



Companion by Minitab®

Getting Started

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Contents

1 Introduction to Companion.....	4
Objectives.....	4
What is Companion?.....	4
How Companion works.....	4
Install the desktop app.....	5
About this guide.....	5
What's next.....	5
2 Execute Your Project.....	6
Objectives.....	6
Start a new project.....	6
Save your project.....	7
Share your project.....	7
What's next.....	8
3 View the Dashboard.....	9
Objectives.....	9
Open the dashboard.....	9
The dashboard.....	9
Your view of the dashboard.....	11
What's next.....	11

1 Introduction to Companion

Objectives

- [Learn about Companion](#) on page 4
- [Learn how Companion works](#) on page 4
- [Install the desktop app](#) on page 5
- [Learn about this guide](#) on page 5

What is Companion?

Companion combines a powerful desktop app for executing projects with a secure web app that provides insight into your entire business initiative. The web app and the desktop app work together to help you control and monitor your deployment.

The web app has:

- Dashboard for reporting key metrics
- Central repository for storing projects
- Design center for managing data and templates

The desktop app has:

- Management section for ensuring consistent project definition and tracking
- Roadmaps for guiding users through their projects
- Forms and integrated tools needed for efficient project execution

The Companion dashboard summarizes project data and displays it in reports to give users and stakeholders views into the deployment. Dashboard reports let you see the aggregated data for key metrics across the deployment, as well as details such as status, phase, or the individual contributions of a single project.

How Companion works

At a high level, here's how Companion works to ensure consistency across projects:

- Users work on their projects in the desktop app using company-approved templates.
- Everyone saves their projects to the web-based project repository.
- The Companion dashboard summarizes the data from the projects in the repository and displays the results in reports for everyone to see.

Note Data architects manage the company-approved data fields and templates in the design center. If you are a data architect, go to [Manage global data fields and templates](#).

Install the desktop app

If you haven't already installed the desktop app, you might want to so you can follow along. Your company's license administrator controls how to install it and receive updates.

- If your license administrator allows you to install the desktop app, then you can access the download from the project repository's Help panel in the web app. When updates are available, you will receive them automatically when you sign in.
- If your license administrator installs the desktop app for you, then you can start to use it when the shortcut appears on your desktop. When updates are available, you will receive them when the license administrator deploys them.

About this guide

This guide highlights some basic features to help you get started. By the end of it, you will know how to:

1. Create, save, and share a new project.
2. Use a Roadmap to guide you through the forms and tools of each phase.
3. Open the dashboard and understand its components.

What's next

Let's get started!

2 Execute Your Project

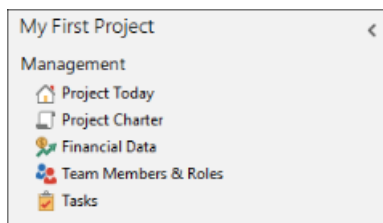
Objectives

- [Start a new project](#) on page 6
- [Save your project](#) on page 7
- [Share your project](#) on page 7

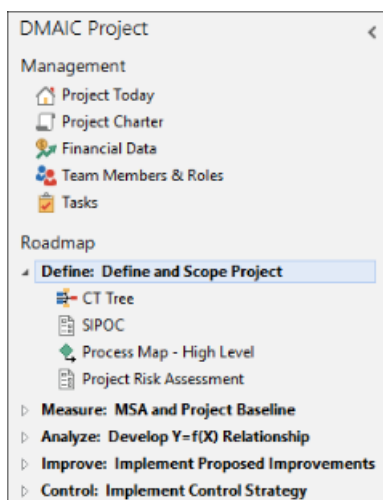
Start a new project

Start a new project from a company-approved project template.

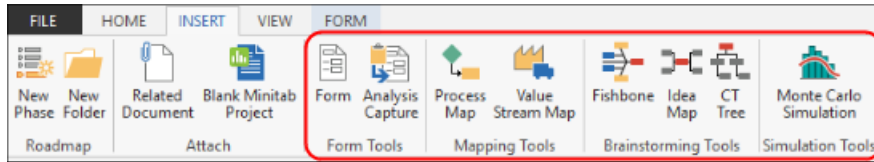
1. Open the Companion desktop app.
2. Choose **File** > **New** and choose a project template.
Each project template has a different Roadmap to help guide you through the phases of your project.
3. Complete the forms in the **Management** section.
The management section is the same for every project template provided by your company. The forms in this section contain much of the data needed for dashboard reports, so it's important to complete them and keep them updated as you work through your project.



4. Complete the recommended forms and tools in each phase of the Roadmap.
The Roadmap is your company's blueprint for executing projects. Forms in the Roadmap might also contain data needed for the dashboard.



5. If the Roadmap doesn't have a form or a tool you need, you can add one from the **Insert** tab.



6. For Information about a specific form or tool in the Roadmap, right-click it and choose **Help**.
You can also go to:

- [Insert and fill out a form](#)
- [Insert an analysis capture tool](#)
- [Process map](#)
- [Value stream map](#)
- [Fishbone](#)
- [Idea map](#)
- [CT tree](#)
- [Monte Carlo simulation](#)

Save your project

All Companion projects are saved to the secure web-based project repository.

1. Choose **File > Save As > Project Repository**.
2. Click **Browse** and enter a name for your project.
3. To include the data from your project in dashboard reports, click **Include in dashboard**.

4. Click **Save**.
The project is saved to the project repository and is checked out to you. When a project is checked out to you, no one else can edit it until you close it.

Share your project

After you save your project, you can share it with anyone who is part of your company's Companion subscription. Sharing projects makes it easier to collaborate with team members and keep key stakeholders informed.

1. Choose **File > Share**.

2. Enter the name of the user you want to share the project with, choose their level of access to the project, and click **Add**.

Repeat to add more users.

Share

- Share this project with other Companion users
- Set the level of access for all users or an individual named user ⓘ
- Change the project owner

Type a name or email address

Agnes Sousa Can View Add

User	Level of Access
All Companion Users	Restricted
Monica Meagher	Is Owner

What's next

Now that you've started a new project, saved it to the repository, and shared it with your team, use the dashboard to see the progress of the overall deployment and how your project is contributing to it.

3 View the Dashboard

Objectives

- [Open the dashboard](#) on page 9
- [Learn about the dashboard](#) on page 9
- [Learn about your view of the dashboard](#) on page 11

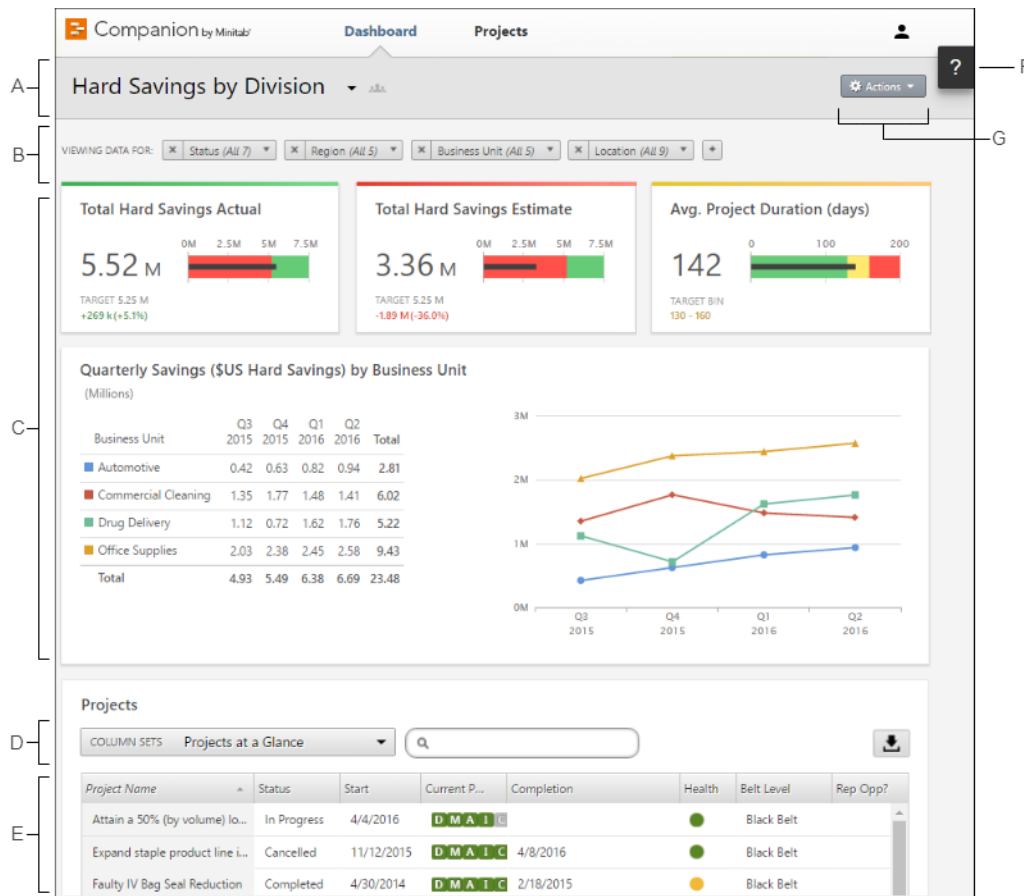
Open the dashboard

You can open the dashboard from the desktop app.

1. Choose **File > Dashboard**.
2. Sign in using your email address and the password you created when you activated your Companion account.

The dashboard

The dashboard is a component of the web app you use to view reports. Dashboard reports summarize data from projects that are stored in the project repository. An example of a dashboard report is shown below.



Dashboard reports may contain any of the following components:

A: Report

A collection of filters, summaries, and column sets.

B: Filters

Allows you to focus on a subset of projects, based on a condition, such as region, location, or project status.

C: Summaries

Displays aggregate project data, such as the number of projects in each division, the average duration of projects, or the total project savings by quarter. Also displays optional targets.

D: Column sets

Determines the fields that are displayed for each project in the projects list.

E: Projects list

Displays a list of all projects meeting the current filter's criteria.

F: Help button

Gives you access to topics, videos, the Quick Tour, and the download link for the desktop app.

G: Actions menu

Gives you access to common tasks, such as editing, copying, and creating new reports, saving a report as a PDF, and setting default reports.

Your view of the dashboard

Most reports on the dashboard are public. Unless you are a data architect or an administrator, you can't create or edit public reports, but you can change what you see by applying filters. For example, you might want to filter a report by your business unit or location. For more information, go to [Apply filters](#).

If you see a public report that you like, you can copy it, and then edit it to suit your personal preferences. You can create reports, but you can't make them public. Only you can view and edit your personal reports. For more information, go to [Create and edit reports](#).

Note Data architects manage public reports. If you are a data architect, go to [Create and edit public reports](#).

What's next

For videos, how-to's, and glossary terms, go to [Companion Support](#).