Welcome to Quality Companion

Quality Companion is a dynamic project management solution that incorporates all the soft tools used in a quality improvement process into one software package. It helps you easily complete all the tasks related to developing, organizing, and managing your project and lets you devote more time and energy to the improvement process itself.

Quality Companion organizes the tools of your project in the Roadmap. The Roadmap lays out the project plan into phases. To the phases, you can add tools, such as process maps and FMEA forms, so that you have a comprehensive record of the project. The Roadmap provides clear evidence of the completion of each of the project phases, the tools used, as well as the results.

Quality Companion also allows you to manage your team members, a to-do list of project tasks, and your key project metrics and X and Y variables.

Together Quality Companion and Minitab feature all of the tools needed to successfully complete quality projects. Use Quality Companion to organize your project and to create forms, flowcharts, and other tools. For data analysis, use Minitab for measurement systems analysis, DOE, control charts, process capability, and other statistics. Quality Companion easily integrates with Minitab so that you can have easy access to all of your project data. You can add Minitab output to your project Roadmap with analysis capture tools.

To help you get started, view any of the Quality Companion demo videos or open a sample project. Also, use phase and tool coaches as your work on your project to help you decide what tools to use when and how to use the tools.

Overview – Quality Companion environment

Quality Companion is designed to help you organize your quality projects from beginning to end. With Quality Companion, you can capture, view, and modify all the information you need to conduct a successful project.

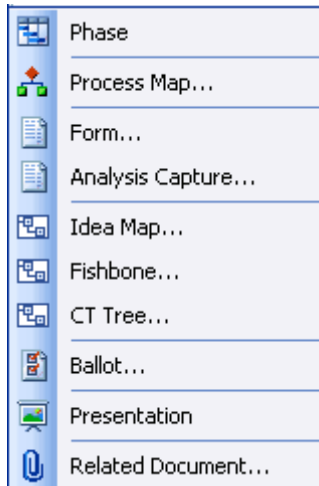The main application window is divided into three main areas:

- The Project Manager provides a tree view of your project with quick access to the tools you need to manage it.
- The workspace is the central area where you work with the tools you choose from the Project Manager.
- The task pane provides quick access to common tasks, activities, and Help.

Menu bars and toolbars allow you to navigate throughout the application and control your user session.

Add a tool to a phase or start a new project

You can add any standard or customized tool template to any phase of your project. When starting a new project, you can choose from the standard and customized project templates. All templates are organized by folder location (Personal, Workgroup, and Standard) and, optionally, by category.

1 Do one of the following:
- To add a tool template, right-click on the desired phase in the Roadmap. Choose **New.**
- To start a new project, choose **File > New > Project**.

2 For tool templates, select the tool type you want from the submenu.

3 If you like, select a category in **Categories** to filter the list of templates. This option appears only when your selected template type contains templates that have assigned categories. The default category is **All**.

4 Templates listed in the dialog are grouped by the folder location of their template file: Personal, Workgroup, or Standard. Personal and Workgroup templates are also indicated by a "P" or "W" overlaid on the icon. Choose the template you want to open and click **OK**.

Tip   Custom template files located in the Personal or Workgroup folders are listed in the dialog box. If a custom template is not listed, you should install the template to one of these folders.

Double-click 👤 in the Roadmap to view the coach associated with a tool or phase. Tool coaches are added by default for all of the Roadmap tools (including forms and Analysis Capture Tools) that Quality Companion provides

Overview – Coach

The coach is a learning tool that provides guidance for how to complete your Quality Companion project. You can create your own coach HTM or HTML files or use the coaches provided by Quality Companion. Quality Companion provides both phase and tool coaches.

Phase Coach

You can add a coach file to a phase to help project users understand the goals of the project phase and the tools that are appropriate to use during that phase. For example, you may need help determining what tools to use to select and scope your quality improvement project. You can use the coach to determine which tools (e.g. process map) are best suited for your needs and then learn more about those tools.

When a phase coach is added, 👤appears next to the phase.

Quality Companion provides phase coaches in the 12 step and DMAIC project templates or you can add your own phase coaches.

Tool Coach

When you add a tool to the Roadmap, tool coaches are available to help use that tool. For example, you know you can use a fishbone diagram to organize potential causes of a problem. However, you would like more information on what a fishbone diagram is and how to use this tool to answer your questions.

When a tool coach is added, 👤appears next to the tool. The tool coach appears by default in the task pane.

Quality Companion provides tool coaches for all tools, forms, and analysis capture tools (excepts for blank forms and analysis capture tools). You can also add your own tool coaches to tools in the Roadmap.

Note   Use the coach for information on how and when to use a tool within your Quality Companion project. Use Quality Companion Help for procedural information on how to use the software.