user group meetings, where clients are encouraged to offer feedback.

Out of the box/Single roadmap

Open eLMS is an off the shelf system for which there is a single development road map. Any customisations are added as configuration features which can be switched on/off by the system administrator.

This approach means that there is a single code base which makes it much easier to update and maintain. This has enabled Open eLMS to provide vastly differing user experiences with essentially the same product.

All clients have access to over 200 configuration features which can be switched on/off. These are at least initially set up by the client's account manager.

Total freedom

Open eLMS is a learning management system that has been built by Open eLMS from the ground up since 2003. It is not reliant upon parent systems (e.g. Totara, Moodle) and as such can be configured in any way the client wishes.

This means that despite there being a single roadmap of development, there are no constraints as to how the system can be customised in the future.

Summary

Open eLMS adheres to the standard accessibility requirements (Websites and Mobile Applications) (No. 2), Accessibility Regulations 2018, and WCAG 2.1, etc., but the company's commitment to accessibility does not stop there. The Open eLMS suite of services has been designed by qualified ergonomists to be the ultimate in ease of use.

Ergonomics brings great additional benefits for all users of the system; it is not just a commercially wise move, it is also the right thing to do.

Smart Classroom/Blended Learning

Product name is Open eLMS Classroom

Instructor Led Events

Open eLMS Classroom is a Smart Classrooms plugin service for Open eLMS, which allows you run live, synchronous training through Open eLMS using Zoom, Teams or even face to face in a classroom setting. Training is recorded and participation is tracked like any other learning resource.

Traditional learning tools like whiteboards can also be integrated into these smart classrooms.

Smart classrooms allow instructors to bring in the latest learning technologies into their lessons. Videos, elearning, ebooks, quizzes and microlearning objects (from H5P) can be bought into any smart lesson. This learning can then be configured to be run in class by the instructor, allow students to run them themselves or even set them for homework once the classroom session has been completed.

A more indepth explanation and demonstration of Smart Classroom technology is available here <https://openelms.com/easy-to-use-and-comprehensive-lms/products/smart-classroom/>

Scheduling and Delivering Live and Virtual Instructor Led Courses

Open eLMS Classroom allows tutors or curriculum developers (persons in charge of the schedules of a number of tutors) to schedule live or virtual instructor led courses.

Courses are run using Zoom, Teams or even face-to-face in a classroom setting.

Training is recorded and participation is tracked like any other learning resource.

This has the advantage that all training can be revisited at any time by accessing the training event on each learner's e-portfolio.

A more indepth explanation and demonstration of Smart Classroom technology is available here <https://www.e-learningwmb.com/page/open-elms-classroom>.*1.54

Smart Classroom Technology for Classroom Based Learning

Offline and online courses both utilise the Smart Classroom technology within Open eLMS Classroom to schedule events, manage online bookings, attendance booking, scheduling, alerting users to attend (via Outlook invites and automated emails) as well as cancellations and outlook calendar integration. When an event is set up, it can be exported to MS Outlook calendar, or it can be applied system wide.

Such events generate outlook invites via email (along with Teams webinar invites if selected).

Open eLMS Classroom also handles waiting lists. A learner is informed if they are on the waiting list for any event.

Notifications are automatically sent out and if there are any cancellations, then the person at the top of the waiting list will progress on to the face to-face or webinar learning session.*1.53

Blended Learning

LMS shall support a blended learning approach with Instructor led training (Students being able to upload assignments and the Trainer being able to mark them – full audit and competencies marked against the User via the system)

Open eLMS Classroom is a Smart Classrooms plugin service for Open eLMS, which allows you to run live, synchronous training through Open eLMS using Zoom, Teams or even face-to-face in a classroom setting. Training is recorded and participation is tracked like any other learning resource.

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Smart classrooms allow instructors to bring in the latest learning technologies into their lessons. Videos, elearning, ebooks, quizzes and microlearning objects (from H5P) can be brought into any smart lesson. This learning can then be configured to be run in class by the instructor, allow students to run it themselves or even set them up for homework once the classroom session has been completed. 1.50

A more indepth explanation and demonstration of Smart Classroom technology is available here <https://www.e-learningwmb.com/page/open-elms-classroom>.

Forms

Open eLMS Forms

Open eLMS Forms allows for the inclusion of 360 appraisal review forms etc all tailored to your organisation's existing processes.

Information is read and written from these forms directly into the Open eLMS system.

Open eLMS Forms is a paid-for service. This product usually retails for £15 per learner, but Open eLMS pays a fixed fee annually to greatly reduce this service fee to £5 per learner.

Social Media Learning

Social Connections and Internal Talent

The system will incorporate a searchable e-portfolio that showcases social connections and internal talent

Open eLMS is a searchable e-portfolio which allows users to upload any learning resources (videos, images, documents, etc.) that they have created.

This learning can be showcased amongst their social connections on the system by releasing any uploads as blog posts.

These blog entries can be signed off by management first (if the organisation desires), prior to being shown to the learning community.

Learners have instant access to their trainers and colleagues (assigned to similar learning programmes) for direct contact via Teams, Zoom, and Skype (depending on what has been enabled within the system).

Social Learning Tools

Video Conferencing in Smart Classroom Sessions

MS Teams and Zoom integrate in Open eLMS in similar ways.

- A lesson is created with people, learning, etc. attached.
- A web conferencing tool is selected (Teams or Zoom)
- This sends out invitations to both learners and teachers informing them of the booking and alerting them before the lesson starts.
- When the lesson is ready to run, the teacher and learners select a link on the interface to start the lesson.
- Learning Resources can be shared with the learners, run live and tracked as complete on learner's profiles

- At the end of the lesson a recording of the lesson is recorded. This is automatically saved with the lesson and is saved on the learners' portfolios for later access.

At no point in this process is there any need to open Teams or Zoom to operate this functionality.*1.49

Video Conferencing Fellow Learners

In addition video conferencing sessions can be created with fellow learners by contacting them directly. Learners can have Teams, Zoom or Skype ID's attached to their profiles which enable them to be contacted in this way.

Blog Posting

Open eLMS is a searchable e-portfolio which allows users to upload any learning resources (videos, images, documents, etc.) that they have created.

This learning can be showcased amongst their social connections on the system by releasing any uploads as blog posts.

These blog entries can be signed off by management first (if the organisation desires), prior to being shown to the learning community. *1.23

ePortfolios

The LXP platform should host fully-customizable learner profiles which act as e-portfolios for users – detailing all development, areas of specialism and areas of interest.

Open eLMS hosts fully-customizable learner profiles which act as e-portfolios for users. As well as assigned learning, the eportfolio can be used to upload and describe all development, areas of specialism, and areas of interest.

Uploaded information can be assigned categories and even attached to criteria in learning

programmes for easy filtering and recall at a later stage.

Social Learning Spaces

There will be social learning spaces and discussion forums

As previously mentioned, learners can contact each other directly through Teams, Skype, Zoom, email, etc. There is also an extensive features list of additional social learning features within Open eLMS. These include:

Discussion forums surrounding learning topics/modules.

Integration with whiteboards (e.g. Jamboard) for social learning spaces ...

Integration with webinar tools (e.g. Teams, Zoom, etc.) when carrying out live lessons.

Badges (using the Open Badge standard) - so achievements can be shared on social platforms such as LinkedIn, Facebook, Twitter, Teams, etc.

Open eLMS are also developing “signposting” learning which will allow LMS resources to be accessed outside the LMS and record data back.

This would work in a similar way to YouTube where you can embed videos on third-party websites and is tracked centrally on the YouTube servers.

Learning Communities

Social learning is a big part of Open eLMS. Learners and tutors are encouraged to input their contact details so they can chat using Skype, Zoom and Teams with fellow students and tutors on their course(s).

Blogs posts with attached documents can be uploaded and shared with the user population (after management approval.)

News is available via an Anders Pink plug in which offers the latest wes articles embedded into each learner’s e-portfolio. There is also the option to add RSS news feeds into the system as a learning resource.

Discussion Forums can be created around events, to foster collaborative learning.

Live chat

Trainees can communicate with fellow students via any chat medium (Skype, Teams, Zoom etc.)

Chat forums are also set up around key events so students can chat about lesson topics within the forum; teachers can mediate.

The system also integrates with MS Teams/Yammer and Jamboards. *1.22

Payments Engine

Charging On/Off Per Course

Charging can be switched on/off per course with prices customised at the learning resource and programme levels.

If a learning item has an associated cost then there is an option to initiate a payment process during enrollment via Civica (this will be bypassed if the charging engine is switched off.)

Variable Charging Per Course

Charging rules can also be applied to individuals, departments and organisations. Percentage discounts can apply to each.

Online Charging/Invoicing/Internal Journals

Each company will have a payment defined (online, via invoice or journal transfer) which will affect how each person from the organisation manages their payments.

Open eLMS will populate the provided template template for the required field headers, so the client can upload the data into Oracle Fusion and therefore automatically create the invoice or the journal items in bulk.

Online charging will be made via the Civica payments engine.

Custom Charging

Prices can be adjusted for different organisations by adding a percentage discount to each customer. This is used by the payment engine's API (e.g. Civica Pay API or similar) to determine the calculated price. This ultimately allows an unlimited number of price points per event.

Online Payment Options

The payments engine will allow payment by card, Paypal or invoice and allow the production of invoices.

Automated Server-Side Tasks

Automated CRON tasks will be carried out to allow the export of data as a CSV file so it can be imported directly into Oracle Fusion; the data will be in a format in accordance with the header information supplied for external invoicing and internal environment.

Type of Process

Open eLMS will utilise a third party payments engine to handle the payments and interact with the Open eLMS system. Should an existing engine already be in use (e.g. Civica Pay) then Open eLMS can use that API, else an alternative will be selected in accordance with the client's wishes.

Aesthetics

The LXP platform will feature highly customizable capabilities

Open eLMS features highly customisable capabilities both at the individual learner and system levels.

At the individual level, filters are recorded each time the system is accessed so that the learner can leave the interface in their optimised state.

At the system level there are over 250 configuration options available (don't worry, Open eLMS will set these up in consultation with your organisation, but they can be changed any time).

Features that can be changed are too numerous to list but they include:

- Branding/look and feel
- Activation/deactivation of functionality
- Integrations
- Default values
- Addition of fields
- Interface options
- Security features

The platform will feature an individual learner dashboard for each user

Each learner experience is unique to that learner, both in terms of the user settings and the learning content contained therein. The individuality of the learner dashboard is determined by many factors including:

- **Time:** Learning is fed onto the dashboard as and when it is needed (as determined by the timings of a learning programme. Different learners on the same programme will have vastly different content depending on when the programme was started.
- **Achievement:** As learners proceed through learning pathways, new learning is added to their portfolio. Different learners who have reached different points on their pathways will have different content.
- **Learner contributions:** The portfolio is supplemented by learning added

by the learner; this will differ from learner to learner.

- **Manager contributions:** Further learning will be assigned directly to the learner by their managers. Different people will require different resources.
- **Individual differences:** Queries in the system will look at differences such as jobs, location, department, skills, etc. and assign learning accordingly. In addition, even if two learners are assigned the same learning programme or pathway, the resultant learning experience can be vastly different depending on individual differences.
- **Group:** Branding can be unique to certain groups (logos, accessibility features, etc.). This enables the implementation of multiple brand identities on a single portal.

Security

ISO 27001 (general IT security) and 27034

The supplier should meet ISO standards 27001 (general IT security) and 27034 (application security).

Open eLMS is ISO 27001 certified Certificate No:372382021: Expiry Date: 13/05/2022. Part of this process requires an annual independent application security audit of the Open eLMS system aligned to ISO 27034 from Enmarq Ltd. A copy of this report can be downloaded from our website at [CompanyDocumentationERW20201008ISO27001SoftwareAuditReport.pdf](#)

Information Security Management System

All people, processes, and technologies are entered into the company's asset register and are then managed by the organisation's Information Security Management System. This involves periodic checks on the controls applied to each and assessments of the residual risk to see if further controls are needed to protect Personal Identification Information (PII) in line with GDPR requirements, ISO 27001 standards and Cyber Essentials Plus security controls.

A full analysis of the company's ISO27001 ISMS Manual has been attached as an appendix to this document.

Independent annual vulnerability assessment

Open eLMS undergoes an annual Software Vulnerability assessment (including Pen tests) from Enmarq - a copy of which is available to download from the company's website ([Vulnerability Assessment Report](#)).

NEW REPORT:

https://drive.google.com/drive/folders/1njmFnk5rHFT453CWdfHuW-seRJhl2u_B

Please note the report was signed off in December 2020 although dated August 2020 as the initiation date. A similar report for this year is being finalised and will be included at the next stage of the propos - **1.A.4.3**

Vetting of staff

All staff with access to data (i.e. PII) will be BPSS vetted prior to receiving client data for import tasks and going forward in BAU. Full candidate reports from Secure Screening Services will be made available upon request.

Access to client data is controlled and audited via the company's Zoho vault password

system.

Subcontractors

Open eLMS employs one subcontractor (providing specialist programming knowledge) who is prevented from dealing with support tasks or accessing any client sites with PII. Despite this, all subcontractors are required to sign a Non-Disclosure Agreement and evidence that they meet the standards within the company's Supplier Security Policy, namely:

Any third party contract must meet the following criteria:

GDPR Article 28 Requirement	Compliant? (Y/N)
Processes the personal data only on documented instructions from the controller.	
Ensures that persons authorised to process the personal data have committed themselves to confidentiality.	
The processor shall implement appropriate technical and organisational measures to ensure a level of security appropriate to the risk.	
Ensure any subcontractors meet GDPR requirements for processors.	
Assist the controller in fulfilling its obligation to respond to requests for exercising the data subject's rights under GDPR.	
Notify the controller of any personal data breach and assist the controller in fulfilling its own obligations regarding breaches.	
Delete or return all personal data to the controller upon request.	
Makes available to the controller all information necessary to demonstrate compliance with GDPR obligations.	
Complete and sign an Information Security Agreement and NDA.	
Policies and procedures - ISO27001 and/or Cyber Essentials.	

Development standards/ISO standards

Open eLMS is ISO 27001 certified (Certificate No:372382021: Expiry Date: 13/05/2022).

Open eLMS undergoes an annual ISO27001 audit and certification from an independent auditor, QMS. This is complemented by a Software Vulnerability assessment from Enmarq - a copy of which is available to download from the company's website (https://drive.google.com/file/d/1V67BhZ9cdl-IMRsQHiocEqolv2DgZo_s/view?usp=sharing).

The Open eLMS API is a RESTful API and as such follows industry standards.

Open eLMS is also LTI Certified and as such can easily use webhooks to communicate with additional third party systems - <https://site.imsglobal.org/certifications/e-learning-wmb/open-elms>.

1. CSC (National Cyber Security Centre) Security Principle - Governance Framework

Details of this are provided as an attachment - https://docs.google.com/document/d/14cp_lr_bowKQOPtZ5CzALpQrqGldellGTjZT6bBblVM/edit?usp=sharing

Cloud Security Network

GDPR Measures

Open eLMS has been **designed** to be compliant with the GDPR. Specific measures taken to ensure compliance include:

- Keeping an audit trail of data exported from the system
- Implementing 'right to be forgotten' functionality which removes persons and their data upon request as well as via an import of a leavers list
- Standard registration interfaces (if used) are GDPR compliant
- Students can take data with them using 'Pack and go' functionality

Open eLMS adopts a security by design approach to PII and data security in the **Implementation** of the SAAS. Measures include, but are not limited to:

- Limiting access to PII and passwords in accordance with Password Policy
- ISO 27001 (Certificate No:372382021) certified Information Security Management System.
- Independently audited Cyber Essentials Plus (Certificate No:372382021) security measures designed to protect against the snooping of PII.
- Use of the Zoho password vault to secure password use
- All staff undergo ISO27001, GDPR, and Data Protection training
- Use anonymised data for testing purposes

Technical measures include data at rest using Azure's standard Disk Encryption <https://docs.microsoft.com/en-us/azure/virtual-machines/disk-encryption>. Open eLMS uses SSE with PMK is server-side encryption with a platform-managed key. This is enabled by default on all managed disks. The data on the disks are encrypted transparently using 256-bit AES encryption, one of the strongest block ciphers available, and is FIPS 140-2 compliant.

In addition, Open eLMS adopts encryption of data in transit utilising an EV SSL certificate, the EV SSL certificate displays the name of the company when viewing the certificate information.

Data Protection Impact Assessment (DPIA)

Open eLMS's DPIA complies with GDPR and Privacy and Electronic Communications Regulations (PECR) requirements.

The generic DPIA for Open eLMS has been supplied at [OpeneLMSERW20191030DPIA.pdf](#).

In addition, security policies are aligned to the company's ISO 27001 certification, safeguarding the privacy of PII in line with GDPR and PECR requirements.

Public Sector Accessibility Regulations 2018 (PSAR)

The Open eLMS system meets all the As in high level functionality as well as all future requirements for the To-Be system. Further details regarding the architecture are listed below:

Accessibility Audits

A regular internal audit against WCAG-2.1 using the Axe accessibility checker has taken place and is supplied. This is repeated every 6 months and linked to the company's accessibility statement on the company's website at [Accessibility Statement for Open eLMS](#) - [Open eLMS presents Open eLMS](#) .

Compatible Software

Software tests have been carried out and can be supplied on demand. These include:

- Dragon v15
- TextHelp Read and Write v12-screen reader
- ZoomText v2021
- Jaws screen reader v18+

Open eLMS is also compatible with Dictate, Magnify, and Narrate. - 1.A.4.4

Data retention and destruction

Open eLMS has functionality to follow best practice guidance for data retention and destruction for leavers. This includes the option to give portability of data to learners via the 'pack and go' functionality and the right to be forgotten with the importing of leaver lists which delete all associated data from the system.

Data Retention

All company data is stored for 6 years prior to being destroyed. Open eLMS can keep client data for up to 3 years after the termination of a project upon request of the client (data is otherwise deleted 3 months after the termination date.)

A copy of Open eLMS's Disposal and Destruction Policy relating to data and the physical destruction of information has been included (e-LearningCompanyInformationAT201912Disposal&DestructionPolicy (1).pdf).

Data Cleansing and Anonymisation

Data is cleansed usually required when imported from another data source which can lead to inaccuracies (e.g. importing courses which have no clear mapping from one course to another.)

Data is anonymised when there is the need to test with real data, but there is the conflicting requirement not to release personally identifiable information (PII).

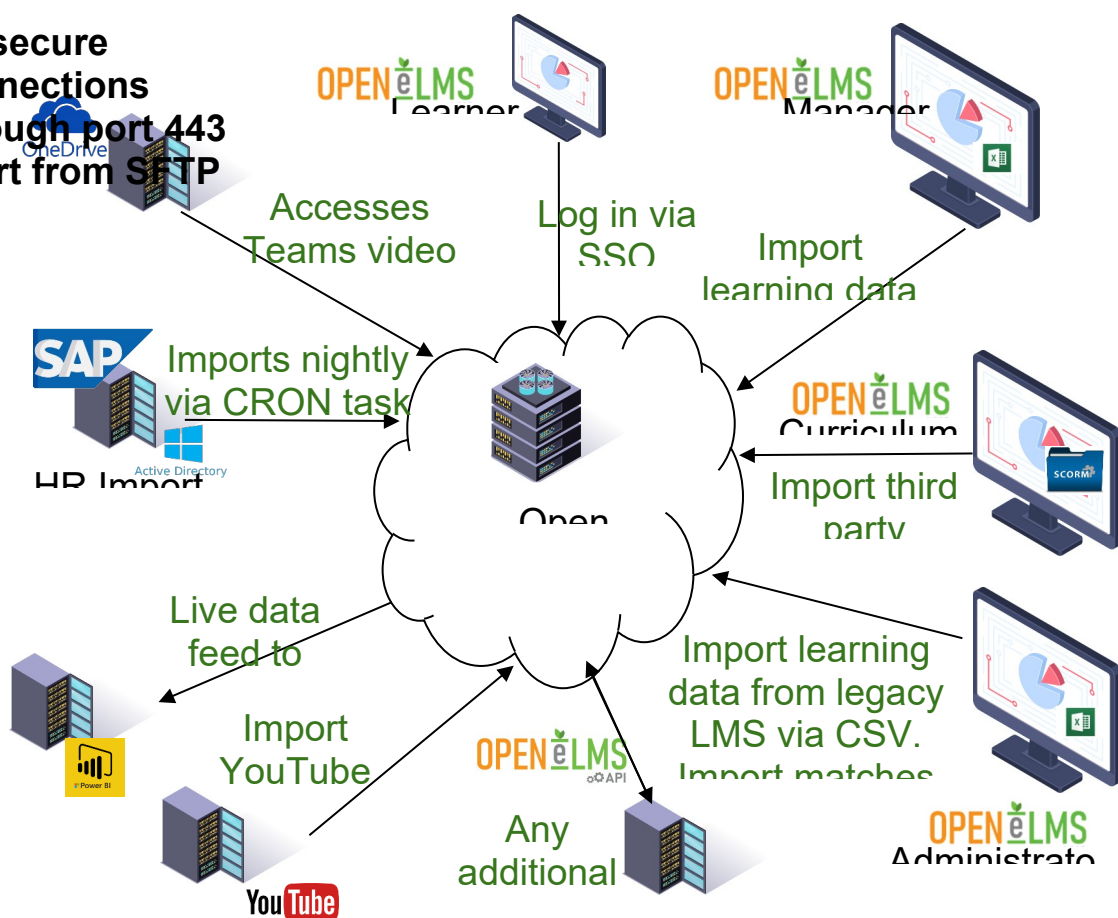
For both cases the project team uses queries to 'make the data fit' and randomly generate PII from a list of predefined names (generating first names, surnames, emails etc.) Open eLMS has a library of queries it can call on to reuse in such cases.

Technical Considerations

Data Flow

The following describes the flow of data across the platform. This technical diagram demonstrates connectivity, ports and traffic flows between Open eLMS and the client's network.

All secure connections through port 443 apart from SFTP



Cross Browser/Cross Platform Compatibility

Open eLMS supports each of the latest two major versions of the following browsers:

- Google Chrome
- Mozilla Firefox
- Internet Explorer
- Apple Safari

The elearning system works independently of Operating System (e.g. iOS, Android, Windows (7 onwards)).

The interface is adaptable to mobile devices with minimal interface changes needed (toolbar functionality is brought into a hamburger menu and selection tiles are made larger etc.) Note the elearning used works the same way on a mobile as an large screen since the Open eLMS Creator is designed to produce elearning that complies with IOS design guidelines for mobile devices.

Should any client want to use the system as an App (for offline use) then the system is limited currently to elearning tracking only.

Storage Capacity

The LXP will have the capacity to store the following:

- ***Up to 1000 SCORM/xAPI packages (estimated to be no more than 500 MB per package).***
- ***Records for circa 1400 live employees at any given time (including but not limited to personal details, qualifications, learning completions, CPD records).***
- ***Records for circa 4000 archived employees (including but not limited to personal details, qualifications, learning completions, CPD records) for an average 6 year time period.***
- ***Uploaded copies of Qualification and Training Certificates (minimum 3000).***
- ***Up to 1000 uploaded PDFs***

Please detail storage capacities - including ranges and prices if appropriate. If using a fair usage policy for storage, then please give details in full.

This is a relatively modest requirement and Open eLMS is regularly stress tested against 30,000 employees. Open eLMS would easily handle this requirement in addition to any video and image uploads the learning population would need to add to their eportfolios.

All references supplied will be for customers with larger data demands so service levels can be validated.

Open eLMS is hosted on an Azure Cloud platform which is highly scalable should there ever be the need to add extra resources to the installation instance.

Storage

Storage provided as part of the core solution, further scalability, and service flexibility to assist Client in managing unanticipated volumes of content

Storage with Microsoft Azure is highly flexible, triggers are in place to increase storage whenever the system nears capacity.

This enables Open eLMS to manage any unanticipated volumes of content. Note checks do also exist in the system to prevent file uploads beyond a maximum limit to prevent sabotage.

Flexibility

How your Infrastructure set-up is capable of flexing to meet unanticipated volumes of user demand whilst maintaining your company's most demanding service level performance obligations?

Monitors will alert if system load is too high, memory use is too high, or storage is below permissible limits. When that occurs, the cause will be investigated, if the bottleneck is software or code, that will be dealt with.

If hardware is causing the bottleneck, processing power or server memory can be increased until demand is met. Since the server is hosted on the Azure Cloud, the server performance can be adjusted using the Azure's control panel as needed.

For increases to the hardware power, the server needs to be shut down so that adjusted parameters can take effect. This process will take up to 10 minutes to complete.

"On the fly" adjustments need a different architecture/set-up of the system, that involves splitting each application on the server as a Azure service, and splitting that service in shards to manage load. This architecture is reserved for large corporate business to consumer sites, but will be implemented if ever needed.

Data Storage Expiry

LMS shall have ability to flag up data that hits the 10 year mark and allow user to decide to keep or delete

Parameters exist within the system to delete or disable data after a set amount of time. These time periods can vary for different types of data as shown (useful for GDPR compliance for varying types of data)..

The system can also be configured not to delete data should that user still be with the company.

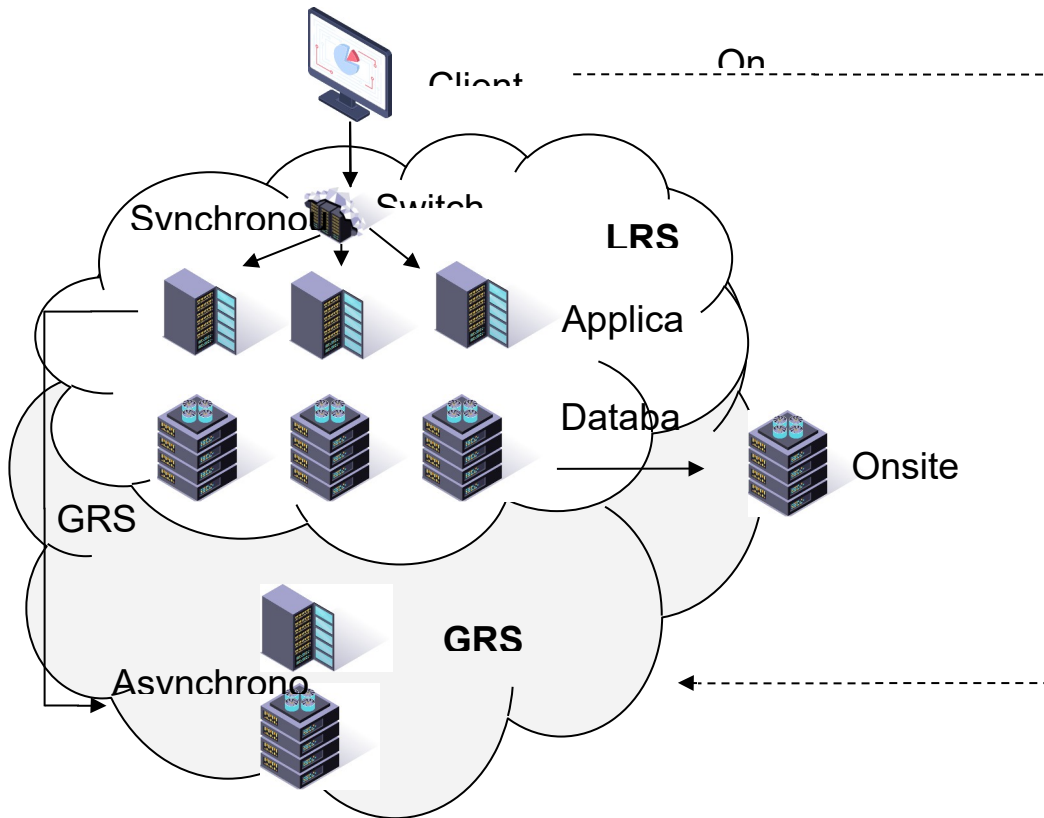
Language Versions

The Open eLMS interface can be displayed instantly in any one of 108 different languages:

eLearning on the site (and accompanying voiceover) can also be translated (including voiceovers) using any one of 29 common languages.

Disaster Recovery/Business Continuity

Open eLMS uses geo-redundant storage (GRS) replication. GRS replicates data and the system to a secondary region (hundreds of miles away from the primary location of the source data). This provides a high level of durability for your data, even if there's a regional outage. A diagram of GRS (and optional LRS) infrastructure is supplied.



Minimum Client PC Specification

Open eLMS is browser based and supports each of the latest two major versions of the following browsers:

- Google Chrome
- Mozilla Firefox
- Internet Explorer
- Apple Safari

The elearning system works independently of Operating System (e.g. iOS, Android, Windows (7 onwards)).

Memory 4 GB RAM

Free space 2 GB of free space

Disaster Recovery Timings

If there is an outage, then the server switches to the secondary server. The Recovery Time Objective is 10 minutes for primary servers to switch over to the secondary server. The Recovery Point Objective is at the same point as from when the primary site fails.

Azure SSO/AD and Hosting

Microsoft Azure SSO

Open eLMS supports Microsoft Azure Single Sign on (Active Directory SSO) amongst many other SSO formats. SSO is included as part of the standard installation procedure and entails no additional charges.

Microsoft Azure Infrastructure

Note that Open eLMS is hosted on Microsoft Azure's Cloud hosting service, this makes integration with other Microsoft infrastructure elements (SharePoint, Office 365, Microsoft Power Platform, etc.) much easier.

All Microsoft Azure data servers are based in the UK, Europe (primary London, secondary Cardiff).

Microsoft Azure Cloud Hosting

Open eLMS is a SAAS product on Azure Cloud. All data processing and data storage is held within this infrastructure.

UK Hosted

The system is fully UK hosted (Primary London, Secondary Server Cardiff).

Clients installed on separate instances

All client installations are completely separate with no file or data sharing between instances. Measures are taken to ensure the script cannot crawl between instances, these include:

- Executable files are prevented from running (e.g. SCORM zip files are run and then deleted upon importing).
- Execution of files is not allowed from elearning, etc.
- Instances are 'jailed' so the script can't crawl out! The PHP setting '***open_basedir***' locks instances by directory and any command that traverses directories is denied.
- The PHP setting '***disable_functions***' is also employed which is not allowed to execute certain PHP functions that could compromise the system.

API Integration

Open eLMS API

Open eLMS API is a RESTful API which supports Microsoft Azure Single Sign on (Active Directory SSO).

The API is documented on the company's website at <https://www.e-learningwmb.com/page/open-elms-api>, this technology allows employees to access and manipulate their training records from other devices. The API calls currently available allow third party devices to:

- Add new user accounts
- Edit user accounts
- List user accounts
- Search user accounts
- Assign learning
- Remove learning
- List learning resources
- Download learning resources zip
- Download learning resources container
- Create new learning resource
- Create or edit elearning
- Check learning progress
- Update learning progress

Open eLMS API support

Support in implementing the API to access (and update) individual training records is included within the standard Open eLMS Enterprise package which makes up this tender.

Assistance is also supplied with implementing data exports from the system (CRON imports of CSV data etc.). These exports can be automated if required.

Included third party API support

Open eLMS already supports a host of third party APIs with integrations embedded into the system (details at <https://www.e-learningwmb.com/page/support>), namely:

- Anders Pink AI
- Badgr
- Go1
- Google Analytics
- H5P
- Olark
- Moodle
- MS Power BI

- MS Teams
- Multi-Factor Authentication
- Salesforce
- Turnitin
- Yammer
- YouTube
- Zoom

Additional third party API support

Open eLMS has extensive experience in implementing third party APIs and can carry out this work outside the remit of this project.

Technical Codes as issued by NCSC and Cabinet Office

Open eLMS will follow the latest national technical codes of practice and security guidelines as issued by NCSC and Cabinet Office.

Define user needs

Open eLMS puts the user at the heart of the design of all its systems as part of its ergonomics design principles. This user centered design means less training, faster adoption and a more effective system implementation. More information about our design philosophy can be found here <https://www.e-learningwmb.com/page/elearning-wmb>.

Make things accessible and inclusive

Accessibility is a core ergonomics principle we adhere to. A copy of the latest accessibility audit - OpeneLMSERW20210403ERWAccessibilityAudit.pdf - has been supplied. The audit is biannual and addresses any issues which address WCAG 2.1 at conformance level AA.

Accessibility by design is also part of the core engineering principles which are inherent as a core engineering principle in the company's Secure Engineering Policy manual (*CompanyInformationERW20191106ISO27001SecureEngineeringPrinciplesPolicy (2).pdf*) to which all coders attest and are trained on.

The company continuously strives to add accessibility features and plugins, such accessibility features build into the Open eLMS product since the beginning of 2020 include:

- AI to add voice to text
- The use of AI to translate audio to one of 27 different languages
- The implementation of the Recite accessibility toolbar as an option via an API link

For more details see the company's accessibility statement here <https://www.e-learningwmb.com/page/accessibility-statement-open-elms>.

Be open and use open source

Open eLMS is built exclusively with Open Source technologies and platforms. This includes all systems supplied:

- Open eLMS (MySQL, PHP, Javascript)
- Open eLMS Creator (Haxe 4, HTML5, Javascript, XML)
- Open eLMS Classroom (MySQL, PHP, Javascript)
- Open eLMS Catalogue (MySQL, HTML5, Javascript)

Make use of open standards

Open Standards are used exclusively throughout the system. These include:

- SCORM
- xAPI
- LTI
- LRS (Learner Record Service XML structure)

Use cloud first

Open eLMS available primarily via Azure Cloud.

Make things secure

Open eLMS is ISO 27001 certified and adopts security by design principles in everything it does. The Open eLMS system undergoes a third party audit annually. Copies of these audits have been supplied (*CompanyDocumentationERW20201008ISO27001SoftwareAuditReport (1).pdf* and *CompanyDocumentationEERW20122018ITSecurityAssessmentReport (1).pdf*).

Make privacy integral

Open eLMS has been designed with GDPR compliance in mind.

- No cookies are used
- Pack and go function which enables the learner to take all uploaded documentation with them
- Import delete list to remove PII data from selected persons
- All data is encrypted (in transit and at rest.)

Share, reuse and collaborate

Open eLMS allows Open eLMS to reuse and share learning throughout the system to avoid duplication of labour.

Quarterly meetings are held with user-groups to share best practice and ideas for future development of the system. Details are available here - <https://www.e-learningwmb.com/page/latest-changes>.

Integrate and adapt technology

Open eLMS (as the name suggests) is an open system, designed for integration and the sharing of data.

In addition to the API and adoption of open standards, the system has a number of plug and play integration namely:

- Anders Pink AI
- Go1
- Google Analytics

- H5P
- Joomla
- Olark
- Moodle
- MS Power BI
- MS Teams
- Multi-Factor Authentication
- Salesforce
- Turnitin
- YouTube
- Zoom

Make better use of data

Open eLMS has extensive reporting and data dashboard capabilities. It can also set up live data feeds with business information systems such as MS Power BI.

Define your purchasing strategy

Open eLMS considers all commercial and technological aspects (financial stability, open platforms/integration, accessibility etc.) prior to making any purchase. Any contractual arrangement with a supplier must include attesting to Open eLMS's ethical purchasing policy (*LearningCompanyInformationERW20210415EthicalPurchasingPolicy.pdf*) and code of conduct.

Meet the Service Standard

Open eLMS attests to meet the service standard. Details of its project management procedures have been supplied as evidence of how it co-operates with clients on learning system projects (*e-LearningCompanyInformationERW20200224Project Management4_0 (3).pdf*).

Data Sharing

Open eLMS unsurprisingly uses 'open' standards for data sharing. This is carried out via:

- The Open eLMS REST API (for data sharing)
- Third party APIs (is compatible with the Boomi API/gateway management for middleware connectivity)
- LTI Certification (for the simple connection of learning systems)
- SCORM standard (elearning course interoperability)
- xAPI (tracking of non elearning objects e.g. video)

Use of Javascript

This is a PC rather than a FC only because the Open eLMS application would need

Javascript enabled to work. Javascript is a very common component of learning systems and it would greatly restrict the functionality of a system such as Open eLMS should it be enforced.

A full response to this issue has been supplied in the spreadsheet - 2021-06-15 Statement of Requirement (1).xls.

User Volume

Open eLMS will be capable of hosting the system users as detailed in 2.3 and accommodate the 6000 users that access the current system monthly.

Windows Server or Linux operating systems

Open eLMS is run on a Linux – Ubuntu OS.

Database will be based on Oracle, SQL Server or MySQL architecture

MySQL version 10.3.28-MariaDB

Web services will be based on Apache or IIS

Apache, version 2.4.25

Plug-in dependencies

No plug-in dependencies.

RESTful API

Yes. See <https://www.e-learningwmb.com/page/open-elms-api>.

Dependent software cost is free

Licences for dependent software e.g. Windows Server, CALs, etc. will be provided by your organisation. All other licence costs for supplier core products must be explicitly detailed and costed.

Open eLMS is built on an open source PHP, Javascript, and MySQL infrastructure. Open eLMS Creator is built using HAXE 4 which is an open source high-level strictly-typed programming language with a fast optimizing cross-compiler. This means that there are no licensing requirements for system components.

All other licence costs for Open eLMS core products are explicitly detailed and costed.

Functionality to export to MS Outlook calendar

Yes. Individual events can be exported to MS Outlook calendar, else this can apply system wide.

Such events generate outlook invites via email (along with Teams webinar invites if selected).

CSV Export

The platform must be capable of conducting import / export in industry standard formats, e.g. delimited CSV

Yes. Open eLMS uses xls by default but this can be changed to csv if required. Imports include:

- Importing new users
- Importing leaver lists
- Importing course data from third party systems
- Bulk import of evidence/uploads/certificates

Hosted Infrastructure

Introduction

Open eLMS adopts a Cloud based infrastructure because of the associated benefits, namely:

- Environmental
- Reliable
- Durable
- Recoverable

Open eLMS utilises Microsoft Azure for this because of its reputation for uptime and reliability, allied to its sustainability credentials. This document expands on these benefits below ...

Hosting Type

Client requires a managed Cloud hosted option. Bidders shall fully summarise their proposed Managed Hosting/Infrastructure solution including, without limitation to: Whether Hosting is Cloud based or equivalent with one or more of – IaaS; PaaS; SaaS;

Open eLMS is a Cloud based installation using the Microsoft Azure infrastructure. The system is supplied as a SaaS.

Subcontracting

The extent to which the Hosting Services are subcontracted partly, fully, or not at all;

The hosting infrastructure is fully subcontracted. Open eLMS manages the service on behalf of its clients (upgrades, scheduling backups, configuration, etc.).

Backups

Backups (all files and database) are taken daily and by default a rolling schedule is taken daily, weekly, monthly, 3 monthly, and 6 monthly (this schedule can be adjusted to suit client requirements).

These backups are saved for 2 weeks after deletion.

Backed up files

These backups include the entire installation, namely:

- database
- database transaction logs

- application configurations
- customer-specific customisations
- uploaded learner files

Primary backup solution

All backups are created using Microsoft Azure backup which encrypts data and stores the data off-site.

Geo-redundant storage (GRS)

Open eLMS uses geo-redundant storage (GRS) which replicates client data to a secondary region (hundreds of miles away from the primary location of the source data). This provides a higher level of durability for system data, even if there's a regional outage.

Storage

Storage provided as part of the core solution, further scalability, and service flexibility to assist Client in managing unanticipated volumes of content

Storage with Microsoft Azure is highly flexible, triggers are in place to increase storage whenever the system nears capacity.

This enables Open eLMS to manage any unanticipated volumes of content. Note checks do also exist in the system to prevent file uploads beyond a maximum limit to prevent sabotage.

Flexibility

How your Infrastructure set-up is capable of flexing to meet unanticipated volumes of user demand whilst maintaining your company's most demanding service level performance obligations?

Open eLMS monitors server load examining a daily average, increases to processing power could be made to accommodate (more cpu/ram/disk space). This has yet to be an issue and would require a significant increase in simultaneous active users to make a dent in performance.

Should there be the need to make changes using the Azure infrastructure, these would be carried out outside business hours, involving shutting down the server instance, upgrading, and restarting. This process would take 10 minutes in total.

Should the traffic levels scale to the levels where there is the need to make these changes in real time, then arrangements would be made to fragment the server into services that also are fragmented into shards. This is a highly complex infrastructure and only really needed for large scale business to consumer commercial websites.

Support

Support Communication channels

Open eLMS' ISO 20000 certified service management system is available via the support channels:

- Email: support@openelms.com
- Telephone (Main switchboard): +44 (0)203 929 2051
- Jira Helpdesk

Support management processes

1st Line Support

Open eLMS will provide full training and resources to provide assistance with first line support. Should the support not be able to get a resolution (through internal knowledge or data supplied through the Open eLMS help systems (<https://openelms.com/support/>) then the issue is escalated to the second line support to Open eLMS.

2nd Line Support

Second line support can come through the assigned account manager or wider support team in any of the support channels of communication (direct meetings, support@ email, Olark chat software, phone etc.) All forms of communication are logged.

3rd Line Support

If the request cannot be met then a formal change request is raised on Jira - this has now been escalated to the third line support.

Account Manager Meetings

Following Go Live the account manager, as is standard, arranges weekly meetings for the first 3 months after implementation, extending to monthly thereafter. These can be extended to 3 months at the Client's behest.

Meetings will address as a minimum the following areas;

- System Performance
- Helpdesk Performance
- System Roadmap and opportunities for improvements

Also, advice is given on how to get the best out of Open eLMS from the Client's perspective.

The account manager is also on hand at any time during business hours to offer just in time training and advice.

Additional quarterly user group sessions

The Client would also be encouraged to join the quarterly user group session, where:

- The latest release is reviewed.
- Ideas for improvements are discussed.
- Feedback, discussion and collaboration with fellow users.

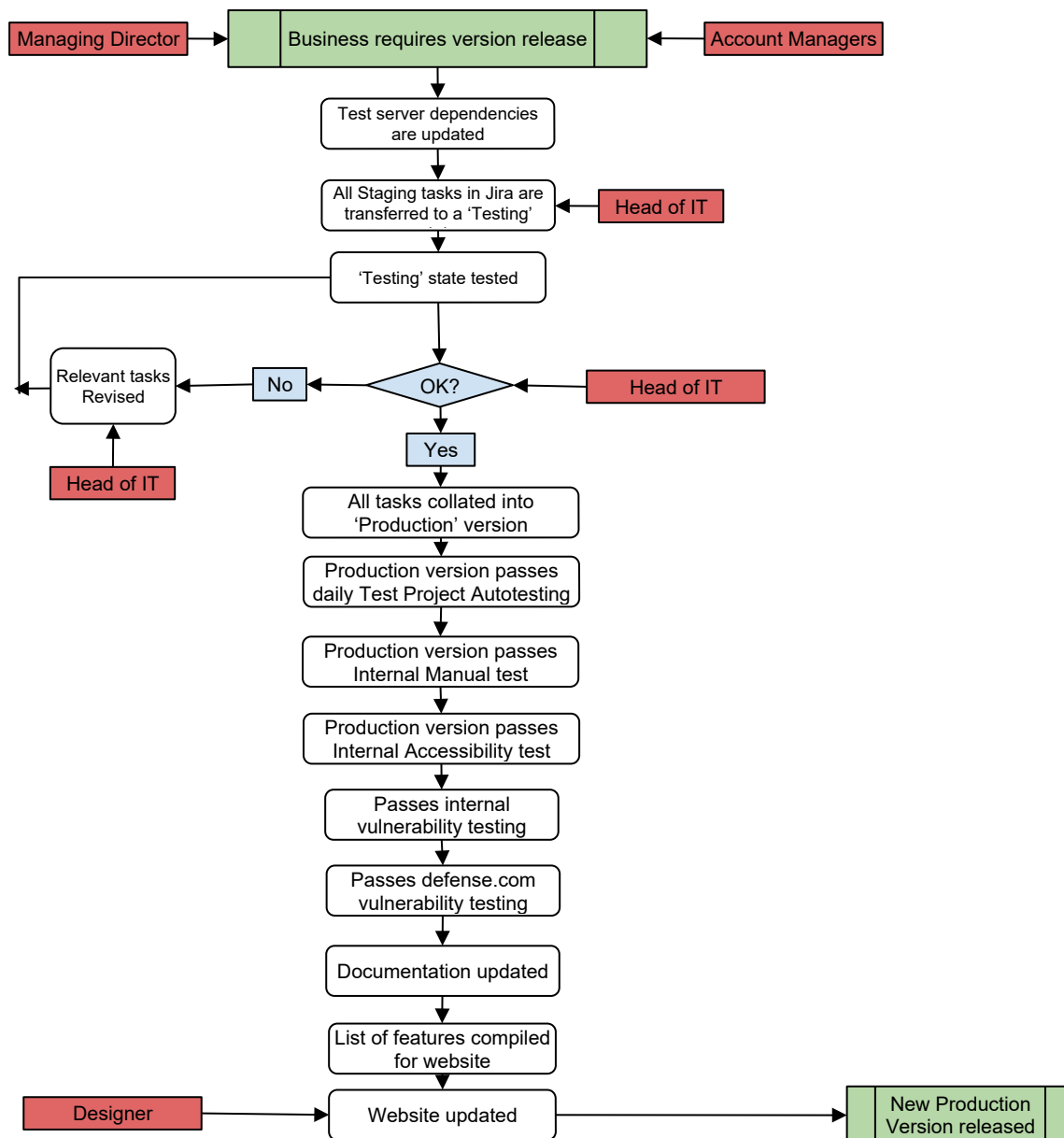
Implementation and Testing

Any changes made are tested by the lead programmer, project manager and account manager prior to being released to a client. Any audit trail is maintained on this process within the Jira system.

Changes can be released onto a client test server or on to the live server depending upon the nature of the change; i.e. depending on whether it is urgent, involves complex design changes which need approval, is system critical etc. The nature of the release will be made after consultation with the client via the account manager.

Testing

The systems will go through Open eLMS's ISO 20000 release management process and undergo an automated and manual testing process which will follow scripts approved by the client.



The holistic testing process consists of:

Developer testing - the developer tests the issue prior to moving the issue to a 'Done' state.

Product Management testing - this is done in moving the issue to the 'Closed' state. The product manager tests the issue in the test build prior to changing the status.

IT Director testing - this test is done prior to moving the issue from the staging build to the production build. This is a test of the code merging process and acts as a secondary test of the Product Management testing phase. The IT Director will review the code to check for formatting, conflicts, quality and consistency issues as part of an overall SAST (Static Application Security Test) of the added code.

The above testing is controlled and documented in the SCORMDATA project in Jira. The SCORMDATA project consists of a Kanban system where issues are moved from a state of Backlog > In Progress > Done > Closed > Autotested. Once the issue is "Closed" then the process of getting ready the issue for publishing can be initiated. This is managed by the IT

Director where the issue gets published in the sequence described (development server > testing build > staging build > production build > release).

The IT Director will ensure that all test server dependencies and security updates are applied to the latest versions and tested as part of the release process (as well as daily automated testing).

The individuals responsible for testing the change must be identified and fully briefed.

The Product Manager and IT Director must accept the changes at the designated stages prior to completion of testing.

Once the change is proved to be effective (working in line with the test criteria) the IT Director authorises its transfer to the operational environment, ensuring that business processes are not disturbed and that business continuity plans are updated.

Versioning of Open eLMS updates is managed through the Jira/Bitbucket coding system. Named releases are controlled through a publishing process which goes from development server > testing build > staging build > production build > release. All named releases (as of 01 November 2020) are documented on the Open eLMS website.

Autotesting - The system is auto tested using Test Project; Test Project is an automation platform for web, mobile and API testing (effectively a wrapper for Selenium and Appium). Open eLMS coders create test scripts which are run daily. These scripts simulate major operations of the software; the desired outcome is a 100% pass rate for all scripts.

Manual testing - A manual 'script' is created in Jira based on the User Test Cases which are documented in the Jira project: Manual Test. The test cases in the project are run periodically (as dictated by the asset register timings) and in addition prior to a named formal release to ensure that the system is working as intended. These scripts are not operationally prescriptive so as to allow a number of routes to the desired outcome; the purpose of this is to test non-standard operations.

Accessibility Testing - The internal accessibility test is run using the Axe accessibility checker against WCAG 2.1 at conformance level A. These reports are produced every 6 months at a minimum (or prior to a named version release) to ensure compliance. The external accessibility audit provided by Ten10 is independent of the release process.

Internal Vulnerability Testing - This testing is carried out by the IT Director using the previous external vulnerability audit and OWASP Top Ten as an updated guide to the most significant vulnerabilities.

External Vulnerability Testing - The 'production' release is tested monthly and prior every release via the automated reporting tool at defense.com. These audits issue recommendations which are acted upon by the program team.

Documentation - Operating procedures and documentation are updated for the changes to the software. These are listed in the Knowledgebase and online manual at <https://www.openelms.com/support/>.

The custom documentation in line with GTAA requirements will be provided in the format of the client's choosing.

Standard support operating times

Standard support is UK based and available from 0800 to 1800 GMT from Monday to Friday via telephone, email and internet chat.

Numbers of Support Staff

An account manager and 5 members of staff are on hand to assist with any support query. It is important to note that support is supplied via the same office that produces Open eLMS, so in depth knowledge of the product is always close at hand.

Alert Systems

Automated alert systems exist (Uptime Robot, Azure Monitor) which will email, text and call key personnel should any service stop working. This is active 24 hours per day.

Enhanced Support

Support is contractually offered from 0800 to 1800. Should any additional incident occur outside these times the support@ email is copied to key personnel in the company and in practice issues will be dealt with outside office hours. The company attests to a 99.9% uptime which would not allow extended downtime.

Should HCC wish to purchase out of hours support (24x7, 365 days a year), then this can be provided via our partner company Enmarq Technologies which offer a 1st and 2nd line 24 hour Help desk service (see [OpeneLMSERW20210504ERWHelpDeskQualityStatement \(1\).pdf](#)). A price for this has not been included in the tender but a price can be provided and the EULA ([LearningWMBCompanyDocumentationERW20191018EULA \(2\).pdf](#)) amended to accommodate this requirement.

Third-Party Complaints

Open eLMS will manage any fault process with any add-on provided directly by Open eLMS (examples include Ander Pink News Feeds, Turnitin, Go1, Captera Performance Management system etc.) as well as any third party elearning course needed to be imported.

It will provide help and guidance with the use and integration of other systems used where possible but not be liable for their performance.

Note that the proposed solution does not propose using any third party systems.

Warranty

All products provided by Open eLMS are covered by a standard 1 year warranty.

Updates and Upgrades

The Open eLMS system is in constant development; SCRUM development cycles take on average 3 weeks and progressive versions are updated into the core development branch

after vigorous testing. These developments are 'released' to clients periodically (approximately every 6 months as named releases.) These releases require new functionality to be 'switched on' by each client via the configuration options in their installation.

Clients are informed of each release and a user group session is held for each release to inform clients of the new features and to get feedback for desired changes or additions to the system.

Training is also given during these sessions on how to activate any new features within each release. This information is also held on the website - this is the information accompanying the latest release - <https://openelms.com/easy-to-use-and-comprehensive-lms/elearning-wmb/latest-changes-2/> .

Patches may be released in between these major releases which consist of bug fixes and optimisations. These releases are released as silent patches and will not affect the system functionality; users of the system will not release a minor release has been made unless it fixes a specific issue that the minor release fixes.

Further details on the release management process can be found in the company's Release Management Policy.

Contractor to provide a 'how to guide' for the system

How to Guides are available on the company's website (<https://www.e-learningwmb.com/page/support-business>). These links can be embedded into system emails or available via the help button in the system.

This can be provided electronically and can be reformatted for reasonable adjustments, for reporting purposes as required.

Design Documentation

All design documentation will be submitted as a staged deliverable for sign-off. An example branding document (CompanyInformation20210225BrandingExampleDocument.pdf) has been provided for reference.

Please note that the system is largely already designed (no significant development - approximately 1-2 days - is needed to meet this tender specification), and product specifications will be provided at the project initiation meeting.*1.73

Training for system upgrades

The Open eLMS system is in constant development; SCRUM development cycles take on average 3 weeks and progressive versions are updated into the core development branch after vigorous testing. These developments are 'released' to clients periodically (approximately every 3 months as named releases.) These releases require new functionality to be 'switched on' by each client (in practice this is often done by the account manager in conversation with each client) via the configuration options in their installation.

Clients are given training on these upgrades via a quarterly user group session. This

session is also used to garner feedback for desired changes or additions to the system.

A video of the Zoom session is sent to all clients and this information is also held on the website - this is the information accompanying the latest Aphrodite release - <https://www.e-learningwmb.com/page/latest-changes>.

Training Resources

Training: Open eLMS delivers training via webinar on the use of the system. This will be delivered via webinars and will consist of 20 hours of formal and informal instruction. Broadly speaking, the training will be split into 3 categories:

- management - line manager data management operations (i.e. Setting up training events: lessons, classrooms, webinars, Reviewing training records, Dealing with quality assurance feedback/inspections, Dealing with risk assessments/audits, Signing off training, Approve and manage bookings, Learning resources, Reporting)
- administration - system setup and routine maintenance (i.e. Adding users, Adding programmes, Checking managers, Manage bookings, Sign off training, Learning resources, Reporting, System setup)
- learning content - curriculum development, learning pathways and elearning development (i.e. creating elearning using Open eLMS Creator including adding videos and other media.)

Just-in-time advice: Weekly project meetings exist where the account manager can be questioned for advice on how to carry out key tasks. These are usually explained using a shared screen presentation. The account manager is also on hand at any time during business hours to offer just in time training and advice.

eLearning Resources

your organisation has access to free elearning on using the Open eLMS system which can be used to refresh skills and evidence competence prior to launch (e.g <https://openelms.com/portfolio/open-elms-creator-session-1-understanding-what-makes-great-e-learning/>).

Embedded Help

Training materials (online help videos) and elearning are available to all user types (including general system users) from within Open eLMS by clicking on the Help icon. Note the system can be configured to include custom help videos for your organisation (there are over 250 configuration options with Open eLMS!).

Online Resources

Help videos are also available via the company's website (e.g. see <https://openelms.com/support/>).

Help Desk & Knowledgebase

Help documentation is available via the system's Confluence Manual. This is a knowledge whcih allows clients to search for first line support scripts, instruction, and monitor support tickets (and give feedback on raised tickets). The [knowledgebase can be accessed here](#).

AI Assisted Chat: Open eLMS has opened up its business intelligence to clients via the use of a chatbox service. Whether the client is seeking out how to use a function of Open eLMS,

the AI system will have the answer. A link to this service will be available in mid April 2023.

Your Account Manager

Finally, your account manager has over 5 years of experience in using the system, there is nothing about the system he does not know. Feel free to contact him at any time.

Training Content

Areas to be covered in each training session

The three sessions will be based around each role, note there will be a small amount overlap between the roles:

Management Training	Administration Training	Curriculum Developer Training
Setting up training events (lessons, classrooms, webinars)	Adding users	Adding learning resources
Reviewing training records	Adding programs	Creating eLearning
Dealing with quality assurance feedback/inspections	Checking managers	Adding media
Dealing with risk assessments/audits	Managing bookings	Adding videos
Signing off training	Signing off training	Creating microlearning
Approve and manage bookings	Learning resources	Scheduling events for others
Learning resources	Reporting	Assigning Supervision
Reporting	Setting up system	Learning Defaults

Training will be over Teams or Zoom dependent upon the Client's preference.

Shadow Support

Open eLMS will ensure that the knowledge transfer is effective with a program of shadow support and reverse shadow support to ensure the skills learned are in place.

Senior trainers within Open eLMS will hold 3 x 1 hour 1-to-1 training sessions where the trainer will go through tasks required from the client, demonstrating how to do them. This process is called “shadowing”.

The process is followed up with an additional 3 x 1 hour 1-to-1 training reverse shadowing sessions, where the trainee does the job under the supervision of the trainer. This ensures adequate knowledge transfer and gives the opportunity to advise on best practice techniques.

No training for learners is necessary, although help is available via a walkthrough video by pressing the help button (a common feature available to all roles).

Training Location

Training will be over Teams or Zoom dependent upon the Client's preference. Should on-site training be required then this can be delivered but is not part of the included training with the quotation for this tender.

Trainers accreditation

The training will be carried out by Open eLMS's senior account manager and director of the company: Andrew Howie, who has a Masters in Lifelong Learning. Andy has nearly 20 years experience in delivering corporate training and creating training programmes for some of the largest organisations in the UK.

Refresher courses

Refresher courses can be provided at £200 per 2 hour session. Note that the Client will have an account manager on hand to provide advice and assistance when needed through regular meetings or the usual support channels.

Walkthrough Videos

Walkthrough videos available on the company's website (<https://openelms.com/support/open-elms-walkthroughs>), embedded into system emails or available via the help button in the system.

Training Resources

In addition, the Client is left with additional resources including:

- Free online elearning modules on the use of the Open eLMS systems which can be

used to refresh skills and evidence competence prior to launch (e.g. <https://www.e-learningwmb.com/page/session-1-understanding-what-makes-great-e-learning>).

- Walkthrough videos available on the company's website (<https://openelms.com/support/open-elms-walkthroughs>), embedded into system emails or available via the help button in the system.
- Knowledgebase available online - <https://openelms.com/support/>
- Guided walk-through of the system (the structured testing script can also be used for product orientation purposes – <https://www.elearningwmb.com/downloads/eLearningWMB20211018ERWUserEvaluationandTesting.pdf>).

Weekly project meetings exist where the account manager can be questioned for advice on how to carry out key tasks. These are usually explained using a shared screen presentation. The account manager is also on hand at any time during business hours to offer just in time training and advice.

Additional training sessions of 2 hours can be purchased for £200.

Additional on-site training can be requested at the cost of £800 per day/£400 per half day plus £200 travel.

Support Materials (guidance documents and resources)

Open eLMS has a wealth of support materials available. There is a knowledge base (<https://www.e-learningwmb.com/page/knowledgebase>) which allows clients to self-serve to resolve any issues with the system. The documents are categorised by:

- * Administrator
- * Manager
- * Curriculum Developer
- * Reporting and Exporting
- * Learner Interface Customisation

Further instruction information is provided through a series of walkthrough help videos which explain all functionality in the Open eLMS system. These videos can be found on the support section of the company's website (<https://www.e-learningwmb.com/support/>).

Additional assistance is available through the Jira/Ops Genie help desk reporting system. This system notifies the project team at Open eLMS immediately upon any issues; such issues are escalated to internal Open eLMS staff and progress can be monitored via the Client's support dashboard to resolution. Issues can also be created by sending an email to the support@elearnigwmb.com email address.

Helpdesk penalty payments

The supplier must provide ongoing helpdesk support and strictly adhere to any service level agreements (SLA's). Trigger points and percentage payment penalties if targets are not met.

Open eLMS provides **help desk support** available during defined core hours. Core hours are defined as Monday to Friday (excluding Public Holidays) from 08:00 to 18:00 (24/7 support can be purchased for an additional fee). Open eLMS SLAs (as outlined in the EULA documentation) specify availability at 99.9%. Availability is assured by back up by colocation hosting at 150 miles apart (ensures the continuation of service should a disaster happen at one location) and the use of Uptime Robot and Azure monitoring procedures to alert key members of staff (phone, email, app alert) in case of any outage so systems can be restarted.

Open eLMS are happy to trigger points and percentage payment penalties if targets not met and are open to your organisation's suggestions to this end. This includes:

- a pro rata rate of 0.1% downtime outside SLA acceptability equates to a 5% annual refund (and a further 5% for each 0.1% excess thereafter).
- a first time to respond rate 25% in excess of the time specified in the SLA will equate to a 5% annual refund (and a further 5% for each 25% excess thereafter).
- a resolution rate 25% in excess of the time specified in the SLA will equate to a 5% annual refund (and a further 5% for each 25% excess thereafter).

Any refunds will be limited to 50% of the total service fee.

Response/Resolution Plan for Support

Communication channels

Issues can be reported to Open eLMS in a number of ways:

1. Via the company's website
2. Directly using the Open eLMS service help desk system - <https://emil-reisser-weston.atlassian.net/servicedesk/customer/portal/2/group/-1>
3. Or via the account managers

Resolution management system

Open eLMS utilises the Jira Service Management software to accelerate the flow of information between operations and development teams to respond and restore systems when incidents occur.

Any incident entered into the communication channels are automatically fed into the company's Jira issue management system and alerted to all support staff. Often the issue can be explained via a support call from the account manager, but if it is a technical issue (aka a 'bug') then it escalates rapidly to 3rd line support.

Target response and Resolution Times

Clients are usually responded to within the hour – regardless of severity – but Open eLMS

attest to the following response scheme within its End User Licence Agreement (EULA), which is well within the Client's requirements. This is documented both on the company's website (<https://www.e-learningwmb.com/page/contacting-support>) and as part of its standard End User Licence Agreement.

Severity	Example	Response time	Resolution target
Critical	Critical Impact/System Down. Open eLMS in its entirety is non-functioning.	1 working hour	2 working hours
Major	Significant Impact. A number of key components are not working which seriously impacts use of the service.	1 working hour	4 working hours
Minor	An individual feature of Open eLMS is not working, Workarounds are not possible.	2 working hours	2 working days
Trivial	A problem with Open eLMS for which a work around is possible.	1 working day	4 working weeks

These response times are for issues reporting within support hours 0800 to 1800 GMT from Monday to Friday (24/7 support can be purchased, but is not provided as part of this tender response).

Support for the launch

The partner will provide full support on planning for system build, integration, launch and periodic reviews on success and impact

Yes. This is part of the company's standard approach to account management. Your account manager will be Andrew Howie, who is a senior director in the company and based in Portpatrick, Scotland.

Data Migration

Open eLMS has an interface for transferring training records from third party systems. This is usually carried out as a one off task carried out immediately prior to launch.

Open eLMS will build a sandbox environment which is used for testing during the deployment phase of the project. The sandbox environment is used to:

1. Test data migrations from existing systems
2. Set up CRON (server side) tasks for the importing/synchronisation of data
3. Create learning resources (elearning/microlearning)

4. Curate the learning library
5. And test the 'going live' procedure

When the system is ready to launch:

1. The database is cleared of user and test data
2. The old site is taken down
3. The migration process is ran so a fresh copy of HR data and imported learning is completed
4. A redirect is set up to the new Open eLMS system

This process is conducted outside office hours to ensure a minimum of down time. The process should take 15-30 minutes to complete. The costs of the Open eLMS service includes the importing of:

- 12,600 Live accounts
- 43,000 Archived accounts
- 1500 Live courses
- 2600 Archived courses
- Data in CSV format

Should the historical data still be 'live' (i.e. running concurrent systems) then a non standard offering which be to create a CRON task to regularly import data as described earlier in this section. Other custom options involve using third party APIs, etc.

Marketing and PR support

The supplier of the LXP platform will provide Marketing and PR support for launch to encourage use and to support any future content releases

Open eLMS has a range of materials which can be freely rebranded for your organisation at their behest at no cost. This includes banner adverts, PR releases, and video adverts e.g. https://youtu.be/7_oHcKODyPY

Uptime

System uptime performance commitments, including KPIs, and a service level package included to cover Support/Hosting

The standard EULA (containing SLAs) is available from the company's website at <https://www.e-learningwmb.com/downloads/EULA.pdf>. The EULA specifies the following Terms and Conditions associated with the Open eLMS system and services. In summary,

the EULA states:

- Hosting provided in the UK by Microsoft Azure
- Backups (all files and database) are taken daily and by default a rolling schedule of backups is adopted at daily, weekly, monthly, 3 monthly, and 6 monthly intervals. This can be adjusted to suit client requirements.
- Acceptance testing agreed no later than 30 days from installation
- Support from 0800 to 1800
- If notification of a defect that substantially impairs the Client's operations, work will start within 4 hours of notification
- If a correction cannot be found within 24 hours, then a work around will be suggested
- The expected uptime for the Open eLMS service is 99.9% of the time
- Intellectual property rights are protected for both parties
- Data protection is assured
- New releases will not affect the performance of Open eLMS - they can be switched on/off in consultation with the client
- All software will be tested for viruses
- Liability is limited to the total subscription fees paid by The Client to the Supplier in the 12 months preceding the date of the incident giving rise to the claim or series of claims.

Upgrades

Policy on Upgrades/Patches including the anticipated frequency of both minor/major upgrades, how upgrades are supported, and a clear distinction between minor and major upgrades

Updates and Upgrades

The Open eLMS system is in constant development; SCRUM development cycles take on average 3 weeks and progressive versions are updated into the core development branch after vigorous testing. These developments are 'released' to clients periodically (approximately every 3 months as named releases.)

How are the upgrades released

These releases require new functionality to be 'switched on' by each client via the configuration options in their installation. Currently there are over 200 such switches in the system.

Decision Making Process for system changes

Clients are informed of each release by the account manager and a user group session is held for each release to inform clients of the new features and how to turn them on. Information is also held on the website .

The account manager will in addition take each client through the latest updates to ensure that they are aware of what they do and can switch them on for the client if needed.

Cost of updates/upgrades

There is no additional cost for any updates/upgrades (including data uploads). This is included in the annual licence fee.

Minor Releases

Minor releases consist of bug fixes and optimisations which will affect all installations. These releases are released as silent patches and will not affect the system functionality; users of the system will not realise a minor release has been made unless it fixes a specific issue that the minor release fixes.

Closed Issues

Once an issue is closed the client is informed as soon as the fix has been applied to the the client site. The client will also get notification by the account manager and an automated email from the Jira system (if selecting to monitor it directly via Jira.)

Reporting and Trend Analysis

Jira provides a dashboard containing key information on the performance of issue resolution. A variety of reports - including trend analysis - is available via extending the Jira system via JQL queries if required.

Open eLMS will work with the client to set up their reporting dashboard in a way that examines the most important metrics and trends to the client.

Support KPIs

Open eLMS attest to service levels in the Open eLMS's EULA document. In summary they are in excess of the targets set, namely:

- System Availability (target 99.99% on a monthly basis)
- Time to first response within SLA (target 85%)
- Time to resolution within SLA (target 85%)

Open eLMS will be happy to provide reports from the Jira and Uptime Robot systems to enable the Client to benchmark performance against other similar systems within the organisation's IT infrastructure.

Known errors and permanent resolutions

Any errors are dealt with as blocker - or at least - critical issues and dealt with very quickly. As a result there are no 'known errors' within Open eLMS.

There are however areas where the need for system improvement has been identified, this makes up the roadmap for the next quarter's development and exist as CAR (Compliance Acceptance Report) Forms within the company's ISO 9001 quality system based on Jira. CAR forms include:

- Enhancements to Open eLMS Classroom
- Update of Open eLMS elearning app
- Learning assignment based on a query builder (e.g. start a Learning Programme if Learning Resource/Course/Lesson etc. is complete)
- Customisable button sets for Open eLMS Creator
- Create proprietary bulletin board (v's implementing third parties)

These issues have since all been implemented as part of the Open eLMS continuous improvement programme.

Informing of Outages

Clients are kept up to date on system performance and are alerted of any planned outages ahead of time. An exception to this is planned server restarts outside of office hours which last no more than 5 minutes. These are necessary in order to install services and patches and would not offer any value to the client. Such incidents are logged however and a record of all such incidents including downtime can be sent to the client upon request.

User satisfaction

Open eLMS is very popular with learners through a variety of studies:

- Independent reviews by industry experts have been glowing - see <https://openelms.com/easy-to-use-and-comprehensive-lms/products/open-elms-lxp/reviews/>
- Open eLMS is the LMS product category leader on Sourceforge
- Open eLMS has a 4.8 star rating on Capterra
- Places for People carried out a positive user experience survey of 250 users (see results below)

Tools also exist within Open eLMS to measure satisfaction and ROI:

- Audits can be created using Open eLMS Creator to create a Kirkpatrick evaluation questionnaire;
- Learning Resources and lessons can be rated (5 stars) and reviews left;

- The underlying improvement in skills, knowledge and behaviour can be evaluated by periodic skill scan questionnaires;
- And improvements in competencies and CPD points can be reported over time to spot performance improvements as a result of Open eLMS implementation.

Testing

Regular testing by the vendor for bugs and circulation/communication of reports to the customer

The system is tested at the end of every SCRUM development cycle (3 weeks) and prior to every major release. The major release is rolled out in stages, initially as an elected beta release and then applied to existing installations as full release. This process takes from 2 to 4 weeks to be applied to all clients.

Open eLMS uses test scripts and internal testing teams to review the Open eLMS system and all interdependencies prior to release.

All customers are added to the support system which is embedded into the Jira Service desk which allows clients to follow the progress on any reported bug to completion.

Service Reviews

Contact between the client and the Open eLMS is initially weekly (stretching to monthly on the agreement of both parties.) Service reviews are usually done annually, but this can be revised to quarterly and built into the regular account management meeting schedule.

Alpha and Beta testing for Launch

Alpha Testing:

Initial alpha testing will start on the 16th February and end on the 23rd February. This follows a highly structured testing plan (<https://www.elearningwmb.com/downloads/eLearningWMB20211018ERWUserEvaluationandTesting.pdf> – this can be adjusted in line with any Client priorities). This testing requires no training as the user is led through each stage of the system step by step.

This is linked to from the the Client demo site at <https://lms.e-learningwmb.co.uk/CLIENTDOMAIN/login> which the Client are welcome to access at any time.

Beta Testing

Beta site testing is scheduled for 9th- 16th March. This takes place after system training and is more free form as testers will now be familiar and more confident using the system. Testers are given the following tasks to check off against and escalate any issues which arise.

Code	Name	As	I want	So that
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Learner1	Run Learning Resource	Learner	to run a learning resource	I can complete the training
Learner2	Upload Learning Resource	Learner	to upload learning	I can add to my learning portfolio
Learner3	Search Learning	Learner	search learning	I can find a learning resource
Learner4	Alerted of due learning	Learner	be alerted by email and interface of due learning	I can timely complete learning
All7	Access Context Sensitive Help	All	receive help in relation to the screen I am on	I can understand how the software works
Coach/Manager8	Assign Learning to Learner	Coach/Manager	assign learning to my employees	they can do the right training
Coach/Manager9	Respond to feedback from QA	Coach/Manager	to respond to QAs comments on uploads	I can resubmit them for QA consideration
Coach/Manager10	Respond to meeting invites	Coach/Manager	to confirm meeting requests	I can schedule/confirm meetings with learners
Coach/Manager11	Approve meeting requests	Coach/Manager	to approve requests for meetings	I can allow learners to book classroom training etc
Coach/Manager12	Sign off learning	Coach/Manager	to approve uploaded learning	I can mark that learning as completed on the learner's e-portfolio
Coach/Manager13	Change the status of audits	Coach/Manager	to action any tasks highlighted by the audit process	I can progress and complete the learning process
Coach/Manager14	Run custom reports	Coach/Manager	to create new reports	I can report on selected fields within the data
Administrator15	Add learners to the system	Administrator	to add learner accounts in the system	I can assign learning to new people
Administrator16	Rebrand the learning	Administrator	to add images to the learning and change	I can rebrand for different clients

			the login page	
Administrator17	Change emails sent out by the system	Administrator	to change default emails	I can customise the messaging experience for each client
Administrator18	Review the dashboard	Administrator	to run the dashboard	I can get an overview on the data in the system
Administrator19	Add e-learning	Administrator	to press the Add Open eLMS Creator button	I increase the library of learning
Administrator20	Customise a learning program	Administrator	to edit a learning program	I can change what learning is assigned to users and when
Financial Auditor21	Export to ILR	Financial Auditor	to export to ILR the learner records	I can ensure the correct funds can be drawn down by each client
Curriculum Developer22	Assign Learners	Curriculum Developer	to assign learning	I can ensure all learners have managers and programmes to undertake
Administrator25	Change Admin > Organisation > Category	Administrator	to change the personnel information connected to user accounts	I can change the information they see and who has management control over them
Administrator26	Change default values in the system	Administrator	to change default timings, labels and configuration options	I can alter the user experience with the same basic software build
Open eLMS Creator28	Open eLMS Creator User Account	Open eLMS Creator	to edit courses	I can change the content from the learner interface
Administrator29	Add Learning Resource	Administrator	to add or edit a learning resource	I can change what learning is available to learners
Coach/	Review skillscans	Coach/ Manager	to review the results	I can see improvement in learning

Manager30			of a skill scan	
Curriculum Developer31	Search for feedback	Curriculum Developer	to review feedback from learners	I can see how courses are doing
Coach/Manager32	Test Manager Zoom/Teams Meeting	Coach/Manager	to check the zoom meeting opens and records statuses	I can teach learners remotely and record their progress
Learner33	Test Learner Zoom/Teams Meeting	Learner	to check the zoom meeting opens and records statuses	I can learn remotely and record my attendance
Learner34	Review Progress	Learner	to check on my progress	I can see how much of the curriculum has been completed
Administrator35	Import YouTube Playlists	Administrator	to add learning content	there is a more complete library of information in the system

Suitable training for nominated testers

Open eLMS will deliver training to all testers needed for the beta stage of testing prior to commencement of this secondary stage of testing.

In addition the Client is left with additional resources including:

- Free online elearning on using the Open eLMS system which can be used to refresh skills and evidence competence prior to launch.
- Walkthrough videos available on the company's website (<https://openelms.com/support/>), embedded into system emails or available via the help button in the system.
- Knowledgebase available online - <https://emil-reisser-weston.atlassian.net/servicedesk/customer/portal/2>

This help will be sufficient for this beta testing phase, however the account manager will be on hand to answer any questions.

Clear escalation and resolution

During testing, any issues can be escalated via the Jira/Ops Genie help desk reporting system. This system notifies the project team at Open eLMS immediately upon any issues; such issues are escalated to internal Open eLMS staff and progress can be monitored via the Client's support dashboard to resolution. Issues can also be created by sending an email to the support@elearnigwmb.com email address.

Access to this system is available to all clients via <https://emil-reisser-weston.atlassian.net/servicedesk/customer/portal/2/group/-1> – you will need to register prior to using the system (this is freely available to all the Client testers of the system).

Contract Management Reviews

Open eLMS is in constant development led by the client's needs. This can lead there to be a disconnect eventually between the products and services contractually offered and what is being delivered. To this end Open eLMS recommends reviewing the contract annually to see if it accurately reflects the current situation.

Note that any updates to the existing system are supplied free of charge to the client as part of the licence process.

Issue reporting including exception reporting

Any issue reported to the account manager or the support team, if not rectified by second line support, is reported into the Jira system and dealt with as a new issue.

There are a number of different types of issue:

- A bug or error needs rectification
- An integration issue - such as assistance with SSO or the Open eLMS API
- Data importing - e.g. merging data from existing sources
- Suggested general system improvements
- Suggested customisation benefiting mainly the client

Issues in this last category would be reported by the Account Manager to the Open eLMS Product Manager as an exception to see if the company considers this a system improvement which would be a good idea on the product roadmap. If the suggestion is an exception to this then this issue would go into an exception report for the client with an associated cost attached to it. This report would need to be signed off by relevant parties as the client before work on this issue can proceed. In practice this usually equates to a confirmation email.

Progress Tracking of Recorded Issues

Support channels include:

- A named account manager (email and direct telephone line)
- The company website's reporting system - <https://emil-reisser-weston.atlassian.net/servicedesk/customer/portal/2/group/-1>
- Jira Helpdesk online system
- Telephone (Main switchboard): +44 (0)203 929 2051

- Live Customer Support Channel: <https://zoom.us/j/4989825429>

Any request raises a ticket on the Jira support desk, this system will update the client on the progress on the issue from reporting, to escalation, to resolution and closure. Updates can be obtained by logging into the support system and by receiving email alerts.

Further details including self-service support materials can be found at <https://openelms.com/support/support-hours/>

Invoicing

Open eLMS invoices clients on an annual basis with 28 days standard payment terms. Invoices are issued once the End User Licence Agreement/EULA (or the client's equivalent) is agreed by both parties.

Customer satisfaction

Open eLMS is a social enterprise (20% of profits are shared by employees) and most employees are long standing (over 5 years at the company.) Open eLMS is ran by a team of people who really care about the quality of the Open eLMS suite of products and want to make it the best learning management product on the market.

Customer satisfaction is therefore taken very seriously. The account manager will work with the client representatives to ensure that Open eLMS consistently delivers on its promises and exceeds customer expectations. To this end customer reviews tend to be at the top of every category:

- Sourceforge: Learning Management System category leader
- Capterra: 4.8 star rating on Capterra the top ranked UK based LMS available

This service leads to consistently excellent customer references and retainment rates.

Flexibility

Flexibility provided to Client with a potential need to defer latest upgrades or revert to a previous version

Total Flexibility exists to defer the latest upgrades or revert any upgrades back to their previous state to effectively revert to a previous position. These releases require any new functionality to be 'switched on' by each client (in practice this is often done by the account manager in conversation with each client) via the configuration options in their installation.

This means that customers can run an old version whilst having no effect on the support offered by Open eLMS (as the underlying code is the same).

Complaints

Your complaints and dispute resolution procedure, including detail of timescales and the escalation process

The following is in accordance with Open eLMS's Complaints Handling Policy:

Upon receipt of a complaint the following must be undertaken:

1. Inform Compliance and input the complaint into the JIRA incident log.
2. Compliance will create a record of the complaint in the central Incidents Register.
3. Dispatch an acknowledgment and initial response in writing within 4 hours. The acknowledgment should, when possible, include the priority with an expected timescale for resolution.
4. Complaints must be promptly, thoroughly, and consistently investigated, where practical by an independent person.
5. A final response email must be sent as soon as possible but no later than within 3 months of the client having lodged a complaint.
6. The client must be advised that PIL considers the complaint closed and they can refer the matter back to compliance if not satisfied with the resolution of the complaint.
7. In circumstances where it is not possible to resolve the complaint within the 3-month timescale, an email must be sent explaining the reasons, detailing the progress to date, and telling the client when it is expected that the complaint will be resolved.
8. Ensure that all correspondence and other pertinent information, including how the complaint was resolved, are retained as a full record of the complaint.

99.9% System availability

Responses should, if not already provided, include a future planned date by which the System will be able to match the SaaS industry level of 99.9% System availability.

Open eLMS complies with 99.9% availability as stated on the company's EULA which contains details on service levels.

24/7 System Availability

A 24 hour - 365 day, out of hours helpdesk providing 1st and 2nd line support is offered via our global technology partners. Contact Open eLMS for further details.

Details of the service along with quality standards is available via the document [OpenELMSERW20210504ERWHelpDeskQualityStatement \(1\).pdf](#).

Support Materials (guidance documents and resources)

Open eLMS has a wealth of support materials available. There is a knowledge base (<https://www.e-learningwmb.com/page/knowledgebase>) which allows clients to self-serve to resolve any issues with the system. The documents are categorised by:

- * Administrator
- * Manager

- * Curriculum Developer
- * Reporting and Exporting
- * Learner Interface Customisation

Further instruction information is provided through a series of walkthrough help videos which explain all functionality in the Open eLMS system. These videos can be found on the support section of the company's website (<https://www.e-learningwmb.com/support/>).

The system also has interactive help, so the user just needs to press the help button in the system to find out how to operate the current page.

Additional assistance is available through the Jira/Ops Genie help desk reporting system. This system notifies the project team at Open eLMS immediately; any issues are escalated to internal Open eLMS staff and progress can be monitored via the client's support dashboard to resolution. Issues can also be created by sending an email to the support@elearnigwmb.com email address.

Performance monitoring

Reactive service levels are monitored (server time via Uptime Robot) and response times via (Jira incident reporting); these systems will be made available to the client. Should either of these fall outside the agreed levels of service as specified within the company's EULA then a reduction in monthly pro rata invoice will be made.

An additional **proactive service level monitoring** shall also include a measure of Open eLMS's effectiveness at meeting targets on its development roadmap - added to every 6 months with each version release.

Proposed Remedies

The reduction will be for

- 1% of the invoice for every 0.1% down time over the accepted level and;
- 1% for every incident responded or resolved to outside the pre-defined times.
- A proportional reduction in the annual maintenance equal to the proportion of road map items delivered

The annual reduction is limited to a maximum of a 25% reduction of the total support cost. This can be added as an addendum to the EULA.

Support Model

Support Model

Support Tier	Details	Person responsible
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L1	Service desk - with webchat support. If no resolution then Issues are set up on Jira available via multiple channels (email, phone, Jira helpdesk interface).	Client
L2	Checks issues such as connectivity, passwords etc.. L2 are trained operatives who can offer support via Knowledgebase articles and will add additional comments via the Jira system.	Open eLMS Support
L3	Replicates client issues on the sandpit or test environment if possible. Should the issue be configuration-based, L3 staff have permission to change client settings to fix issue.	Open eLMS Support
L4	Should the fix necessitate a coding fix or hardware failure, then the issue is escalated to the core programming team. Offering L4 support at this level ensures swift responses are made and any hotfixes are escalated to the release process where needed.	Open eLMS Program Team

GTAA IT Support Model Definition

Note to the [Support Vendor name] to complete the following table.

Disclaimer: The pre-filled information in this table is only an illustration. It is the [Support Vendor name] (in blue) on this table is correct and accurate.

GTAA Support Tier	Vendor/ System Maintainer	Category for Support					SLA reference
		SOW ref.	End Device/ Desktop Services	Infrastructure/ Security / Network / Environments	Oracle Database	Software Application	
L1 Support	GTAA-System-Maintainer L1 Support		GTAA-System-Maintainer	GTAA-System-Maintainer	GTAA-System-Maintainer		GTAA-GTAA-System-Maintainer MSA
L2 Support	GTAA-System-Maintainer L2 Support		GTAA-System-Maintainer	GTAA-System-Maintainer	GTAA-System-Maintainer		GTAA-GTAA-System-Maintainer MSA

L3	GTAA-		GTAA-System-Maintainer	GTAA-System-Maintainer	GTAA-System-	GTAA-System-	GTAA-GTAA-System-
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Support	System-Maintainer L3 Support				Maintainer	Maintainer	Maintainer MSA
		3.2.1 3.2.2	Open eLMS VAR L3	VAR L3	VAR L3	VAR L3 (Software-Application Support)	GTAA-VAR SLA
L4 Support	Open eLMS VAR L4	3.2.1 3.2.2				VAR L4 (Software-Application Support)	GTAA-VAR SLA
		3.2.1 3.2.2				VAR Data Structure Support Open eLMS	
	IBM (OEM)					IBM	IBM Software license
	Oracle (OEM)					Oracle	Oracle Software license

Server Administrative

Easy to Maintain

The platform should be easy to update from an administrative point of view, to ensure that the information on there should always be current and up to date

Open eLMS makes it easy to update administrative data by a number of processes, ideally setting these processes up on day 1 will greatly reduce the amount of administrative work needed in the day to day management of the system:

- Automated imports
- SSO
- Automated passwording, 2 Factor Authentication etc.
- CRON tasks
- Batch processing

Automated imports

Automated import tasks can be set up to import new hires, change existing personnel and remove leavers by communicating with the iTrent system via CRON tasks (server side automated tasks which import the HR data). Once set up, there should be no more need for adding HR data into the system.

SSO

Single Sign On (SSO) works in a similar way to automated imports. When a user signs on, Open eLMS will compare the data it has on that user with the data from iTrent and update the information accordingly.

Automated passwording, 2 Factor Authentication etc.

The most time consuming administrative task when running an online portal with a manual sign-on is the forgetting of passwords. Automated password resetting and automated 2 factor authentication (if needed) means that this process requires no administrative input.

CRON tasks

CRON tasks are automated server side tasks which do maintenance tasks when the system is largely in down time (at night etc.).

These tasks ensure the system data is updated, reports are sent out, data refreshed etc. so there is no need for manual intervention.

Batch processing

Throughout the programme there are tasks which are suitable for batch processing. For example, the administrator may want to force a password change on an entire department, rather than initiating this process individually...

...or a manager may want to take a register for a training session marking everyone as attending (rather than changing the status of everyone individually)...

...or sign off training for everyone rather than drilling down into each piece of work...

...or assign /import training for a group of people rather than individually.

Bulk processes such as these make the management of administrative tasks both quick and easy to complete.

Low Maintenance

Administrative upkeep is low maintenance – automated updates, business rules, and workflow features.

Administrative upkeep is extremely low maintenance with Open eLMS. Firstly - there is no need to undertake downloads or manual installation processes to update the system. All **updates are automated**, as they come on line your organisation can decide whether to activate them or not; this process will be greatly assisted by your account manager.

Business rules and workflow features mean the system can be set up to run so that **all tasks are automated**. This includes:

Queries

The use of queries which assign learning to imported learners dependent upon their needs, including:

- Job
- Location
- Skills
- Previous learning
- Group
- Department

As the learner proceeds through their learning, programmes, and learning pathways will deliver more learning as it is needed.

Enrollment

Learning can be set up as enrollable - which means that the learner themselves can decide on what they wish to undertake. Certain enrollable learning can be visible/hidden from learner groups etc dependent upon the business needs and management sign-off on enrollment can be enforced if required.

Automated Reports

Similar to automated emails, automated reports can be set up to run periodically and be sent to appropriate personnel.

A combination of the features described above (i.e. automated updates, business rules, and workflow features) ensures that administrative upkeep is extremely low maintenance.

Configurable Roles

The platform should offer role based model that is easily configurable by your organisation

Open eLMS offers a role-based model that is easily configurable by your organisation. Roles are set up by default with expected permissions and interfaces design for each role.

These roles are all editable, with nearly 500 different options available to customise each role. All functionality can have their Menu, View, Add, Edit, and Enable permissions switched on/off according to needs.

Any user can be assigned more than one role and can have interface changes applied to each role.

Roles and permissions will be set up in advance of rollout by your account manager in accordance with your organisation's wishes.

Integration and Extension Capabilities

Introduction

Please explain the extent to which your proposed solution integrates with the key corporate Client Systems listed within the “Specification of Requirements” and how the integrations are achieved?

The specification of requirements calls for integration with specific applications (e.g. iTrent, MS Outlook etc.) or to general software applications (webinar software, social learning etc.) This document will set out the integration and extension capabilities of all such systems provided ‘out of the box’.

The number of integrations is not limited to those listed; the Open eLMS API and LTI certification makes the number of integrations theoretically limitless.

MS Active Directory, such as LDAP

Open eLMS can integrate with any SSO technology. This is a standard procedure set up at the start of any project.

SCORM & Experience API

Open eLMS is SCORM 1.2 and xAPI compliant and can import learning from third party suppliers following these standards.

SCORM 2004 compliance is expected to be released in Q3 2020 to Q4 2021 (current project for Unilever PLC).

MS Outlook calendar

Integrate learning events into Outlook calendar so deadlines and lesson dates can appear on both Open eLMS and Outlook.

iTrent

Open eLMS follows the UK Government’s ILR standard (Individualised Learner Record) which records demographic characteristics, role-specific characteristics, hierarchy, employment start date, and much more. There are over 200 fields which are recorded, just some of these are shown below.

A CRON task (automated server side processing) will be created to periodically* synchronise the data in iTrent using the Unique Identifier with that recorded in Open eLMS.

Updates to the learner fields (name, job role, structure changes, reporting manager, etc.) will affect queries which will adjust learning content as appropriate.

* Note this method of automatically importing data (usually every night) from iTrent (or when

users log in) has proven to be a successful method of integration. Should your organisation want to use the iTrent API then this is possible, but it is suggested that this would not be needed if iTrent is maintained as the master source of HR data.

Open eLMS Creator

This integration allows the creation of elearning, quizzes, audits, skillscans, and surveys directly from within the Open eLMS system.

There is no need to import SCORM files, etc. as the system is seamlessly embedded into Open eLMS (as with Anders Pink, H5P, Go1 etc).

Rich multimedia learning - Anders Pink AI (Option)

Anders Pink gives Open eLMS the ability to integrate the very latest articles on topics related to subjects of your choice. These are curated using the Anders Pink AI engine, which are displayed seamlessly at the top of searches within Open eLMS.

Anders Pink scans thousands of high quality sites and sources of your choice from around the web for you, delivering exactly what you want. You choose the topics, keywords, sites, and sources. Create custom briefings on the topics you want to track. It updates every few hours: you don't miss what matters.

Rich multimedia learning - Go1 (Option)

Go1 is an elearning content hub providing the world's largest library of elearning content directly into Open eLMS. Go1 needs to be purchased separately.

Rich multimedia learning - YouTube

Open eLMS will automatically play and track YouTube content, no integration is necessary.

There is also the option to import entire playlists from your YouTube library which will add videos and associated metadata (description, author, etc.) to Open eLMS when importing.

MicroLearning - H5P (Option)

H5P makes it easy to create, share and reuse microlearning elements such as interactive videos, 360 degree images, interactive stories, quizzes, etc. H5P empowers everyone to create rich and interactive web experiences more efficiently.

Multi-Factor Authentication - Microsoft/Google Authenticator

Multi-factor authentication is an electronic authentication method in which a computer user is granted access to Open eLMS after successfully presenting two pieces of evidence.

H5P microlearning objects can exist as standalone learning objects or be embedded into Open

eLMS Creator elearning courses.

Social learning: Yammer

Open eLMS can set up webinar lesson events with linked Yammer boards to encourage further discussion (replacing the Open eLMS discussion board).

Social learning: Jamboard

Open eLMS integrates with Jamboard so that webinar lessons can be enhanced by this teaching aid. Social learning occurs where students can contribute to the board which can then be saved and accessed after the lesson.

Social learning: Badgr

Badges allow you to use awards won in Open eLMS to be transferred out of the Open eLMS infrastructure and remain with learners on social media channels (Linked In, Facebook, etc.) and CVs.

Online learning: Moodle

Linking Open eLMS with Moodle allows you to directly open and track Moodle courses within Open eLMS. This allows you to reuse libraries of existing content already hosted on your Moodle system.

Webinar Lessons: Teams

Linking Open eLMS with Microsoft Teams gives you the option of holding virtual lessons with learners and trainers using Microsoft's video communication platform.

The integration allows you to create and set up lessons from within Open eLMS. These lessons can then be recorded and accessed 24 hours after the lesson has ended.

Webinar Lessons: Zoom

Zoom enables teachers, coaches, and trainers to conduct face to face learning with a group of learners at any one time.

Similar to Teams, the integration allows you to create and set up lessons from within Open eLMS. These lessons can then be recorded and accessed 24 hours after the lesson has ended.

A complete list of 'out of the box' integrations can be found on the company's website at <https://www.e-learningwmb.com/page/multi-factor-authentication>.

File Uploads and Web Files: Various

Open eLMS can import almost any file type or insert weblinks into the system (useful for Google Docs, Sharepoint links, etc.).

Type of integration provided; full two-way, real time or other

Integration	Type
MS Active Directory, such as LDAP	Real time
SCORM & Experience API	File import aligned to a standard
MS Outlook calendar	One-way
iTrent	CRON file import
Open eLMS Creator	Real time
Anders Pink AI	Real time
Go1	Real time
YouTube	File import aligned to a standard
H5P	Real time
Microsoft/Google Authenticator	Real time
Yammer	Real time
Jamboard	Real time
Badgr	Real time
Moodle	Real time
Teams	Real time
Zoom	Real time

Two-way integrations can be built dependent upon your organisation's needs and the ability to implement the Open eLMS API or webhooks on third party systems.

Opportunities

Integration opportunities with Systems specified within the ITT

Open eLMS has out of the box integration opportunities with all systems specified within the ITT. See the previous sections for details.

Further integration opportunities are available by using the Open eLMS API on third party systems or using third party APIs to create further integrations with other systems.

Web-conferencing

Current depth and comprehensiveness of integrations available with third party web

conferencing tools, including MS Teams or equivalent

MS Teams and Zoom integrate in near identical ways using the following steps:

- A lesson is created with people, learning, etc. attached.
- A web conferencing tool is selected (Teams or Zoom)
- This sends out invitations to both learners and teachers both informing them of the booking and alerting them before the lesson starts.
- When the lesson is run, the teacher and learners select a link on the interface to start the lesson.
- Learning Resources can be shared with the learners, ran live and tracked as complete on learner's profiles
- At the end of the lesson a recording of the lesson is recorded. This is automatically saved with the lesson and exists on learners' portfolios for later access.

At no point in this process is there any need to open Teams or Zoom to operate this functionality.

Content Repositories

Depth of integration available with third party content repositories, such as Google Docs or equivalent

The content repositories (Open eLMS Catalogue (included), Go1, and Anders Pink) are available out of the box.

Integration with other third party repositories (e.g Google Docs, Sharepoint documents) can be inserted as web links or bulk imported via a spreadsheet.

Live Integrations

Bidders may support their answers by evidence of current live available integrations

A number of Live integrations will be added to the demonstration site at <https://lms.e-learningwmb.co.uk/cityofglasgowcollege> including:

- Anders Pink
- Badgr
- Open eLMS Creator
- Teams

- YouTube
- Zoom

Some integrations (e.g. H5P) require a link to a licenced copy of the software. You will need to edit your email address in the system to emilrw@e-learningwmb.co.uk to access this functionality (please use this for demonstration purposes only).

Contract Termination

When a client terminates a contract, all data is erased within 3 months of leaving the service (or this period can be shortened to 1 month or extended to 3 years if required).

Audit logs (retained in each instance's database), with details such as login ID, IP, role, login type and Date/Time stamp are similarly kept for the lifetime of the client's installation (they are not deleted until the termination of the contract.)

Should Open eLMS go out of business all data will be made available upon request and served to the client in a machine readable format (this includes exports and access to the database backup.)

This is covered in 12.6 section 14 of the End User Licence agreement, Open eLMS are happy to sign the client's ESCROW agreement to this effect.

Exit Strategy

Safety and Wellbeing

Open eLMS will support the client to exit the contract in a manner which ensures the safety and wellbeing of those that are accessing the tendered service.

The company's Health and Safety Policy Statement has been provided (e-LearningCompanyInformationERW20210328Health&SafetyPolicy.pdf).

Data Transfer

Open eLMS has importing/exporting functionality for the inclusion of data into any third party system. Support will be given with this process.

Any elearning (created using Open eLMS Creator or from third-parties) can be exported from the system for reuse on other systems. Such course files can also be provided via ftp transfer upon request.

All data is usually stored on the servers for up to 3 months after the contract end date and backups are stored for 6 months after that. These timeframes can be adapted to each client's unique requirements.

Exit or Terminate any Sub-Contracting

Open eLMS will be responsible for the exit or termination of any contracts they have entered into to assist with the delivery of the service.

Tasks and Timescales

Task	Description	Responsibility	Deadline after contract termination
Preview database structure	It is envisaged that prior to termination, your organisation would wish to examine the database structure and organise in advance with any new supplier how they wish to import the data. This can be arranged by providing the client with a backup copy of the MySQL database at any time.	WMB	Any time before the termination.

Contract termination	your organisation elects to terminate the contract.	Client	0 days
Backup copy made available	A backup copy of the database is made available containing all data. This is made available for download by a secure FTP. This MySQL database can be restored and interrogated or used for importing data to a new system.	WMB	7 days
Data exports	Exported reports drawn from the system can be taken for up to 3 months after the termination of the contract. This can be achieved via standard reporting functionality.	Client	3 months
Personnel Data exports	Pack and go functionality will be available so individual learners can take their data with them.	Client	3 months
Deletion of data	Deletion from Open eLMS Servers of the: <ul style="list-style-type: none"> ● database ● uploaded files ● Audit logs 	WMB	6 months (or this period can be shortened to 1 month or extended to 3 years if required)

Staff

Project Team

Open eLMS	Client
Account Manager	System admin
Project Manager	
Program Lead	

Account Manager - Andrew Howie

Andy has over 20 years experience in L&D.

Andy is a director of Open eLMS and will be the first point of contact.

Project Manager - Emil Reisser-WestonMSc-MEng

Emil has been project managing e-learning projects since the early 90s. Emil has worked with some of the largest PLCs in the FTSE 100 as well as local and national government.

Should any project work be required outside the parameters of the standard export procedures, then responsibilities for the relationship with your organisation will be passed over to the Project Manager.

Program Lead - Lauris Mikulans

Lauris has been with Open eLMS for nearly 10 years and has led the work on Open eLMS since version 3 of the software.

Lauris will be responsible for technical tasks such as exporting data and setting up FTP downloads.

System Admin - Client

Interrogation of exported data. Importing exports from Open eLMS (via interrogated data or export reports directly from Open eLMS) into the new system.

Continuing Service

Open eLMS can ensure the continuation of service during any migration process. The site can be live whilst the company assists with data migration. It is imperative that text outputs are provided to any third party before the transition of service, so imports can be tested and any migration queries can be created.

The account manager will remain in place and act as the Exit Manager as defined with Schedule 9. The Exit Manager assists with the termination process as well as continues to carry out any standard account manager operations to ensure the continuation of service prior to, and during, termination.

Open eLMS will also store data for an agreed period of time after migration should anything go wrong with the exit process. All data is usually stored on the servers for up to 3 months after the contract end date and backups are stored for 6 months after that. These time frames can be adapted to the Client's requirements.

Data security and privacy

During the execution of this strategy, Open eLMS will act in accordance with the company's ISO 27001 certification (Certificate No:372382021: Expiry Date: 13/05/2022), Data Protection and Information Security Policy (<https://docs.google.com/document/d/1ElIcGOiSlgBp0vIEZN8annsK-s2MN3XKSNWgM-VazVU/edit?usp=sharing>) and using independently audited IT precautions in line with the independently audited Cyber Essentials Plus (Certificate No:372382021) security measures. These processes involve controlling access to Personally Identifiable Information (PII) by taking a number of measures including:

- Password security
- Personnel training regarding the security of client data
- Processes to control access
- Deletion of PII when not needed

- Technical measures (e.g. encryption of data at all times in transit and at rest).

Cost of migration = £0

In line with Open eLMS's commitment to providing an all in one price for its services, these migration processes will entail no additional costs.

How data will be transferred to an incoming provider

At the end of any contract, Open eLMS will make available a backup copy of the database (MySQL database) for data extraction. This will be sent via end to end encryption (e.g. Keybase) or via a secure ftp link. The new supplier will be provided with a report, documenting the database and what configuration options have been selected in the Client instance. All procedures in The Terms and Conditions Schedule 9 will be adhered too.

An alternative solution would be to provide exports directly from the system using the CSV export/reporting functionality. Custom exports can be created to migrate users and learning data from Open eLMS to any third party system. This functionality is self-serving however support will be provided as needed to assist with this process.

A register of exportable learning resources will also be provided to the client for which the client owns the IP. An interface is provided for downloading the SCORM zip files on this register (necessary for setting up elearning on any new system). This includes any elearning (created using Open eLMS Creator or from third-parties).

elearning courses provided from the Open eLMS Catalogue can be sold for transfer to any new system at the standard market rate in accordance with Schedule 9 in the Terms and Conditions in Appendix 3 and as detailed in the pricing schedule (KMCIT-145 Appendix 2 - Pricing Schedule.xlsx).

Open eLMS will also assist the client in archiving learner files and utilising the pack and go functionality to equip users with uploaded data. It is a common approach of Open eLMS to build in exporting functionality into the system rather than relying on back-end queries which need to be customised by support staff.

Assistance will be given in the transfer of any licences from third party software vendors (licence keys, configuration information, etc.) to any new supplier (e.g. Anders Pink, H5P, etc.).

Method of data migration to a new System

A backup file of the MySQL database will be stored in a secure FTP location which will be sent via an end-to-end encrypted email service (Open eLMS uses Google Workspace servers and would require a similar setup).

Should your organisation not use Google Workspace, then the data can also be sent with end-to-end encryption via Keybase (or similar). The file will also be passworded.

Sending the entire database will give your organisation the flexibility in what they want to bring forward with any third party supplier.

How the Exit Management Strategy will be tested and maintained throughout the life of the contract

The processes within Open eLMS which determine the exit strategy (daily data backups, export of reports) are tested daily from all instances. Should any backup fail, then this will be alerted to the Open eLMS system administrator.

The migration process to any new system can only be tested in its entirety once the new system has been selected. For this reason, it is important to start this process at least 3 months prior to the exit date of the contract, so ensure migration queries and data exports are working as expected.

Roadmap Innovation and Customer Leverage

Introduction to Innovation

The innovation roadmap is client-led. Quarterly user-group meetings, allied with weekly/monthly calls furnish new requirements. This, allied with user-centred design, has created a system consistently ahead of the competition, including:

- Open eLMS - 'Netflix-style' LXP interface (2012).
- Open eLMS Creator - integrated cloud authoring (2007).
- Open eLMS App - native app (2010).
- Open eLMS Bespoke - VR elearning (2017).
- Open eLMS Classroom - smart classroom technology (2020).
- Open eLMS Forms - form builder (2022).

The road map of development is likely to change as the company is very much client led. Quarterly user-group meetings (<https://openelms.com/easy-to-use-and-comprehensive-lms/elearning-wmb/latest-changes-2/>) are allied with weekly/monthly calls with clients to give a wealth of information about new ideas about how to make the product the best it can be.

It has taken nearly 20 years of adopting this approach to create a truly **comprehensive** LMS that - due to being built upon good design principles - is **still easy to use**.

The following is a summary of the highlights of the future product solution "road map".

Roadmap: Short Term (next 3 months)

The following list of features has been planned for the next quarter to mid December 2021. The impetus behind these changes is to add better integration of the system with the best third party systems especially focussed on the Open eLMS Classroom technology ...

- Include custom graph builder
- Enhance discussion boards
- Enhance calendar integration with Google and Outlook
- Enhance RSS feeds
- Integrate further options into Open eLMS Classroom
- Open eLMS App inclusion of calendar features
- Visually display Learning Pathways

Roadmap: Medium Term (to Q2 2022)

In the medium term, the focus will be on the integration of new technologies to improve the learning experience.

- Signposting - this innovation by Open eLMS will allow learning from Open eLMS to appear anywhere on the internet (similar to the way YouTube videos can be embedded on third party websites). This allows learning to be displayed on a just in time basis - acting as “sign-posts” to show people the way, rather than relying on long term memory.
- Improved integration of AI video presenters into Open eLMS Creator
- Integration of AWS AI engine - SageMaker - into Open eLMS for the automatic production of learning pathways
- Payments - improve payments engine to include a variety of providers other than Stripe/Capita. Make the payments system work out of the box.
- PowerPoint Import into Open eLMS Creator is being developed, it is hoped this will be ready by mid 2023.

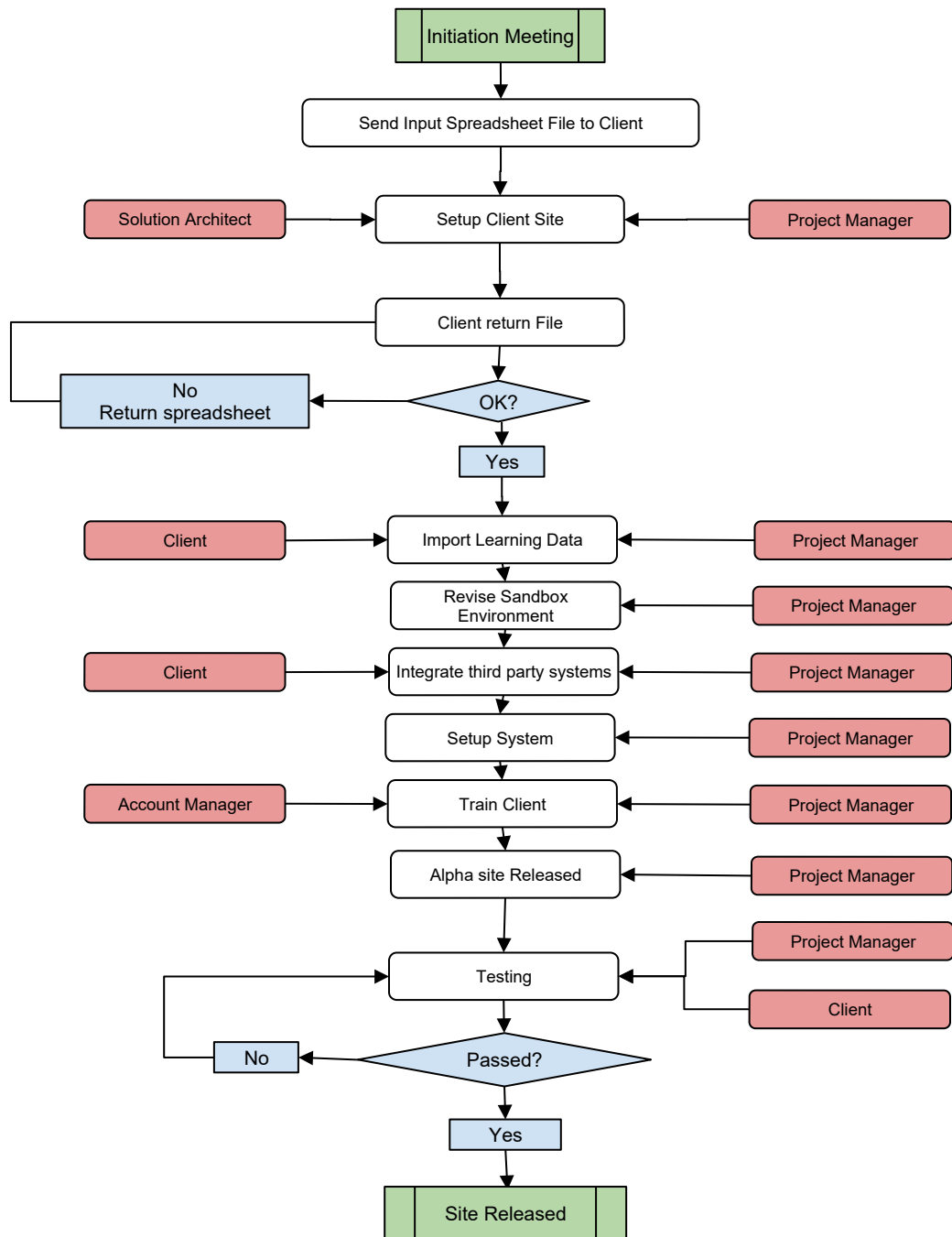
Roadmap: Long Term (2022 Q3 to 2023 Q2)

- App functionality will be added for managerial roles, reports, etc.
- Open eLMS Creator library added to - plans for 50 more business courses by 2023 Q2.
- Improve reporting engine - add graphs to reports from Open eLMS.
- Auler integration
- Increasing number of ‘out of the box’ system integrations

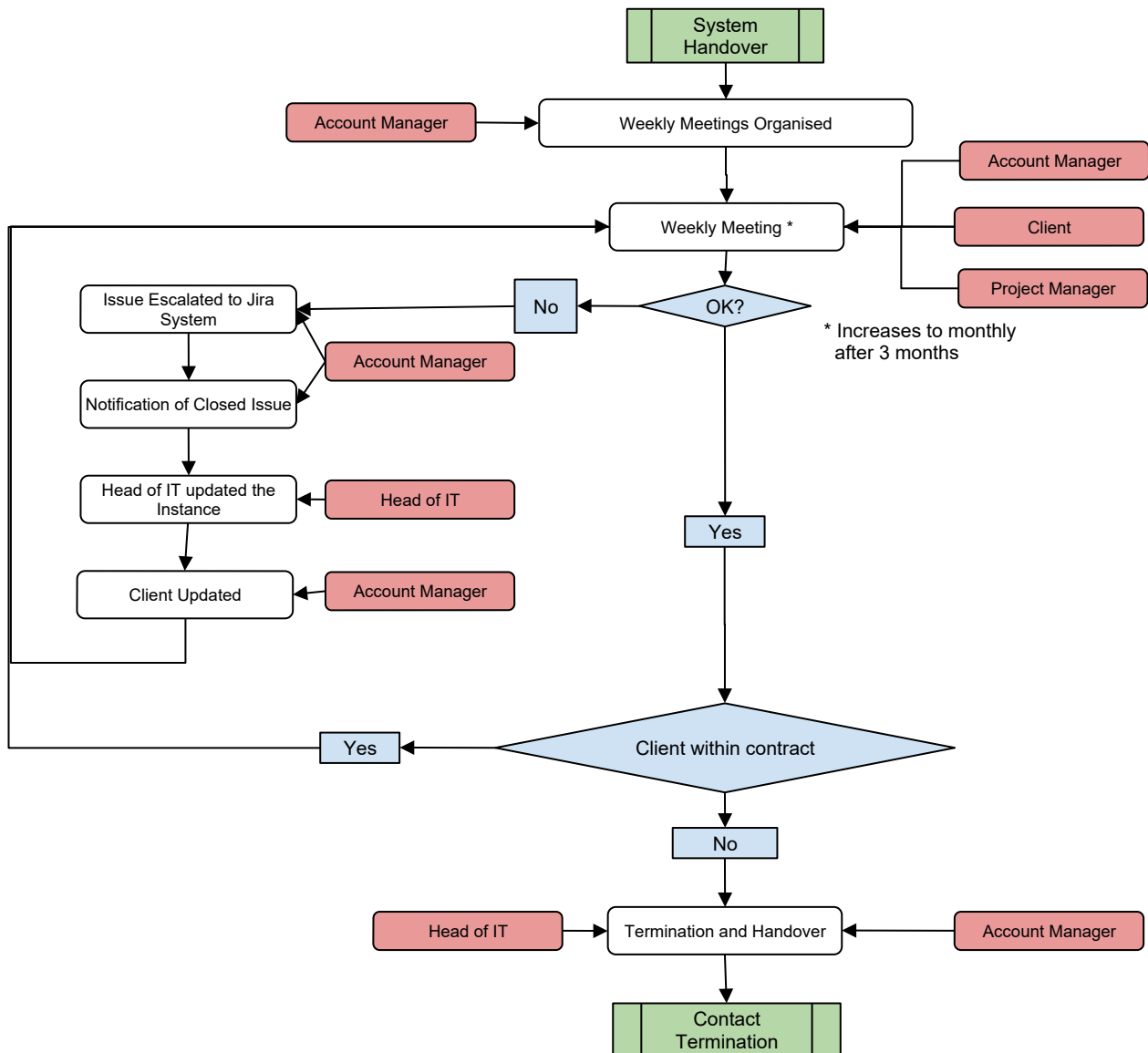
Project Management of System Implementation

Project Management

The Project Management Process is used for managing system implementations such as the one proposed for GTAA. This process is as outlined in the company's ISO 9001 and ISO 20000 certified procedures.



Account management takes over after the site has been released to the client.



Nature of work

No new development is required for the implementation of Open eLMS in accordance with this project. There are however a number of configuration tasks:

- Importing HR Data
- SSO, APIs and registration interfaces
- Editing short course content (mostly repositioning content from other courses) so it fits the requested course names
- Importing learning data
- Branding
- Configuration setup - over 250 options

Project Plan

Specific project plan, with clear milestones, for implementation of the milestones scenario as detailed in Appendix X – Project Plan Expectation.

At the project initiation meeting timescales should be agreed - below is a draft schedule (days = working days). The schedule is in stages with sign-off needed at each stage.

Process	Responsibility	Deliverables	Day	Date
Planning/Information Gathering				
Organisational Structure	Client / Account Manager: WMB Project Manager: WMB	Webinar initiation meeting with the Client to discuss process.	0	13/12/2021
Staff Data / Branding	Client	Completed file containing HR and branding data.	5	17/12/2021
Build/Configuration				
Design	Project Manager: WMB	Rebranded sandbox site setup Imported Data. Includes customised interface Configuration options.	10	24/12/2021
	IT Lead: WMB	Provision of details required to set up SSO on sandbox site - see Set up Open eLMS SSO for Azure AD - Jira Service Management (atlassian.net)	10	24/12/2021
Data Migration	Client	Completed file containing learning data from existing system.	15	05/01/2022
Deployment				
Installation	IT Lead: WMB	Sandbox environment launches, SSO, HR Data, and snapshot of data from existing system implemented.	20	12/01/2022
Integration	IT Lead: WMB	Forms implemented (optional - Open eLMS Forms).	30	26/01/2022

Integration	IT Lead: WMB	Integration with Oracle Fusion completed. Integration with Open eLMS Creator Integration with Civica Payments Alpha system launched.	30	26/01/2022
Review				
Testing	Client	Alpha site tested. Initial feedback supplied to WMB.	45	16/02/2022
Integration/ Programming	WMB	Iterative process - OE releases amended build as beta release.	50	23/02/2022
Training	Account Manager OE/ Client	OE delivers training via webinar on the use of the system. This usually can be managed in three x 2 hour sessions for management, administrators and content developers.	55	02/03/2022
Testing and Feedback	Client	Beta site tested by wider control groups. Feedback to client including alterations to system in branding or organisational structure.	60	09/03/2022
Programming	Account Manager WMB	Changes delivered.	65	16/03/2022
Testing and Feedback	Client	Client signs off beta.	67	18/03/2022
Programming	Project Manager WMB	Changes applied to 'release' site.	70	23/03/2022
Testing and Feedback	Client	Completes checks on 'release site' prior to launch. Release version Signed Off.	75	30/03/2022
Rollout				

Marketing	Client	Sends out to target audience information about the system prior to release. Open eLMS will provide marketing videos etc. e.g. https://youtu.be/7_oHcKODyPY	77	01/04/2022
System Launched	Project Manager WMB	Existing site closed, data exported from existing system and import query ran to update the release site with the latest data before launch.	77	01/04/2022
Monitoring/Maintenance				
Feedback	Project Manager OE/ Client	System performance review meeting Implementation on new integrations.	Weekly	

Project management system

Open eLMS implementation follows a structured, staged approach of delivery aligned to the PRINCE II project management methodology with sign-off required from all parties at each stage. The quality checks are aligned to the company's ISO 9001 certification and the service management levels to the ISO 20000 certification (the company's Project Management Manual - e-LearningCompanyInformationERW20200224Project Management4_0.pdf has been supplied along with certifications eLearningWMBERW20220301Certificates.pdf.) Any changes to the methodology or standards used will be agreed in accordance with Client's Variation Procedure.

This implementation incorporates the Open eLMS Creator authoring system, Open eLMS Classroom, and Open eLMS Forms (optional) as well as the core Open eLMS Learning Management System.

The approach taken is outlined below:

Stage	Process	Description
Planning/ Information Gathering	Organisational Structure	The Learning Management System is configured to match the organisational structure (departments, divisions, roles, etc.). Information about the structure is passed to Open eLMS.
	Branding	Course introduction animations, log in screen, logos, and colours are provided in advance to prepare the design.
	Staff Data	Staff data should be prepared by the client in advance as a CSV table. Advice is given on importing the data during the installation stage.
Customisation	Design	Branding elements are prepared in advance and

		supplied for the installation. These are signed off in advance by the client.
Deployment	Installation	The project manager applies configuration settings to the installation.
	Data Migration and Integration	Staff data is imported and managers are set up on the system and default courses are assigned. Integration with third party systems is carried out.
Review	Training	The client receives training on the Learning Management System (Open eLMS) and the Content Management System (Open eLMS Creator).
	Testing and Feedback	The client reviews the system and feeds back any issues directly to the project manager or with Open eLMS's online reporting system.
Rollout	Beta Signed Off	The beta version is amended and signed off ready for roll-out.
	System Launched	Client launches the course (usually by a staged roll out) by sending email alerts from the system.

This process is mapped into the Jira project management system, which is used to monitor progress and integrate task management into the program team. The client project manager will have access to this plan to review and update as necessary. Progress is reviewed at weekly meetings with the entire project team to review work and identify pinch points ahead of time.

An example of such a chart is included below - taken from an implementation project with Onward Housing Association.

The project team

This process is repeated with every project and the project team has a vast experience in implementing Open eLMS in environments very similar to the Client. The selected Account Manager/Project Manager team for this project is currently responsible for similar Open eLMS data integration projects with Sandwell Borough and Suffolk County Councils.

Senior account manager and director - Andrew Howie - will be the Account Manager.

Andrew is a former director of a training company with a Masters in Lifelong Learning. Andy has vast experience in dealing with the learning and development needs of large organisations, marrying them with the latest technology.

Managing Director – Emil Reisser-Weston – will be the Project Manager for this project.

Emil has worked in elearning and Computer Based Training (CBT) for nearly 30 years and has project managed learning related projects for the likes of Unilever, PwC, the Home Office, Surrey County Council, amongst others.

RACI

A RACI chart (sometimes called a Responsibility Assignment Matrix) is a way to identify your project teams' roles and responsibilities for any task, milestone, or project deliverable. By following the RACI acronym, you can clarify responsibility and reduce confusion. RACI stands for:

Responsible. This person is directly in charge of the work. There should only ever be one Responsible role per task so you know who to go to with questions or updates. If a task has more than one Responsible person, you can lose clarity and cause confusion. Instead, aim to add additional collaborators as some of the other RACI roles, which can have more than one person.

Accountable. The Accountable person is responsible for overseeing overall task completion, though they may not be the person actually doing the work. There are two ways to assign an Accountable role. Sometimes, the Accountable is the project manager (or even the Responsible, though in that case the person is taking on two different roles during the task workflow). In these cases, the Accountable is responsible for making sure all of the work gets done. In other cases, the Accountable is a senior leader or executive who is responsible for approving the work before it's considered complete. Like the Responsible role, there should only ever be one Accountable.

Consulted. This will be the person or people who should review and sign off on the work before it's delivered. There may be multiple Consulted roles for each task, project milestone, or deliverable.

Informed. This is the person or group of people who are informed about the progress and completion of work. They probably are not involved in any other aspect of the deliverable.

	Project Manager	Account Manager	Tech Program Lead (on shore + off shore)	Program mer (near shore)	Product Director (near shore)	Tester (off shore)	Program mer (off shore)
Planning to Deployment	C	I	A		R		
Data Conversion	I	I	R	A			
Middleware/ Integration	C	I	R				
Customizations	C	I	I		R		A
Testing and release	I	I		A	R	A	A

R= Responsible, A = Accountable, C - Consulted, I = Informed

Milestones & Payments

Milestones are inserted into this plan in agreement with the Agency. The draft milestones which initiate payment are as follows:

- Initiation Meeting
- Alpha system launched
- Beta system approved
- System Launched

The initial payment will be agreed and then further payments will be proportional to the work undertaken in the project implementation.

Milestones are inserted into this plan (in accordance with Schedule 4 of the T&Cs) in order to release payments to Open eLMS. These milestones (in draft format to be agreed by the Client) are as follows:

Milestone	Deliverables	Duration	Milestone Date	Client Responsibilities	Milestone Payments	Delay Payments
Initiation Meeting	Attendance of initiation meeting	1 hour	13/12/2021	Attend meeting with appropriate project personnel	30% of the 'Prior to Go-Live cost' £7,121.25	25% of the milestone payment should be paid if the delay is solely attributable to Open eLMS.
Alpha system launched	Alpha system launches with integrated systems and HR data for testing	30 days after project initiation	26/01/2022	Provide HR data and import data in accordance with schedule	30% of the 'Prior to Go-Live cost' £7,121.25	25% of the milestone payment should be paid if the delay is solely attributable to Open eLMS.
Beta system approved	Beta version ready for release	67 days after project initiation	18/03/2022	Extensive testing and feedback in accordance with	30% of the 'Prior to Go-Live cost' £7,121.25	25% of the milestone payment should be paid if the delay is

				schedule deliverables		solely attributable to Open eLMS.
System Launched	Open eLMS launched with Client data and integrated systems	77 days after project initiation	01/04/2022	Data exported from existing system and existing system closed down during the transfer process	10% of the 'Prior to Go-Live cost' £2,373.75	25% of the milestone payment should be paid if the delay is solely attributable to Open eLMS.

Open eLMS will monitor performance against this plan and provide reports as to progress against this plan at weekly project meetings. Any variations to this plan will be notified to the Client as soon as possible and no later than the next working day.

Implementation Risks

Risk 1: Poor Communication and Solution:

The primary conduit of communication will be the account manager. the client will be assigned Andrew Howie, director of the company, as the account manager. Andrew will liaise with the Open eLMS team.

The account manager will conduct weekly meetings during the implementation phase (later extended to monthly).

Risk 2: Data Security and Solution:

Open eLMS ensures a safe data transition as they are ISO 27001 and Cyber Essentials Plus certified and as such have detailed procedures in place to ensure the security of PII. Measures include, but not limited to:

- limiting access to PII and passwords
- Use of the Zoho password vault to secure password use
- All staff undergo ISO27001, GDPR and Data Protection training
- All staff and equipment undergo Cyber Essentials Plus audits.
- Use anonymised data for testing purposes
- All passwords are encrypted as is data at rest and in transit.

Risk 3: Time Overrun and Solution:

No programming is needed to deliver this project which will assist with a smooth implementation of the Open eLMS system. This will allow ample time for intensive user testing to ensure that the information architecture and user experience match the client's expectations.

Risk 4: Business Continuity and Solution:

Open eLMS has a business continuity plan which ensures the fulfilment of support and services to the client. There is global redundancy to the Open eLMS servers and support services. All support services can be run independently of a physical office location, whilst the Cloud based Azure installation hosts the system on two sites over 200 miles from each other which switch in the case of a failover - the system creates a crash-consistent recovery point every 5 minutes.

The business continuity plan has been provided (*e-LearningWMBCompanyInformation20191018BusinessContinuityPlan.pdf*) and is tested and independently audited annually as part of ISO 27001 certification.

For the longer term continuity of the business, Open eLMS would be happy to hold the uncompiled code within an ESCROW agreement so that the client can further develop and support the system should Open eLMS cease trading. Note all technologies used are open source and would not require the use of any Open eLMS suite to maintain or extend should the ESCROW come into force.

Risk 5: The product become obsolete and Solution:

Open eLMS relies on user feedback for new ideas and ways to innovate. To this end it relies on feedback from its user for new ideas - this is fostered through initially weekly and then monthly meetings between the Open eLMS account manager and the client's representatives.

Open eLMS also has quarterly user group meetings where new versions are discussed, training is given on configuration options and feedback is received for new features.

Project Risks

As with any large system implementation there are always issues in bringing people together and changing existing work practices. There are, however, a number of issues which are more specific to this project. Although none of these issues will prevent the rollout of the system, it is worth highlighting them at this stage to ensure your organisation gets the most out of Open eLMS.

Form Creation

Should the Open eLMS Forms option be taken, resources need to be provided to ensure that any forms associated with personnel development and review (360 feedback, quarterly reviews etc.) are provided to Open eLMS in a timely manner so these can be created.

eLearning Authoring

Personnel and time will need to be set aside for any authoring of training using the Open eLMS Creator authoring system. Should resources to do this be unavailable, Open eLMS can offer the Open eLMS Bespoke service at an additional cost, but adequate notice would need to be

given.

Creation of H5P Content

Again, use of this add-on gamification authoring system will need personnel and resources to create the microlearning modules needed prior to launch.

Curation of content

There are nearly 250 courses in the Open eLMS Catalogue [library of courses](#). Selecting the appropriate learning (including the selection of content for H&S purposes) will take time. In addition to this, the setting of course properties (enrollable, mandatory, repeated, locked - require management approval, etc.) will take careful consideration to ensure that the training works in the right way to meet organisational needs.

Modules, pathways, queries, etc.

How the learning is collated and what determines pathways of learning will need to be carefully considered. The more work done ahead of the launch will mean that there is less administration needed to set up learners going forward.

Email customisation

Email notifications (default and custom) need to have the messages checked and edited to meet your organisation's requirements.

Third party integration

Talent and management development tools from third-party suppliers need to be integrated into Open eLMS. Access to third-party APIs will be needed; care should be taken to notify all suppliers ahead of time to avoid development delays.

Reports

Custom reports should be set up ahead of launch to ensure that managers have the correct information. If setting up a live link to Microsoft Power BI (Business Information System Dashboard), then this should be organised ahead of time. Open eLMS has created elearning resources to help with this if needed.

Updates

Resources will need to be committed for an ongoing dialogue with the assigned account manager. This relationship ensures that the product is further developed to your organisation's (and others client's) needs and your organisation gets the most from any latest developments initiated by others.

Key Stages:

The key stages are listed below:

1. Planning/Information Gathering
2. Build/Configuration

3. Deployment
4. Review
5. Rollout
6. Monitoring/Maintenance

A detailed description of each stage is included in the previous answer.

Resources allocated

Client Resources

For a project of this nature, it is strongly recommended that the Client supply at a minimum a single point of contact to coordinate activities from technical and design staff.

The Client's representative will call upon additional project team members as and when required. It is envisaged that such resources will call upon one or more of the following:

- IT Services representative
- HR representative (with knowledge of iTrent system)
- L&D representative (with knowledge of training needs)
- * Design lead for the in-house production of learning content
- Project manager/manager to coordinate timely deliverables from your organisation.

* The number of designers under the design lead would depend upon the amount of content required. Open eLMS would be happy to scale this work and offer predictions of resources needed once a needs analysis is complete.

Open eLMS Resources

Open eLMS will supply a Project Manager who will be the project lead from Open eLMS during the implementation stage of the project (Planning/Information Gathering to Rollout).

The ongoing responsibility and main point of contact after this period will be the Account Manager.

Hardware/Software Resources

Open eLMS supply services using a SAAS model, as such all server space (Azure Server) and software (Open eLMS) will be supplied by Open eLMS.

Project Team Members (Extended)

Open eLMS	Days	the client	Days
-----------	------	------------	------

Account Manager	5	Account Management Team	20
Project Manager	5		
Program Lead	2		
Programmer	5		
Head of Design	1		

Account Manager - Andrew Howie

Andy has over 20 years experience in L&D. Andy is a director of Open eLMS.

Project Manager - [Emil Reisser-Weston](#) MSc-MEng

Emil has been project managing e-learning projects since the early 90s. Emil has worked with some of the largest PLCs in the FTSE 100 as well as local and national government.

Program Lead - [Lauris Mikulans](#)

Lauris has been with Open eLMS for nearly 10 years and has lead the work on Open eLMS since version 3 of the software.

Head of Design - Lasma Ulge

Head of Design, Lasma Ulge, is responsible for the unique look and feel of Open eLMS's online training. Lasma has been with Open eLMS for 12 years.

Client Resources

Input dependencies on Client, including resources, to deliver a successful Implementation;

For a project of this nature, it is strongly recommended that your organisation supply at a minimum a single point of contact to coordinate activities from technical and design staff.

your organisation's representative will call upon additional project team members as and when required. It is envisaged that such resources will call upon one or more of the following:

- IT Services representative
- HR representative (with knowledge of iTrent system)
- L&D representative (with knowledge of training needs)
- Design lead for the in-house production of learning content
- Project manager/manager to coordinate timely deliverables from your organisation.

* The number of designers under the design lead would depend upon the amount of content required. Open eLMS would be happy to scale this work and offer predictions of resources needed once a needs analysis is complete.

Roles and responsibilities of the supplier

Open eLMS attest to the following duties in the company's standard EULA:

- Hosting provided in the UK by Microsoft Azure.
- Backups (all files and database) taken daily and by default a rolling schedule taken daily, weekly, monthly, 3 monthly, and 6 monthly (can be flexible to suit Client requirements).
- Acceptance testing agreed no later than 30 days from installation.
- Support from 0800 to 1800; includes access to the knowledgebase and support helpdesk.
- Response/resolution times will be proportionate to the seriousness of the event:
 - Critical Event: Critical Impact/System Down. Open eLMS in its entirety is non-functioning.
Response time 1 working hour, resolution target 2 working hours.
 - Major Event: Significant Impact. A number of key components are not working which seriously impacts use of the service.
Response time 1 working hour, resolution target 4 working hours.
 - Minor Event: An individual feature of Open eLMS is not working, workarounds are not possible.
Response time 2 working hours, resolution target 2 working days.
 - Trivial Event: A problem with Open eLMS for which a work around is possible.
Response time 1 working day, resolution target 4 working weeks.
- The expected uptime for the Open eLMS service is 99.9% of the time.
- Standard Open eLMS users will have assistance with the following data processing tasks at no additional cost:
 - Importing HR Data from a provided template

- Setting up SSO
- Enterprise users will have assistance with the following data processing tasks at no additional cost:
 - Importing course data from a provided template
 - Setting up CRON tasks to automate these imports
- Intellectual property rights are protected for both parties.
- Data protection is assured.
- New releases will not affect the performance of Open eLMS - they can be switched on/off in consultation with the Client.
- All software will be tested for viruses.
- Liability is limited to the total subscription fees paid by The Client to the Supplier in the 12 months preceding the date of the incident giving rise to the claim or series of claims.
- Meetings for Enterprise clients include weekly account management meetings for the first 3 months after implementation, extending to monthly thereafter and weekly project management meetings (during implementation).

Roles and responsibilities of the Client

The Client shall cooperate with the Supplier in any manner reasonably required by the Supplier in order to carry out the Support Services, including:

- Provision of reasonably requested information and data.
- Making available suitably qualified employees and contractors of the Client (at least one person available on a daily basis during the implementation stage of the project).
- Report any issues to the support help desk via email, telephone to the appointed account manager, or the help desk directly in a timely manner.
- Comply with Open eLMS's standard procedures with regards to the handling of Personally Identifiable Information (PII) in accordance with the company's ISO 27001 certification (a copy of the company's Data Protection & Information Security Management System Policy (CompanyInformationERW20190701DataProtectionISPolicy2.0.pdf) has been supplied).

Risk Identification and management

Open eLMS will work closely with designated members of the Client's HR and ICT departments to produce a weekly project overview and risk log (outlining progress and highlighting areas of concern), to ensure all actions agreed within this implementation plan are delivered on schedule. The approach Open eLMS takes to hazard identification and the quantification and management of risks is outlined in the company's supplied Risk Assessment Manual

(ISO27001ERW20201216RiskAssessmentManual.pdf).

The major risk to the rollout of this project, which is common to all clients, is server failure which could cause a loss of service. To this end, Open eLMS uses geo-redundant storage (GRS) replication. GRS replicates data and the system to a secondary region (+100 miles away from the primary location of the source data). This provides a high level of durability for your data, even if there's a regional outage.

If there is an outage, then the server switches to the secondary server. The Recovery Time Objective is 10 minutes for primary servers to switch over to the secondary server. The Recovery Point Objective is at the same point as from when the primary site fails.

Risk Assessment

LMS System & Contractor shall provide a full formal statement of alignment against the 14 NCSC Cloud Security Principles to support Risk Assessment
(<https://www.ncsc.gov.uk/collection/cloud-security/implementing-the-cloud-security-principles>)

Open eLMS will adhere to the 14 principles as outlined in the NSC Cloud security guidance (and upon demand provide evidence from its Information Security Management System), namely:

1. User data transiting networks are adequately protected against tampering and eavesdropping by the encryption of all data in transit utilizing an EV SSL certificate.

2. Asset protection and resilience

User data stored by Open eLMS is located on the MS Azure infrastructure which is protected against physical tampering, loss, damage and seizure. MS Azure is ISO 27001 certified and complies with SOC 2 Type 1 and SOC 2 Type 2. Details can be found here - [System and Organization Controls \(SOC\) 2 Type 2 - Azure Compliance | Microsoft Docs](#).

3. Separation between users

Data is separated and password protected so that a malicious or compromised user of the service should not be able to affect the service or data of another. Measures have been taken to prevent injection attacks which could cause corruption or affect the security of the data. These measures are also subject to an annual audit (provided).

4. Governance framework

Open eLMS has a security governance framework governed by its ISO 27001 certification which coordinates and directs its management of the service and information within it. All technical controls are linked to the company's asset register and as such are within this framework and subject to auditing and management controls.

5. Operational security

Open eLMS systems are operated and managed securely in order to impede, detect or prevent attacks. Access is limited to key security personnel and this is controlled by the Zoho Password vault in line with the company's Access Control Policy (provided).

6. Personnel security

Open eLMS limits access to PII (client Open eLMS data) to key security personnel. This yields a high degree of confidence in their trustworthiness as all named personnel are senior staff with at least 5 years tenure with the company. All staff are screened and supported by adequate training via the company's internal Open eLMS learning management system.

7. Secure development

Open eLMS has been built using a 'Security by Design' approach. This is documented in the company's Secure Engineering Principles Policy which has been provided and to which all programming/support staff attest.

8. Supply chain security

Open eLMS are owner authors of the entire Open eLMS system which limits the use of suppliers. The exception to this is MS Azure which has satisfactorily implemented both physical and technical measures which are audited and certified to put trust in the hosting environment.

9. Secure user management

Open eLMS provides adequate security measures to ensure the privacy of data held within the system. Unauthorised access is secured by:

- Complex passwording rules
- Forced password refreshing
- SSO
- 2 Factor Authentication options
- IP blocking options

10. Identity and authentication

Open eLMS has various access levels and associated interfaces which are limited to authenticated and authorised individuals.

11. External interface protection

Register and login for Open eLMS are identified (as identified in the annual report) and appropriately defended (injection attacks, snooping etc.).

12. Secure service administration

System administration access is securely defended through passwording or SSO authentication. Open eLMS have alerts on the system to monitor any excessive attempts to break into the system via password guessing etc.

13. Audit information for users

All user access involving the export or deletion of data is logged so that deliberate malicious actions can be traced and data can be selectively reverted to a state prior to the attack. The AUthority will have instant access to this data in order to respond accordingly.

14. Secure use of the service

Open eLMS provides training in using the service to all administrators of the system. This training includes client responsibilities for adequately protecting the data and duties under the GDPR and Data Protection Act.

This statement has been provided as an attested document by the company's managing director WestMerciaPolice20220112ERWNCSCPrinciples.pdf and a copy of Open eLMS's Cloud Security Policy (eLearningWMBERW20210805CloudSecurityPolicy.pdf) has also been provided.

Risk Assumptions

Open eLMS will contribute to the RAID log and manage any implementation risks with the Agency. The log will be reviewed at the weekly project meetings.

Data Migration

Open eLMS will build a sandbox environment (<https://lms.e-learningwmb.co.uk/CLIENTDOMAIN>) which is used for testing during the deployment phase of the project. The sandbox environment is used to:

1. Migrate data from existing systems
2. Set up CRON (server side) tasks for the importing/synchronisation of data
3. Create learning resources (elearning/microlearning)
4. Curate the learning library
5. And test the 'going live' procedure *

* This 'going-live' procedure involves the migration of data from the existing systems using existing migration interfaces for the importing of HR Data, learning resources and learning resource data.

When the system is ready to launch:

1. The database is cleared of user and test data
2. The old site is taken down
3. The migration process is ran so a fresh copy of HR data and imported learning is completed
4. A redirect is set up to the new Open eLMS system

This process is conducted outside office hours to ensure a minimum of down time. The process should take 15-30 minutes to complete.

Dual running period prior to 1 April 2022

This is perfectly OK and highly recommended. Synchronicity between the two systems can be handled by data import or live synchronicity when opening/closing learning via the Kallidus API (KIP AP).

6-week intensive support post go live

Open eLMS as standard offers 3 months of weekly meetings, extending to monthly meetings after this period of time. The account manager will be on hand via the usual channels to offer advice and any issues can be reported via the company's helpdesk at any time.

Implementation Timescales

At the project initiation meeting timescales should be agreed - below is a draft schedule (days = working days). The schedule is in stages with sign-off needed at each stage.

Process	Responsibility	Deliverables	Day
Planning/Information Gathering			
Organisational Structure	Client / Account Manager: Wipro Project Manager: Wipro Project Support Wipro Solution Architect OE	Webinar initiation meeting with the Client to discuss process.	0
Staff Data Branding	Client	Branding Data supplied	5
Alpha Release	Solution Architect OE	Rebranded alpha (sandbox)site setup	6
Build/Configuration			
Configuration	Project Manager: OE	Configuration options reviewed on alpha site. Configuration Log delivered Any out of scope requirements identified.	5

Single Sign On (SSO)	IT Lead: OE	Provision of details required to set up SSO on sandbox site - see Set up OpenLMS SSO for Azure AD - Jira Service Management (atlassian.net)	17
Alpha Build and Review			
Data Migration	Client/ Solution Architect OE	Completed file containing learning data from existing system.	20
Integration	Technical Consultant OE	Integration with third party systems planned ICDs delivered Integrations developed	30
Build	Client Wipro PM Solution Architect OE Program team OE	Any out-of-scope tasks agreed for progress Tasks added to functional requirements documentation Tasks progressed to completion	44
Beta Release	Solution Architect OE	Beta version of the sandbox site released.	45
Review			
Testing	Tester OE/ Architect OE	Testing strategy implemented Performance testing Functional testing Integration testing Migration testing End to end testing UAT testing And BAT testing carried out	46
Testing and Feedback	Tester OE/ Client	Feedback delivered to OE/Wipro	55
Programming	Solution Architect OE	Changes delivered.	65
Documentation	Wipro PM Solution Architect OE Tester OE	Documentation delivered to include final reports on testing process	66

Training	Account Manager OE / Client	OE delivers training via webinar on the use of the system. This usually can be managed in three x 2 hour sessions for management, administrators and content developers, with a process of shadowing and reverse shadowing to ensure knowledge retention..	75
Rollout			
Marketing	Client	Sends out to target audience information about the system prior to release. Open eLMS will provide marketing videos etc. e.g. https://youtu.be/7_oHcKODyPY	77
System Launched	Project Manager OE	Existing site closed, data exported from existing system and import query ran to update the release site with the latest data before launch.	77
Monitoring/Maintenance			
Feedback	Project Manager OE / Client	System performance review meeting Implementation on new integrations.	Weekly

RACI

	Project Manager	Account Manager	Tech Program Lead (on shore)	Product Program Director (near shore)	Tester (on shore)	Programmer (off shore)
Planning to Deployment	C	I	A		R	
Data Conversion	I	I	R	A		
Middleware/ Integration	C	I	R			
Customizations	C	I	I		R	A
Testing and release		I		A	R	A

R= Responsible, A = Accountable, C - Consulted, I = Informed

Contact and Teamwork

Contact and teamwork approach with our organisation including the extent to which the Contractor implementation team will be regularly available;

Open eLMS hand responsibility of the project to the Project Manager during the implementation of Open eLMS. The Project Manager as standard will set up weekly project meetings with your organisation to offer updates on the project schedule and coordinate tasks carried out by both organisations.

After the project has launched, the account manager will take over responsibility for the project (he will attend all meetings to that point.) It is standard practice for those meetings to be held weekly and then extend to monthly intervals at the behest of the client.

All members of the project team will be available via phone and email to answer questions at any time.

Service Management

The Service Level Management process is reviewed every 6 months internally within Open eLMS and reported on accordingly.

This process reviews all products and services under the Open eLMS brand utilising the following relevant benchmarks and metrics.

Service Description	Performance target	Method of Measuring
Open eLMS hosting	99.9% uptime on a monthly basis	Uptime Robot. Any downtimes are logged on the Incident Log and tabulated
Customer satisfaction	4 out of 5 star average feedback	Recorded via email survey from Jira Service Management system. Reviewed 6 monthly
SLA Success rate for Time to first response	80% plus	Metrics from Jira Service Management reporting system. Reviewed 6 monthly
SLA Success rate for Time to resolution	80% plus	Metrics from Jira Service Management reporting system. Reviewed 6 monthly
Automated testing	100% pass in a 24 hour period	Daily test results from TestProject automated testing system.

Pricing

Introduction

Open eLMS strive to offer a simple all-inclusive pricing schedule which does not adjustment or the purchasing of additional services.

Note there is no separation of licensing/support costs - as Open eLMS is software as a service, all licences automatically include support.

Support includes systems upgrades (issued every 2-3 weeks), user groups, data importing etc.

A breakdown of the costs for 3 years is supplied.

Implementation Costs

System Setup and data transfer

This cost covers the set up of the system and migration of existing system data.

£3,000

Oracle and Civica Integration

This payment covers all integration work with the Oracle imports and payments API

£4,200

Annual Costs

Open eLMS/Open eLMS Classroom Combined Licence/Support cost (includes support) for the Client

£ 35,048

The cost is based on 6,700 (active or read only) users but will not limit the system to that number during the 3 year period; this provides unlimited use of the system during this time. Open eLMS reserves the right to increase this cost in line with inflation and pro rata with Client employee and subcontractor numbers after the three year period.

Open eLMS Creator Combined Licence/Support for the Client

£6,000

Open eLMS public facing social values site

FREE

Optional Costs

Day Rate

1 day programmer/project manager rate for system customisation outside software upgrades

£800

API implementation (optional)

The implementation of a third party API solution

£800

Payment Profile

Implementation costs will be invoiced for and work will begin once contractual documentation is signed. the client will have 28 days for payment to be made.

Open eLMS payment will be made annually. The first payment will be due 28 days after the system goes live. Further invoices will be issued on an annual basis, 28 days prior to the next annual period commences.

A single fixed cost

Open eLMS licences Open eLMS with a company-wide licence calculated on the numbers in the organisation at the start of the contract. This means that there is a flat annual fee for the use of all systems regardless of the number of people leaving/joining during the licence period. This means that neither party needs to monitor users etc. and makes the management of licences much easier than based on a per user model.

To make budgeting even easier, the SAAS model used for Open eLMS means that the annual subscription includes all hosting, support, maintenance, project management costs, etc.

This cost also include all standard implementation costs supplied to Enterprise clients including:

- Importing HR Data from a provided template
- Importing course data from a provided template
- Setting up CRON tasks to automate these imports
- Setting up SSO

The licence also includes the support services:

- Access to account manager by phone/email during office hours 6 hours training (3 webinar sessions)
- Support help desk
- Knowledgebase
- Weekly project management meetings (during implementation)
- Weekly account management meetings for the first 3 months after implementation, extending to monthly thereafter

Not just the LMS

This price includes the following software: Open eLMS, Open eLMS Catalogue, Open eLMS Creator, and Open eLMS Classroom. Open eLMS are owner-authors of all these systems and as a result are in a unique position to offer these services at no cost with an annual saving of £193,409.

Social Value

Summary of Social value

Open eLMS is a socially aware company, donating 20% of profits back to its employees and spending a significant amount of time each year on socially aware free projects. The company has issued a number of free courses to assist with social causes, the most recent being the 'Coronavirus Awareness' course, now used globally to help combat the disease and 'Black Lives Matter' to increase awareness of this important issue in society and business. Open eLMS also maintains and runs the drugs training for free website for zero income to the company.

On many projects Open eLMS will offer to freely set up and host a customer facing portal where learning will be made available to encourage financial inclusion and teach life skills to enable people to either get back to work or for self-improvement. The elearning includes 25 courses covering:

- * Universal Credit
- * Debt Relief
- * Tenant Housing

~~Open eLMS is passionate about protecting the environment and adhering to its responsibilities to reversing climate change. The company is a net carbon reducer by a factor of 500 (the company has estimated its carbon footprint and donates money to remove over 500 times more carbon than the company emits.)~~

In 2020 the company went paperless and continues to take measures to reduce its carbon footprint. Key KPIs which have significantly reduced in the last year are:

- Brochure expenditure (again paperless!)
- Stationary expenditure
- Postage expenditure
- Mileage expenditure
- Face to face meetings

All employees undertake ISO 5001/ ISO 14001 training and attest to the company's Environment Policy which detail the company's Energy Management Policy.

In addition, all suppliers are made aware of - and asked contractually to adhere to the company's code of conduct which sets out Open eLMS's environmental efforts.

Economic benefits (Social Values Skills)

Open eLMS will offer to **freely** set up and host a customer facing portal where learning will be made freely available for the client's customers to encourage financial inclusion, teach life skills and give them skills to either get back to work or for self-improvement.

This focuses on providing a platform to base training and supplement existing learning resources for initiatives.

All the client customers will also be able to set up accounts for a variety of learning needs:

<i>GCSEs:</i>	<i>A Levels:</i>
<ul style="list-style-type: none"> ● Art and Design ● Biology ● Business ● Chemistry ● Computer Science ● Design and Technology ● Economics ● English Language ● English Literature ● French ● Geography ● German ● History ● Mathematics ● Media Studies ● Music ● Physical Education ● Physics ● Religious Studies ● Spanish 	<ul style="list-style-type: none"> ● Art and Design ● Biology ● Business ● Chemistry ● Economics ● French ● Geography ● German ● History ● Mathematics ● Physics ● Psychology ● Spanish
<i>Back to Work Training:</i>	<i>Financial Inclusion:</i>
<ul style="list-style-type: none"> ● Job Hunting ● Preparing for interviews ● Advertising and Media ● Creative Content ● Digital Marketing ● e-Learning Creation ● Junior Journalist ● Sales Practitioner ● Team Leader/ Supervisor 	<p>Universal Credit Series (<i>What is Universal Credit, Universal Credit - Money Management and Responsibilities, Universal Credit - Working, Universal Credit - Self Employment, Universal Credit - Housing, Universal Credit - Children and Childcare, Universal Credit - Health Conditions and Disabilities</i>)</p> <p>Debt Relief Series (<i>Introduction to Debt: StepChange Debt Charity, About Debt: StepChange Debt Charity, Referring a Tenant: StepChange Debt Charity, Housing Debt Case Studies: StepChange Debt Charity</i>)</p> <p>Tenant Housing Training (<i>Home Ownership, Welfare</i></p>

	<i>Reform Tenants)</i>
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Environmental benefits (Climate Change)

All employees undertake ISO 5001 / ISO 14001 training and attest to the company's Environment Policy which detail the company's Energy Management Policy (see e-LearningCompanyInformationAH20191204EnvironmentalPolicy.pdf).

Open eLMS is passionate about protecting the environment and adhering to its responsibilities to reversing climate change. In 2020 the company went paperless and continues to take measures to reduce its carbon footprint and work towards zero emissions (e.g. using a zero emissions energy supplier for gas and electricity). Key KPIs which have significantly reduced in the last year are:

- Brochure expenditure
- Stationary expenditure
- Postage expenditure
- Mileage expenditure
- Face to face meetings

All suppliers are made aware of - and asked contractually to adhere to our code of conduct (eLearningWMBLU20210701CodeofConduct.pptx (1).pdf). This section of the code sets out Open eLMS's environmental efforts.

The Open eLMS Classroom service allows system users to conduct face to face training, toolbox talks and presentations without needing to travel to a training centre etc. This has huge benefits in reducing carbon emissions and energy costs surrounding running a training facility.

Social Benefits

Open eLMS is a socially aware company, donating 20% of profits back to its employees and spending a significant amount of time each year on socially aware free projects. The company has issued a number of **free** courses to assist with social causes, the most recent being the Coronavirus Awareness course, now used globally to help combat the disease - and Black Lives Matter - see <https://openelms.com/course-list/> - to increase awareness of this important issue in society and business.

Open eLMS believe that good quality learning can deliver real benefits in changing people's lives. Schools and colleges have been hit hard by the pandemic, with the private sector generally being more successful with greater resources at their disposal. To this end Open eLMS welcomes opportunities such as this one provided by the client to provide all its services and learning content free of charge. It is hoped that this will narrow the education gap in secondary education and allow all students to achieve their full potential.

TOMS Framework Value

The amount of training provided can have a real effect on lives, from increasing social mobility through improved education, to helping people getting on the employment ladder.

The amount of free training to the client is approximately 200 hours, should 1,000 of the client's customers take up this offer then the potential for social value is immense, TOMS Framework value calculates this as a £21,144,542 target contribution to social & local economic value.

Free the client Customer Portal

To add further social value, Open eLMS will offer to freely set up and host a customer facing portal where learning will be made freely available for the client's customers to encourage financial inclusion, teach life skills and give them skills to either get back to work or for self-improvement.

All the client customers will also be able to set up accounts for the revision of key GCSE and A Level subjects. Learning using the Netflix presentation style of Open eLMS is a valuable resource which will contribute to education attainment.

Free eLearning Courses

The following training will be supplied...

Educational Resources:

GCSEs:

- Art and Design
- Biology
- Business
- Chemistry
- Computer Science

- Design and Technology
- Economics
- English Language
- English Literature
- French
- Geography
- German
- History
- Mathematics
- Media Studies
- Music
- Physical Education
- Physics
- Religious Studies
- Spanish

A Levels:

- Art and Design
- Biology
- Business
- Chemistry
- Economics
- French
- Geography
- German
- History
- Mathematics
- Physics
- Psychology
- Spanish

Back to Work Training:

Job hunting series (Preparing for a job interview, Writing a CV) and more specifically learning programmes on ...

- Advertising and Media
- Creative Content
- Digital Marketing
- e-Learning Creation
- Junior Journalist
- Sales Practitioner
- Team Leader/ Supervisor

Financial Inclusion:

This learning will tell customers where they can get assistance when needed. The elearning includes:

Universal Credit Series (*What is Universal Credit, Universal Credit - Money Management and Responsibilities, Universal Credit - Working, Universal Credit - Self Employment, Universal*

Credit - Housing, Universal Credit - Children and Childcare, Universal Credit - Health Conditions and Disabilities)

Debt Relief Series (Introduction to Debt: StepChange Debt Charity, About Debt: StepChange Debt Charity, Referring a Tenant: StepChange Debt Charity, Housing Debt Case Studies: StepChange Debt Charity)

Tenant Housing Training (Home Ownership, Welfare Reform Tenants)

Increasing Social Inclusion through using Open eLMS

Open eLMS brings people together by allowing learners to post blogs which can be shared amongst the user groups. Ideas can also be raised on public forums and customers and staff can communicate through Zoom or Teams.

Environmental Benefits of Open eLMS Classroom

The Open eLMS Classroom service allows system users to conduct face to face training, toolbox talks and presentations without needing to travel to a training centre etc. This has huge benefits in reducing carbon emissions and energy costs surrounding running a training facility.

Sustainability Training

All employees undertake ISO 5001/ ISO 14001 training and attest to the company's Environment Policy which detail the company's Energy Management Policy (see e-LearningCompanyInformationAH20191204EnvironmentalPolicy.pdf).

Open eLMS is passionate about protecting the environment and adhering to its responsibilities to reversing climate change. In 2020 the company went paperless and continues to take measures to reduce its carbon footprint. Key KPIs which have significantly reduced in the last year are:

- Brochure expenditure
- Stationary expenditure
- Postage expenditure
- Mileage expenditure
- Face to face meetings

All suppliers are made aware of - and asked contractually to adhere to the company's code of conduct (eLearningWMBLU20210701CodeofConduct.pptx (1).pdf). Section 6.1 of the code sets out Open eLMS's environmental efforts.

Fair Work Practices

Please describe how you will commit to fair work practices for workers (including any agency or subcontractor workers) engaged in the delivery of this Contract.

Internal Measures

Simply put, at Open eLMS we are not in business to make a profit, instead we aim to make a difference. Our core values of honesty, fairness, and inclusion are inherent in what we supply and how we treat people (clients and employees).

Open eLMS walks the walk - we are committed to the fair working practices outlined within our code of conduct (linked from the company's website at <https://www.e-learningwmb.com/wp-content/uploads/2022/04/eLearningWMBLU20210701CodeofConduct.pptx.pdf>.)

Material difference made by the company include:

- Sustainability commitments (reducing carbon footprint through internal measures, subsidising green energy for employees, company scheme donating to related charities, etc.)
- Donations to local charities through sponsorship
- Suppliers are paid on the day of receiving invoices
- Generous bonus scheme and well above living wage for all employees
- Sizeable share ownership amongst most staff

These are real measures which demonstrate our commitment to fair working practices.

Suppliers

Open eLMS only employs one subcontractor from a long standing and trusted supplier. The supplier is signed up to the Responsible Business Alliance (RBA) Code of Conduct and the company's Ethical Purchasing Policy attached.

The subcontractor deals with development systems only and has no access to any Personally Identifiable Information as controlled by the company's password management system and Password Policy.

Both the Ethical Purchasing Policy and Password Policy are included in the appendices of this document.

Open eLMS is aligned to the SUSTAIN Supply Chain Code of Conduct and would be willing to attest to this document as part of any contractual obligation.

Employees own the business

Open eLMS is run for the benefit of its employees, where half the staff have significant shares in the business and all staff share in the profits of the business. Outside these numeration schemes, ALL staff get paid well in excess of the UK National Living Wage rates. This leads to high staff retention rates of good employees, with most employees having worked for the company in excess of 5 years.

Creation of quality jobs and training opportunities

Open eLMS believes in empowering its employees to be the best that they can be. The company has an internal training portal where employees are encouraged to improve their knowledge and learn new skills (<https://lms.e-learningwmb.co.uk/internaltraining/login>).

Open eLMS has a flat management structure which empowers all employees to make decisions and have ownership for their product areas. True to the ergonomics principles the company has been founded on, there are no cogs in wheels at Open eLMS - everyone is an integral machine in their own right!

Modern Slavery

Open eLMS supports the Modern Slavery Act (2015), regardless of its legal obligations (the company is not defined as a “relevant commercial organisation” under the act). A copy of the company’s Modern Slavery Policy is provided

(
https://docs.google.com/document/d/1IpFZ4Kjk8l9dH73ZKlwRAVnksExVeFd9_AHwzXHSeSY/edit?usp=sharing).

Open eLMS has a zero tolerance approach to any form of modern slavery. The company is committed to acting ethically and with integrity and transparency in all business dealings and to putting effective systems and controls in place to safeguard against any form of modern slavery taking place within the business or our supply chain.

Open eLMS has a responsibility to ensure, through our due diligence processes and so far as is possible, that workers are not being exploited, that they are safe and that relevant employment, health and safety, and human rights laws and standards are being adhered to, including freedom of movement and communication. If the company and its employees believe that these rules are not being adhered to, they will notify the relevant authorities.

All employees and suppliers (or products and services) must avoid any activity that may lead to a breach of this policy and should report any concerns immediately under the reporting procedure which is defined in the company policy. The prevention, detection and reporting of modern slavery in any part of Open eLMS’s business or supply chain, whether in the UK or abroad, is the responsibility of everyone working for Open eLMS. Any new supplier must be considered with regard to the qualifying questions on the Modern Slavery Checklist (provided as an addendum to the company’s Modern Slavery Policy). Should the supplier come from a location, engage in a business or provide certain raw materials, then a complete modern slavery response is required from the supplier.

Sustainability Overview

Open eLMS is a social enterprise, it is passionate about making a difference, not only those who work for the company, but for the wider community as a whole. To this end:

- All employees share in 20% of company profits at year end;
- The majority of employees are significant shareholders - committed to the long-term future of the company;

- The company supports its workers like no other, e.g. we have currently loaned two employees an amount to purchase their own homes at zero percent interest;
- Schemes are set up in the company to encourage contributions to carbon reduction charities;
- The senior management team are passionate about the power of learning and the good it brings to a wider community. Social inclusion projects, such as the one suggested in this proposal, are standard for large clients.

Open eLMS are aligned to the SUSTAIN Supply Chain Code of Conduct and would be willing to attest to this document as part of any contractual obligation.

Further information about how Open eLMS meets its sustainability commitments is detailed below.

Hosting

Sustainable Hosting practices including power management commitments

Open eLMS does not host the Open eLMS service directly, instead it hosts the service on the cloud using Microsoft Azure. A 2018 study (<https://www.microsoft.com/en-us/download/confirmation.aspx?id=56950>) found that using this cloud platform can be up to 93 per cent more energy-efficient and up to 98 per cent more carbon efficient than on-premises solutions.

Open eLMS selected this service over others largely due to its sustainable practices and commitments including:

- Practising zero deforestation from new construction
- A commitment to 100% renewable energy by 2025
- Water positive by 2030
- Zero waste by 2030

Within Open eLMS, the company uses Green energy suppliers (gas and electricity) where possible and offers subsidies for home workers where this is available.

Community Benefits

Community Benefits relevant to Client. Examples of community benefits can be found in Appendix L – Community Benefits Examples.

Open eLMS are passionate about the power that education has to *level the playing field* and encourage social mobility. Open eLMS can contribute to this goal by offering the Client a learning portal for the local community.

Open eLMS will **freely** set up and host a public facing portal where learning will be made available to encourage financial inclusion and teach life skills. This learning will either get people back to work or enable self-improvement.

This aligns with the client's requirements for Young Person Engagement and Educational Support.

People in the local community will be able to set up accounts for a variety of learning needs:

Carbon reduction

Carbon reduction operating practices

All employees are aware of the need to reduce carbon consumption, to this end they undertake ISO 5001 training and attest to the company's Environmental & Sustainability Policy (see Appendix for details).

Open eLMS is passionate about protecting the environment and adhering to its responsibilities to reversing climate change. In 2020, the company went paperless and continues to take measures to reduce its carbon footprint and work towards zero emissions (e.g., using a zero-emissions energy supplier for gas and electricity). KPIs which have significantly reduced in the last year are:

- Brochure expenditure
- Stationary expenditure
- Postage expenditure
- Mileage expenditure
- Face to face meetings

All suppliers are made aware of - and asked contractually to adhere to our code of conduct (see linked from the company's website at <https://www.elearningwmb.com/docs/eLearningWMBLU20210701CodeofConduct.pptx.pdf> at section 6.1). This section of the code sets out Open eLMS's environmental efforts.

Climate Change

four ways in which climate change could be addressed through the contract?

- 1) The Open eLMS Classroom service allows system users to conduct face to face training, toolbox talks, and presentations without needing to travel to a training centre, etc. This has huge benefits in reducing carbon emissions and energy costs surrounding running a training facility.
- 2) Open eLMS uses Azure Cloud with market leading carbon reduction policies (zero deforestation, 100% renewable energy by 2025, water positive and zero waste by 2030).
- 3) The company practices market leading environmental policy (including subsidising home working heating if using a totally green energy supplier).
- 4) Open eLMS are committed to reversing the effects of climate change, the company has set up a payroll giving scheme from which senior managers have committed up to 5% of their salary to carbon reduction charities.

Mitigation Measures

How you will manage/mitigate negative climate change impacts associated with the production, distribution, and disposal of the learning experience software?

Open eLMS commits, where possible, to use green energy providers. This does not leave a zero carbon footprint, as green energy is not used at all work locations due to lack of availability.

To this end, senior management contribute a proportion of their salary to carbon reduction projects through payroll giving. No analysis has been carried out to quantify this, but it is pretty certain that such offsetting activities would produce a new zero carbon footprint of the company as a whole. Plans exist to audit the company's carbon footprint in Q2 2022.

Sustainability measures

Carbon dioxide reducing company

Open eLMS is a net carbon reducer and to this end offset the carbon via donations to a tree planting scheme. The company has set up a scheme to plant trees to offset 5,000 Kg of carbon every month (far and above the 2,984Kg emitted by the business in 2021).

This gives an estimate of Open eLMS a Carbon Dioxide Removal (CDR) of 24,192 KgCO₂/y.

Open eLMS Classroom- Intrinsically sustainable!

The Open eLMS Classroom service allows system users to conduct face to face training, toolbox talks, and presentations without needing to travel to a training centre, etc. This has huge benefits in reducing carbon emissions and energy costs surrounding running a training facility.

Minimising environmental impact

Open eLMS is passionate about protecting the environment and adhering to its responsibilities to reversing climate change. In 2020, the company went paperless and continues to take measures to reduce its carbon footprint. KPIs which have significantly reduced in the last year are:

- Brochure expenditure
- Stationary expenditure

- Postage expenditure
- Mileage expenditure
- Face to face meetings

Suppliers

Open eLMS uses Azure Cloud with market-leading carbon reduction policies (zero deforestation, 100% renewable energy by 2025, water positive, and zero waste by 2030).

All suppliers are made aware of - and asked contractually to adhere to - the company's code of conduct (a copy of which is on the company's website - <https://www.e-learningwmb.com/wp-content/uploads/2022/04/eLearningWMBLU20210701CodeofConduct.pptx.pdf>). Section 6.1 of the code sets out Open eLMS's environmental efforts.

EMS

Open eLMS has implemented an Environment Management System (see Environmental Policy for details) and has made plans to gain ISO14001 certification within 6 months of being awarded this contract.

A copy of the company's Carbon Footprint reduction certificate has been provided (<https://drive.google.com/file/d/1o7XPMz4Ww-sAR3DSrGcaVbqGuWMPcS2J/view?usp=sharing> .)

Internal training

All employees undertake ISO 5001/ ISO 14001 training and attest to the company's Environment Policy which details the company's Energy Management Policy.

ED&I Policy

Please detail how your organisation will advance ED&I through the life of this Contract. Your response should include:

A copy of the ED&I, or equivalent policy/policies.

A copy of Open eLMS's Equality and Diversity Policy is provided in Appendix 1. It meets the requirements specified in the Appendix K - Response Guidance -ED&I LXP V01.

ED&I Data Monitoring

Equality monitoring: How and why applicant and staff equality data is monitored and for which characteristics; together with how data is used to make improvements and results are communicated to relevant stakeholders.

At Open eLMS, diversity is better than average for an IT company with nearly half of all workers identifying as coming from an ethnic minority and 2 senior managers being female. It is accepted though that more needs to be done.

Before every interview, an anonymised monitoring questionnaire is emailed to the candidate to record their personal characteristics. This data will be used to analyse objectively the fairness of the selection process. This form collects data on Ethnicity, Gender, Sexual Orientation, Age, Disability, and Religion. This form is also sent out to any staff who require it to update their information held on file.

The equality and diversity data is communicated to Open eLMS's board annually via its managing director and part of the company's annual report to shareholders. This information is designed to affect policy and drive change within the organisation.

EDI, Accessibility and Neurodiversity and system development/design

Open eLMS's products are designed by an ergonomist who adopts a role based approach to the design of the Open eLMS learning systems. This approach involves designing systems which cater for the diverse needs of any target audience. The following measures are taken to ensure no group feels marginalised by the provision of the Open eLMS suite of products and services:

- * All learning content in the Open eLMS Catalogue is vocalised by video presenter or voiceover.
- * AI is used to provide voiceover for elearning created by Open eLMS Creator.
- * The Open eLMS Catalogue is audited for ethnic diversity and gender to ensure actors used represent the ethnice diversity and a balance of men and women found in the wider society.
- * Open eLMS is built with adaptable frameworks which allow comfortable performance on both computers and mobiles.
- * An accessible version of the system can be switched on/off by each user. This removes blending options and background images which can make it harder for the visually impaired to read the screen.
- * A dyslexic version of the Open eLMS system can also be enabled by the learner, which inverts the main colours in the system so the users can read white text on a black background (this has been found to assist most dyslexic readers.)
- * The Open eLMS system goes through an internal accessibility audit every 6 months and an external accessibility audit annually for computers and mobile devices (provided by Ten10 - [eLearningWMB20220401Ten10AccessibilityAuditReportv2.0.pdf](#) .) Both audits sign off against WCAG 2.1 at conformance level AA.

EDI in the company

Open eLMS has an active Equality and Diversity policy and monitors equality in the organisation on an annual basis which makes up part of the company's annual report to shareholders.

ED&I & the Supply Chain

How ED&I is managed within your supply chain, including contractual conditions with your tier 1 suppliers

All third party suppliers attest to Open eLMS's ethical purchasing policy, which states that "Participants should be committed to a workplace free of harassment and unlawful discrimination. Companies shall not engage in discrimination or harassment based on race, color, age, gender, sexual orientation, gender identity and expression, ethnicity or national origin, disability, pregnancy, religion, political affiliation, union membership, covered veteran status, protected genetic information or marital status in hiring and employment practices such as wages, promotions, rewards, and access to training. Workers shall be provided with reasonable accommodation for religious practices. In addition, workers or potential workers should not be subjected to medical tests, including pregnancy or virginity tests, or physical exams that could be used in a discriminatory way".

Open eLMS visits every supplier where reasonably practicable, if this is not possible, it seeks references as to the working conditions and its commitment to sustainability, ED&I, etc.

A copy of this document can be found in Appendix 2. Please note Open eLMS only employs one subcontractor from a long standing and trusted supplier. The supplier is signed up to the Responsible Business Alliance (RBA) Code of Conduct in the company's Ethical Purchasing Policy. This is embedded into the contract with the company - Cubet (<https://cubettech.com>).

Open eLMS are aligned to the SUSTAIN Supply Chain Code of Conduct and would be willing to attest to this document as part of any contractual obligation.

Wellbeing

Open eLMS provides support for the mental well being for its staff and clients. The company provides a free course on Mental Wellbeing and Mindfulness (available at <https://openelms.com/portfolio/mental-wellbeing-and-mindfulness/>).