Minitab Engage™

Getting Started

Minitab®

Contents

1. Introduction to Minitab Engage™

Objectives

- Learn about Engage on page 4
- Learn about this guide on page 4
- Install the desktop app on page 5

Learn about Engage

Engage 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.

In the web app

The web app includes the following features.

Dashboard
Use the dashboard to report key metrics.

Project Repository
Use the project repository to store your projects.

Workflow
Use workflow to collect and vet ideas, convert the best ideas into projects, and advance projects through phases.

Design page
Use the **Design** page to create a sandbox where data architects can manage data, templates, public reports, workflow, and notifications.

In the desktop app

The desktop app includes the following features.

Idea form
Use the idea form to submit ideas.

Management Section
Use the management section to ensure consistent project definition and tracking.

Roadmaps
Use roadmaps to provide a step-by-step guide for your project.

Integrated tools
Use integrated tools for efficient project execution.

Learn about this guide

This guide introduces you to some of the most commonly-used tools in Engage. Use this guide to learn how to complete the following tasks.

- Submit project ideas and understand workflow.
- Open your project and add tools to the project roadmap.
- Submit your project for review and share it with your team.
- Open the dashboard and understand its components.

Install the desktop app

Your company's license administrator controls how the desktop app and its updates are installed.

- If your license administrator sets up automatic installation, then you can download and install the desktop app from a link in the web app. When updates are available, you will receive them automatically when you sign in. You must have Administrator permission on your computer to install the desktop app and its updates.
- If your license administrator sets up manual installation, then you can start to use the desktop app after its shortcut appears on your computer's desktop. When updates are available, you will receive them after your license administrator deploys the updates.

What's next

Let's get started!

2. Start a project

Objectives

Learn about workflow

Workflow provides an automated way to collect and vet project ideas, convert the best ideas to projects, and then advance those projects through phase reviews and approvals. Engage can be configured with or without workflow. If your company has configured Engage to operate with workflow, every official project starts as an approved project idea.

The following steps summarize the basics of workflow.

1. Users submit project ideas to a steering committee.
2. The steering committee evaluates the ideas and converts the best ones to projects by assigning a methodology and a project owner.
3. Users receive an email notification when they become a project owner, if workflow is configured to do so. Project owners execute the project in the desktop app using company-approved templates.
4. To complete a phase, the project owner must submit the project to the review board. Then, the review board must approve the current phase before the project can move to the next phase.
5. Everyone saves their projects to the web-based project repository.
6. The Engage dashboard summarizes the data from the projects in the repository and displays the results in reports for everyone to see.

Note: Data architects configure workflow and manage company-approved data fields and templates from the **Design** page. If you are a data architect, go to Data architects and the Design page.

Create and 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, you can create an idea and submit it using your company's official idea form. After you submit your idea, Engage notifies the appropriate steering committee.

You can create and submit your idea in the web app or the desktop app.

In the web app

1. Go to your Engage web site.
2. Sign in to the web app. Use the email address and password you created when you activated your Engage account.
3. In the web app, select **Workflow**.
4. Select **New Idea**.
5. Complete the idea form. Be sure to complete any data fields required for approval.

6. In the upper right corner, select **Submit**.
7. In the web app, select **Done Editing**.

In the desktop app

1. To open the desktop app, double-click the shortcut icon .
2. Sign in to the desktop app. Use the email address and password you created when you activated your Engage account.
3. In the desktop app, choose **File** > **New**.
4. Under **New Idea**, select the **Create idea** button.
5. Complete the idea form. Be sure to complete any data fields required for approval.
6. In the upper right corner, select **Submit / Review**.
7. In the **Project Workflow** dialog box, select **Submit for Review**.

Open a new project

After you submit your idea, Engage notifies the appropriate steering committee. A steering committee is a group of users that evaluate and prioritize new ideas. If the steering committee approves your idea, it automatically moves to the hopper. If the idea is rejected, Engage notifies you, and you can modify and resubmit the idea.

From the hopper, steering committee members evaluate and compare approved ideas and decide which ones to convert to projects. When a steering committee member decides to start a project, they select a methodology and assign a project owner. Engage sends a notification to the project owner, and the notification includes a link to the project.

1. If you are the owner of a project, select the link to the new project in your notification.

   Engage opens the new project in the desktop app so you can begin to execute the project through the phases of the methodology as outlined by the **Roadmap**.

2. 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 is important to complete these management forms and keep them updated as you work through your project.

   - **Project Today**
   - **Project Idea Proposal**
   - **Project Charter**
   - **Financial Data**
   - **Team Members & Roles**
   - **Tasks**

3. Complete the recommended forms and tools in each phase of the **Roadmap**.

   The roadmap is your company's blueprint to execute projects. Forms in the roadmap might also contain data necessary for the dashboard. From the **Roadmap**, you can perform the following actions.

   - Add a form or tool. From the navigator pane, select **Add Tool**, search for the tool or form to add, then select **Create**.
   - Add and open a new Minitab project. Right-click the navigator pane and choose **Insert Tool** > **Minitab Project File**.
   - Organize the roadmap with phases or folders. Right-click the navigator pane and choose **Insert Phase** or **Insert Folder**.
   - Move tools and forms to different phases or folders. You can also move folders and phases. Use the **Shift** key or the **Ctrl** key to select and drag multiple items at the same time.

Tip: After you complete a form or a tool, you can export it directly into Microsoft® Word and Microsoft® PowerPoint. Right-click the workspace, then select **Send to Microsoft® Word** or **Send to Microsoft® PowerPoint**.

What's next

Now that you have submitted your idea and started your project, learn how to use individual tools to execute your project in the workflow environment.

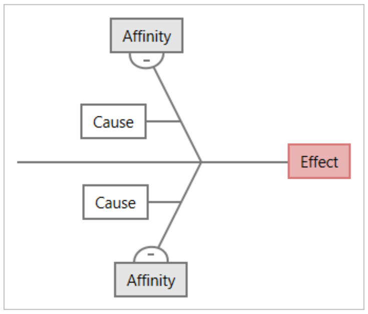
3. Use a brainstorming tool

Objectives

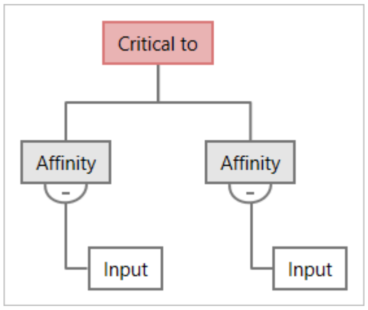
Learn about brainstorming tools

Engage offers several types of brainstorming tools.

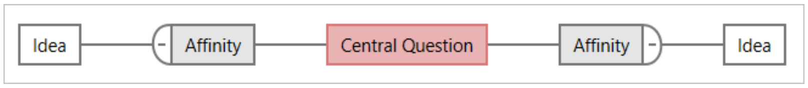
Use a fishbone to brainstorm the possible causes of a specific effect.



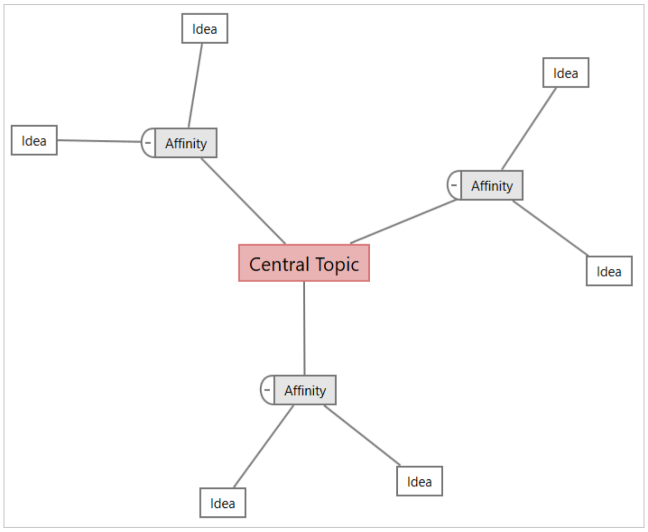
Use a CT tree to identify ways to meet customers' needs. CT trees allow you to brainstorm inputs about a critical-to-quality statement.



Use an idea map for general purpose brainstorming. Idea maps allow you to brainstorm ideas about a central question.



Use a mind map to organize related ideas and concepts. Mind maps allow you to brainstorm ideas about a central topic.



Add a brainstorming tool

Add a brainstorming tool to quickly generate and visually organize thoughts.

1. From the navigator pane, select **Add Tool**, then select a brainstorming tool template.

   Either browse through the list of tools or start typing the tool name in the **Search** box.

2. Select **Create** to add the tool to your project.

Generate a brainstorm list

In a brainstorming tool, you can quickly generate a brainstorm list by typing items in the task pane or by importing variables from other tools in your project.

1. In a brainstorming tool, choose **View** > **Task Pane**.
2. In the task pane, type an item and press **Enter**.
3. Select one or more items in the list and drag them to a shape on the diagram.

   You can also drag items from the diagram back to the list.

   Tip: To import variables from other tools into the brainstorm list, select **Import X Variable** or **Import Y Variable** in the task pane, then, in the **Data Selection** dialog box, select the variables to import.

Make X and Y variables from shapes

After you drag items from the brainstorm list to shapes on the diagram, you can make X and Y variables from the shapes. When you make a variable from a shape, you can later add it to shape on a process map or to a table in a form for further analysis. In this example, you want to make an X variable from a shape that contains an item that you generated in the brainstorm list.

1. In a brainstorming tool, select a shape that contains an item from the brainstorm list, then right-click and select **Make X Variable**.
2. When the **Make Variable** dialog box appears, select **OK**.
   Engage makes a variable from the list item you dragged to the shape.

This new variable is unmapped until you add it to shape on a process map, which you will do in the next chapter.

What's next

Now that you have generated ideas and made X variables from shapes on a brainstorming tool, use a process map to map your process.

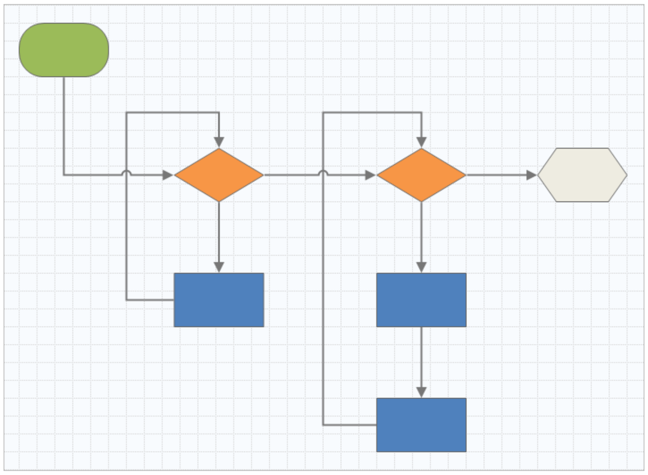
4. Map your process

Objectives

Learn about maps

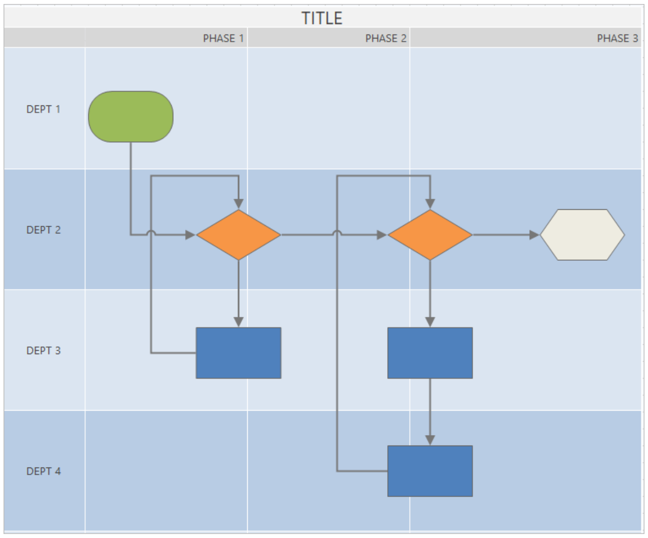
Engage offers several types of maps.

Process map



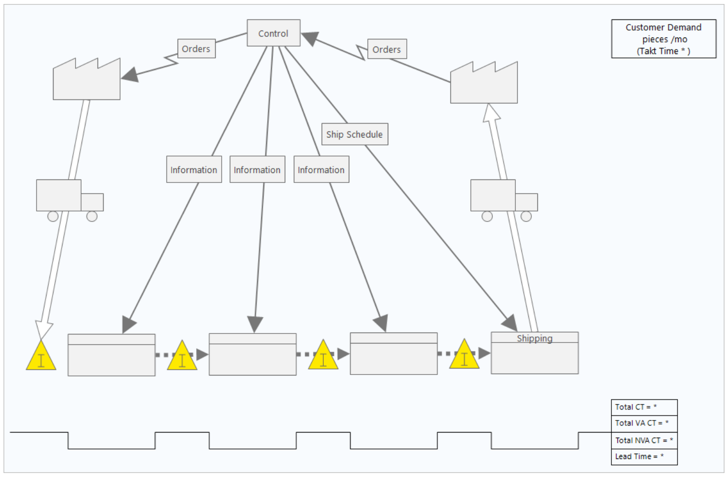
Use a process map to illustrate the sequential flow and the relationship of steps in a process or procedure.

Cross-functional process map



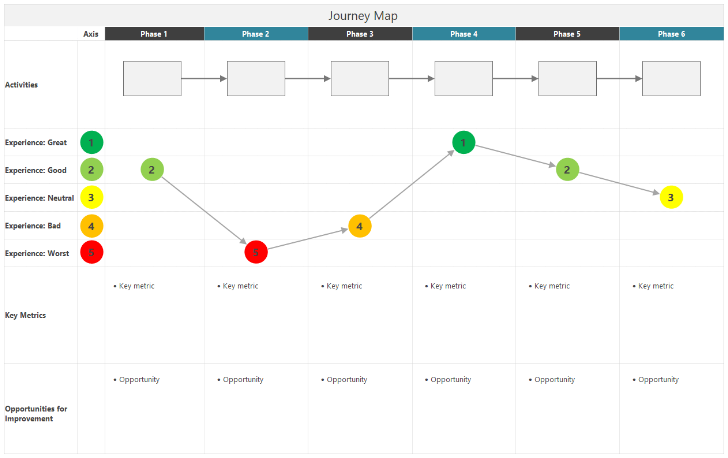
Use a cross-functional process map to illustrate the sequential steps of a process or a procedure as they cross departments and phases. Departments (also called swim lanes) divide the steps horizontally. Phases divide the steps vertically.

Value stream map



Use a value stream map to show how materials and information flow through the value stream. A current state value stream map helps you to identify waste and to envision an improved future state.

Journey map



Use a journey map to illustrate the process a person goes through as they accomplish a task.

Add a process map

Add a process map tool to describe the flow of your process.

1. From the navigator pane, select **Add Tool**, then select **Process Map** to see the available process map templates.
   You can also browse through the list of tools or start typing the tool name in the **Search** box.
2. Select **Create** to add the tool to your project.

Add shapes and connectors

From the **Shapes** gallery, you can complete the following steps.

1. Add shapes.
   a. Select the start shape and select the workspace. While the shape is selected, enter text to identify the start shape.
   b. Select the decision shape and select the workspace. While the shape is selected, enter text to identify the decision shape.
2. Connect the shapes.
   a. Select the right-angle connector, then hold the pointer on the start shape.
   b. When the anchor points appear on the start shape, select one and drag it to an anchor point on the decision shape.
   Anchor points keep the shapes connected when you move them around on the map.

3. Continue to map your process.

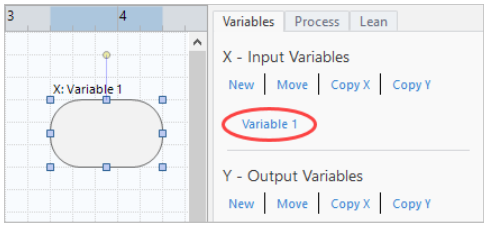
Tip: To add the same shape multiple times, select the **Multi-Insert** button, select the shape in the gallery, then select the map where you want the shape to appear. Continue to select the map until you have added as many shapes as you need. Select **Multi-Insert** again to turn it off. You can also use **Multi-Insert** with connectors.

Add variables to a shape

You can add, copy, and move X variables, Y variables, lean data, and process data to shapes on a process map to give you a better understanding of which variables affect the outcome of each step.

In the previous chapter, you made an X variable from a shape on a brainstorming tool. Now, you can move that X variable to a shape on your process map.

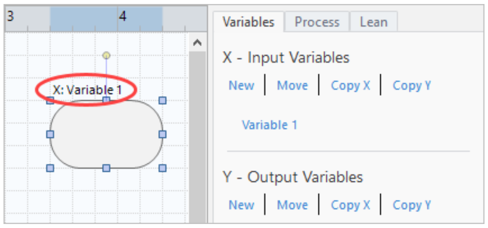
1. Select a shape on the process map.
2. In the task pane, open the **Variables** tab. Under **X - Input Variables**, select **Move**.
3. In the **Data Selection** dialog box, select the variable, then select **OK**.
   The variable name appears in the task pane.



Show data on a map

After you add data to a shape, you can show it on the map to see where to focus your attention.

1. Right-click a shape, then choose **Shape Data** > **Select and Arrange Shape Data**.
2. In the **Select and Arrange Shape Data** dialog box, choose variable data fields to position relative to the selected shape.
   For example, under **X Variables**, drag **Name** to the shape, position it, then select **OK**.
   In this example, the variable name appears above the shape.



What's next

Now that you have mapped your process, you can use forms to evaluate the variables that affect your process and develop plans to address the issues.

5. Work with variables in forms

Objectives

- Learn about forms on page 17
- Add a C&E Matrix on page 17
- Add a Control Plan on page 18

Learn about forms

Engage offers several types of forms so you can collect data about project. Usually, users enter data in forms, but sometimes, data is shared from other tools, across projects, or with the dashboard.

To learn more about all the forms in Engage, go to Available forms.

Add a C&E Matrix

After you identify variables in a brainstorming tool and map your process, you can add a C&E matrix to evaluate and prioritize the potential variables.

1. From the navigator pane, select **Add Tool**, then select **C&E Matrix (X-Y Matrix)**.
2. To add an existing X variable, hold the pointer on the row, select the add/delete button, then select **Select Existing X Variables**.

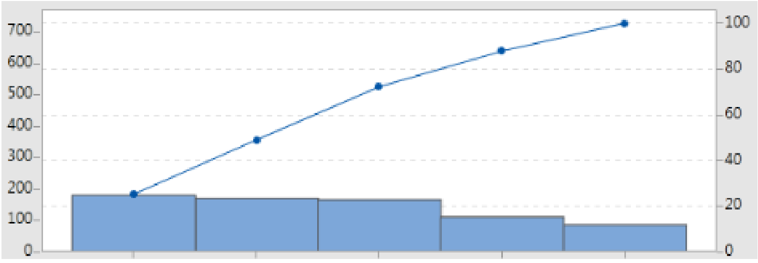
   Either browse through the list of tools or start typing the tool name in the **Search** box.
3. In the **Data Selection** dialog box, select the X variable that you identified in the brainstorming tool and added to the process map.
4. To add a new Y variable, hold the pointer on the column, select the add/delete button, then select **Create New Y Variables**.

   You can add multiple column and specify whether to add to the right or left of the insertion point.
5. Complete the matrix.

   To move between fields and table cells, press the **Tab** key.

   As you add data to the **C&E Matrix (X-Y Matrix)**, Engage creates a **Pareto Chart**.
6. Review the **Pareto Chart** to determine which X variables are likely to have the most impact on your process.

   The weighted value is on the left y-axis, and the percentage is on the right y-axis.



Add a **Control Plan**

After you identify the problem areas to address, you can use a control plan to create a list of vital inputs to control and outputs to monitor. You can also create a list of tools that you can use to control and monitor these variables.

1. Form the navigator pane, select **Add Tool**, then select **Control Plan**.
2. Enter any X variables that may affect your process. To add an X variable, hold the pointer on the row, select the add/delete button ±, then select **Create New X Variables**.
3. You can also select variables that you already created in other tools, such as process maps and brainstorming tools. To add an existing X variable to the control plan, hold the pointer on the row, select the add/delete button ±, then choose the X variable.
4. Complete the form.

What's next

Learn how the Monte Carlo simulation tool lets you use random data samples to evaluate the behavior of a complex system or process.

6. Add a Monte Carlo simulation

Objectives

- Learn about Monte Carlo simulation on page 19
- Learn about parameter optimization on page 19
- Learn about sensitivity analysis on page 19

Learn about Monte Carlo simulation

If you want to improve your product or service by using simulated data, you can insert and run a Monte Carlo simulation. Monte Carlo simulation uses repeated random sampling to simulate data for a given mathematical model and evaluate and optimize the outcome.

1. From the navigator pane, select **Add Tool**, then select **Monte Carlo Simulation**.
2. Define the model and run the simulation. Enter the variables and the response equation manually, or select **Import Models from Minitab** and import any number of models from a Minitab project.
3. Review the results.
4. Perform a parameter optimization.
5. Perform a sensitivity analysis.

After you run a Monte Carlo simulation, Engage displays the results, how your results compare to generally accepted values, and guidance for next steps.

For more information, go to Monte Carlo Simulation.

Learn about parameter optimization

Parameter optimization identifies optimal settings for the inputs that you can control. Engage searches a range of values for each input to find settings that meet the defined objective and lead to better performance of the system.

For more information, go to Perform a parameter optimization.

Learn about sensitivity analysis

Sensitivity analysis identifies inputs that have little effect on the variation of the output, or inputs that reduce the variation of the output. Engage displays a graph that shows the effect of changing the input standard deviation on the percent of output that is out-of-specification.

After you analyze the results, you can change inputs or outputs, then rerun the analysis to evaluate a number of hypothetical scenarios.

For more information, go to Perform a sensitivity analysis.

What's next

Now that you have added some tools to the **Roadmap** and completed the first phase of your project, you can submit your project for phase review and share it with others.

7. Submit and share your project

Objectives

- Submit your project for phase review on page 21
- Check the review status on page 21
- Share your project on page 21

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. A phase review is required before you can mark the phase complete.

Note: The following instructions show how to submit the project for phase review in the desktop app, but you can also submit a project for phase review in the web app. For more information, go to Review active projects.

1. In the desktop app, in the upper right corner, select **Submit / Review**.
2. In the **Project Workflow** dialog box, ensure that all the required fields for the phase are complete, then select **Submit for Review**.

   Engage saves and submits the project for review, then notifies only the review board members who are responsible for reviewing the current phase.
3. Close the **Project Workflow** dialog box.

Check the review status

As you wait for the review board to review your project, you can check its status in the web app.

1. Sign in to the web app. Use the email address and the password you created when you activated your Engage account.
2. Select **Workflow**.
3. Select the **Active** stage, from the **My Ideas and Projects** filter, choose **Add Tool** > **My Ideas and Projects**.
4. From the list of projects you own, find the project you want to check, and select the expand icon to see the details.
5. Under **Phases**, select the people icon to see who has reviewed your project so far.

Share your project

Share your projects to collaborate with team members and keep key stakeholders informed. Your workflow project is automatically shared with the members of its review board, but you can share your project with anyone who is part of your company's Engage subscription.

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 select **Add**. Repeat to add more users.

What's next

Now that you have submitted your project for phase review and shared it with other users, use the dashboard to see the progress of the overall deployment and how your specific project contributes.

8. View the dashboard

Objectives

Open the dashboard

You can open the dashboard from the desktop app.

1. Choose **File** > **Dashboard**.
2. Sign in to the web app. Use the email address and the password you created when you activated your Engage account.

Learn about the dashboard

The Engage dashboard summarizes project data into reports to give users and stakeholders information about the deployment. Dashboard reports allow you to 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.

The dashboard is a component of the web app. 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 include any of the following components.

1: Report
: Displays the collection of filters, summaries, and column sets.

2: Filters
: Allow you to focus on a subset of projects, based on a condition, such as region, location, or project status.

3: Summaries
: Display aggregate project data, such as the number of projects in each division, the average duration of projects, or the total project savings by quarter. Summaries can also display optional targets.

4: Column sets
: Determine the fields that are displayed for each project in the projects list.

5: Projects list
: Displays a list of all projects that meet the criteria of the selected filters.

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 and videos, and on the **Projects** page, the download link for the desktop app.

Learn about your view of the dashboard

Most reports on the dashboard are public. However, only data architects can create or edit public reports. If you are a data architect, go to Create public reports.

To personalize your view of a public report, you can apply filters. For example, you might want to filter a report by your business unit or location. For more information, go to Apply filters.

You can also create private reports that only you can view and edit. To save time, copy a public report that you like, then edit it to create a custom private report. For more information, go to Create private reports.

What's next

For videos, how-to's, and glossary terms, go to Minitab Engage Support.

Minitab® Our mission is to help people discover valuable insights in their data.

Minitab helps companies and institutions to spot trends, solve problems and discover valuable insights in data by delivering a comprehensive and best-in-class suite of data analysis and process improvement tools. Combined with unparalleled ease-of-use, Minitab makes it simpler than ever to get deep insights from data. Plus, a team of highly trained data analytic experts ensure that users get the most out of their analysis, enabling them to make better, faster and more accurate decisions.

For nearly 50 years, Minitab has helped organizations drive cost containment, enhance quality, boost customer satisfaction and increase effectiveness. Thousands of businesses and institutions worldwide use Minitab Statistical Software, Minitab Connect, SPM, Quality Trainer, Minitab Engage, and Minitab Workspace to uncover flaws in their processes and improve them. Unlock the value of your data with Minitab.

Data Transformation — Data Analysis & Predictive Modeling — Model Deployment and Monitoring

Minitab Connect®
Powerful statistical and predictive analytics everyone can use

Minitab®
Data access, automation, and governance for comprehensive insights

SPM®
Machine Learning and Predictive analytics software

Minitab Model Ops™
Model lifecycle management on a simple yet powerful platform

Visual Business Tools — Project Ideation & Execution — Quality Solutions

Minitab Workspace®
Visual tools to ensure process and product excellence

Minitab Engage™
Start, track, manage, and execute innovation and improvement initiatives

Quality Trainer®
Master statistics and Minitab anywhere with online training

Real-Time SPC
Powered by Minitab
Monitor, respond, and deliver immediate quality and process monitoring