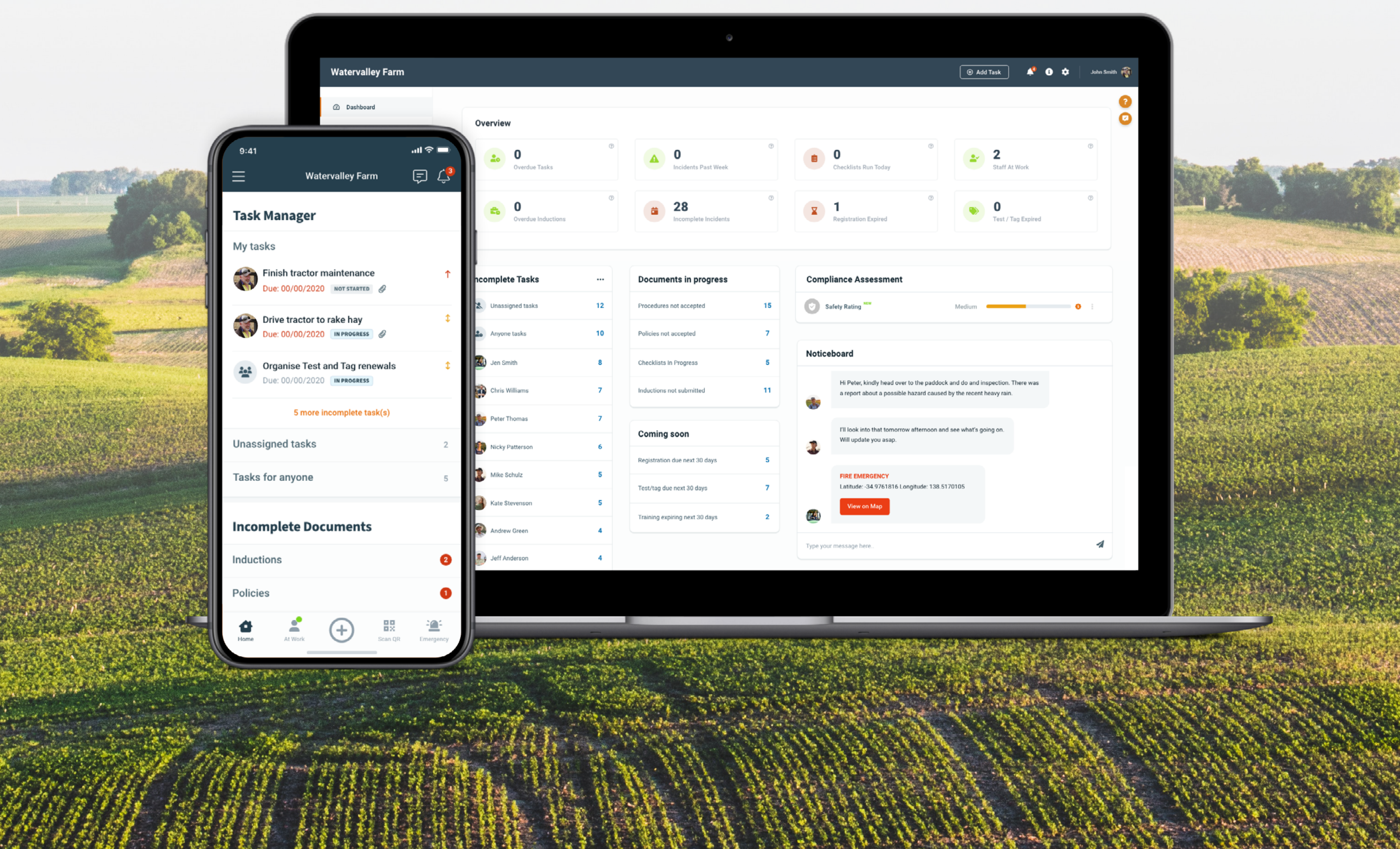
10 Simple Steps to Set Up Safe Ag Systems

The following steps are a simple way to set up and start using your Safe Ag Systems software. You can vary the order of these steps to suit your needs.



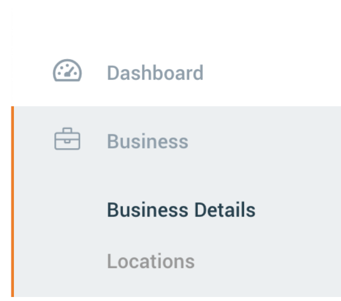
NOTE: Complete the following steps on your Desktop

STEP **1**

Business

Complete your **Business Details** and make sure you click **Save** for each section:

- ☐ **Primary business details** – the Primary Entity Name, Business Email and Postal Address will be used for your policies, letterhead and reports
- ☐ **Business contacts** and **Content Preferences** under the Primary Heading Tab *(You might have to scroll down to see this)*
- ☐ **Other Entities** - this is any other businesses related to your Primary Business (Contracting, trusts or land owners, for example)
- ☐ **Your Logo** – if you have one



STEP **2**

Business

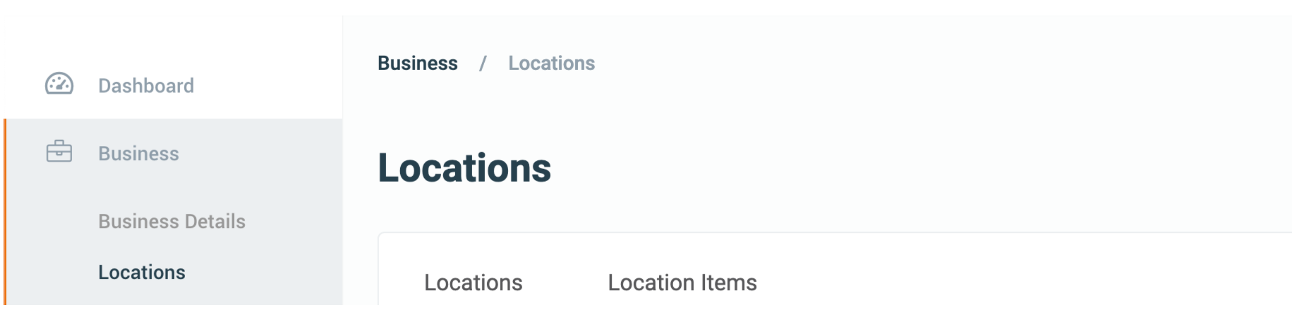
Map out **Locations**:

- ☐ Click **Add New Location** to create your property(s) by entering the details and mapping the boundary.
- ☐ Click **Add Item** to add hazards, items or further lines

TIPS

A Location is an entire farm with adjoining paddocks. If you have multiple locations you will need to add each one separately.

A Hazard is anything that has the potential to cause harm. Mark significant hazards that your workers or visitors need to know of. Start with significant hazards – eg. Chemical shed, powerlines/poles, dams.



STEP
3

Emergency Management

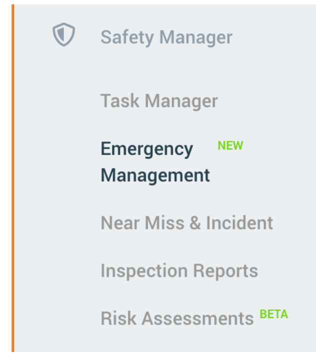
Complete **Emergency Management**:

*This step **MUST** be completed directly after Step 2 - Locations*

- [ ] Select your **Location** from the Location drop-down menu
- [ ] Complete **Emergency Management**. Make sure to navigate to the other tabs once you've completed **Important Contacts**
- [ ] If you created multiple Locations in Step 2 - Locations, you'll need to repeat this process to complete the Emergency Management Plan for each location

TIPS

People might not think clearly in a state of panic. Provide simple information in your emergency plan that staff can easily understand in an emergency.



STEP
4

People

Start Adding in Users:

- [ ] From **Manage People**, select **Add New** to add your staff and/or contractors. Add their name and email address. Setting an access level will send them a welcome email. If they don't need to login yet, an access level can be set later
- [ ] Use **Personnel and Training Records** to add employee details. For example, you can add licences or qualifications, medical conditions or employment details

TIPS

Anyone working on your farm should be able to access your farm rules, emergency management plan and complete inductions. Different access levels determine what users can see and do:

Contractor (including Seasonal Workers) – App access only. View Emergency Plan, Policies and Procedures. Complete assigned Inductions and Tasks. Log Hazards, Incident and Near Misses. Inventory access via a QR code only. Noticeboard access may be provided.

Worker – View Emergency Plan, Policies, Procedures and complete Checklists. Complete assigned Inductions and Tasks. Create Tasks and Inventory Items. Log Hazards, Incident and Near Misses. View and post on the Noticeboard.

Supervisor – All functionality applicable to a Worker. Can also create, edit and publish Procedures and Checklists. Create and assign Tasks. Add and edit Locations. Initiate and sign off Inductions. Limited access to Reporting and Manage People.

Business Administrator – Access to view, add, edit and delete across all areas of Safe Ag Systems.

STEP 5

Inventory

Upload **Machinery and Equipment, Structures, Tools, Chemicals:**

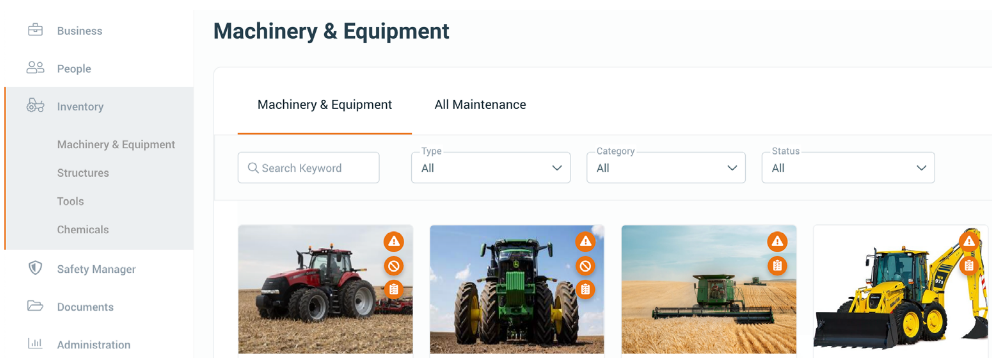
- [ ] Add Inventory under each heading in the left menu, and clicking **Add New**
- [ ] Complete the details for each item. Use the MSDS to complete info for chemicals
- [ ] Once the item has been added, you can print a QR code in **More options •••**

TIPS

Split your farm activities into 4 quarters of the year and identify what inventory items you will be using. Add inventory in at the start of the quarter. For example, add your shearing shed and wool press in before you start shearing.

Once inventory is added, workers can use the App to scan the QR code and access inventory information, record maintenance, view SWPs, complete checklists and record chemical usage.

If you have a large number of inventory items to upload, this can be done in bulk via the Client Experience Team. You can find more information on our Knowledge Base.



STEP 6

Documents and Files

Create **Procedures**:

- [ ] If you have your own Procedures or Safe Work Procedures (SWP), add them by clicking **Build New**. Use Builder Elements to copy and paste the procedure, or attach as a PDF. If you don't have your own, or want to the use templates provided, use the **Template Library** tab
- [ ] Find a template and click **More options •••** and select **Use Template** then **Customise** – this will save the template to the **Drafts** tab
- [ ] Edit the procedure as needed. Click **Preview** to review. If no other changes are needed, click **publish** and sign off to make the procedure available.

TIPS

Procedures are your farm rules around how a machine should be operated or task completed.

Set who can access the procedure at the bottom of the Publish window.

As you add inventory items, you can create and link relevant procedures. Start by focusing on procedures for your machines or tasks with the greatest risk of causing injury.

STEP
7

Documents and Files

Create **Checklists**:

- [ ] If you have your own Pre-Operational Checklists, add them by clicking **Build New**. Use builder elements on the right hand side to re-create. If you don't have your own, or want to the use templates provided, use the **Template Library** tab
- [ ] Click on **More options •••** and select **Use Template** and **Customise** – this will save the Checklist to the **Drafts** tab
- [ ] Edit the Checklist to suit your needs. Click **Preview** to review. If no other changes are needed, click **Publish** to make the checklist available

TIPS

Checklists can be used for pre-start checks, competency assessments or inspections - as well as many other things!

Set who can view the completed Checklist logs at the bottom of the Publish window.

As you add inventory items, create and link checklists that relate to them. Focus on checklists for your machines or tasks with the greatest risk of causing injury.

STEP
8

Inventory

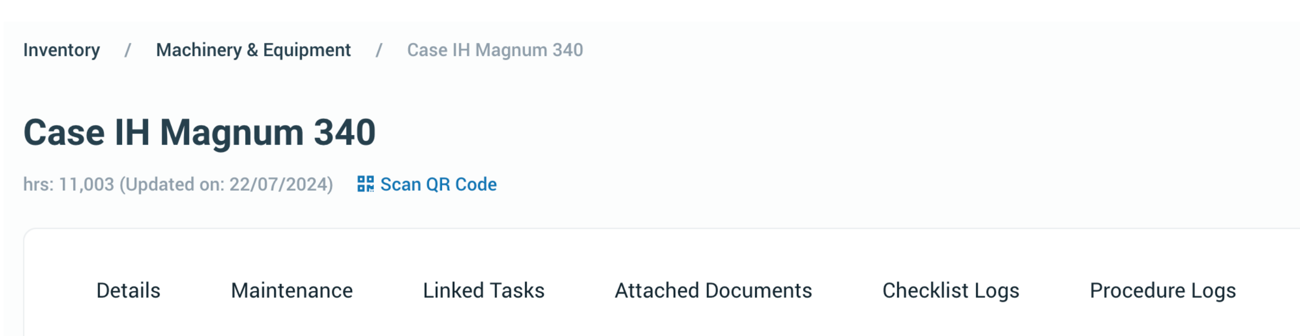
Attach your **Procedures** and **Checklists** to your **Inventory**

- [ ] Navigate to **Inventory**, and select **Machinery & Equipment, Structures, Tools**, or **Chemicals**
- [ ] Click on an inventory item and select the **Attached Documents** tab
- [ ] Click **Attach Document** and either **Attach a Checklist** or **Attach a Procedure**. Find the document to link and click **Save**

TIPS

Attach procedures and checklists to your inventory items to make it easier for your staff to find them.

Generate an Inventory item's QR code so staff can scan it in the App to view the item and any linked documents.



STEP 9

Documents and Files

Create **Policies**

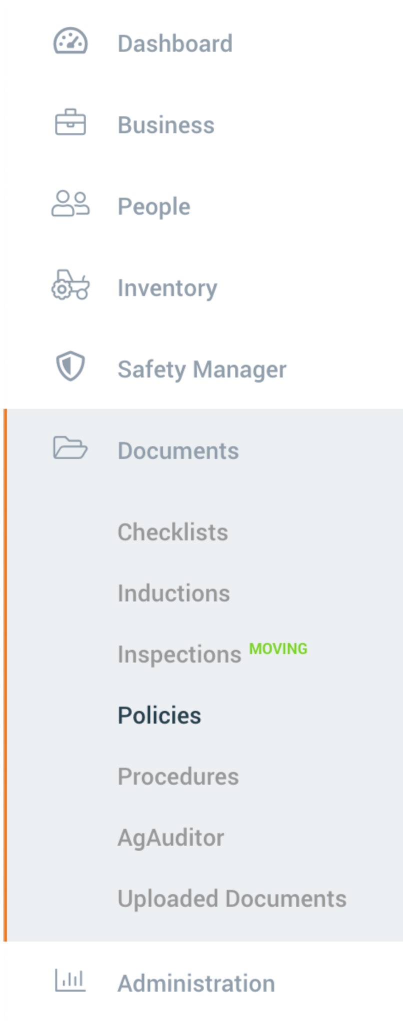
- ☐ If you've got your own Policies, you can add them by clicking **Build New.** Use Builder Elements to copy and paste the policy, or attach as a PDF. If you don't have your own or want to use the templates provided, navigate to the **Template Library** tab
- ☐ Click on **More options •••** and select **Use Template** and **Customise** – this will save the Policy to the **Drafts** tab
- ☐ Edit the Policy to suit your needs. Click **Preview** to review. If no other changes are needed, click **Publish**. Complete the fields within Publish Document window, including sign-off, and click **Publish**

TIPS

Policies are the overarching rules of your farm. Consider your farming operation and identify the important rules for your day-to-day activities. Remember – more is not always better!

Start with a ***Work Health and Safety Policy*** and then add policies that you identify as important to your business. It's important that you tailor them to suit your business.

Set who can access the policy at the bottom of the **Publish** window.



STEP
10

Documents and Files

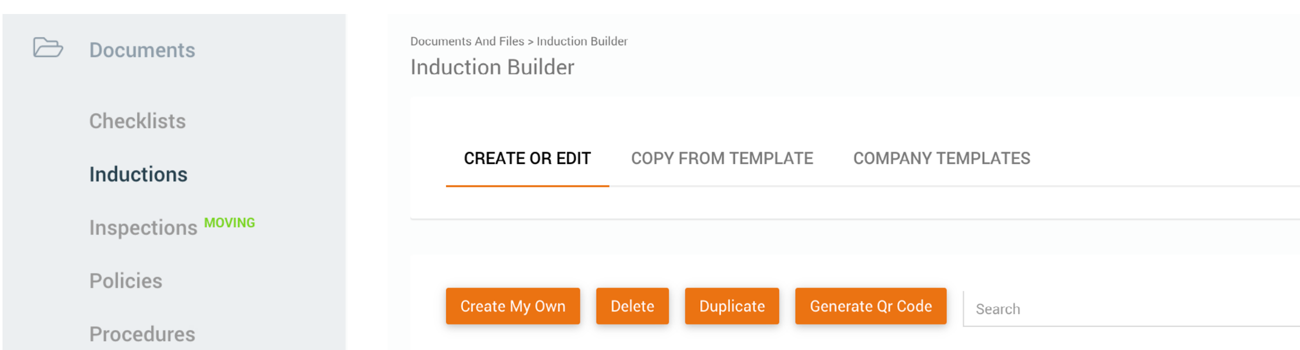
Create **Inductions**

- [ ] If you have your own Inductions, add them by clicking **Create My Own**. If you have don't have your own or want to use the templates provided, navigate to the **Copy from Template** tab. To copy a template, select the grey box next to the template name and click **Copy Template**, then **Save**
- [ ] Select the **Create or Edit** tab. Click the **Edit** button against the Induction
- [ ] Link policies, images or websites to a statement using the icons on the right-hand side of each statement. Add new statements by selecting **+ Add new statement** at the bottom of the editing window. Move or delete statements by using the icons above each statement's category
- [ ] Once complete, press **Save** to make it available to assign to staff

TIPS

Inductions enable you to formally explain the farm rules to your workers and to gain their agreement/ acceptance.

Start with a *General Work Health and Safety Induction* for employees and a *General Contractor Induction* for Contractors. Add additional inductions for your operation if required.



Check out the following options below if you need more help with the system:

- Knowledge Base
- Contact Us
- Implementation Packages
- Help inside the system ?
- Youtube Channel Videos
- Newsletter tips and hints

Implementation Project Plan

Lead by Example

Champion the use of the new system. Showing your staff how easy the system is to use. This will help in getting your staff onboard.

Dedicate time

Ensure you allow time to set up your new system. You could start by adding in inventory items, and setting up your documents.

Empower your people

Bring the team together and introduce your new safety management platform and App while highlighting the benefits.

Implementation and Training

Create goals and benchmarks with achievable timelines for your workers. Schedule training sessions or book an implementation session with our Client Experience team.

Make the culture shift

Create a guideline or cheat sheet for new users. Support and encourage your team during the change.

Keep moving forward

Don't get complacent and fall back into old habits. Encourage workers to use the system and stop relying on previous systems or paper-based options.

Start a Routine

A great way to establish a daily login routine is to encourage workers to mark themselves At Work/Not At Work via the App. It's great for working alone, and it keeps other teammates informed of your location in an emergency.

Speak to an Expert

Save our Client Experience phone number ***08 8490 0939*** in your contacts. Don't be afraid to use it, it's included in your subscription. They're more than happy to help!

Feeling lost?

If you're not feeling confident using the App, why not give our Demo and How To videos a go? We also offer Premium Support packages if you're after a more hands-on experience!