



# Companion by Minitab®

入門

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# 1 Companion 簡介

## 目標

- 瞭解關於 Companion 第 4 頁
- 瞭解 Companion 如何運作 第 4 頁
- 安裝 Desktop App 第 5 頁
- 瞭解關於本指南 第 5 頁

## Companion 是什麼?

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.

Web App 包含:

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

Desktop App (桌面應用程式) 包含:

- 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.

## Companion 如何運作

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.

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**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](#).

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# 安裝 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.

## 關於本指南

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.

## 下一步

Let's get started!

# 2 執行您的專案

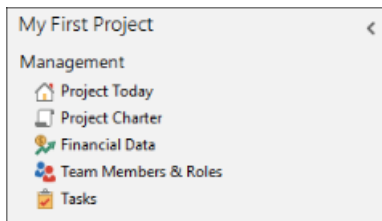
## 目標

- [開始一個新專案](#) 第 6 頁
- [儲存您的專案](#) 第 7 頁
- [分享您的專案](#) 第 7 頁

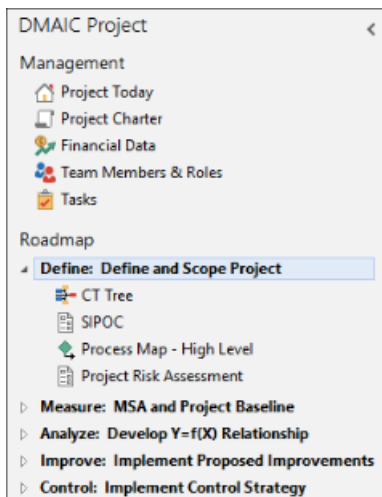
## 開始一個新專案

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

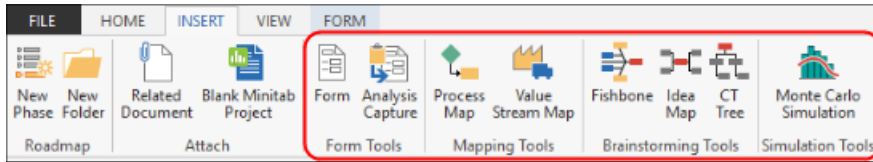
1. Open the Companion desktop app.
2. Choose **File** > **New** and choose a project template.  
Each project template has a different Roadmap to help guide you through the phases of your project.
3. Complete the forms in the **Management** section.  
The management section is the same for every project 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**.

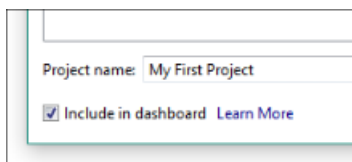
You can also go to:

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

## 儲存您的專案

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.

## 分享您的專案

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. 選擇 **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.

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

## 下一步

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 檢視 Dashboard

## 目標

- 開啟 [Dashboard](#) 第 9 頁
- 瞭解關於 [Dashboard](#) 第 9 頁
- 瞭解檢視您的 [Dashboard](#) 第 11 頁

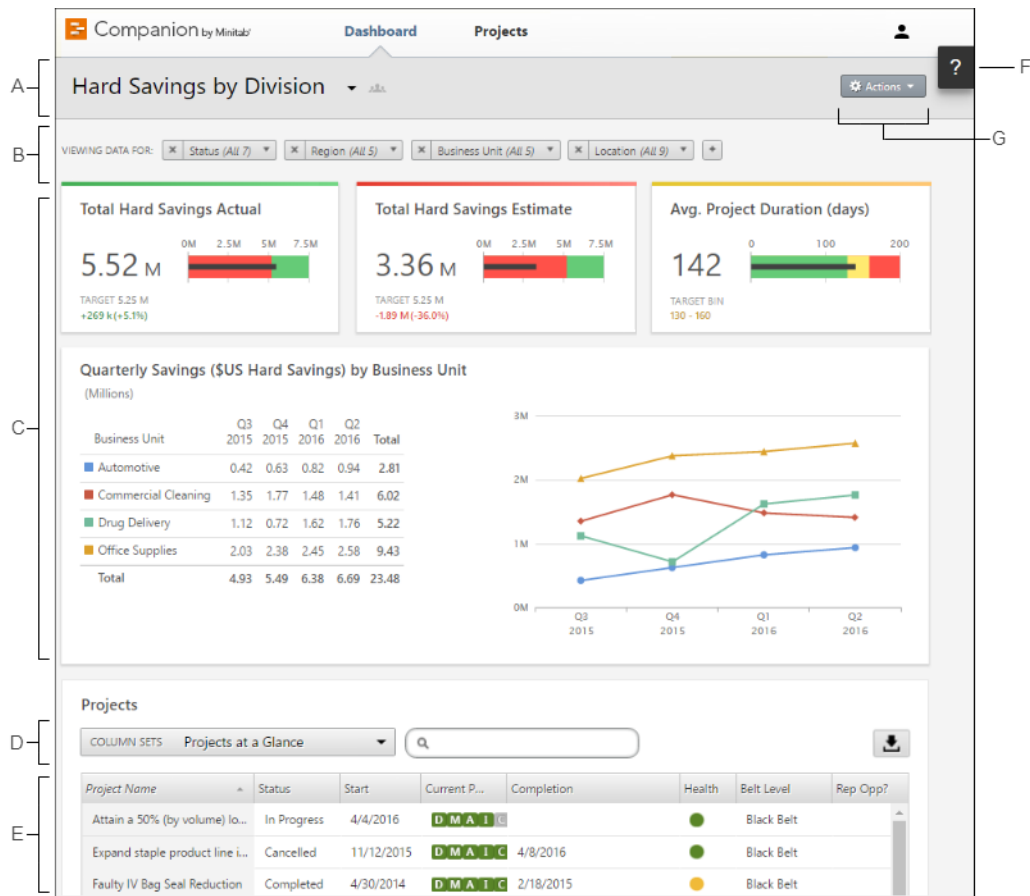
## 開啟 Dashboard

您可以從 Desktop App (桌面應用程式) 開啟 Dashboard。

1. 選擇 **File > Dashboard**。
2. 當啟用您的 Companion 帳號時，請使用您的 Email Address 和所建立的密碼登入。

## Dashboard

Dashboard (儀表板) 是用於查看報告的 Web App (網頁應用程式) 的一部分。Dashboard 報表匯整總結了儲存於專案儲存庫 (Repository) 的專案數據。下列是一個 Dashboard 報表的範例。



Dashboard 報表包含下列各部分：

#### A: 報表 (Report)

一個由篩選器、摘要總結和欄位集合所組成。

#### B: 篩選器 (Filters)

允許您根據條件，例如：區域、位置或專案狀態，而專注於瞭解專案的一部份集合。

#### C: 摘要總結 (Summaries)

#### D: 欄位集合 (Column sets)

確認將顯示在專案列表中每個專案的顯示資訊。

#### E: 專案列表 (Projects list)

顯示符合當前篩選條件的所有專案的列表。

#### F: Help 按鈕

讓您造訪取用 Desktop App (桌面應用程式) 的主題、影片、快速導覽和下載連結。

#### G: 功能選單 (Actions menu)

讓您可以使用常見功能，如：編輯、複製和建立新報表、儲存報表為 PDF，並設定預設報表。

## 檢視您的 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](#).

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

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## 下一步

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