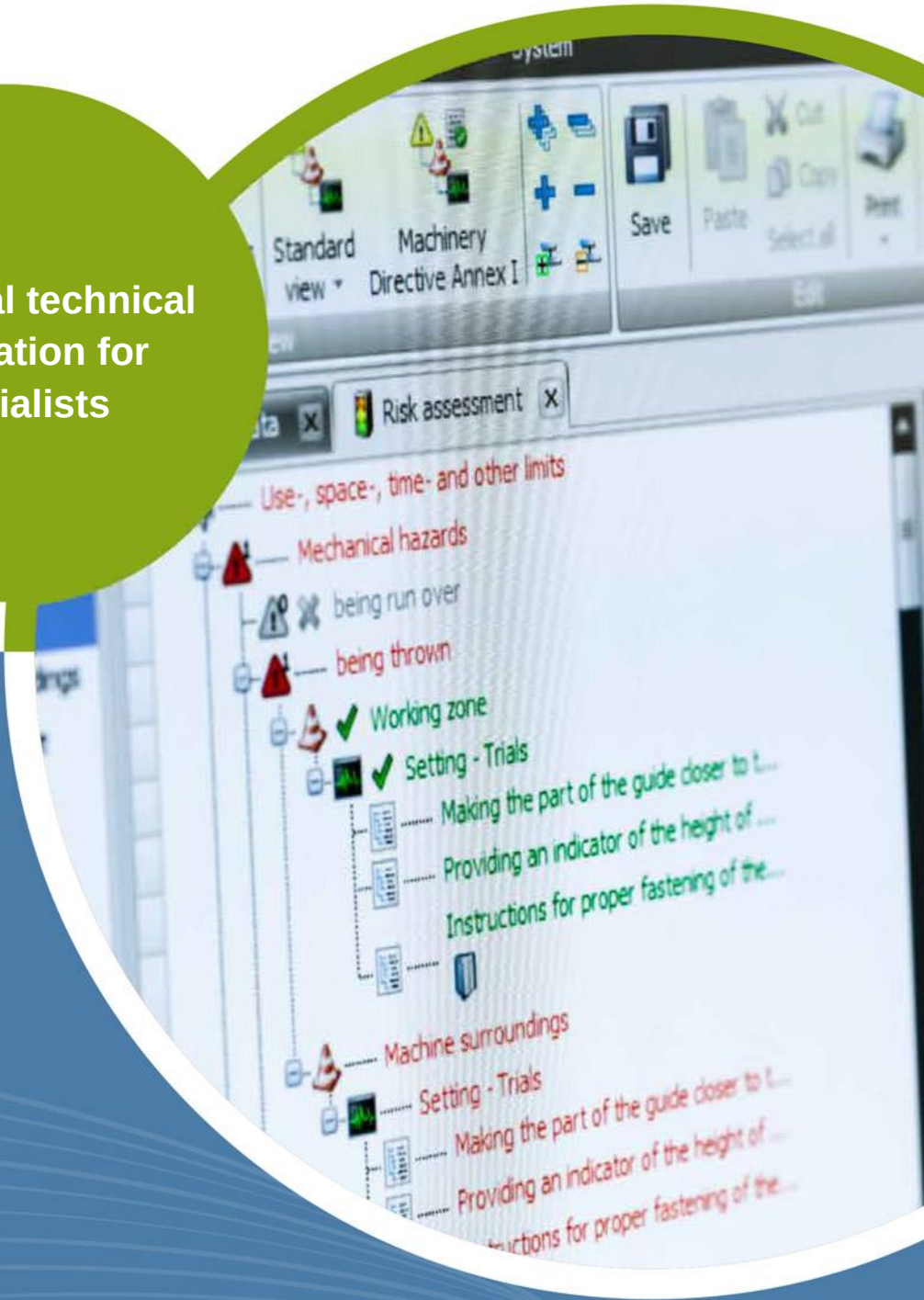
# Safexpert update checklist

**Version: 2021-01-19**

**Additional technical information for specialists**




Safexpert

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# 1. Preparation and installation

**Important**! From version 8.0 onwards, Safexpert has improvements which offer easier methods for storing data, for assigning access rights to projects and for updating hazards lists.
In order to use the new functions to their fullest extent, it is important that the Safexpert system administrator carries out the appropriate upgrades and data additions after the update to 8.x.
This checklist will support you step by step in planning and executing the update. Please adhere to these specifications exactly.

**Safexpert update checklist**

| Step | To do | Note | Completed |
|---|---|---|---|
| 1.1 | Plan and determine the time for switching to the current version | See section 5. | |
| 1.2 | Download set-up data and Safexpert user guide | At https://www.ibf-solutions.com/downloads the download link for the Safexpert demo version is available in the section “Demo version” (ZIP file):<br> <br><br>Note: Your licence will be activated in the course of the setup (see Safexpert user guide, section 5.1). | |
| 1.3 | Clarify the system prerequisites | See Safexpert user guide, section 5.1 | |
| 1.4 | Clarification as to which database should be used | See Safexpert user guide, section 5.2<br>Supplementary detailed information on this can be found in the document “MS-SQL_EN_Installation_informations.pdf.” Download from: https://www.ibf-solutions.com/downloads<br>**Note:** If necessary, please contact your IT department or IT advisor for clarification. | |
| 1.5 | Carry out a data backup | Back up the existing Safexpert database. Keep this data backup even after the update to Safexpert 8.x. | |
| 1.6 | Optional: Export data | See chapter 5. | |
| 1.7 | Install Safexpert | See Safexpert user guide, section 5. | |
| 1.8 | Carry out client installation on all PCs | See Safexpert user guide, section 5.4. | |

**Note:** From version 8.0 onwards, Safexpert has a new database at its disposal. During the update, the data from the earlier database is copied into the new database. All data from the previous version remains unchanged. Should the update not run correctly for any reason, you may continue to work with the previous version without any restrictions.
It is also possible to operate earlier versions in parallel with Safexpert 8.x. However, it is not advisable to do so, since this may lead to different people working on different databases. Retroactive reconciliation of the data is no longer possible after the update.

# 2. Update run

| Step | To do | Note | Completed |
|---|---|---|---|
| 2.1 | Execute the Safexpert update wizard | <br>See Safexpert user guide, section 15. | |

**Note:** Carry out this update run immediately after the update. As a result, all newly available data from the Safexpert Live Server will be automatically transferred to your system.

# 3. Manual data additions

Safexpert cannot automatically update or add certain data. Therefore, carry out these data additions manually:

| Step | To do | Note | Completed |
|---|---|---|---|
| 3.1 | Add user data | • In the main menu **System**, click on the function **User management**. (see Safexpert user guide, section 16.1).<br>• For all users, add the data “department”, “function” and “company location”.<br>• Adapt the roles and rights when necessary. | |
| 3.2 | Adapt your own hazards lists (in so far as your own lists are present) | • In the main menu **System**, click on the function **Hazards lists** (see Safexpert user guide, section 16.3)<br>• Correct or add the bibliographical data for all your own hazards lists according to the lists mentioned below. | |
| 3.3 | Create a conversion table for your own hazards lists | • See Safexpert user guide, section 16.3.<br>**Note:** Please also see section 16.3. Accordingly, it is recommended that you create a conversion of your own hazards lists to the hazards list currently included in Safexpert according to EN ISO 12100:2010 and also add your own cross-reference lists. This will make future updates of your projects easier. | |
| 3.4 | Adapting your own checklists | • In the main menu **System**, click on the function **Checklists** (see Safexpert user guide, section 16.3)<br>• Correct or add the references for all your own checklists according to the list mentioned below. | |
| 3.5 | Adapting the pictograms libraries | • In the main menu **System**, click on the function **Pictograms library** (see Safexpert user guide, section 16.2).<br>• During the update process the existing pictograms libraries were converted to the three languages German, English and French (see note in the column “Title”).<br>  ◦ If you did not add any pictograms in one of these tree converted libraries, delete the converted libraries.<br>  ◦ If you have added pictograms in one oft the converted libraties: delete in all converted libraties all pictogramms except the ones that were added by yourself.<br>  Correct or add the references for all your own converted pictograms libraries. | |

**Note:** If you do not carry out this data addition, the Safexpert updating mechanisms may not be able to be used to their full extent.

## Adapting or adding bibliographic data for your own hazards lists

The management of hazards lists is carried out in Safexpert 8.0 in the same way as the management of standards. For this reason, a few new data fields have been introduced, but a few have also been removed. Please therefore make these adjustments manually for all of your own hazards lists:

| Up to Safexpert 7.1 | From Safexpert 8.0 onwards | Note |
|---|---|---|
| Identification number | Document number | This is automatically transferred and cannot be changed, because the identification in projects is made on the basis of this number. |
| Hazards lists | Title | This is automatically transferred. |
| Description | Brief information | This is automatically transferred. |
| *New in Safexpert 8.0* | Language | This is automatically transferred. A hazards list is automatically created in Safexpert 8.0 for every language of a hazards list that existed before the update. Check as and when necessary that all lists are complete and make sure they match the language of the country. |
| *New in Safexpert 8.0* | Keywords | Optional: Enter keywords. These will act as aids in locating the lists. |
| *New in Safexpert 8.0* | Certified by | Optional: Add the data where necessary |
| Created by | Created by | This is automatically transferred. |
| Created on | Created on | This is automatically transferred. |
| *New in Safexpert 8.0* | Last change by | This will automatically be transferred from “Created by.” |
| *New in Safexpert 8.0* | Last change on | This will automatically be transferred from “Created on.” |
| *New in Safexpert 8.0* | Applicable | This is automatically transferred. |
| Released | Valid | This is automatically transferred. Check if the details match. |
| *New in Safexpert 8.0* | Valid from | **Important:** Enter the time from when on the hazards lists were applicable. |
| *New in Safexpert 8.0* | Withdrawn | **Important:** Enter the time until when the hazards lists were applicable. |
| *New in Safexpert 8.0* | Subject area (ICS) | Optional: Acts as an aid to locate the list. See Safexpert user guide, section 14.3. |
| *New in Safexpert 8.0* | Publisher | Optional. This provides information about the creator of the hazards lists. |
| *New in Safexpert 8.0* | Based on | **Important:** Where necessary, enter the standard on which the hazards list is based. |
| *New in Safexpert 8.0* | Predecessor document | **Important:** This enables tracking the history of a hazards list. |
| *New in Safexpert 8.0* | Successor document | **Important:** This enables to track the history of a hazards list. |
| *New in Safexpert 8.0* | Changes allowed by the user | Changes to existing hazards lists are only possible if the option “Changes allowed by the user”<br>is activated. This option is not activated during an update so that the hazards list behaves as it does in Safexpert 7.x. |
| Field name for additional information about the hazard | Field name for additional information about the hazard | This is automatically transferred. |

**Note:** To compare the data with the earlier version, you can open both versions of Safexpert in parallel.

## Adjust or add references for your own checklists

The management of checklists is carried out from Safexpert 8.0 onwards in the same way as the management of standards. Please therefore make these adjustments manually for all your own checklists:

| Up to Safexpert 7.1 | From Safexpert 8.0 onwards | Note |
|---|---|---|
| Identification number | Document number | This is automatically transferred and cannot be changed, because the identification in projects is made on the basis of this number. |
| The user (inspector) is allowed to change the checklist | Changes allowed by the user | This is automatically transferred. |
| Checklist and title | Title | This is automatically transferred. |
| Description | Brief information | This is automatically transferred. |
| Language identification | Language | This is automatically transferred. |
| Index / Search concept | Keywords | This is automatically transferred. |
| Certified by | Certified by | 255 characters are transferred. Please check and correct where necessary. |
| Created by | Created by | This is automatically transferred. |
| Created on | Created on | This is automatically transferred. |
| Last change by | Last change by | This is automatically transferred. |
| Last change on | Last change on | This is automatically transferred. |
| Approve checklists | Applicable | This is automatically transferred. |
| Approve checklists | Valid | This is automatically transferred. |
| *New in Safexpert 8.0* | Valid from | **Important:** Enter the starting time at which the checklist was applicable. |
| *New from Safexpert 8.0 onwards* | Withdrawn | **Important:** Enter the ending time until which the checklist was applicable. |
| Subject area | Subject area (ICS) | This is automatically transferred. See Safexpert user guide, section 14.3. |
| Publisher | Publisher | 255 characters are transferred. Please check and correct where necessary. |
| *New from Safexpert 8.0 onwards* | Based on | **Important:** Where necessary, enter the standard on which the hazards list is based. |
| *New from Safexpert 8.0 onwards* | Predecessor document | **Important:** This enables tracking the history of a hazards list. |
| *New from Safexpert 8.0 onwards* | Successor document | **Important:** This enables tracking the history of a hazards list. |
| Area of use | *No longer available* | Redundant in the field “Keywords.” |
| Author / Team of authors | *No longer available* | Redundant in the “Creator” field. |
| Last checked for updates on | *No longer available* | The update check is now carried out via the fields “Valid from” and “Withdrawn”. |
| Change log | *No longer available* | The change log is established via the fields “Predecessor document” and “Successor document”. Therefore transfer the data into these fields. Additional information can, where necessary, be saved in the field “Brief information”. |

# 4. Disable the preceding version of Safexpert

The data of the previous version (7.1 or earlier) is copied into the new database by updating to Safexpert 8.x. It is also theoretically possible to operate earlier versions in parallel with Safexpert 8.x.
However, it is not advisable to do so, since this may lead to people working on different databases. It is NOT technically possible to synchronise the data retroactively. It is therefore strongly recommended that you block access to the old database in any case:

| Step | To do | Note | Completed |
|---|---|---|---|
| 4.1 | Block access to the previously used database | Rename the “SystemDB” directory to “SystemDB-updated_to_85.” | |
| 4.2 | Inform and train all users where necessary. | | |

# 5. Test of Safexpert 8.x while work is still being carried out with 7.1 or an earlier version

It is recommended, particularly in companies in which Safexpert is used by multiple users, to plan and coordinate the change to Safexpert 8.x accordingly. In addition, the Safexpert system administrator can install a version in advance for test purposes. In this case, projects can also be created. The most important changes in Safexpert 8.x see Safexpert user guide, chapter 3.

If the projects that were created during the tests are to be made available again after the update, proceed as follows:

1. Install Safexpert 8.x in parallel to Safexpert 7.1 or an earlier version.
2. After you have completed your tests, export all data created in Safexpert 8.x, e.g.: projects, checklists, cross-reference lists, report templates, libraries,...
   **Note:** Use distinct file names during the export so that it is possible to easily reimport the files after the update.
3. Back up the exported data.
4. Uninstall the test installation of Safexpert 8.x.
5. Remove the test database of Safexpert 8.x (e.g. from the SQL Server).
6. Reinstall Safexpert 8.x completely (update) according to the aforementioned checklists.
7. Import all data previously exported.

# 6. Further information and support

Please adhere exactly to these specifications when carrying out your update to Safexpert 8.x and consult this document before you contact our hotline:

- SQL Server installation instructions (www.ibf-solutions.com/downloads)
- Safexpert user guide, chapter 3 (What's new?)

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# 7. Training courses for existing users

In order to work with the functionalities that were already available in Safexpert 7.1 a new training course should not be necessary.

With the introduction of version 8.x, Safexpert offers numerous improvements which will make the engineering process considerably easier. In particular, the new concept for using sector-specific know-how from C-standards offers enormous advantages. Therefore, we are offering special training for existing users of Safexpert. Please contact our sales department for further information.