



Companion by Minitab®

## Getting Started

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# 1 Introduction to Companion

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## 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
- Workflow for collecting and vetting ideas, converting them into projects, and advancing projects through phases
- Design center for managing data, templates, and workflow

The desktop app has:

- Idea form for submitting ideas
- 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 submit project ideas to the steering committee.
- The steering committee evaluates the ideas and converts the best ones to projects by assigning a methodology and a project owner.
- Users are notified when they become a project owner. Project owners execute the project in the desktop app using company-approved templates.
- After each phase, the project owner must submit the project to the review board.
- The review board must approve the current phase before the project can move to the next phase.

- 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.

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

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## Install the desktop app

If you haven't already installed the desktop app, you might want to so you can follow along with this guide. Your company's license administrator controls how to install the desktop app 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. Submit project ideas and understand workflow.
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 Start a Project

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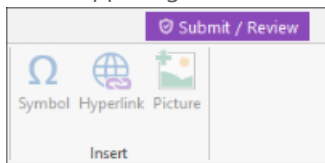
## Objectives

- [Submit your idea](#) on page 6
- [Understand workflow](#) on page 6

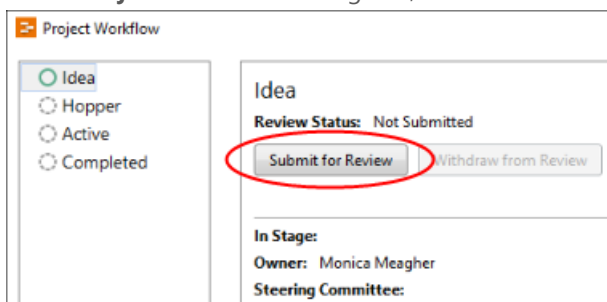
## Submit your idea

When workflow is on, every project that starts as an idea is automatically included in the dashboard. If you have a project idea, submit it using your company's official idea form.

1. In the desktop app, choose **File > New > New Idea > Create Idea**.
2. Complete the idea form. Be sure to complete any data fields required for approval.
3. In the upper right corner of the form, click **Submit / Review**.



4. In the **Project Workflow** dialog box, click **Submit for Review**.



Companion automatically saves the idea, if it isn't already, then submits it to the steering committee for review.

## Understand workflow

After you submit an idea, your company's steering committee is notified. The steering committee is a group of Companion users selected to evaluate and prioritize new ideas. If the steering committee approves the idea, it automatically moves to the hopper. If they reject the idea, its originator is notified and given the opportunity to resubmit.

From the hopper, the steering committee can evaluate and compare approved ideas and decide which ones to convert to projects. When a steering committee member decides to start a project, they must select a methodology and assign a project owner. The project owner receives an email notification containing a link to the active project.

If you are selected as a project owner, you are notified so you can begin to execute the project through the phases of the selected methodology.

## What's next

Now that you've submitted your idea and have a basic understanding of workflow, learn how to execute your project in the workflow environment.

# 3 Execute Your Project

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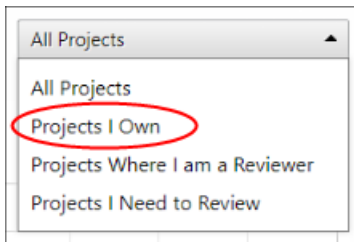
## Objectives

- [Open the new project](#) on page 8
- [Submit your project for phase review](#) on page 9
- [Share your project](#) on page 10

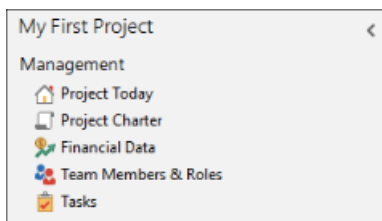
## Open the new project

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

1. If you become the owner of a project, do either of the following:
  - Click the link in your email notification.
  - Sign in to the web app, click the **Workflow** tab, click the **Active** stage, and from the filter, choose **Projects I Own**.

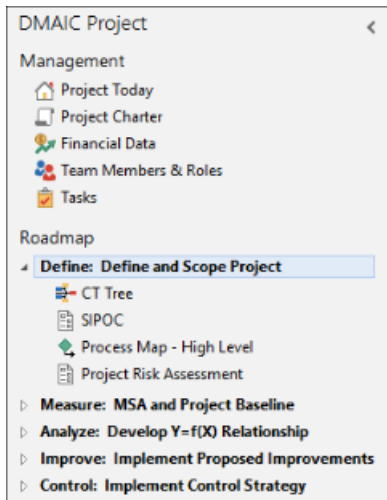


2. From the list of projects you own, click the one to open.  
Companion opens it in the desktop app.
3. Complete the forms in the **Management** section.  
The management section is the same for every project template provided by your company. The forms in this section contain much of the data needed for dashboard reports, so it's important to complete them and keep them updated as you work through your project.

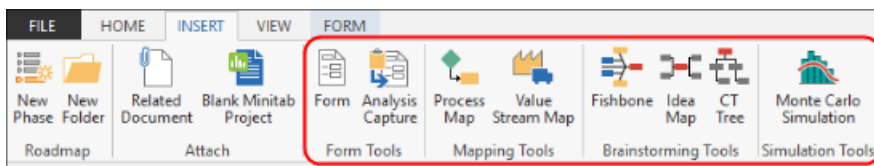




- Complete the recommended forms and tools in each phase of the Roadmap.  
The Roadmap is your company's blueprint for executing projects. Forms in the Roadmap might also contain data needed for the dashboard.



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

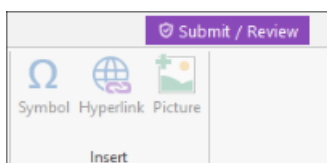


- For Information about a specific form or tool in the Roadmap, right-click it and choose **Help**, or go directly to one of the following topics:
  - [Insert and fill out a form](#)
  - [Insert an analysis capture tool](#)
  - [Process map](#)
  - [Value stream map](#)
  - [Fishbone](#)
  - [Idea map](#)
  - [CT tree](#)
  - [Monte Carlo simulation](#)

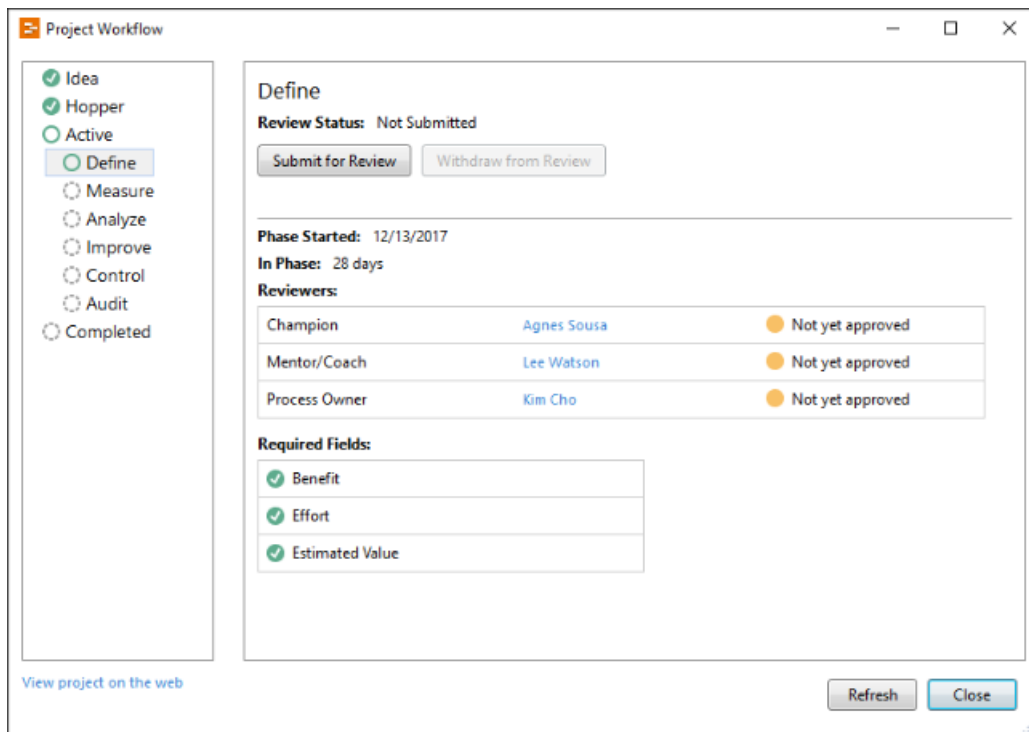
## Submit your project for phase review

After all the required fields for the first phase of your project's methodology are complete, you can submit it for review. Phase reviews are required after each phase. You cannot work on the next phase of a project until the current phase is approved.

- In the desktop app, in the upper right corner, click **Submit / Review**.










- In the **Project Workflow** dialog box, click **Submit for Review**.



Companion saves and submits the project for review. Only the members of the review board who are responsible for reviewing the current phase are notified.

- Close the **Project Workflow** dialog box.

To see the review board members responsible for reviewing each phase, you can click the different phases in the **Project Workflow** dialog box, or you can go to the **Workflow** tab in the web app. In the **Active** stage, expand the project details and click the people  icon for the phase.

Phase	Approved	Reviewers
Define	Not submitted	3 
Measure	Not started	2 
Analyze	Not started	2 
Improve	Not started	2 
Control	Not started	4 
Audit	Not started	1 

## 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.

**Note** Your workflow project is automatically shared with members of the review board.

- 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

Ari Ursino    Can View ▼    Add

User	Level of Access
All Companion Users	Can View ▼
Neil Patel	Is Owner ▼
Agnes Sousa	Can Edit ▼
Kim Cho	Can Edit ▼
Lee Watson	Can Edit ▼

## What's next

Now that you've started to execute your project, submitted it for phase review, 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.

# 4 View the Dashboard

## Objectives

- [Open the dashboard](#) on page 12
- [Learn about the dashboard](#) on page 12
- [Learn about your view of the dashboard](#) on page 13

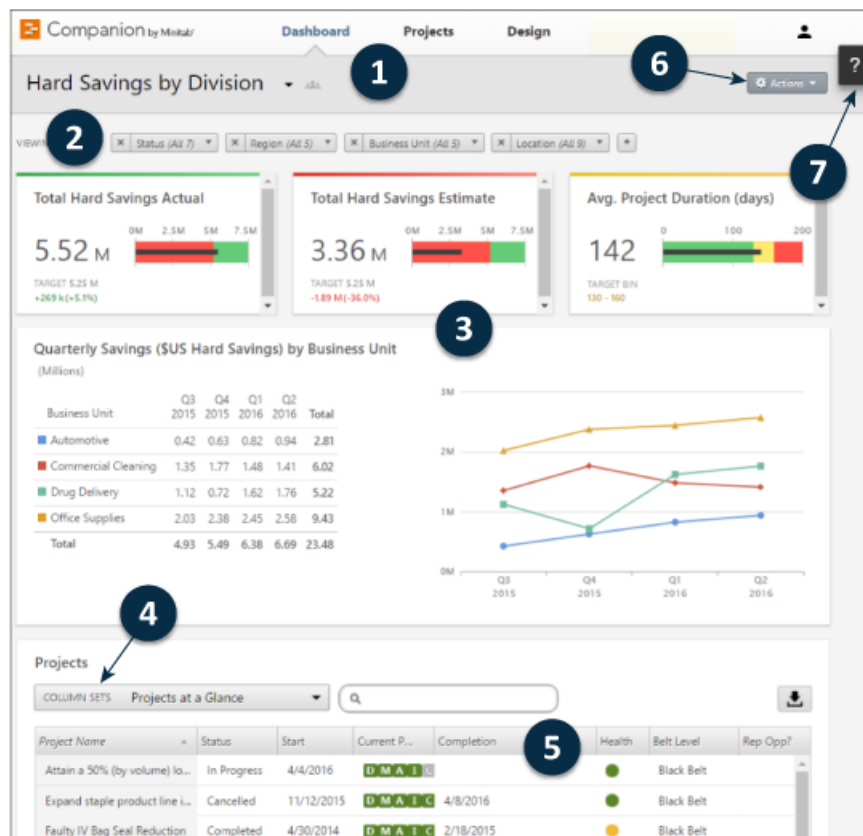
## Open the dashboard

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. The following image is an example of a dashboard report.



Dashboard reports may contain any of the following components:

**1: Report**

A collection of filters, summaries, and column sets.

**2: Filters**

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

**3: 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.

**4: Column sets**

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

**5: Projects list**

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

**6: 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.

**7: Help button**

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

## Your view of the dashboard

Most reports on the dashboard are public. Unless you are a data architect, 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](#).

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

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## What's next

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