Annex A: Defence Learning and Management Capability (DLMC)

Annex version 1.2 (Oct 26)

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Annex A: Defence Learning and Management Capability (DLMC)

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1 Defence Direction for the Defence Learning and Management Capability (DLMC)

This annex provides Defence Policy for all Defence and Contractor personnel involved in developing, procuring or integrating Technology Enhanced Learning (TEL) provision across Defence, positioning that direction in the wider context of the Defence Learning and Management Capability (DLMC) digital ecosystem. This policy will continue to be developed iteratively during 2026-2027 as the DLMC programme delivers new services and integrates existing ones across Defence.

1.1 Technology Enhanced Learning (TEL)

1.1.1 **Definition of TEL**. TEL is defined as '*Technology that improves the design and delivery of training in order to enhance learners' experience'* and is commonly taken to mean *'Information Technology'*.

1.1.2 **Defence TEL and DLMC**. Defence TEL ranges from Training Management Information Systems (TMIS') to Virtual Learning Environments (VLEs) to Modelling & Simulation (M&S) Environments[1], encompassing a wide range of TEL tools within these broad capabilities. There are currently multiple TEL systems and environments across Defence, but the endorsed direction of travel is to ensure common usage of approved, integrated TEL capabilities across as much of Defence as possible, leading to a coherent and connected Defence TEL landscape and a corresponding reduction in the number of TEL systems and environments employed. The coherence and integration of TEL capabilities across Defence is a key function of the DLMC programme.

1.2 The DLMC Programme

1.2.1 **Vision, Intent & Strategic Objectives.** The DLMC Programme Mandate sets out the vision, intent and strategic objectives as follows:

- **Vision**: "Defence people, fully enabled by their digital learning and management services, shaping a sustainable workforce and maximising the use of Defence talent in support of Operational Capability".

- **Intent**: Future DLMC services will modernise the services provided by TAFMIS and DLE legacy systems through the delivery of integrated TMIS and VLE digital services.

[1] M&S environments & tools are directed by the Defence Modelling & Simulation Office (DMSO) in Cyber and Specialist Operations Command (CSOC) and designed in accordance with policy and rules set out in JSP 939.

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- **Strategic Objectives**: DLMC will provide modern, accessible and engaging pan-Defence learning management and delivery services that support the Defence People Strategy, improve learner experience, strengthen governance and assurance, and generate coherent learning and skills data to inform workforce planning, investment and the development of operational capability.

1.2.2 **Responsibilities.** DLMC is a programme in the Defence People Portfolio, sponsored by Defence People and delivered by the DLMC Programme Team located in Army Command. Key Responsibilities are:

- Functional Sponsor: ACDS People, Force Development, MSHQ.
- Sponsoring Group: People Steering Committee, a 3* Forum chaired by DG People and Standards, with 2* reps from across the Quad[2].
- Senior Responsible Officer (SRO). Chief AI and Data Officer (CAIDO), Army Digital Security and Intelligence (DSI) Directorate.
- Programme Board: 1* Forum with reps from all Commands, chaired by the SRO.
- Business Change Managers Forum: OF5 Forum chaired by AH Trg Pol/Assurance TSLD.
- Lead Users Forum: A desk level forum representing the business requirements of all commands, chaired by SO1 Trg Cap TSLD as the Defence Lead User.

1.2.3 **Ownership.** The DLMC Programme owns and is responsible for the current TAFMIS and DLE services. The TAFMIS Delivery Team now reports directly to the DLMC Programme and delivers the TAFMIS service on its behalf, while the DLE Service Delivery Team (SDT) in Digital Foundry, Digital and Data (was Defence Digital), continues to deliver the DLE service[3] in conjunction with the Programme Team. The DLMC Programme is responsible for delivering future DLMC services to replace and/or improve existing TAFMIS and DLE services over the course of the Programme lifetime; transition of future DLMC services to a permanent delivery owner is a key element of the DLMC Programme.

1.2.4 **DLMC Information & POCs.** Information on DLMC planned services, progress and relevant POCs can be found on the DLMC Comms Hub on MODNET.

[2] Military Strategic Headquarters (MSHQ) and Armed Forces; Department of State (DoS); National Armaments Director Group (NADG); Defence Nuclear Enterprise (DNE).

[3] Note that an anonymised instance of the DLE, referred to as the Cyber VLE, has been launched and runs in parallel to the DLE for those Defence personnel requiring anonymised access to learning. Ownership nominally resides with the DLMC Programme, but funding comes from Defence Cyber.

1.3 Coherence and Collaboration

1.3.1 **Integration.** TEL Integration at Defence level is driven through the DLMC Programme and the UK MOD TEL and Advanced Distributed Learning (ADL) WG. Commands are responsible for engaging with the Defence TEL integration mechanisms and developing their own TEL integration mechanisms as appropriate in line with Defence policy, including the TEL Ruleset (see section 4 below).

1.3.2 **DLMC.** The DLMC Programme provides a cohering function for Defence TMIS and VLE provision through the design and delivery of future DLMC services. The Programme Team also run a change control process for improvements to existing DLMC (TAFMIS & DLE) services[4].

1.3.3 **UK MOD TEL and ADL WG.** The UK MOD TEL and ADL WG is a voluntary WG attended by motivated reps from across Defence to discuss and promote resolution of technical TEL issues across Defence and to engage with NATO ADL initiatives and WGs, including the development of TEL-related STANAGs. See the UK MOD TEL and ADL WG SharePoint site for further details.

1.3.4 **NATO Training Group ADL Programme.** The ADL Programme is a US-led NATO TEL programme developing NATO TEL Policy and Guidance to which the UK MOD TEL and ADL WG provides input.

1.4 Governance and Assurance

1.4.1 **DLMC Live Services.** Currently TAFMIS and the DLE are the live services governed and assured through the DLMC Programme Service Delivery and Change Board (SDCB). As additional DLMC services go live, they will also be governed and assured by the SDCB before transitioning to a permanent owner.

1.4.2 **Defence Customer Consultation.** In addition to the SDCB, the Defence Customer is consulted on live DLMC service provision through:

- The DLMC Programme Board (1*).
- The DLMC Business Change Managers Forum (OF5).
- The DLMC Change Implementation Working Group (CIWG).
- The DLMC Lead Users Forum (LUF).

[4] TAFMIS and DLE Changes are managed, prioritised, designed, delivered and assured by the TAFMIS team and DLE Service Delivery Team (SDT) respectively. Significant changes are passed through the DLMC Programme Team for approval.

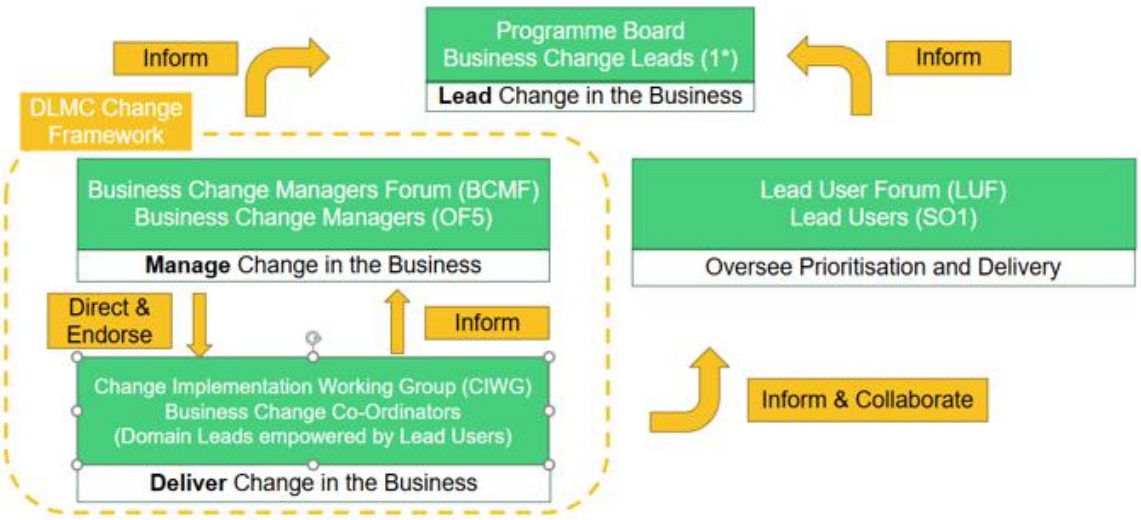


Figure 1. DLMC Business Change Network

1.4.3 **Defence Modelling & Simulation (M&S).** Defence M&S is governed and assured through Defence Modelling and Simulation Office (DMSO) Boards and Working Groups.

1.4.4 **Customer Executive Boards (CEBs).** As a key enabler of learning design, delivery, governance and assurance, the adoption pathway and use of DLMC services **must** be considered by CEB training governance and assurance functions.

1.4.5 **Working Groups (WGs).** As set out at Section 1.3.3.

1.5 Defence mandated use of DLMC

1.5.1 **Mandated DLMC components**. To achieve the strategic objectives laid out in para 1.2.1, it is necessary to mandate the use of a number of DLMC components described in paras 1.5.3-1.5.6 below.

1.5.2 **Essential Training Data.** A range of essential training (or learning) data **must** be input to the pan-Defence DLMC ecosystem, either via new DLMC services when they come online *or* via sS legacy services integrated via the DLMC Integration Platform[5]. A list of mandated training data types is as follows (this list will be developed iteratively in due course):

- **Governance**. Key governance data providing a record of compliance and training system 'health':

[5] See the DLMC Comms Hub for more information on the DLMC Integration Platform.

- TrAD data (the authoritative governance information required to define, approve, assure and manage a Defence training intervention).
- TAM data (subset of key TrAD governance data used for oversight, assurance and reporting purposes).
- 1, 2 and 3 LoDA data (comprises the information generated through 1, 2 and 3 LoDA activity, including audit scope, compliance assessments, findings, risks, recommendations and corrective actions).

- **Learner Record**. A complete and accurate history of learning accomplishment of an individual, including their learning outcomes and currency from all completed and in-progress learning activities. Specifically, this includes the following:
  - Learning activities (booked, started and completed)
  - Qualifications
  - Competences
  - Skills
  - Licences
  - Professional Memberships
  - Learning Deficiencies
- **Learning Activity Catalogue**. A list of current learning activities that can be viewed, searched and updated.

1.5.3 **DLMC Scoping and TrAD Manager Application.** Once live, all Defence training organisations (including their respective TRAs, TDAs, TPs and CEBs) **must** use this application to record critical details of new TNA activity, and to raise, complete and endorse new TrADs which will be known as 'eTrADs[6]'. Further direction on mandatory TrAD data migration activity will be communicated via the DLMC Programme's comms channel.

1.5.4 **DLMC Training Authorisation Matrix (TAM).** The DLMC TAM will be automatically populated by ~~e~~TrAD data, and in due course by other DLMC applications, creating a pan-Defence TAM which will for the first time allow analysis of the 'health' of Defence training at the strategic level. Once live, all

[6] The mandated elements of the (e)TrAD will remain as per the direction at Chapter 3 of JSP 822.

Defence training organisations (including their respective TRAs, TDAs, TPs and CEBs) **must** use this application to provide their TAM function.

1.5.5 **Defence Learning Environment (DLE).** The DLE is a live DLMC service and Defence's approved Virtual Learning Environment (VLE). It is owned by the DLMC Programme and delivered by the DLE Service Delivery Team (DLE SDT), Digital Foundry, Defence Digital. The DLE[7] **must** be used for all Learning (Training & Education) requiring the use of a VLE to enable the T-DLOD through online and blended learning. Detailed direction for the DLE can be found at section 2 below.

1.5.6 **TAFMIS**. TAFMIS is also a live DLMC service and Defence's current approved TMIS, owned by the DLMC Programme. Where Defence organisations are *currently* using TAFMIS, they **must** continue to do so until such time as it is decommissioned and replaced. This will support pan-Defence transition to DLMC replacement services for TAFMIS in 2026-2027. Detailed direction for the interim use of TAFMIS can be found at section 3 below.

1.6 Procurement

1.6.1 All procurement of new TEL across Defence **must** comply with Government Digital Services (GDS) regulations and follow the TEL Ruleset (see section 4 below), based on the GDS Technology Code of Practice). Teams wishing to procure new TEL **must** also consider whether a mandated solution is already provided by DLMC (see para 1.5), and if not, how the new TEL will integrate with the DLMC ecosystem once in service. This will ensure robust analysis of the TEL requirement, minimising duplication of existing TEL and providing sufficient evidence for business cases to be approved by the Cabinet Office or delegated approvals authority. Detailed rules for M&S TEL procurement are set out in JSP 939.

[7] The DLMC Programme has endorsed the use of Moodle as the VLE software for future DLE.

2 Defence Direction for the Defence Learning Environment

The DLE is Defence's mandated Virtual Learning Environment (VLE) which currently utilises Moodle as its core Learning Management System. This system is continuously developed to improve user experience and increase the effectiveness of online and blended learning within Defence.

2.1 DLE Roles and permissions

2.1.1 The DLE has a number of roles that require training and provide system permissions. Permissions **must** only assigned on completion of the relevant DLE Role Functionality Training. Permissions must be removed from users who are no longer in a relevant post.

2.1.2 The DLE Roles are as follows:

- Non-editing Trainer (Assessor)
- Trainer (Assessor)
- Course Administrator
- Course Designer
- Sub-Category Designer
- Category Designer
- Category Manager
- Sub-Category Manager

2.1.3 Below is a brief description of each role.[8] For full role responsibilities see Trainer Support.

2.1.4 **Non-editing Trainer role.** Use the DLE to deliver and support training but have no editing rights to change course content.

2.1.5 **Trainer role**. Deliver and support training hosted on the DLE, including but not limited to creating course content. Will also facilitate learner use of the DLE.

[8] These role descriptions will be reviewed and updated as required as part of the DLE Training Review currently taking place. Note the additional roles of Learning Plan Supervisor & Viewer will be added in the V7 Update.

2.1.6 **Course Administrator role.** Administer courses hosted on the DLE, including but not limited to managing DLE course instances and assigning permissions at course-level.

2.1.7 **Course Designer role**. Design and develop courses on the DLE. Provide advanced course design for learning iterations on the DLE within their remit. All courses delivered on the DLE must be designed by a DLE Course Designer.

2.1.8 **Sub-Category Manager role.** Manage the Sub-Category presence on the DLE. Provide communication and support of endorsed policy while providing governance for courses within their remit.

2.1.9 **Category Manager role.** Manage the TLB Category presence on the DLE. Provide communication and support of endorsed policy while providing governance for courses within their remit.

- Note: The Category Manager Role should only be applied at the top of a TLB Category. Category Managers should not be assigned to a Sub-Category.

2.1.10 **Assessor Roles.** The Assessor role is a set of permissions attached to Non-editing Trainers and Trainers that allows these roles to ensure Forums, Quizzes and Assignments follow important MOD and wider policy. Completion of Assessor role training is mandatory for Non-editing Trainers and Trainers to be granted Assessor permissions. Assessor role permissions will be granted by Course Designers.

- **Non-editing Trainers and Assessing Non-editing Trainers**
  - Non-editing Trainers are unable to edit a course and have limited access to reports and other user information.
  - An Assessing Non-editing Trainer has very limited editing permissions and will have access to:
    - Assignment submissions
    - Respondents in a Questionnaire
    - Results in a Quiz

- **Trainers and Assessing Trainers**
  - A Trainer will not have access to:
    - Assignment submissions
    - Respondents in a Questionnaire
    - Results in a Quiz
  - An Assessing Trainer will have access to:
    - Assignment submissions
    - Respondents in a Questionnaire

- Results in a Quiz

2.2 DLE Key Responsibilities

2.2.1 Course Designers

- It is the responsibility of Course Designers to design and develop courses on the DLE and to assign and remove Trainers and Non-Editing Trainers on their Courses as required.

- Delete learning instances hosted on the DLE that are redundant, obsolete or trivial.

2.2.2 Category Managers and Subcategory Managers

- It is the responsibility of Category Managers and Subcategory Managers to provide oversight, guide and assurance of all DLE course content hosted within the category or sub-category.

- Provide communication and support of endorsed policy while providing governance for courses within their remit and to ensure that all those with permissions within their category have completed the relevant DLE training.

- Delete learning instances hosted on the DLE that are redundant, obsolete or trivial.

- Archive courses where needed to maintain training completion data.

  Note: The Category Manager Role should only be applied at the top of a TLB Category. Category Managers should not be assigned to a Sub-Category.

2.2.3 **Monitoring users in a DLE Course or Subcategory.** There may be people who have access to a DLE Course or Subcategory, who should not. These people may:

- Compromise the validity of assessment.

- Undermine the quality of course delivery.

- Have unauthorised access to training data.

  - It is the Course Designer's responsibility to check the Course under their management and remove users if they are no longer appropriate.

- It is the Subcategory Manager's responsibility to check the Subcategory under their management and remove users if they are no longer appropriate.

2.2.4 **Assigning Roles**. When assigning roles at any level, it is vital that all roles comply with the following:

- Under no circumstances should roles be assigned without proof that relevant DLE Role Functionality Training has been completed.
- Ensure that any permissions assigned align to the correct level of Role Functionality Training.
- When a user has left post, any permissions associated with that role must be removed.

2.2.5 **Trainers and all other Roles.** It is the responsibility of all users to follow DLE SyOPs. Examples of what could happen if DLE SyOPs are not followed are:

- Disciplinary action can take place if someone uses abusive language, harassment or insulting behaviour on a Forum.
- Fines can be incurred if copyright is breached if not cited and referenced correctly in an essay Assignment.
- The DLE archive may have to be deleted if Official Sensitive information is held on the DLE. This can present significant issues for all users of the DLE.

2.3 Application of DSAT to DLE Learning Content and Delivery

2.3.1 **DLE Assurance.** Formal training that is delivered online should be subject to formal training quality assurance processes in the same way as any other formal training and education activity. All learning instances and content hosted on / delivered via the DLE – whether delivered online or as part of a blended learning delivery – must be governed and managed as part of an MTS in accordance with DSAT Direction & Guidance in JSP 822. The DLE Rubric should be used as part of the DSAT 1 LoDA and 2 LoDA process[9] for any course that uses online learning or has identified digital Work Based Training. This will help improve the quality of courses and to identify key areas for improvement.

2.3.2 **DLE Rubric and JSP822 Compliance Checklist.** The DLE uses the DLE Rubric for quality assurance for eLearning Design and Delivery. The DLE Rubric is a Red / Amber / Green (RAG) rating system which must be used by course designers

[9] As set out in JSP 822.

during the DLE course design process and as an action plan for improvement (see para 3.3.1). Subcategory Managers must ensure the DLE Course is compliant with the JSP 822 compliance checklist. The course will not be visible to users until the Subcategory Manager has actioned the JSP Compliance checklist.

2.3.3 **DLE Accounts (DLE User).** All Defence personnel and supporting contractors are entitled to access learning available via the DLE.[10] Other personnel requiring DLE access include UK MOD recruiting candidates with a training start date, international students, exchange personnel and personnel from other Government departments. To ensure these varied needs can be met whilst also maintaining appropriate security and access controls, three types of account have been created:

- **Full Account**. These accounts can be created by all MOD staff either with a MOD email address or Service Number by logging into www.defencegateway.mod.uk and creating a DLE account.

- **Full Sponsored Account**. These are requested from the DLE team using the Defence Gateway Application form. This grants full access and rights to the DLE, including self-enrolment onto courses, for a maximum of two years. Accounts of this nature need a sponsor of OF3/C2 or above.

- **Limited Access Student (LAS)**. These are requested from the DLE team using the Defence Gateway Application form. This grants limited (read only) access and no enrolment rights onto courses. Users with this account must be manually enrolled onto courses by the course owners.

2.4 DLE Training, Course setup, and compliance

2.4.1 **DLE Training.** The DLE provides a Virtual Learning Environment (VLE) for the delivery of online and blended learning. To use the DLE effectively, and to gain DLE permissions, DLE Training must be completed.

2.4.2 DLE Training is currently structured as follows:

- DLE Role Functionality Training (DLERFT): This provides a learning pathway of five self-paced (& self-enrol) online learning courses tied to DLE roles and permissions which must be completed prior to the related DLE permissions being authorised by Category Managers/Sub-Category Managers permissions on successful completion. The courses and attached permissions are set out in the table on the DLERFT page.

[10] In order to obtain a DLE account, personnel must have a Defence Gateway account.

- DLE Digital Design & Delivery Training: Currently provided through Designing Online Courses (DOLC) by DCTS, DEFAC to enable acquisition of improved DLE Learning Design skills.

- DLE Elective Training:

    - DLE Turnitin Training is provided as a self-paced online learning course for those needing to gain permission to use the Turnitin plugin.

    - DLE Trainer Support provides access to Quick Reference Guides, Knowledge Based Articles and other resources to aid best practice on the DLE.

2.4.3 **New Course development and procurement.** All new, online / blended courses **should** be built on Moodle (Defence approved Learning Management System (LMS)). Contact the DLE team within the Foundry (UKStratComDD-CIS-ASD-DLESvcDel@mod.gov.uk) for advice prior to procurement to ensure you are able to capture data and deliver VfM for Defence. The DLE team, through Trainer Support, can also help with the following:

- Course design queries and support.

- Policy queries.

- Lead user queries and support.

- New requirements.

2.4.4 **Custom code.** The DLE team strongly advises against adding custom code to courses and cannot provide support if code needs amending or fixing. Any code that falls outside of Moodle's default boundaries is considered "custom", such as using Bootstrap to change a category page's layout. It is best practice to use core Moodle functionality, and to consider H5P, rather than attempt to add code. The DLE team do not support custom coding and thus do not offer a support wrap. Please seek advice from the DLE team (UKStratComDD-CIS-ASD-DLESvcDel@mod.gov.uk) prior to using Custom Code.

2.4.5 **SCORM on the DLE.** A SCORM (Shareable Content Object Reference Model) package is e-learning content that is developed outside of the DLE and then uploaded on to Moodle. SCORMs are often developed using bespoke programs such as alternative LMS. Use of a SCORM package to create new e-learning content is by exception only and is subject to approval by the DLE team (UKStratComDD-CIS-ASD-DLESvcDel@mod.gov.uk). Any course with SCORM content must have a full support wrap for the full duration that the course is

available on the DLE, as the DLE Support team does not provide a support wrap for broken or malfunctioning SCORM packages.

2.4.6 **OFFICIAL-SENSITIVE on the DLE.** Any DLE Course that holds OFFICIAL-SENSITIVE content is required to set the course as OFFICIAL-SENSITIVE in the Settings section of the DLE Course and register the Course as OFFICIAL-SENSITIVE via the email address provided in the same location. The OFFICIAL-SENSITIVE course register is updated regularly and audited to ensure OFFICIAL-SENSITIVE courses remain compliant with the above conditions. The following conditions apply to an OFFICIAL-SENSITIVE DLE Course:

- A user can access an OFFICIAL-SENSITIVE course from MODNET or a trusted Defence Gateway network directly once enrolled or via AWS AppStream (virtual desktop) from non-MODNET or Defence Gateway network.

- If a Course contains any OFFICIAL-SENSITIVE content the entire course is OFFICIAL-SENSITIVE.

- If a Course uses any OFFICIAL-SENSITIVE content held on Alfresco the course is OFFICIAL-SENSITIVE and the content in Alfresco **must** be held in a limited access folder.

- Courses that are classified as OFFICIAL-SENSITIVE must only be available with these enrolment methods:

    - Manual Enrolment, or

    - Self-enrolment with an Enrolment Key.

2.4.7 **Evolving DLE capability and function**. The DLE is a continually evolving system with increasing capability and a wide variety of potential uses. Further detail on capability developments and guidance on how to use the DLE can be found in DLE Trainer Support. The DLE Community can also be accessed via Teams.

3 Defence Direction for the Training and Financial Management Information System (TAFMIS)

TAFMIS is Defence's primary and (currently) only mandated Training Management Information System, accessible via MODNET and available pan-Defence. TAFMIS is a DLMC Live Service which will be decommissioned and replaced by 2027. Detailed timelines for its replacement will be communicated via DLMC Programme comms channels and updated policy direction will follow. In the interim TAFMIS will continue to be continuously developed to improve user experience and increase the effectiveness of Training Analysis, Design, Delivery and Assurance within Defence. This Direction & Guidance applies to all Royal Navy, Army, Royal Air Force and Joint Individual Training Providers throughout Defence that use TAFMIS. *It also covers JPA OLM for those providers not provided with access to TAFMIS*.

3.1 TAFMIS Scope

3.1.1 It is mandated that all organisations provided with TAFMIS **must** use TAFMIS to manage the individual training, events, processes and resources of people engaged with Phase 1, Phase 2 and Phase 3 training.[11] This is essential to ensure a consistent approach to DSAT and to provide coherent and complete management information across Defence.

3.1.2 All other individual training organisations **should** instead use JPA OLM for course bookings, the recording of competences and completing training history.

3.1.3 TAFMIS directly enables the application of the DSAT process for Defence Training & Education. Details on TAFMIS services can be found in the briefing documents at TAFMIS PORTAL MOC Team TAFMIS Briefings.

3.1.4 The course naming conventions laid down in JSP 794 **must** be used, where possible, on both TAFMIS and JPA OLM. JPA contains the master list of competences for both systems – new competences cannot be created in TAFMIS. The protocols for change are laid down in JSP 794.

3.1.5 Organisations seeking to use TAFMIS as the Defence-mandated TMIS **must** request access via the change process; see the TAFMIS Portal for details[12].

[11] For the Army, Phase 1 is termed Basic Training (BT), Phase 2 is termed Initial Trade Training (ITT) and Phase 3 is termed Subsequent Trade Training (STT).
12 Go to Army Software House (ASH) Catalogue ; enter 'TAFMIS' in the search box and this will bring up the TAFMIS forms. The 'Normal Change Request Form' should be used to request a new organisation be provided with TAFMIS.

3.2 TAFMIS Roles and Responsibilities

3.2.1 **Service Delivery.** TAFMIS is hosted by Army Software House (ASH) and delivered by the TAFMIS Service Delivery Team (SDT). First line support for TAFMIS is provided by the MOD Service Desk. Change requests should be submitted via the TAFMIS change process[13].

3.2.2 **TAFMIS Managers.** All Defence training sites identified for, or supplied with, TAFMIS **must** appoint a TAFMIS Manager. The TAFMIS Manager will be the single point of contact for that site and is to follow the ToRs for TAFMIS managers. Initial nomination of and any change to a site's TAFMIS Manager is to be notified to the appropriate Headquarters.

3.2.3 **Key TAFMIS POCs.** These are listed on the TAFMIS SharePoint Site.

3.3 TAFMIS Access

3.3.1 **TAFMIS Infrastructure Requirement.** TAFMIS is designed to be accessed from MODNET desktops and laptops across the MOD Core Network. Where MODNET is not available, RLI-connected infrastructure is needed at the MODNET desktop build standard. Failure to do this may affect the performance of the TAFMIS software.

3.3.2 **TAFMIS Accounts**. TAFMIS Accounts are arranged via TAFMIS Account Administrators. TAFMIS users are responsible for managing their accounts through the registration and use of the AHE Self Service Password Manager tool.

3.4 TAFMIS Training

3.4.1 **TAFMIS Training.** Users must be TAFMIS trained to a level appropriate for their role. Users may be granted access to TAFMIS prior to attending TAFMIS training, but they are required to complete the relevant courses within 3 months of appointment. If a user fails to complete training within the prescribed time, their supervising TAFMIS Manager will be notified that system access will be withdrawn from that user until such training is completed successfully. Descriptions, dates and booking procedures for TAFMIS courses can be obtained from TAFMIS Managers. Details on TAFMIS training are available via the TAFMIS Training Portal. The frequency of TAFMIS training will decrease in line with the introduction of DLMC services.

[13] Go to Army Software House (ASH) Catalogue ; enter 'TAFMIS' in the search box and this will bring up the TAFMIS forms. The 'Request for Data Change Form' is to request data changes for simple amendments to data held in the system; the 'Normal Change Request Form' is for system changes and enhancements.

3.5 TAFMIS Continuous Improvement

3.5.1 **TAFMIS Change Management.** TAFMIS Change Management is authorised through the DLMC Service Delivery and Change Board (SDCB) and managed by the TAFMIS Service Delivery Team.

3.6 TAFMIS Support

3.6.1 **Service Centre**. Issues with TAFMIS **must** be reported to the Service Centre; where required, these will be passed to the TAFMIS 2nd line support team for resolution.

3.6.2 **TAFMIS Portal**. A range of supporting information for TAFMIS is available via the TAFMIS Portal.

3.6.3 **TAFMIS Standard Operating Procedures (SOPs).** To ensure that the use of TAFMIS (both process and data) is consistent across Defence Training & Education, all organisations using TAFMIS **must** use the TAFMIS Workbooks and Quick Reference Guides for each of the TAFMIS modules. These are available via the TAFMIS Portal and the TAFMIS Training Portal. Further detailed information and instructions on new releases to TAFMIS are also held on the TAFMIS Portal along with relevant service management forms.

3.7 TAFMIS Assurance

3.7.1 **1 and 2 LoDA**. Use of TAFMIS in line with TAFMIS Policy, SOPs and direction in TQMs is to be assured and reported on as part of 1 and 2 LoDA. Direction on the use of TAFMIS should be laid down in TRA/TDA/TP TQMs as part of the MTS.

3.7.2 **Integration with other systems.** The integration between TAFMIS and other systems means that changes to the implementation or use of one could impact on the others. Consequently, all system changes **must** be considered carefully and authorised by the appropriate Headquarters and, where necessary, at the Programme level.[14]

3.7.3 **Data quality.** The premise of enter data once, use many times works best when accurate data entry is made in the first instance. Data quality is a measure of the condition of data based on factors such as accuracy, completeness, consistency, reliability and time-sensitivity. Increasingly, the use of data analytics to help drive business decisions has emphasised the need to be able to have a single version of a truth to enable successful recruiting and training operations. All TAFMIS users

[14] The HQ/Programme must ensure that the systems requiring integration with TAFMIS comply with the recognised learning standards (see Rule 4 TEL Toolset).

must ensure that data entered into TAFMIS is compliant with data quality standards. To save time, effort and resource, all data entry is to be conducted as soon as practical, with specific attention paid where data is added near to or on month end.

3.7.4 **Data Changes.** Training Providers are to implement a system of validating the data entered into TAFMIS systems and include this in their TQM. When instances of duplicate records, incorrect service numbers and records assuming a previous state (e.g. a trainee marked back on site by TAFMIS after being marked off site, or data entered by site, which is then overwritten by TAFMIS) are identified, users are to raise a data change request using the appropriate form on the TAFMIS Portal. Further action may require the submission of a 'Normal Change Request' and sites are to follow the current guidelines laid down by the TAFMIS Service Manager.

3.7.5 **Responsibility for data quality.** Within each Service's individual training headquarters, a role is to be nominated to take overall responsibility for TAFMIS data quality. Within each Training Provider, a 'Data Champion' is to be appointed with overall responsibility for data quality. Across individual training at all levels, the active monitoring and management of data quality is to take place so that the full benefits of TAFMIS can be realised.

3.8 **TAFMIS Modules**

3.8.1 **Course and Student Administration (CA).** Essential management information is gathered by the system from CA users dealing with such areas as Course Administration, Student Administration and Trainee Tracking. These functional areas provide managers with visibility of trainees from recruitment through to assignment to the SCs equipped for operations. Consequently, this module, including the Trainee Tracking function, is to be fully implemented by Training Providers as a first priority.

3.8.2 **Training Analysis Developer (TAD).** TAD supports the DSAT analysis & design process for Training Requirement Authorities (TRAs) and (TDA) Course Design Cells (CDCs). Given the effort involved in migrating to TAD, CDCs who are not already using TAD must liaise with TRAs to prioritise the migration to TAD. TAD will automatically populate fields throughout the course folders, such that as the TRA migrates courses, the CDC will be able to access TAD course documentation. Consequently, all training units not already using TAD are to aim to use TAD in its entirety as soon as possible. It is recognised, however, that the migration of large quantities of legacy information into TAD by Training Development Teams (TDTs) and CDCs new to TAFMIS is challenging. As a result, the TAFMIS Team will be available to assist in the change process where needed.

3.8.3 **Templates.** The Templates module is used to create a graphical model of how elements of the course will be run from start to finish. It allows definition of the number of lessons per day or week, time flow of lessons linked to the course calendar and examination positioning. Resource and trainer requirements and TOs can be added to individual or multiple elements. This provides information on the resources used for training, with a forward projection of resource requirements and, potentially, costs. An important aspect of the Templates module is that it enables the capture of information necessary to improve management of resources, balancing their use to achieve greater efficiency. Templates also provide links into courses to automate InVal. As a minimum, Training Providers are to show each course in sufficient detail to support an accurate assessment of the utilisation of trainers and those key resources with a significant associated cost. The design of courses that call on several different, costly resource types for different lessons/events will need to be prioritised for production in more detail. Data input into the Templates module provides automatic inputs to other modules – for instance, it is essential to identify the 'test' elements in course templates in order to allow the Assessment and Validation modules to function.

3.8.4 **Planning and Scheduling Tools (PST).** Training Providers are to use PST. To meet the minimum requirement for use, the current year's 'schedule' must hold a programme of courses with associated start and end dates, as well as associated key resources. This enables trainee administration, InVal and trainer/resource management to be accomplished using TAFMIS. In addition, skeleton schedules must be created as far into the future as is required to support 'Trainee Tracking' assignments and 'Recruit Allocation Planning'. By fully utilising PST, Training Providers will be able to:

- Manage resource shortfalls.
- Find the best dates for courses based on the course template and availability of resources.
- Schedule non-course activities.

3.8.5 **Resource management.** The resource management module identifies the requirement for resources that are required to deliver training and is to be used. Training Providers are to use TAFMIS to define those resources that are significant cost drivers or of greatest importance and utility to their own schedulers and resource managers. The Service and Joint individual training HQs are to work together to deliver standardisation of naming of resources to enable balancing and sharing of key resources across Training Groups, Commands and Services where this is sensible.

3.8.6 **Instructor management.** The instructor management module identifies the requirement for instructors that are required to deliver training and Training

Providers are to enter instructor details in TAFMIS and use the facility to manage instructors. TAFMIS supports the management of instructors in relation to training and non-training activities.

3.8.7 **Course assessment.** The Course Assessment module provides the functionality to manage assessment templates, question banks, exams and statistics, and to create questionnaires and must be implemented. The scanning software enables the automated input of answer sheets.

3.8.8 **InVal and ExVal.** The TAFMIS module that supports InVal and ExVal is called Course Validation. InVal supports course evaluation during and at the end of courses and is usually carried out by Training Providers. ExVal is the responsibility of the TRAs. Where available to TRAs, they are to use this module. The primary purpose of ExVal is to determine the impact on performance after training activity and, therefore, the validity of the training in preparing individuals for their Role. It measures changes in the behaviour of individuals as a result of a training activity and how well the enhancement of KSA has prepared individuals for their Role. Findings from ExVal may be used by the TRA during TNA in the review of the Role PS.

3.9 TAFMIS Information Systems & Data

3.9.1 **Business Intelligence (BI)**. At the Headquarters level a BI cell is needed to address corporate information needs. The requirement is to gather, collate, analyse and report management information on the performance of the recruiting and training pipeline to provide BI in order to support the commanders' decision processes. TAFMIS provides two Capabilities for the provision of management information and business intelligence:

- **Business objects.** Business Objects is the reporting software that enables the extraction of day-to-day reports and management information from TAFMIS, which can then be published on SharePoint. Business Objects must be used to prepare all reports on training data within the scope of TAFMIS in order to:
    - Minimise the need for duplicating and/or re-keying data.
    - Support the Defence intent of establishing 'one version of training truth'.

  Reporting protocols and needs will be promulgated by the respective Headquarters, consistent with a common approach across Defence.

- **Enhanced Management Information System (EMIS).** The EMIS Data Warehouse is an extension to the TAFMIS Management Information capability across recruiting and training to meet the emerging need for Business

Intelligence. EMIS provides stakeholders, through visibility and exploitation of data, with accurate management information to:

- management information in an agile manner so that decisions can be made.
- Enable better informed management reducing the potential for data mismanagement.
- Increase the effectiveness and, where possible, efficiency of the recruiting and training pipeline.

- **SharePoint.** The output of Business Objects reports can be converted into PDF, or Excel documents for publication to designated SharePoint sites appropriate to the Customers for the reported information. In this way, the number of Business Objects licences can be kept to a minimum. Note, the TAFMIS SharePoint will not be available once TAFMIS has been replaced by the DLMC.

- **System interfaces.** The TAFMIS module suite is an integrated design intended to support all the principal functions of training design and administration. Data entered into TAFMIS is shared amongst several systems including JPA and the Defence Recruiting System (DRS), which is planned to be replaced by Armed Forces Recruiting System (AFRS). These systems rely on the timely and accurate input of data to ensure the underlying processes work correctly and accurate management information is available. The system interfaces have been developed to support the concept of 'enter data once, use many times'. This means that some of the data captured throughout recruitment and training is passed to JPA to be recorded on an individual's record of service, enduring throughout their entire career.

- **Data exchange.** Data is exchanged between the TAFMIS modules in a number of ways:
  - **TAD.** TAD provides a mechanism for creating, storing, amending and linking the data required for course analysis and design. TAD supports the DSAT process from organising the results of a RA through to developing a full LSpec. At the relevant stages, approvals and authorisations are available to support the exchange of information between TRAs, TDAs and Course Design Cells. Data from TAD is used in Templates.
  - **Templates.** Templates provide functionality to design a course and define the duration, timing, content, resource and trainer requirements. Data created in Templates is used in Scheduling, Trainer and Resource Management and assessment and validation.

- **CA.** CA includes functionality to administer courses and trainees, manage resources, trainers and accommodation and conduct trainee tracking and pipeline management. Data is exchanged between these functions, with DRS, scheduling, CME and JPA.

- **PST.** PST supports the process of adding the correct number of courses to a schedule in order to meet the SOTT based on the SOTR for each Training Year (TY), while attempting to schedule courses to satisfying the training requirements within the resources available. Data from PST is exchanged with the CA module.

- **Course assessment.** This supports InVal through the use of question banks, exams, statistics and scanning software. Results are displayed in CA modules.

- **Course validation.** Provides functionality to Course Design Cells and TDTs to create and scan questionnaires in support of course evaluation and ExVal.

- **Business Objects.** This is a management information tool that supports day to day reporting and management information reports.

- **EMIS.** This is the corporate business intelligence capability in TAFMIS that extracts a sub-set of the data entered by users of the systems described above and is used to provide coherent management information.

- **FOTIS.** This is a spreadsheet-based adjunct to TAFMIS that is used to produce the SOTR.

4 Defence Guidance for the TEL Ruleset

4.1 Introduction

4.1.1 The TEL Ruleset describes 12 principles, based on the Government Digital Services (GDS) Technology Code of Practice (TCoP), that are to be used for any development or implementation of TEL.

4.2 The TEL Ruleset

4.2.1 To facilitate Cabinet Office approval, the 12 principles of the TEL Ruleset must be adhered to[15] as part of any business case when developing or procuring TEL for Defence[16]:

- **Rule 1. Define user needs**[17]. TEL development[18] is to follow a flexible method which allows regular review between all stakeholders (such as managers, developers, sponsors, trainers, trainees etc) and draws on experience and innovation through the TEL Knowledge Hub. Project leads should understand the needs of the users and wider stakeholder requirements and examine a range of potential solutions to meet these needs. Furthermore, new TEL developments or procurements must clearly show a (documented) effort to meet wider Defence needs as well as TLB or role-specific requirements. Value for Money (VfM), capacity and capability (including any specific risk mitigation) must always be pre-eminent when delivering a new TEL solution and should be articulated with the perceived benefits of the new TEL solution in the business case.

- **Rule 2. Make things accessible**[19]. New TEL should be accessible for users and by extension, training designers and managers. Consideration should be given to Specific Learning Differences, wider disabilities and Digital Literacy of those using and developing training by means of TEL. Additionally, attention should be made towards the potential training and upskilling of trainers and wider support staff on new TEL.

- **Rule 3. Be open and use open source**[20]. If reuse of extant TEL and associated software is not possible, analysis of available license-free TEL must be evident when considering new TEL requirements. Licence free software such as Open

[15] Each principle requires articulation on either how it will be met or the limitations that prevent it.
[16] The TEL Ruleset does not apply to Simulation. For Simulation refer to the DMaSC Ruleset in JSP939.
[17] https://www.gov.uk/guidance/define-user-needs
[18] Note that TEL development is specific to the development of TEL platforms / tools and is separate of the development of learning content through the DSAT process that might then be hosted on / delivered through a TEL platform.
[19] https://www.gov.uk/guidance/make-things-accessible
[20] https://www.gov.uk/guidance/be-open-and-use-open-source

Source (code which can be changed without restrictions) and Freeware, offer the opportunity for cost-effective TEL with no on-going licence fees (some Freeware is only available for personal use); however, due consideration must be given to the security of MOD data and systems.

- **Rule 4. Make use of open standards**[21]. To inform Cabinet Office spend control process, Defence TEL solutions should use open standards to ensure they work and communicate across the Defence Learning Ecosystem with other Defence and external IT systems as required and can easily be upgraded and expanded to meet evolving and future requirements. The three leading standards organisations which Defence TEL should use are as follows:

  - IEEE and the associated Learning Technology Standards Committee (e.g. xAPI P9274). https://standards.ieee.org/
  - 1EdTech (e.g. LTI Learning Tools Interoperability). https://www.1edtech.org/
  - ISO (e.g. 19788 Learning Metadata). https://www.iso.org/

- **Rule 5. Use Cloud first**[22]. If feasible, under JSP 440 and GDPR guidelines, public cloud should be considered in the first instance as per Government direction. Alternatively, if this is not feasible then sufficient justification to why the procured TEL should or could not use public cloud.

- **Rule 6. Make things secure**[23]. Systems and data must be within prescribed Government Security Classification policy and wider Defence Security requirements[24]. Local unit ITSO and SCIDA points of contact should assist with this analysis for TEL security and associated activities including timelines.

- **Rule 7. Make privacy integral**. Adherence to the General Data Protection Regulation should be an integral part of any current or new information system. Assistance through the application of Privacy Impact Assessments as part of the TEL procurement is recommended[25].

- **Rule 8. Share and reuse technology**[26]. Existing TEL is to be used if it has been previously procured or designed. Many fully accredited TEL instances have been purchased for MoD use and include the DLE and VLE instances as well as enterprise licenses for authoring tools and 3D simulations such as VBS3. Defence is also required to utilise extant wider Government resources, such as Civil

[21] https://www.gov.uk/guidance/make-use-of-open-standards
[22] https://www.gov.uk/guidance/use-cloud-first
[23] https://www.gov.uk/guidance/make-things-secure
[24] As per JSP 440.
[25] https://www.gov.uk/guidance/make-privacy-integral#how-to-embed-privacy-by-design
[26] https://www.gov.uk/guidance/share-and-reuse-technology

Service Learning products for generic learning requirements and ICS catalogue for commercial hardware, software and services which are common across government.

- **Rule 9. Integrate and adapt technology**[27]. New TEL systems should be interoperable with existing technologies, infrastructure and organisation where possible. Good integration enables new technology to work with legacy systems, without limiting the ability to adapt to future demands or upgrade systems. Integration should allow the ability to create, share and adapt learning content and exchange data with other systems and effective planning should identify capability and process gaps. Exceptions to this can only be approved through the Defence Modelling and Simulation Coherence (DMaSC) Rules[28].

- **Rule 10. Make better use of data**[29]. Consideration should be given towards the minimalisation of data collection and reuse of data to avoid duplication of datasets and optimise exploitation of information (i.e. within Training Management Information Systems and across such systems) within Government regulations.

- **Rule 11. Define your purchasing strategy**[30]. The purchasing strategy must show consideration towards commercial and technology aspects and contractual limitations. Procurement of new TEL should be justified via the submission of a business case with approved means of in-year funding and, importantly, future sustainment. TEL Project leads should engage with their respective commercial representative at the earliest opportunity to exploit current contracts and opportunities before exploring bespoke procurement, but noting the following:

    - Avoid customising off-the-shelf products and services in a way that inhibits their maintenance, upgrade or removal in future.

    - Suppliers must not provide either: systems integration, service integration or service management services, at the same time as providing a component service within that system.

    - Existing enabling agreements ensure that approved suppliers are used who satisfy Government or Defence requirements. These agreements are managed and reviewed to ensure that VfM and quality are maintained. If existing agreements do not meet the TEL requirement then the Acquisition System Guidance (ASG)[31] for new contracts is to be followed in conjunction with the TEL Ruleset, which includes the ability for projects to run their own

[27] https://www.gov.uk/guidance/integrate-and-adapt-technology
[28] Detailed in JSP 939.
[29] https://www.gov.uk/guidance/make-better-use-of-data
[30] https://www.gov.uk/guidance/define-your-purchasing-strategy
[31] Further guidance can be found in the Introduction to Commercial Matters for all Involved in Defence Acquisition (dated Aug 2018).

commercial competition under the direction and guidance of an allocated Commercial Officer.

- **Rule 12. Meet the Digital Service Standard for digital services**[32]. If the TEL project or programme includes the creation of a service, then the GDS Standard should be adhered to. This includes the adoption of Agile procurement methods[33] and the ownership of code, including intellectual property rights (IPR) should be understood and documented.

5 Point of Contact

5.1 Point of Contact. People-TSLD-Trg Capability SO1.

[32] https://www.gov.uk/service-manual/service-standard
[33] https://www.gov.uk/service-manual/agile-delivery