# Cummins Quality Management System (CQMS-MetricStream) Site Administrator Guide-Managing CQMS Users

# 1. Managing CQMS Users

# 1.1 CQMS User Account

A CQMS-MetricStream Site Administrator has the authority to add and maintain (update and expire) CQMS-MetricStream User Accounts for any CQMS Users across the company but can only modify accesses for those accounts within their own organization.

All Cummins Employees that need access to CQMS-MetricStream will use their existing production LDAP account and password. This means that all Cummins Employees will use their WWID to login and their existing production passwords.

In addition, CQMS-MetricStream External Supplier Contacts, once registered in the Cummins Supplier Portal, will directly access CQMS through their Supplier Portal Login (supplier.cummins.com).



All CQMS-MetricStream User Accounts are managed under System **Users** tab as shown below.

## **CQMS Site Admin Guide**

## **Cummins Internal Use Only**

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Note: Site Administrators can see <u>all</u> CQMS-MetricStream Accounts under the Users tab. However, Site Administrators can only allow users access to their organizations roles (org-role pair).

For example a senior engineer at CTC may need access to be a Waiver First Approver in an organization outside of their site. The Site Administrator at the site where access is required may wish to modify the users account and grant them access to their sites org-role pair(s).

When working on CQMS-MetricStream User Accounts, always have the following information available:

Full Name WWID Role(s) Organization

# 1.2. Create a new Cummins CQMS-MetricStream User

A new CQMS-MetricStream user will be created from their existing Cummins Production LDAP account so you should **NEVER** use the **Create User** button in the **Users** tab.

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In CQMS-MetricStream, the **External Users** button will pull in the Cummins Users existing LDAP Account information; specifically their User ID (WWID), First Name, Middle Initial (if defined), Last Name, email and password.

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Note: A CQMS-MetricStream User Account is based off of the original LDAP Account information and cannot be changed directly in CQMS-MetricStream. If a user has updated their name on email, they will need to contact the Cummins Help Desk to request that their LDAP Account from WWIMS be updated. The CQMS User Account will be updated once a day automatically through a scheduled interface (infolet).

The following steps identify the process for creating a new CQMS User:

1. Click the **Users** tab and type the WWID or search using the Users First or Last Name by using the % character before and after the name in **Search for User:** field and then click the **Go!** Button.

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The sample screen shot above shows that user nd100 already exists as a valid CQMS-MetricStream User so you will not need to add them.

If no match is found from your search then this user does not have a valid CQMS-MetricStream account (user profile). Please proceed to the next step.

2. Click the External Users button to locate the LDAP Account information.

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3. Enter the WWID in the Search for User: field and then click the Go! Button. We cannot use First or Last Name in this field. It MUST be the WWID. \*\*\* Do NOT use the % wildcard character this search. The system interprets it as part of the user name rather than a search feature. \*\*\*

INC/PNC CAR/SCAR	My Reports & Charts Admin	MNC Reports - New Design	CAR/SCAR Reports - New Design	PNC Reports - New Design	PPAP Internal	PPAP Admin	Incident IT Help	PPAP Reports	SR Internal	SR Reports	Plant Reports	Administration	System
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Note: If no row is found, then this user does not have a valid Cummins Production LDAP Account and cannot gain access into CQMS-MetricStream until an LDAP Account is created.

If the search results show the person you need to setup, please proceed to the next step.

4. Check the new user checkbox and then click the **Update Users** button to pull their LDAP account information into CQMS. This step will automatically create a new CQMS-MetricStream user profile.

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Note: A successful status message highlighted in yellow will appear in the upper right corner of the window. This message confirms that the user had been successfully added as a CQMS-MetricStream User and you can now see their profile under the **Users** tab.

5. Click the **Users** tab and type their WWID in the **Search for User:** field and then click the **Go!** Button.



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One row should now be shown and this resembles the new user profile. Click on the User Name (WWID) hyperlink to open the newly created user profile. \*\*\* Do NOT check the "Edit User" Checkbox or click the "Edit Users" Button. \*\*\*

6. Update/Confirm the new users profile

information. Under the **User Profile** Section:

Verify/Update the **Locale** to English-United States (it should default to this) Verify/Update the **Time Zone** to current time zone of the user Set **Default First Page** to Infocenter

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# **Metric**Stream

Manage Users > Edit User					
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User Profile Responsibilitie	es Preferences	Profiles	User Org-Role P	air Associations	User Infolet Group Associati
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First Name*	Sana				
M.I.					
Last Name <sup>®</sup>	Mirza				
Email Address*	sana.n	nirza@test	123.com		
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Start Date*	01/27/	2015		3:53 PM	×
End Date			-		~
Comments					

Note: To remove a user from CQMS-MetricStream, set the **End Date**. This will disable the account and not allow the user to login. The **End Date** should be set to one day prior to the day you want to deactivate the login. To **IMMEDIATELY** deactivate user's account,enter YESTERDAY's date

Under the Responsibilities Section:

Check **On Demand** (Reports tab) Check **Dashboards** (Dashboard tab) . .

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Note: Only Site Administrators will have the following three additional Responsibilities and you **SHOULD NEVER** give these to anyone:

Client Administrator (Users tab)

Application Administrator (Setup tab)

Assignment Manager (Assignments tab)

New Admins should have their Quality Leaders approval to be an admin and they are required to go through training. Please Contact Corporate Quality.

Under the **Preferences** Section:

Note: If there is nothing in this section, then proceed to the Profile Parameters. This section will appear once a CQMS-MetricStream job runs and it should automatically default to the value NEW\_WINDOW.

If the Preference Name **DRILLDOWN\_WINDOW\_TYPE** exists as shown below, confirm the Preference Value is *"NEW\_WINDOW"*. This will allow all the reports where a drill-down is defined to open in a separate window instead of the current window.



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User Profile	Responsibilities	Preferences	Profiles	User Org-Role Pair Associations	User Infolet Group Associatio	ins	
Preference I	Name				P	reference Description	Preference Value
DRILLDOW	N_WINDOW_TYPE				5 0 1	Specifies whether the drilldown report should be opened within the same window or in a new vindow	New Window 🔽
Submit	Cancel						

#### Under the Profiles Section:

Profile Parameter	~	/	
Profile Value		Add	
Existing Profile Parameters	Enterprise Name(CQMS-DEV1) User Name(nd100)		
Profile Name			
Profile Value		Delete	Edit

No profile parameters will be defined for a new user profile. Click on the Profile Parameter drop down list to set the following two parameters:

Profile Parameter		
Profile Value	Supplier Name	
Existing Profile Parameters	Quality Manager PPAP Supplier	
	Hide_Doc_Nav_Tree USER PPAP internal	
Profile Name	Supplier Code BRZ QA INSPECTOR LOGIN ID	
Profile Value	BUSINESS_UNITS COMPLIANCE_AREA PPAP Report	
Submit Cancel	infocenter	
	Enterprise Name	

Select the Profile Parameter **Enterprise Name** and set the **Profile Value** to "CQMS" and then click the **Add** button.

Select the Profile Parameter **User Name** and set the **Profile Value** to "<wwid>" and then click the **Add** button.

Note: The profile parameter values are <b><u>case sensitive</u></b> . The Enterprise Name must be in all	
UPPERCASE and the User Name (WWID) must be in all lowercase as shown below.	

Profile Parameter	~	·	
Profile Value		Add	
Existing Profile Parameters	Enterprise Name(CQMS-DEV1) User Name(nd100)		
Profile Name		1	
Profile Value		Delete	Edit

The **Org-Role Pair** and **User Infolet Group Associations** Sections will be blank. The associations to Infolet Groups and Org-Role Pairs will be performed outside of the profile (see steps 9 & 10 below).

7. Click the Submit button to save and complete the user profile settings.

At this time, the new CQMS-MetricStream User is created but if the new user logs in, there will be a message that says no InfoPorts have been defined. This means that no Infolet Groups and Org-Role Pairs have been assigned to this user.

The new user must be assigned to the appropriate Infolet Group(s) <u>first</u> and then to the Org-Role pair(s) <u>after</u> to determine what CQMS-MetricStream Activities the user can perform and what CQMS-MetricStream Data the user has access too.

Note: Site Administrators **DO NOT** manage Supplier Contact Accesses. These are managed through the CQMS Supplier Registration Group via email to **CQMSSupplierRegistration** <u>cqmssupplierregistration@cummins.com</u>. The process in the following link MUST be followed prior to contacting the Registration Group. Managing CQMS Metric Stream Supplier Contacts

The ONLY items that a Site Administrator can edit for a Supplier Contact Profile is Time Zone, Default First Page and at times when required, place an End Date in the profile. In case of End Date, Supplier Registration must still be informed so the Supplier Profile can be fully deactivated.

8. Click **System** Tab, **Edit users** and then the **Manage Infolet Groups** button to add the users to the appropriate infolet groups.

Edit User						-
User Profile	Responsibilities	Preferences	Profiles	User Org-Role Pair Associations	User Infolet Group Associations	
Search Infolet	Group		Go			
Infolet Grou	ıp Name					Assign To User
ACE						
APPSTU	DIOCORE					
ASIDE						
Applicatio	n Administrator					
Apps Infra	astructure					
BFCEC_F	PPAP_REPORT					$\checkmark$
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CAR Actio	on Items					
CAR Adm	in					$\checkmark$
CAR SCA	R respondent					
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Submit	Cancel	Get Selected				

The Site Administrator will setup the appropriate Infolet Groups based on which Role(s) the user needs access too (see Appendix A – Infolet Groups and Roles).



Edit User

Note: The Infolet Group Name and the Role Name are not always the same. For example the **MNC Approver** infolet group maps to the **Enterprise Supervisor** role.

Note: One Infolet Group does not always map to just one role. For example the **Waiver** infolet group maps to the **Waiver Approver 1**, **Waiver Approver 2**, **Waiver Level 1 Escalation**, **Waiver Level 2 Escalation** and **Waiver Level 3 Escalation** roles.

Sometimes, there are NO Infolet Mappings to a role. For Example, **Escalation Levels 1, 2 & 3** or **Supplier Quality Escalation Levels 1, 2 & 3. (See Appendix A – Roles & Infolets for further information)** 

9. Identify which Infolet Group required then click on check box to add the user into the selected Infolet Group and click on Submit button.

User Profile Resp	onsibilities	Preferences	Profiles	User Org-Role Pair Associations	User Infolet Group Associations	
earch Infolet Group			Go			
Infolet Group Nam	ie					Assign To User
ACE						
APPSTUDIOCO	RE					
ASIDE						
Application Adm	inistrator					
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BFCEC_PPAP_	REPORT					$\checkmark$
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CAR Admin						$\checkmark$
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A Page 1	of 8 🕨 🕨	🕨   🍣   Rec	ords per pa	ge:10	L	
Submit	Cancel	Get Selected				

Note: A user can be added to one or more infolet groups depending on their functions.

10. Once the **ALL** of the appropriate Infolet Groups have been added, return to the **System** tab and then click the **Manage Organization – Role Pairs** button.

The organization defines the data access and the role defines the CQMS-MetricStream functionality the user can perform.

<b>Metric</b> Strea	m				My Task	I III	ly Calendars			
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System > Mana Manage Use Search for User	age Users ers User Sta All Create User User User	tus: Access Create Pr	♥ Go	Manage Organiza	ation - Role Pairs	Move/Copy O	rg - Role Pairs			
Edit Users	User Name				Name				Use	er Type
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	071_10u012				Brian Davies					Q
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11. Search all the organizations roles by entering the CQMS Organization Name in the **Search for Organization:** field and then click the **Go!** Button.

For example, the next screen shot shows all the roles available in the JEP Organization.

Note: Only 10 roles are displayed per page and then page links will appear in the lower right corner. For example, the JEP Organization has four pages of roles as shown below (Up To 40 Roles).

	St Hy Tasks: 2 (5 New, 0 Past due)	Thy Calendary	Archista JayAumar Help
C CARSON Pry Reports & Charts Admin IVAP Second IVAP Admin QUDI Reports	s Section III Instr. IVMP Reports SR External SR Reports COTC-R3 Reports MRC Reports - New Delo	n Mic Naporta - New Design CAR,5CAR Reports - New Design My Reports Administration	
on Types   Exterprises   Gadgets   Looses   Uses   RUP   Hundor   Tools -			
Animatration > Manage Roles > Manage Organization - Role Pairs			
lanage Organization - Role Pairs			
earch for Organization: Search for Role:			
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Back			
rgentarbun Name	Role Name	Assign Users	
129	Plant Reporting	/	
æ	MrxC Part Manager	/	
JEP	MNC Aana SQIE	1	
æ	PLANT SQIE	/	
JEP	Query_Builder	/	
129	ADDINA SGE	/	
129	SQIE Enter	1	
10 <sup>-</sup>	JEP Reporting	/	
19	CQMS Reports Role	1	
10	internal Supplier	1	
25 <sup>9</sup>	CC Receiver	1	
10	CAR Action Approver	1	
AP	Walver Escalation Engg Manager	Austan None.1	
18	CAR Team	Assign Non.1	
JEP	Walver Level 3 Escalation	Assist. Non. J	
259	Walver Level 2 Excalation	Assign Note 1	
JEP	Walver Level 1 Excelation	Assizt Non.1	
259	Walver Approver 2	1	
	Walver Approver 1	1	
11P	Record in all Recordships		

12. Select the appropriate role and click on the *Assign Now!* link in the **Assign Users** Column to add the user to a role.

Note: The pencil icon means that there are already CQMS users in this role for this organization. If the role shows the **Assign Now!** Link, no CQMS users are currently in this role for this organization.

Note: Some roles are not utilized in CQMS and will remain with the Assign Now! link. For example -

Waiver Escalation Engg Manager CAR Team

CAUTION! The **Supplier User** and **Internal Supplier** roles have restricted access. NEVER use these Roles as a Site Administrator. Please refer to the <u>Managing CQMS Metric Stream Supplier Contacts</u> Process and email the CQMS Supplier Registration Group on **CQMSSupplierRegistration cqmssupplierregistration@cummins.com**.

13. Assign the new user to a role.

The left side of the form will show all the available users who are **NOT** in the role and the right side will show which users are **already mapped** to this role. To select a new user, check the appropriate checkbox, click the >> button to add the user and then click the **Submit** button to save the change and close the form. To add multiple users to this role, repeat the adding process in this step until all the users are listed before pressing submit.

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Administration > N	Manage Roles > Manage Orga	ization - Role P	Pairs > Assign	Users															
Assign Users																			
Organization : JE	P - Role : CAR Initiator																		
Available Users											Assigned Users								
Search for Ava	ailable Users	60									Search for Assi	aned Users		60					
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	005725				arole Falconer					(and		32003					Michael J A	state	
	071 100012				Intan Davles					**	-	88234					Gene F And	erson	
	0714tmgm				Christian Krauch						0	33852					James S Be	restord	
	0g1_10s108_b			(	Ophylla Zhao							33926					Karen S Big	ney	
	10001-2			1	UAY PATIL							ab873					Dorinda E C	ourtine-White	
	1000278			5	Douglas Kenyon							ab874					Richard J M	innick	
	100572-salisbury-001			,	lafeica Wafaquani							ac255					Reid M Inteh		
	toonarasimha			ŧ	HATTA NARASIMH	AMURTHY						ac256					Brian A Koo	ken	
	104396-modesto-01			1	Joyd Rippy							ad355					John W Hail		
	104853dh			5	ave Huang							30444					Linda M Mo	Vaster	
								1 2 3 4 5	i b 10										

Note: A user can be added to one or more roles depending on their function.

A user can be removed from a role by checking the checkbox of the appropriate assigned user located on the right hand side, then click the << button and then click the **Submit** button to save the change and close the form.

Note: For plants outside EBU who do not use GPS to manage SQIEs, site admins need to add the SQIE to the appropriate Infolets and Org Role Pair. They must wait 4 hours for the infolet to run then add them to the required SSID for their plant in the Manage Corp SQIE link. This take a further 4 hours to complete. This is how long it takes to map a Corp/Purchasing SQIE to a Supplier SSID.

14. Once the new user is added to the appropriate Infolet Groups and Org-Role Pairs, the user account will now have the appropriate permissions to perform their work.

In order to complete the setup of a new CQMS-MetricStream user the following programs (infolets) will need to run. These programs run on a scheduled daily basis.

#### o MS CMI 151 Set Infocenter Layout Order

- This infolet keeps the tab order consistent for all CQMS-MetricStream users
- Currently this infolet runs once a day

#### • MS CMI LDAP Users Profile Sync

- This infolet keeps the CQMS-MetricStream account in sync with LDAP
- Currently this infolet runs once a day

#### MS Get All Users Organizations based and Org Hierarchies

- This infolet shows all the organizations where a user can raise nonconformances
- Currently this infolet runs every 4 hours upon completion

#### • MS CAPA Get All Users Based on Org Roles

- This infolet shows all the organizations where a user can raise CAR/SCAR/PAR
- Currently this infolet runs every 4 hours upon completion

### • MS\_QMS\_FLOW\_DOWN\_ORG



This infolet is needed when there is a role change Currently this infolet runs twice a day

Note: If the new CQMS-MetricStream User Account needs to be setup faster than the infolet schedules mentioned above, please record a Remedy Ticket and request for the infolets to be run manually by the CQMS-MetricStream Support Team.

# 1.3. Create a new Supplier Contact - CQMS User

Supplier contacts (both supplier contacts from other Cummins plants (Internal Suppliers) and third party suppliers (External Suppliers)) will need to be registered before they can access the CQMS-MetricStream system.

In order to setup a supplier contact the Site Admin, Corp/Purchasing SQIE or Sourcing Manager must make a formal email request CQMS Supplier Registration team via this email address (<u>CQMSSupplierRegistration@Cummins.com</u>) but must follow the process outlined in the following link prior to emailing the registration team.

#### Managing CQMS Metric Stream Supplier Contacts

Once the request is made, the CQMS Supplier Registration Team will validate and complete the request and invite the supplier contact to complete their registration. Once the registration is completed, a daily infolet runs to complete the setup and account creation automatically in CQMS-MetricStream.

The requestor will be notified via email once the account is setup and complete for Global Supplier Portal / SIM Registration. This does not mean the supplier can access CQMS yet. They will have to wait for 24 hours before they can access.

External Supplier Contacts will gain access to CQMS-MetricStream through the <u>CQMS</u> link located in the Business Applications Section of the Supplier Portal (<u>supplier.cummins.com</u>).

Internal Supplier Contacts (other Cummins plants) will gain access to CQMS-MetricStream through <u>cqms.cummins.com</u> using their existing LDAP Account.

Note: If a supplier contact is currently using iscm to manage their NCMRs and SCARs, they will continue to use those links to finish their current work but all new MNCs/PNCs and SCARs will be created in CQMS-MetricStream (<u>CQMS</u> link).

# 1.4. Updating a CQMS-MetricStream User Account

The management of all CQMS-MetricStream User Accounts will be performed under the **Users** tab. Any changes to a user's account will take affect once the change is submitted.

To add a new organization - role, perform the following steps:

1. Verify the user is already a member of the corresponding Infolet Group by clicking the **Manage Infolet Groups** button under the **Users** tab (or by looking at the user's profile).

Note: The user must first be added to the Appropriate Infolet Group before being assigned to the appropriate organization – role. If the user is not assigned to the corresponding Infolet group, assign them

now by clicking the 🥂 icon under the Assign Users column.

- 2. Once you have verified or assigned the user to the appropriate Infolet group, click the **Manage Organization Role Pairs** button.
- 3. Search for the appropriate organization and role you wish to add the user to and then click the *relation* icon under the Assign Users column.
- 4. Check the users name under the **Available Users** List, click the >> button to assign the user and click the **Submit** to save and close the form.
- 5. Verify the newly added organization role by reviewing the users profile under the **Users** tab.

To remove an organization - role, perform the following steps:

- 1. Under the **Users** tab, click the Manage **Organization Role Pairs** button.
- 2. Search for the appropriate organization and role you wish to remove the user from and then click the *icon* under the Assign Users column.
- 3. Check the users name under the **Assigned Users** List, click the << button to remove the user and click the **Submit** to save and close the form.
- 4. Verify the removal of the organization role by reviewing the users profile under the **Users** tab.

Note: Removing a user from an Organization – Role may also require the removal of an Infolet Group if there are no other organization – roles mapped to that Infolet Group. To remove the user from the Infolet Group, click the **Manage Infolet Groups** button. This is **NOT** really necessary and can be skipped.

#### To expire (deactivate) a user, perform the following steps:

- 1. Under the **Users** tab, open the users' profile.
- 2. Set the **End Date** to the current date or a future date to deactivate their account and click the **Submit** button to save and close the form.



To immediately deactivate a user, enter yesterday's date into the end date and press submit

Note: If there are work assignments assigned to the user you are expiring, please be sure to reassign the work before the user is deactivated.

To reactivate a user's access to CQMS, perform the following steps:

- 1. Under the **Users** tab, open the users' profile.
- 2. Remove the **End Date** and click the **Submit** button to save and close the form.

To update the time zone, perform the following steps:

- 1. Under the **Users** tab, open the users' profile.
- 2. Select the appropriate **Time Zone** and click the **Submit** button to save and close the form.