

PeopleFluent Learning

CFR Installation Guide

Release 24.04

Contents

CFR Installation Pack..... 3

Step 1: CFR License 4

Step 2: Enable Database Auditing..... 5

Step 3: Configuration..... 6

Legal Notice 8

CFR Installation Pack

The CFR Installation Pack includes:

- CFR Installation Guide (this document)—instructions on how to run the database installation script and prepare the application to support CFR compliance.
- SQL script—a script that will create the database tables and triggers required for CFR auditing functionalities.
- CFR Overview—a document outlining the technical requirements of Title 21 CFR Part 11 and how the functionalities of the application help to meet them.

Notice to Users

This document is subject to revision based on external hardware and software changes; it may be updated periodically to reflect those changes.

PeopleFluent supports and provides defect fixes for PeopleFluent products under valid Support and Maintenance Agreements on only those operating systems and third-party systems that have been certified and published by PeopleFluent. PeopleFluent will not be responsible for providing any defect fixes for non-certified distributions.

Document Information

Revision Information	
Release	24.04
Revision Date:	April 24, 2024
Revised Document Version Number:	1.0
Details of Revision:	Initial publication.

Step 1: CFR License

You need a special license to enable CFR related features in the LMS. This document assumes that you have already acquired this license through sales channels and updated it in the *WEB-INF\conf* directory of the LMS application. Please proceed only when the license is in place.

Step 2: Enable Database Auditing

To enable database auditing, you must run the database script provided in the CFR Installation Pack.



Before running the script:

- It is recommended to back up your production database.
- You must install or update PeopleFluent Learning before running the CFR installation script for the same version.
- Stop the web server that is hosting the LMS.

Running the Script

On Windows Systems

1. Edit the db.username and db.password in the build.xml file with the authentication information for executing the database installation scripts.
2. Make sure the JAVA_HOME and TOMCAT_HOME environment variables are set correctly.
3. Execute `install.bat`.

On Linux/Unix Systems

1. Edit the db.username and db.password in the build.xml file with the authentication information for executing database installation scripts.
2. Make sure JAVA_HOME and TOMCAT_HOME environment variables are set correctly.
3. Set execution permission to `install.sh` and `ant` by running `chmod +x install.sh ant`.
4. Execute `install.sh`.

Reverting in Case of Failure

The CFR installation script takes a backup of the original database scripts present in the nschema folder of the installation directory to nschema.backup. In case of failure, the database can be recreated using these scripts and backed-up data can be restored. Please contact PeopleFluent, providing the details of the failure.

Step 3: Configuration

After enabling database auditing, restart the application, log in as a system administrator and configure the system for CFR using the settings described below.

Role Access Controls

- Ensure the access control for *Allow User Deletes* is disabled for all User Roles.
- Ensure that access to the API is disabled so that the application remains a closed system.
- Enable *Compliance Reports*, which provides access to:
 - R501 - Module Completion Target Status
 - R502 - Program Completion Status
 - R503 - Mass Distribution Program Compliance Status (ORG membership based)
 - R504 - Mass Distribution Program Compliance Status (DA-based)
 - R505 - Audit Trail Report
 - R506 - Audit Trail User Action Report
 - R507 - Learning Module Audit Report
 - R508 - User Transcript Audit Report
 - R509 - Module Completion Audit Compliance Report
 - R510 - Module Deadline Completion Percentage by Organization

System Configuration

The *eSignature* category is available for CFR-enabled licenses, under which is the *Learning program completion from* setting. Set this to:

- *Learner*, if programs should be marked complete by the learner, or
- *Instructor*, if programs should be marked complete by the instructor.

Organization Maintenance

PeopleFluent recommends enabling electronic signatures for all required places at the root organization level. If necessary, settings can be customized for individual organizations. The following eSignature settings are available per organization:

- eSignature legal name format
- Enable eSignature for course CSV loader
- Enable eSignature for program CSV loader

- Enable eSignature for when a learner withdraws from a course
- Enable eSignature for course update/delete
- Enable eSignature for course launch
- Enable eSignature for structured course importers
- Enable eSignature for course finish/completed
- Enable eSignature for exam launch
- Enable eSignature for change in question status
- Enable eSignature for question importers
- Enable eSignature for manual grading of test answer
- Enable eSignature when transcript details are modified by a reviewer
- Enable eSignature when transcript details are modified via the catalog editor
- Enable eSignature for transcript attendance details modification
- Enable eSignature when transcript details are modified via the enrollment wizard
- Enable eSignature when editing an external training record
- Enable eSignature for Certification update/delete
- Enable eSignature for awarding/deleting User Certifications

Legal Notice

This document has been created for authorized licensees and subscribers ("Customers") of the software products and associated services of Learning Technologies Group, Inc. by its division PeopleFluent and all of its affiliates (individually and collectively, as applicable, "PeopleFluent"). It contains the confidential and proprietary information of PeopleFluent and may be used solely in accordance with the agreement governing the use of the applicable software products and services. This document or any part thereof may not be reproduced, translated or retransmitted in any form without the written permission of PeopleFluent. The information in this document is subject to change without notice.

PEOPLEFLUENT DISCLAIMS ALL LIABILITY FOR THE USE OF THE INFORMATION CONTAINED IN THIS DOCUMENT AND MAKES NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO ITS ACCURACY OR COMPLETENESS. PEOPLEFLUENT DISCLAIMS ALL IMPLIED WARRANTIES INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. PEOPLEFLUENT DOES NOT GUARANTEE THAT ITS PRODUCTS OR SERVICES OR ANY SAMPLE CONTENT CONTAINED IN ITS PRODUCTS AND SERVICES WILL CAUSE OR ENABLE CUSTOMER TO COMPLY WITH LAWS APPLICABLE TO CUSTOMER. USERS ARE RESPONSIBLE FOR COMPLIANCE WITH ALL LAWS, RULES, REGULATIONS, ORDINANCES AND CODES IN CONNECTION WITH THE USE OF THE APPLICABLE SOFTWARE PRODUCTS, INCLUDING, WITHOUT LIMITATION, LABOR AND EMPLOYMENT LAWS IN RELEVANT JURISDICTIONS. THE PEOPLEFLUENT PRODUCTS AND SAMPLE CONTENT SHOULD NOT BE CONSTRUED AS LEGAL ADVICE.

Without limiting the generality of the foregoing, PeopleFluent may from time to time link to third-party websites in its products and/or services. Such third-party links are for demonstration purposes only, and PeopleFluent makes no representations or warranties as to the functioning of such links or the accuracy or appropriateness of the content located on such third-party sites. You are responsible for reviewing all content, including links to third-party web sites and any content that you elect to use, for accuracy and appropriateness, and compliance with applicable law.

Any trademarks included in this documentation may comprise registered trademarks of PeopleFluent in the United States and in other countries.

Microsoft, Windows, and Internet Explorer are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries. Oracle and PeopleSoft are registered trademarks of Oracle International Corporation. Adobe and Acrobat are registered trademarks of Adobe Systems Incorporated. All other names are used for identification purposes only and are trademarks or registered trademarks of their respective owners. Portions of PeopleFluent Workforce Communication software may include technology licensed from Autonomy and are the copyright of Autonomy, Inc. Quartz Scheduler is licensed under the Apache License.

Website: peoplefluent.com

Copyright © 2024, Learning Technologies Group, Inc. All rights reserved.