

Accipio

TOTARA

Learn + Perform: G-Cloud Service Definition

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SERVICE OVERVIEW

To Whom It May Concern,

We are delighted to submit our **Totara G-Cloud 15 Service Definition** and introduce Accipio as your potential learning technology partner.

Accipio delivers a fully managed Totara solution, tailored for ambitious organisations seeking to transform onboarding, compliance, learning, and performance at scale. As a **Totara Platinum Alliance Partner**, we combine deep learning platform expertise with award-winning innovation to provide a secure, scalable, and future-ready learning management system.

Our service leverages the power of Totara Learn (and/or Perform) —**enhanced by AccipioOne**, our exclusive suite of enterprise-grade plugins—to offer unrivalled capabilities in **reporting, automation, compliance tracking, performance management, and learner engagement**.

Hosted securely on **Amazon Web Services (AWS)** and backed by **rapid-response support** (with an average response time under 10 minutes), our end-to-end solution includes platform design, configuration, training, content integration, and ongoing optimisation. Whether you're migrating from another LMS or launching your first digital learning initiative, **Accipio provides the tools, experience, and partnership to help you succeed**.

This service is available via the **G-Cloud 15 Framework** and is ideal for public sector bodies, enterprises, and training providers seeking a cost-effective, powerful, and extensible platform that grows with their needs.

We're trusted by major organisations such as **PepsiCo, the Premier League, UCAS**, and **several UK government departments**. Our clients benefit from:

- **Unrivalled support** (<10-minute response times over the last 3 years)
- ISO 27001, ISO 9001, and Cyber Essentials Plus certifications
- Unlimited storage and UK-based secure hosting
- A highly responsive, expert team and a roadmap driven by client needs

If you'd like to explore how we've delivered measurable results for organisations like yours, please browse our client success stories:

www.accipio.com/case-studies

We hope this proposal meets your needs and we'd welcome the opportunity to work together.

Warm regards,

The Accipio Team

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WHY CHOOSE ACCIPPIO

At Accipio, we don't just implement learning platforms—we build powerful, scalable ecosystems that transform how organisations engage, train, and empower their people.

We are a Totara Platinum Partner, trusted by global organisations such as PepsiCo, the Premier League, UCAS, the Cabinet Office, DHSC, and the Chartered Insurance Institute. Our combination of cutting-edge innovation, service excellence, and deep platform expertise makes us a partner of choice for ambitious organisations.

Here's why leading brands choose Accipio:

Proven Expertise

- Over a decade of experience in learning platform implementation and support.
- Delivered platforms for organisations with 500,000+ users.
- Trusted by household names in corporate, government, education, and non-profit sectors.

Unlimited Rapid Support

- Access to world-class support with responses in under 10 minutes.
- Most tickets are resolved within 24 hours.
- Our team acts as an extension of your internal team, offering proactive solutions and genuine partnership.

AccipioOne – Unrivalled Platform Extensions

- Our award-winning plugin suite, AccipioOne, is the most advanced extension framework for Moodle and Totara.
- Includes tools for:
 - Diagnostics & 360° feedback
 - Apprenticeship and CPD tracking
 - IV/EV and qualification grading
 - TMS, eCommerce, social learning, and more
- Built over 7 years with 1m+ lines of proprietary code to solve real-world learning challenges.

Beautiful, Functional Design

- Our exclusive Ignite theme delivers a visually stunning, fully responsive platform with hundreds of configurable settings.
- Designed for accessibility (WCAG 2.2 AA), usability, and total brand alignment.

Deep Customisation Capability

- One of the largest Moodle/Totara development teams in the UK.
- Experts in developing bespoke features, integrations, and workflows.
- Our robust agile development and QA processes ensure features are delivered on time, to spec, and fully tested.

Enterprise-Grade Hosting & Security

- Hosted on AWS, optimised for Moodle and Totara.
- Unlimited storage and 99.95%+ uptime.
- Fully compliant with ISO 27001, ISO 9001, Cyber Essentials Plus, and GDPR.
- Suitable for government, healthcare, and high-security environments.

Unmatched Added Value

- Free quarterly upgrades and platform reviews
- Access to 1,000+ curated eLearning modules (extra cost)
- Quarterly innovation workshops
- Ongoing roadmap alignment and strategic planning

Whether you're launching a new learning platform or optimising an existing one, Accipio offers the experience, tools, and ongoing support to ensure long-term success. We don't just deliver software—we deliver transformation.

CORE TOTARA LEARN FEATURES

Totara Learn is a powerful, flexible learning management system designed to support compliance, capability building, and performance improvement across large, complex organisations. Combined with **Totara Engage**—the Learning Experience Platform (LXP) module—it enables continuous learning, collaboration, and knowledge sharing, empowering learners to take charge of their development in a modern, social-first environment.

Delivered by Accipio's expert team and enhanced by our **AccipioOne plugin suite**, this combined platform becomes a dynamic, scalable solution for both formal and informal learning.

Programmes & Certifications

- Build structured **learning pathways** combining courses, activities, events, and evidence.
- Automate enrolment, sequencing, completion tracking, and re-certification logic.
- Ideal for compliance, onboarding, and CPD across regulated or complex environments.

Audience Management & Dynamic Rules

- Deliver learning to specific **audiences** based on user profile data.
- Use **dynamic rules** to trigger enrolments, emails, reminders, and goal creation.
- Drive **personalised learning experiences** and reduce administrative effort.

Organisational Hierarchies & Roles

- Reflect organisational structure with built-in hierarchies.
- Empower managers with visibility and control over their teams' learning and performance.
- Automate learning plans and dashboards based on role or position.

Multi-Tenancy & Delegated Administration

- Partition the platform by business unit, department, or external client.
- Each tenant can have its own branding, catalogue, reporting, and admin permissions.
- Perfect for enterprise-wide rollouts or training provider models.

Custom Reporting & Dashboards

- Totara's report builder provides drag-and-drop, real-time insights.
- Filter by department, region, role, or custom fields.
- Dashboards tailored for learners, managers, and exec stakeholders.
- Auto-schedule reports to meet compliance or strategic needs.

Competency & Performance Management

- Map competencies to job roles and track progress.
- Integrate with learning plans, appraisals, and development goals.
- Leverage **Accipio Diagnose** for advanced 360° feedback and gap analysis.
- Extend with Totara Perform for formal performance management and appraisals.

Seminar & Blended Learning Management

- Integrated seminar tools for classroom, webinar, and event scheduling.
- Manage capacity, locations, sign-ups, and waitlists.
- Automate communications and attendance logging.

Mobile-Ready Learning

- Fully responsive across all modern browsers and devices.
- Optional **Totara Mobile App**, branded for your organisation.
- Offline access to content and courses.

Compliance, CPD & Audit Trails

- Certification tracking with auto-expiry and renewal notifications.
- CPD logs and structured evidence submission workflows.

- Comprehensive audit trails and governance-friendly reporting.

Totara Engage – Learning Experience Platform

- Empower users to discover, share, and recommend resources and playlists.
- **Collaborative workspaces** for team and project learning.
- Social learning tools including likes, shares, and comments.
- **AI-driven recommendations** for personalised learning paths.
- **Microlearning support**, surveys, and learner-generated content.

Totara Engage brings a modern, consumer-grade LXP experience to your learning platform—**increasing learner engagement, knowledge sharing, and collaboration** across the organisation.

When delivered by Accipio, these features are enhanced with:

- Our **AccipioOne plugin suite** for diagnostics, CPD, TMS, and eCommerce
- Full implementation, theming, training, and support
- AWS hosting and ISO-certified security
- A roadmap driven by client feedback and public sector needs

Together, Totara Learn + Engage + Accipio = a flexible, intelligent, and future-ready learning ecosystem.

CORE TOTARA PERFORM FEATURES

Totara Perform is a flexible performance management system that helps organizations enhance employee growth through goal setting, real-time feedback, appraisals, and competency tracking. It supports both traditional and continuous performance management processes, enabling organizations to align individual performance with business objectives .

Goal Setting & Alignment

- **SMART Goal Frameworks:** Define Specific, Measurable, Achievable, Relevant, and Time-bound goals.
- **Goal Cascading:** Align individual goals with team and organizational objectives.
- **Progress Tracking:** Monitor goal achievement through real-time dashboards.

Continuous Feedback & Check-Ins

- **Regular Check-Ins:** Facilitate ongoing conversations between managers and employees.
- **Multi-Source Feedback:** Collect insights from peers, subordinates, and supervisors.
- **Feedback Loops:** Encourage a culture of continuous improvement and development.

Appraisals & Performance Reviews

- **Customizable Appraisal Forms:** Tailor review templates to fit organizational needs.
- **Automated Scheduling:** Set up periodic reviews with reminders and notifications.
- **Integrated Learning:** Link performance outcomes to learning and development plans.

Competency Management

- **Competency Frameworks:** Define and manage the skills and behaviors required for each role.
- **Assessment Tools:** Evaluate competencies through self-assessments, manager reviews, and evidence collection.
- **Gap Analysis:** Identify skill gaps and recommend targeted learning interventions.

Advanced Reporting & Analytics

- **Performance Dashboards:** Visualize individual and team performance metrics.
- **Custom Reports:** Generate reports based on various criteria, such as department, role, or competency.
- **Data-Driven Insights:** Use analytics to inform talent management and succession planning.

Integration & Scalability

- **Seamless Integration:** Connect with Totara Learn and Engage for a unified Talent Experience Platform.
- **Third-Party Systems:** Integrate with HRIS, payroll, and other enterprise systems.
- **Scalable Architecture:** Support organizations of all sizes, from SMEs to large enterprises.

Mobile Accessibility

- **Responsive Design:** Access performance management tools on any device.
- **Mobile App Support:** Conduct check-ins, provide feedback, and review goals on the go.

By implementing Totara Perform, organizations can foster a high-performance culture that adapts to changing business needs, supports employee development, and drives organisational success.

ACCIPIOONE PLUGIN SUITE

To unlock the full potential of Totara, every Accipio implementation includes access to AccipioOne—our exclusive, enterprise-grade suite of plugins that extend and enhance the platform’s core functionality.

Developed over the past seven years and comprising more than 1m lines of code, AccipioOne addresses real-world challenges like compliance tracking, personalisation, monetisation, diagnostics, and CPD management. These tools are fully integrated, continuously updated, and backed by Accipio's ISO-certified development and support processes.

Learning, Performance & Diagnostics

- Accipio Diagnose

Run 360° diagnostics and skills gap analysis to personalise learning journeys and map development needs.

- Accipio Grade

Manage internal and external verification (IV/EV) processes for qualifications. Ideal for regulated assessments and apprenticeship frameworks.

- Accipio Apprentice

Support end-to-end apprenticeship and qualification delivery with progress tracking, funding milestones, evidence collection, and mentor engagement.

CPD, Compliance & Accreditation

- Accipio CPD

Track, log and report on CPD activity. Includes expiry reminders, manager sign-off, dashboards, and automated CPD portfolios.

- Accipio Compliance

Advanced compliance visualisation across the organisation.

Management Tools & Workflow Automation

- Accipio TMS

A full-featured Training Management System with booking, approvals, budgets, and calendar integration.

- Accipio Projects

Manage benefits, learning-linked initiatives, and project progress with integrated dashboards and reporting.

- Accipio CMS

Manage content centrally via elements that can be reused and updated and completed centrally.

eCommerce & External Engagement

- Accipio Shop

Native eCommerce functionality including course catalogues, discount codes, payments (Stripe etc.), and event bookings. Subscriptions to even selling access to a certificate or resit.

- Accipio Nexus

SCORM licensing and tracking across external organisations or clients.

User Experience & Personalisation

- Accipio Discover

Curated playlists, content recommendations, and custom dashboards for a modern LXP-style experience. Content curation tool that pulls insights into the LMS.

- Accipio Rank

Built-in SEO tools to improve visibility of your course library, especially for public-facing sites.

- Accipio Coach

AI-assisted coaching and development recommendations.

- Accipio Motivate

Intelligent nudges, gamification, and recognition features to boost engagement.

Design & Visual Experience

- Ignite Theme

Our best-in-class theme for Moodle and Totara, with 100s of visual settings, mobile optimisation, accessibility compliance, and full brand alignment.

KEY BENEFITS

- Seamless integration with Totara
- Modular: choose what you need, switch off what you don't
- Continuously updated with security and feature enhancements
- Designed to improve learner outcomes, reduce admin burden, and unlock revenue opportunities

With AccipioOne, your Totara site becomes more than an LMS—it becomes a strategic enabler for learning, performance, and organisational growth.

IMPLEMENTATION & PROJECT APPROACH

At Accipio, we believe that technology should adapt to your organisation—not the other way around. Our implementation process is built on deep experience, clear communication, and agile delivery, ensuring your Totara platform is launched smoothly, securely, and to specification.

We apply a proven methodology to each implementation, tailored to your specific goals, timelines, and internal resources.

Our Implementation Phases

1. Discovery & Planning

- Define success criteria and KPIs
- Review current systems, users, and learning structures
- Map organisational hierarchy, roles, and reporting lines
- Agree on branding, configuration preferences, and timelines
- Produce a detailed project plan and risk register

2. Platform Setup & Configuration

- Deploy Totara on high-performance AWS hosting
- Set up multi-tenancy, organisational hierarchies, user roles, and permissions
- Install and configure AccipioOne plugin suite
- Apply theming (Ignite) and brand styling

3. Content Migration & Integration

- Import existing SCORMs, courses, programmes, or user data
- Connect with key systems (SSO, HRIS, CRM, finance)
- Configure enrolment rules and dynamic workflows
- Set up reporting dashboards and scheduled outputs

4. Training & UAT (User Acceptance Testing)

- Deliver role-specific training for admins, managers, and course creators
- Provide sandbox access and walk-throughs for key users
- Facilitate UAT with support for issue tracking and sign-off

5. Launch & Post-Go-Live Support

- Go-live with full support coverage during launch window
- Hypercare period with rapid-response troubleshooting
- Named project team remains involved for handover and transition

Project Management Approach

- Agile methodology: Iterative development with regular sprint reviews
- Named Project Manager: Your single point of contact
- Transparent progress tracking: Shared task boards, weekly updates
- Collaborative tooling: Teams, Asana, or your preferred tools
- Change control: Managed through clear, documented processes

Communication & Engagement

- Weekly or fortnightly progress calls during implementation
- Online collaboration spaces for asset sharing and tracking
- Quarterly strategy sessions post-launch to support long-term success

Typical Timelines

Phase	Duration (Indicative)
Discovery & Planning	1–2 weeks
Setup & Configuration	2–3 weeks
Migration & Integration	2–4 weeks (if required)
Training & UAT	1–2 weeks
Go-Live & Hypercare	1 week
Total	~6–10 weeks

Accelerated timelines available for smaller projects or urgent go-lives.

What You Get

- Expert-led, white-glove setup
- Flexible delivery model (remote, hybrid, or onsite)
- Risk-managed go-live with fallback plan
- Long-term roadmap support and optional phased enhancements

TRAINING & ONBOARDING

We understand that even the best platform won't succeed without confident, capable users. That's why we place as much emphasis on training and onboarding as we do on configuration and technology.

Our onboarding process is designed to empower your administrators, managers, and learners, ensuring everyone can hit the ground running and get the most out of your Totara platform from day one.

Tailored Training Programmes

We offer a blended training model, combining live delivery with self-paced resources:

Administrator Training

- Full walkthrough of system configuration and admin tools
- Managing users, roles, audiences, and hierarchies
- Reporting, analytics, and compliance tracking
- Maintaining and extending the platform post-launch

Manager Training

- Assigning and monitoring learning
- Using dashboards and reports
- Running team compliance and performance reviews

Course Creator Training

- Creating and curating courses, programmes, and certifications
- Best practices for SCORM, assessments, media, and accessibility
- Managing enrolments, badges, certificates and activities

Learner Induction (Optional)

- Self-serve orientation and walk-throughs
- Video guides, FAQs, and in-platform "user tours"
- Customisable support resources and helpdesk guides

What's Included

- Bespoke training tailored to your structure and roles
- Live sessions
- Video recordings for reuse and onboarding at scale
- Continuous access to Accipio's help centre and knowledge base

Onboarding Highlights

- User tours for intuitive walkthroughs

- Train-the-trainer options to build internal capability

Ongoing Learning & Development

Post-launch, your team benefits from:

- Quarterly strategy and knowledge-sharing workshops
- Platform roadmap updates and release overviews
- Optional refresher sessions or deep-dives into new features

Our training ensures that Totara becomes more than a tool—it becomes part of your organisation’s learning culture, with confident users who are empowered to make it a success.

SUPPORT & MAINTENANCE

At Accipio, support isn’t just a safety net—it’s a core part of the value we deliver. We are proud to offer what is widely considered the best Moodle and Totara support in the world, with meaningful responses in under 10 minutes and most tickets resolved within 24 hours.

Our support team acts as an extension of your organisation, ensuring your platform runs smoothly, your users stay supported, and your team feels confident every step of the way.

Unlimited Rapid Support

- 10-minute average response time over the last 3 years
- 24/7 monitoring and alerting
- Unlimited support tickets included
- Available via email, phone, and dedicated support portal
- Named support team with escalation path

Dedicated Named Contacts

- Project Manager: Manages onboarding, configuration, and rollout
- Solutions Architect: Advises on technical strategy and innovation
- Lead Developer: Responsible for customisations and plugin integrations
- Support Specialist(s): Day-to-day troubleshooting and issue resolution

What We Support

- Totara platform issues
- AccipioOne plugin support
- Hosting infrastructure (if hosted by Accipio)
- Admin tasks (roles, enrolments, reports, etc.)
- Course setup and best practice advice

- Troubleshooting integrations (SSO, HRIS, CRM, etc.)

Service Level Agreement (SLA)

Priority	Description	Target Response	Target Resolution
P1 – Critical	Platform inaccessible or major service failure	< 30 mins	< 2 hours
P2 – Major	Key functionality broken or severely degraded	< 60 mins	< 4 hours
P43 – Low	Functional issues, queries, cosmetic bugs	< 8 hours	< 1 business day

All times based on business hours: Mon–Fri, 08:30am–5:30pm UK time.
Emergency and 24/7 support available for hosted clients.

Support Extras

- Ticket summary reports via ZenDesk
- Access to knowledge base and how-to guides
- Release notes and plugin updates
- Monthly service review (optional extra)

Secure Ticket Handling

- ISO 27001/9001 and Cyber Essentials Plus compliant
- GDPR-aligned data handling and user access logs
- Secure client file transfer and data sanitisation

With Accipio, you're not just buying software—you're gaining a responsive, expert support partner committed to your long-term success.

HOSTING, SECURITY & INFRASTRUCTURE

Accipio provides robust, secure, and scalable hosting for Totara via Amazon Web Services (AWS). Our infrastructure is optimised specifically for Moodle and Totara environments, delivering industry-leading speed, uptime, and security for clients with even the most demanding requirements.

We manage everything—hosting, performance, backups, monitoring, and patching—so you can focus on delivering learning, not managing servers.

Enterprise-Grade Hosting

- Hosted on AWS – industry-standard cloud infrastructure with high performance and global resilience.
- Optimised for Moodle/Totara – environment designed by specialists to ensure high-speed delivery and database performance.
- Elastic scaling – automatically handles spikes in traffic or concurrent users.
- Unlimited storage – included as standard in all packages.
- Uptime guarantee – 99.99%+ with real-time monitoring and SLA tracking.

Security & Compliance

We understand the importance of information security, especially in regulated sectors like government, healthcare, and education.

- ISO 27001 – Certified for Information Security Management
- ISO 9001 – Certified for Quality Management
- Cyber Essentials Plus – Government-backed UK cybersecurity certification
- GDPR-compliant – All user data stored and processed in accordance with UK and EU data laws
- Secure by design – Regular penetration testing, threat modelling, and patching policies

Data Protection & Backups

- Daily automated backups stored securely and retained for a minimum of 30 days
- Optional disaster recovery and hot standby environments for business continuity
- Redundant architecture with no single points of failure
- Fully encrypted storage and SSL-enabled connections for all platform traffic

Data Residency Options

We offer a choice of data hosting locations to align with client policy and compliance needs:

- UK only
- UK + EU
- Other regions available upon request

System Monitoring & Maintenance

- 24/7 performance and availability monitoring
- Proactive alerts for downtime, latency, and system load
- Quarterly upgrades included (minor and security releases)

- Zero-downtime updates where possible
- Maintenance windows scheduled in advance and agreed with clients

Integration & Interoperability Support

Our hosting environment is preconfigured to support integrations with:

- Identity management (SSO, LDAP, SAML, Azure AD)
- HR systems, CRM, payment gateways
- Secure API-based integrations with internal systems

Our AccipioConnect framework makes integration simple.

With Accipio's secure, certified infrastructure, your Totara platform will be fast, reliable, scalable, and secure from day one—with the assurance that your data and your users are protected to the highest standards.

MIGRATION & OFFBOARDING

At Accipio, we make it easy to move onto our Totara platform—and just as importantly, we make it easy to move off if needed. Whether you're switching from another LMS or exiting at the end of your contract, we follow a transparent, structured approach to data migration and transfer.

Migration to Accipio

We have extensive experience migrating data from legacy systems, other Moodle/Totara installations, or non-Moodle platforms.

Our migration process includes:

- Discovery workshop to assess your current platform and data structures
- Mapping of users, courses, completions, hierarchies, certifications, and roles
- Content audit and clean-up (optional)
- Secure transfer of data in MBZ, CSV, or direct DB formats
- Testing in a staging environment before go-live
- Documentation of the migration process and final structure if required

We use automated migration tooling and custom scripts to streamline the process, reduce errors, and speed up transition timelines.

Offboarding Process

Should you choose to leave Accipio, we ensure a smooth and secure transition to your new provider or internal team.

What's included:

- Full export of Totara database (SQL format)
- Export of all files, logs, content, and user data (data folder). This includes transfer of SCORM packages.
- Transfer of custom plugins and reports that have been built exclusively for you
- Uninstallation or deactivation of AccipioOne plugins (if required)
- Handover documentation and support available during the transition period
- Data deletion on request, in line with GDPR

Data Transfer Standards

- All data transfers are encrypted (SFTP)
- Clear chain-of-custody procedures
- Formal sign-off and verification at each stage

Support During Transition

- A dedicated project manager will oversee the entire exit process
- We provide up to 30 days of exit support after contract end (optional extra)
- Option to extend support for a handover overlap period if required

Client Data Ownership

- You retain full ownership of all data throughout your contract
- No proprietary lock-in—platform is open source, extensible, and portable
- Any custom developments built specifically for you can be retained, reused, or transferred (subject to licensing)

Our migration and offboarding policies reflect our commitment to transparency, openness, and long-term partnership—whether you're starting with us or moving on.

PRICING & COMMERCIALS

Our pricing model is transparent, scalable, and designed to offer exceptional value across organisations of all sizes—from startups to large enterprises and public sector bodies.

We offer a range of packages to suit your needs, with all core Totara functionality and some AccipioOne plugins included as standard.

Our fees can be found in G-Cloud pricing document.

Included as Standard

- Totara (core platform)
- Hosting (AWS, UK/EU data centres)
- AccipioOne plugin suite (some free access)
- Implementation & configuration
- Branding and theme setup (Ignite theme)
- Unlimited support (with <10 min response time over the last 3 years)
- Upgrades (quarterly)
- Daily backups & disaster recovery
- Quarterly strategy and innovation workshops
- Access to 1,000+ curated eLearning modules (extra charge)

Payment Terms

- Standard payment terms: Net 30 days
- Multi-year agreements available (up to 4 years via G-Cloud)
- Annual billing (or split by agreement)
- All pricing excludes VAT

How to Buy

This service is available via:

- G-Cloud 15 Framework
- Direct award through the Digital Marketplace
- Support with internal procurement forms and business cases is available upon request

Notes

- All costs are capped and fixed for the contracted period unless changes are agreed via a formal change control process.
- We offer flexible pricing reviews for usage growth or major platform extensions.

CUSTOMER RESPONSIBILITIES

To ensure the successful delivery and ongoing performance of your Totara platform, we work closely with your team throughout the project lifecycle. While Accipio provides a fully managed service, there are some key responsibilities that rest with the customer to ensure efficiency, clarity, and impact.

During Implementation

- Project Sponsorship & Stakeholders

Assign a primary sponsor and key stakeholders who can provide timely decisions, sign-offs, and feedback.

- Internal Communications

Notify relevant teams about the implementation timeline, changes, and roles—particularly IT, HR, and L&D teams.

- Content Readiness

Supply existing training materials, SCORM packages, policies, and other learning content for migration or upload.

- Access to Systems

Where integrations are required (e.g. HRIS, SSO), provide sandbox/test credentials and relevant API or documentation access.

- User Structure & Data

Share required organisational hierarchies, reporting lines, role definitions, and learner demographics for setup.

Post Go-Live / Ongoing

- Internal Support Routing

Nominate super users or administrators to act as a first line of support internally (we provide training for these roles).

- Change Management

Drive user adoption through internal promotion, feedback loops, and onboarding communications. Accipio will support with guides and training materials.

- Data Protection Compliance

Ensure all user data provided complies with relevant privacy and GDPR policies. We support with DPIAs and can act as a data processor under your instructions.

- User Permissions Management

Maintain day-to-day control over staff permissions, enrolments, and compliance recordkeeping (unless managed by Accipio as part of a full admin service).

What We Expect from You

Responsibility Area	Customer Role
Project Leadership	Provide internal coordination and decisions
Content Ownership	Supply source materials, approve any edits
User Data & Structure	Share required files for initial configuration
System Access	Enable access to systems for integration
Internal Admin	Maintain learner and manager records

Accipio will guide and support you throughout the process—but successful implementation is a partnership. We bring the tools, expertise, and support; you bring the context, people, and strategy. Together, we'll make your Totara deployment a long-term success.

TECHNICAL REQUIREMENTS

Accipio's Totara solution is designed to be intuitive, accessible, and low-maintenance from a technical standpoint. While we manage all hosting, security, and infrastructure elements as part of our fully managed service, there are a few basic technical requirements to ensure a seamless experience for your users and administrators.

Internet Access

- Totara is a cloud-based platform accessed via any modern web browser.
- A reliable internet connection is required for learners and administrators.

Supported Browsers

We recommend using the latest version of any of the following:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge
- Apple Safari

⚠ Internet Explorer is no longer supported.

Device Compatibility

The platform is fully responsive and accessible across:

- Desktop (Windows, macOS, Linux)
- Tablets (iOS, Android)
- Smartphones (iOS, Android)
- Optional branded mobile app available via Apple App Store and Google Play

User Access & Authentication

- Browser-based login (HTTPS) with optional Single Sign-On (SSO) integration
- We support:
 - Microsoft Azure AD
 - Google Workspace
 - LDAP
 - SAML2
 - Custom authentication flows via API

File & Content Upload

Administrators and course creators can upload:

- SCORM packages (1.2 / 2004)
- PDF, DOCX, PPTX, XLSX files
- Video and audio content (MP4, MP3)
- Embedded media via YouTube, Vimeo, etc.

Accessibility Compliance

- Full compliance with WCAG 2.1 AA
- Compatible with screen readers and keyboard navigation
- Optional accessibility testing and customisation services available

Optional Integration Points

For enhanced functionality, using AccipioConnect, we can integrate with:

- HR Systems (e.g. SAP, Oracle, iTrent, Workday)
- CRMs (e.g. Salesforce, Dynamics)
- Payment gateways (e.g. Stripe, GOV.UK Pay, PayPal)
- Content libraries (e.g. LinkedIn Learning, Go1, OpenSesame)

Admin Device Requirements

No software installation is required. Admins need:

- A standard web browser
- Stable internet connection
- Basic Excel or CSV capability for bulk uploads (optional)

Accipio's solution is designed to minimise your internal IT overhead, while maximising scalability, security, and ease of use.

ACCESSIBILITY

At Accipio, accessibility is not just a compliance checkbox—it's a core design principle. We believe that every learner, regardless of ability, should have full, equal access to the tools, content, and features of your learning platform.

Our Totara implementations are configured and tested to meet Web Content Accessibility Guidelines (WCAG) 2.1 AA standards by default, and we provide additional support and enhancements for organisations with specific accessibility needs.

Accessibility Features

- Fully responsive design for all screen sizes
- Semantic HTML for compatibility with screen readers
- Keyboard navigation and skip links
- High-contrast themes and adjustable font sizing
- Accessible forms, buttons, and inputs
- Descriptive alt text and aria labels for assistive technology
- Support for captions, transcripts, and audio descriptions

Theme & Plugin Compliance

- Our Ignite theme is built with accessibility baked in, regularly updated to meet WCAG 2.1 AA
- AccipioOne plugins follow strict accessibility coding practices, including markup and tab order logic

Custom Accessibility Enhancements

We offer tailored options such as:

- Additional accessibility audits using screen reader software (NVDA, JAWS, VoiceOver)
- Custom theming for specific visual/colour needs
- Alternative navigation layouts for cognitive or motor impairments
- Helpdesk support for learners requiring additional assistance

Legal & Policy Compliance

- Aligned to Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018
- Meets UK and EU Equality Act standards
- Accessibility statements can be configured on your platform
- Optional accessibility statement writing support provided

Inclusive Content Support

- Guidance and training on creating accessible learning content
- Review of third-party SCORM packages for accessibility compliance
- Help with video captioning, transcripts, and image descriptions

Accessibility is a shared responsibility—Accipio handles the platform, and we'll work with your team to ensure content and user experiences meet your learners' needs.

TRIAL ACCESS & DEMONSTRATION

We believe seeing is believing. That's why Accipio offers guided demonstrations and optional trial access to help you fully explore Totara and the power of our AccipioOne plugin suite—before making any commitment.

Live Demonstration

We provide personalised, hands-on demonstrations tailored to your specific use cases, audience, and goals.

What's included:

- End-to-end walkthrough of Totara functionality
- Showcasing multi-tenancy, automation, certifications, and reporting
- Deep dive into AccipioOne plugin capabilities
- Q&A session with our solutions consultants
- Recording available on request for internal distribution

Live demos can be scheduled via Microsoft Teams or your preferred platform.

Trial / Sandbox Access (Optional)

We also offer temporary access to a branded sandbox environment for deeper evaluation.

Trial Access Includes:

- Pre-loaded test users and content

- Sample certifications, reports, and dynamic rules
- Access to selected AccipioOne features
- Admin and learner views
- Optional guided tour overlay for orientation

⚠ Sandbox trials are time-limited (typically 14–30 days) and subject to a brief scoping discussion to ensure relevance and data security.

Request a Demo or Trial

To request a live demo or sandbox environment:

- Contact your Accipio account manager
- Email ask@accipio.com
- Call 020 7117 2690

Support During Evaluation

- A named contact is available throughout your trial period to answer questions and tailor the experience
- Optional follow-up session to review findings, feedback, and potential next steps

Trying our platform before you buy ensures that your decision is informed, aligned, and future-ready—with no surprises.

DATA PROTECTION & COMPLIANCE

Accipio is fully committed to maintaining the confidentiality, integrity, and availability of your data. We operate in line with the UK GDPR, the Data Protection Act 2018, and all applicable security and compliance requirements for public sector organisations.

Whether we're hosting your platform, processing user data, or supporting integrations, our security posture is built on industry-leading practices and independently verified certifications.

Data Protection Standards

We comply with all applicable legislation, including:

- UK GDPR
- Data Protection Act 2018
- Privacy and Electronic Communications Regulations (PECR)
- Freedom of Information Act 2000 (in support roles)

Data Controller & Processor Responsibilities

- Accipio acts as a Data Processor for client-hosted Totara environments.
- The customer (you) remains the Data Controller and retains full ownership of all data stored on the platform.
- All processing is governed by a Data Processing Agreement (DPA) in line with Article 28 of UK GDPR.

Hosting & Data Residency

- Hosted on Amazon Web Services (AWS) UK and/or EU regions (as agreed)
- Data is never transferred outside the UK/EU without explicit instruction and safeguards
- All data in transit and at rest is encrypted (TLS 1.2+ and AES-256)

Certifications & Accreditations

Standard	Status
ISO 27001 (Information Security)	✓ Certified
ISO 9001 (Quality Management)	✓ Certified
Cyber Essentials Plus	✓ Certified
ICO Registered Data Handler	✓ Yes

Security Safeguards

- Role-based access control and audit logging
- Multi-factor authentication for admin access
- Penetration testing (available upon request)
- Daily off-site backups with encrypted storage
- Optional secure file transfer portal for sensitive data

Data Retention & Deletion

- Client data is retained for the duration of the contract
- On termination, data is returned in a secure, portable format (e.g., SQL)
- All backups and stored files are deleted after a grace period (typically 30 days), unless otherwise agreed
- Certificate of data destruction available on request

Subject Access & Audit Support

We support:

- Subject Access Requests (SARs)
- Freedom of Information (FOI) preparation
- GDPR audits and DPIA templates
- Data breach response coordination (if applicable)

We are proud to operate with transparency, accountability, and respect for privacy—ensuring your data is protected to the highest recognised standards.

SERVICE ROADMAP & INNOVATION

At Accipio, we don't just deliver a platform—we deliver continuous improvement, innovation, and strategic alignment. We actively invest in new features, integrations, and enhancements to ensure your Totara platform evolves with your organisation's needs, technology trends, and regulatory expectations.

Our AccipioOne roadmap is shaped by:

- Industry and public sector trends
- Customer feedback and feature requests
- Advances in learning science and digital user experience
- Totara core developments
- Our own R&D through the AccipioOne plugin suite

Quarterly Innovation Cycles

We operate on a quarterly release and review cycle, which includes:

- Plugin and platform updates (minor and major releases)
- New features from our AccipioOne roadmap
- Retiring or refactoring legacy code
- Security patching and hardening

All clients receive a quarterly review session to explore:

- What's new in Totara and AccipioOne
- Opportunities to optimise the platform
- Roadmap prioritisation and feedback loop
- Usage data and engagement trends

Customer-Led Development

We actively collaborate with our clients to:

- Co-design new plugin features or modules
- Pilot innovations before public release
- Collect and implement roadmap input via our feedback form
- Fund shared development for common features across sectors

Recent customer-inspired innovations include:

- CMS
- Compliance modules

- AI-based personalisation and curated collections (Accipio Discover)
- 360 diagnostics and role-based skills assessments (Accipio Diagnose)
- Custom-built IV/EV grading workflows (Accipio Grade)

Planned Innovations for FY25/26

- CMS
- Next-gen compliance tools
- AI integrated into core plugins
- Gamification and points systems for engagement
- AI-powered content curation

Commitment to Open Standards & Community

- Active contributor to the Moodle and Totara ecosystems
- Advocates for open-source innovation, data portability, and customer choice
- Compliant with all GDS Technology Code of Practice principles
- Security cleared staff

With Accipio, you're not locked into a static system—you're investing in a continuously evolving, secure, and forward-thinking platform backed by a team that anticipates what's next.

CASE STUDIES / TESTIMONIALS

If you'd like to see how we've helped similar organisations achieve measurable results, please browse our client success stories here:

www.accipio.com/case-studies

