Configuration Process

Primary Person:	Author
Configuration Settings	Client: Web Client (Browsers: Chrome, Edge, Firefox, IE, Safari) • Allow Pop-ups on CRM websites
Problem / Opportunity Statement:	Spinifex Go is an online tool that enables you to get your Standard Operating Procedures off the shelf and into operation. Spinifex Go allows your people to find out; • What they should be doing • How they should be doing it • When they should be doing it... By delivering your relevant standard operating procedures securely to your people in a timely manner.
Pain Points:	Your business relies on certain people and procedures but often: • No-one is sure about what they are responsible for • Most work is random and chaotic • There is a high turnover of people • Fluctuations between actual and budgeted values • High rates of rework and waste • Poor quality history recording
User Goals:	• Employees will know what is expected of them • They will have the right tools, time and parts to get the job done • They can apply the skills they have learnt in training • Their skills will increase so they have more job satisfaction • They will be thinking like you!
Business Goals:	• Improved duty of care to your staff • Attraction and retention of skilled people • Increased accuracy of forecasts • Greater control on costs • Improved data accuracy creating confidence in reporting outcomes

Narrative Description (e.g., plans, evaluation, actions, objects, context, events):	Existing systems like finance, contract management, document management, time & billing, project management etc... do not solve people issues. That's because these systems are just recording and reporting tools! They do not manage the people. The problem with these recording and reporting systems is that they tend to work individually in a kind of silo way, often losing sight of the core objective of the business or project. Spinifex Go will enhance these systems by removing overlap and creating synchronisation.
Detailed Steps	1. There are two Security Roles specific to Spinifex Go. They are 'Spfx Author' and 'Spfx Default' User. Please ensure that the 'Spfx Author' Security Role has Full access to the Account, Contact and Spinifex Go custom entities and that 'Spfx Default User' has at least Read access to the Account, Contact and Spinifex Go custom entities. The access permissions can be adjusted as required by the System Administrator. When the permissions have been set then Users can be added and assigned to the relevant Security Roles as appropriate. 2. A Spinifex Go License must be obtained to start using the Spinifex Go App. Email support@spinifexonline.com to request a free 30-day License Key. Provide the Unique Name of the CRM Instance in the email. This can be found under Settings/Developer Resources. The License Key will then be issued for that CRM Instance. 3. To activate the License, open the Licensing entity under Spinifex Settings in the Spinifex Go App. Create a new Licensing record. Enter the License Key string in the form and save the record. If the Key is valid the Expiry Date will appear in the form and the App will be available for use until the Expiry Date is reached. If the Licence is not extended the data in the Spinifex Go App will be locked. Extend the License by adding new Licensing records with the new License Key provided. Expiry Dates will be displayed in the format selected by the CRM user. 4. The AutoNumber entity contains records that define how the user-friendly Unique names are produced for certain custom entities when a new record is created. 5. Record the main (Licensee) Organisation's details in the 'Organisation – SP' form for the Account (Organisation) entity. Check the "Licensee (y/n)" check box and add the Organisation Description and the Logo (after saving record) which will be displayed in Dashboards and Reports. 6. Add relevant Site records for the Licensee Organisation in the Site entity. 7. Add Project records for selected Sites in the Project entity. Record the Project Goal or Objective. Providing a clear objective is fundamental for engaging people. The Project Type must also be selected from a dropdown list. The initial list contains 'Operations' and 'Maintenance' but it can be edited to contain the Project Types relevant to the main organisation. The Project will link to several System Standards which can be created and linked from within the Project form after saving the Project or at a later stage. 8. Break down the goal or objective of the Project into individual System Standards that describe the Standards to be maintained so that it becomes something tangible. 9. Record the System Standard details in the System Standards entity and link the Standards to the relevant Project(s). Each Standard record has a Type attribute that must be selected (eg Operations, Maintenance) and a checkbox to denote whether the Standard is a "Master" or

	not. The Type attribute relates to the Project Type value set when creating a Project. If the "Master" check box is selected, this System Standard will automatically link to a new Project of the same Project Type on creation of the Project. After creation of the Project, links between System Standards and Projects can be added or removed by the Author. 10. For each System Standard add several related System Standard Criteria that are required to meet the Standard's objective. 11. For each Criteria, determine HOW TO OBTAIN IT. We record this in a System Procedure. Each Criteria must link to a System Procedure. 12. Record System Procedures in the System Procedure entity. 13. For each System Procedure add several related System Procedure Tasks that are required to fulfil the purpose of the Procedure. 14. For each Task select the relevant Task Frequency from the Frequency list. The Frequency list can be edited by the Author and the desired Sort Order specified. The list is populated initially with commonly used values. 15. The Roles and Teams of Roles required to perform a Task are created in the Role and Team entities. 16. In the Task form select the Role or Team that is responsible for performing the Task. Role and Team records may have been created previously or they can be created and selected from within the Task form. Select EITHER a Role OR a Team. 17. A user that performs a certain Role may determine for which Tasks the Role is responsible by and opening the Duty Statement Report from the menu bar after selecting the relevant Role in the Active Roles view or from the menu bar in the Role form. A Role may assume responsibility for a Task through membership of a selected Team. 18. Ensure that all Standard Criteria are linked to the relevant System Procedure. Open the Active System Standard Criteria list view to determine which Criteria have missing links that need to be inserted. 19. Ensure that all Procedure Tasks are linked to a Role or a Team. Open the Active System Procedure Tasks list view to see which Tasks have missing links that need to be inserted. 20. The System has the flexibility to allow information to be entered in the order desired in most cases and the transparency to allow the Author to determine where relevant data needs to be added. For more information see the Spinifex Go Help file: http://gonextgen.spinifexwem.com/ or contact us through the Spinifex Productivity Engineering website: http://www.spinifexproductivityengineering.com.au/
Success Metrics:	• Ability to record and access Standards and Procedures required for relevant projects conducted by the Organisation.

	• Transparent access to Role requirements for individuals across relevant projects, to help manage their activities. • Creation of informative reports on recorded information. • Adherence to rules that require the use of recorded Standards and Procedures.