IBF

EASY USER QUICK START GUIDE

Your rapid entry into risk assessment

Safexpert

IBF – YOUR PARTNER FOR EFFICIENT CE MARKING

Your quick start in the risk assessment

This brief guide explains how you can directly enter into the risk assessment in a few minutes without initial training. A risk assessment can be performed easily; you do not need a lot of effort. We show you how!

For more information about the **other functions** in Safexpert (for example, CE guides, standards search and standards management, etc.), please refer to the Safexpert User Guide. This can be found in the Safexpert setup folder or in Safexpert using the function key F1.

Advice: In our free online presentation, our product specialists will give you the perfect overview of the different functions and modules supporting you in your daily work: www.ibf-solutions.com/en/seminars/safexpert-web-presentation

1. Installation of Safexpert

You can install Safexpert with the setup file, which you can download from our website: www.ibf-solutions.com/en/downloads. Thus, you are ready for the test of Safexpert.

If you have already purchased Safexpert, unlock the modules you have purchased using the license code you received after your order by e-mail. Find details for the set up at section 4 of our Safexpert User Guide.

2. Login into Safexpert
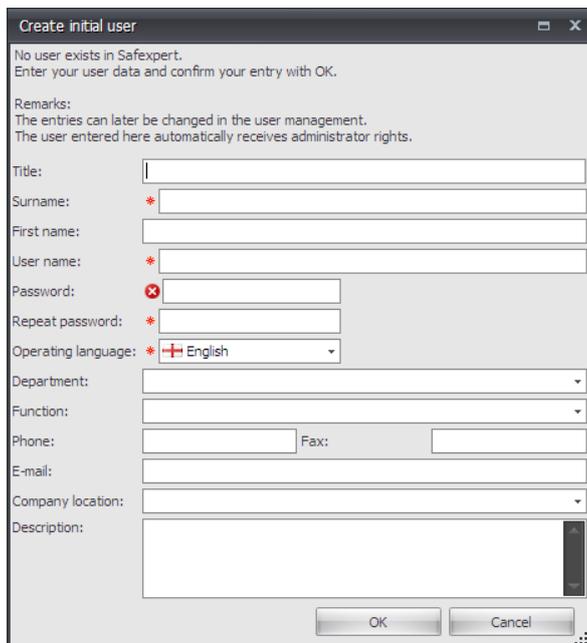
The first time you start Safexpert you need to create an initial user with corresponding data.

Click **OK** after you typed in your data.

> **Practical advice:** Your user data will be automatically transferred to the relevant points in Safexpert. This avoids repeating a manual entry in the future. Based on your e-mail address Safexpert informs you about important standard changes.

A window to set up your **Company favourites** will be displayed. Please click on **Cancel** in order to proceed to risk assessment quickly.

> **Practical advice:** The function "Company Favourites" offers the possibility to set up a company specific standard database in order to ensure that frequently needed standards in your company are found fast. For more information please refer to Safexpert User Guide chapter 5.

3. Create your first project
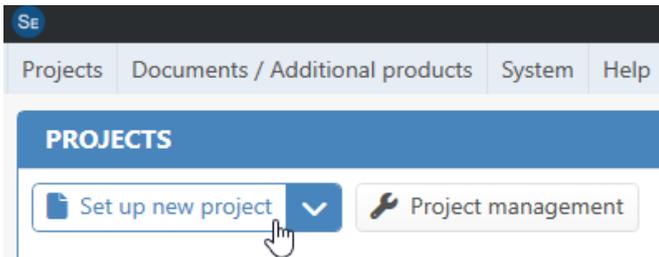
Click on **Set up new Project** in the section "Projects" of your Safexpert Dashboard or in the main menu **Projects**.

Now the wizard for creating a new project opens. Make the first significant step of your risk assessment here: Defining the **Limits of the machine**. Enter all necessary data and proceed with Next.

When you click **Complete** in the window of **Defining special properties** Safexpert creates your project.

If you use the module „**Risk assessment**", Safexpert opens the risk assessment window immediately.

For users of the „**Basic**", „**Compact**" or „**Professional**" version the project overview opens. Please select Risk assessment in the Edit main menu, to open the risk assessment.

4. Perform risk assessment
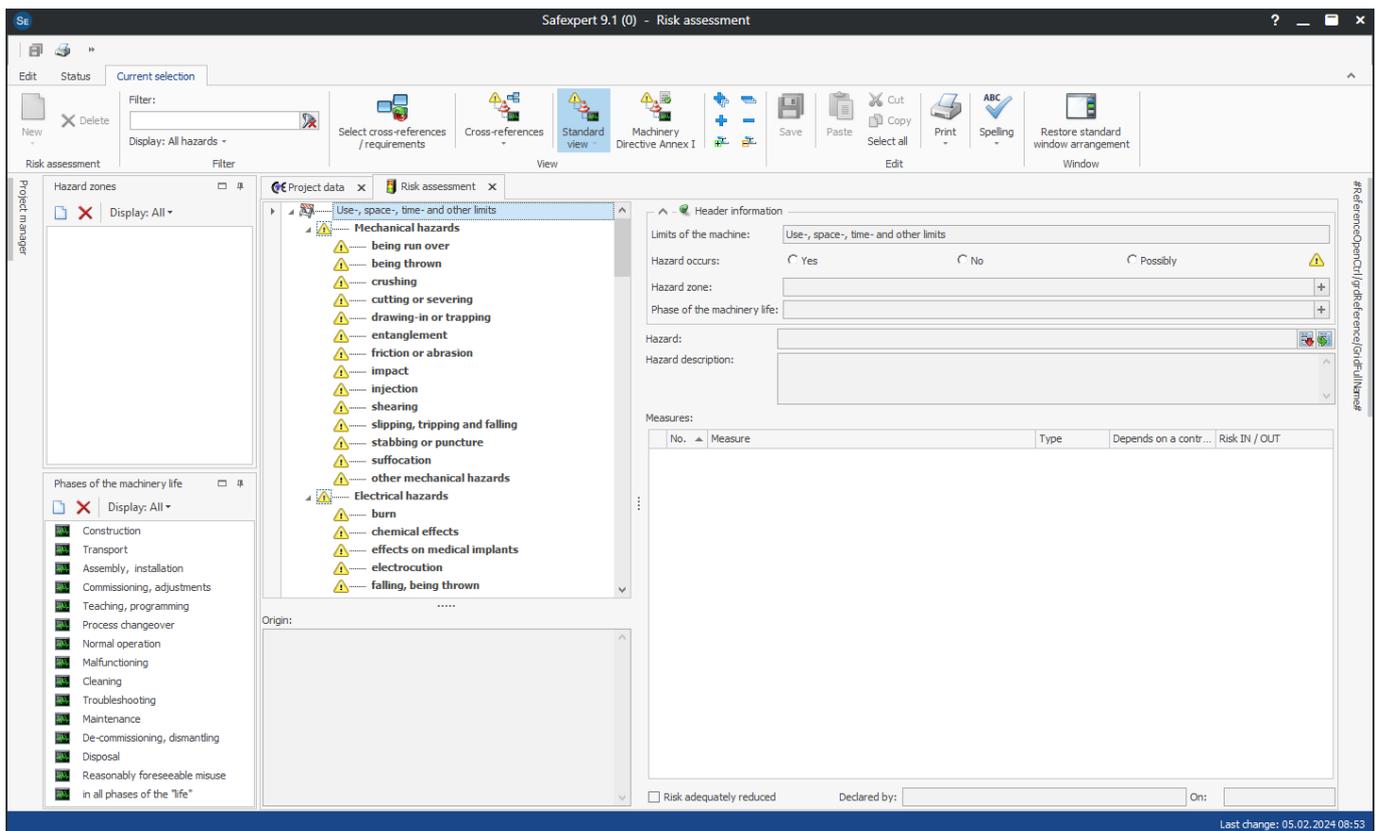
4.1 Identify hazards

In the first process step, you identify all reasonably foreseeable hazards which may occur at various hazard zones and in all phases of the machinery life, based on the hazards list from ISO 12100. Optionally, you can make entries in the windows **Phases of the machinery life** and **Hazard zones** in advance.

Practical example with Safexpert

To illustrate, we will demonstrate the steps of the risk assessment on the following practical example:
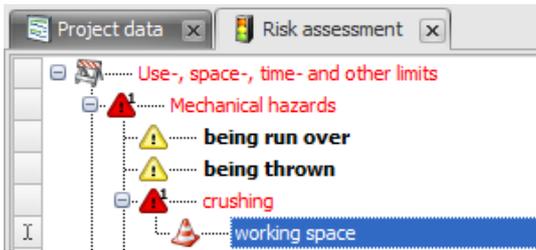
1. Click on the hazard **Crushing** in the hazards list.

2. **Add a hazard zone**
   Select from the context menu (right mouse button) the menu item **New > Hazard zone** and enter a description, for example: **Working space**.
   Alternatively, you may create new hazard zones in the window "hazard zones" and place them via Drag & Drop to the hazard.

3. **Add a phase of the machinery life**
   Click on **Working space** and choose from the context menu the menu item **New > Phase of the machinery life**.
   Select from the pull-down menu a phase of machinery life, for example: **Normal operation**.
   Alternatively, you may place the phase of the machinery life out of the window **Phases of the machinery life** via Drag & Drop to the hazard location.

4. **Hazard description**
   Describe the hazard in the input field **Hazard description**:
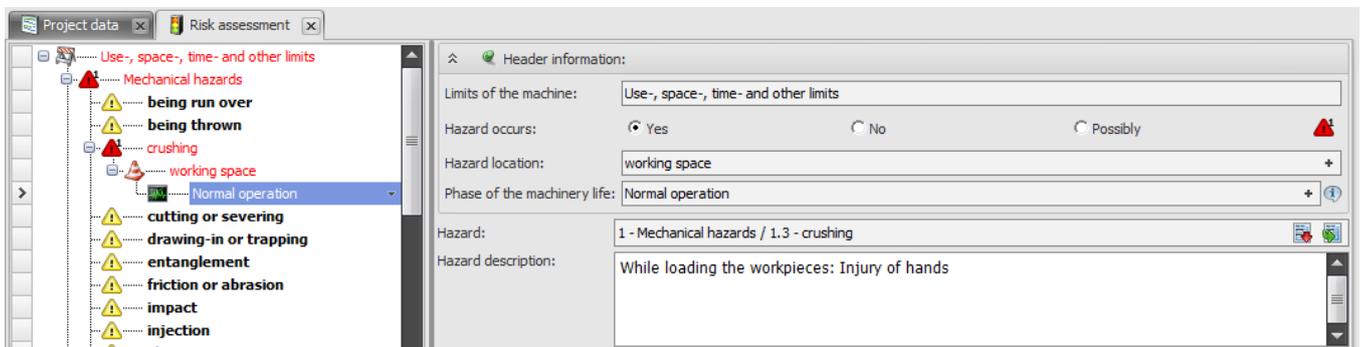
This defines clearly which hazards occur at which hazard zone and in which phase of the machinery life. Repeat this process for all hazards.
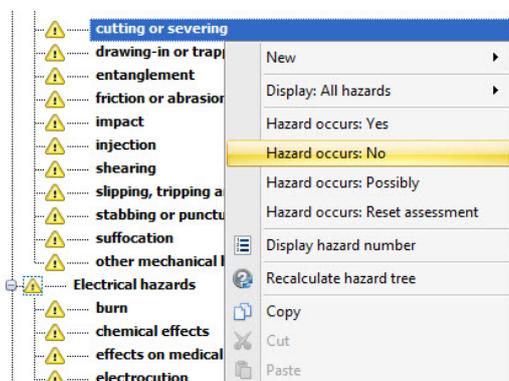
5. **Identify non-occurring hazards**

   In order to identify all hazards which definitely do **not** occur on your machine, select these hazards and choose from the context menu **Hazard occurs: No**.

   The selected hazards will be highlighted in grey in the hazard tree and therefore are marked as not applicable.

   So, it's fully documented, which hazards you have excluded and for this reason not further taken into account.

4.2 Risk estimation, risk evaluation, risk reduction

The next step is to estimate the risk for each identified hazard that people are exposed to. Based on this risk, you evaluate which measures are required to reduce the risk.
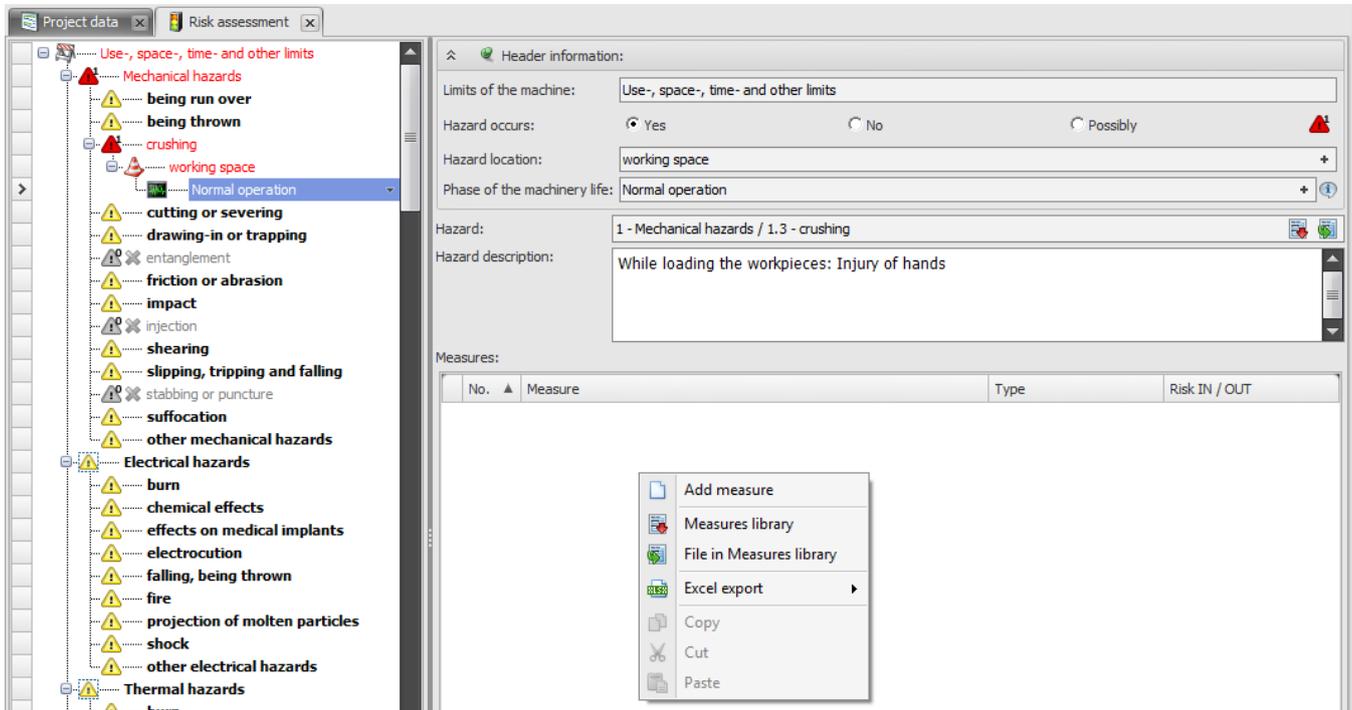

Proceed as followed:

1. **Add measures**
   Now add a measure to reduce the risk. In the actions pane **Measures**, select the menu item **Add Measure** from the right-click context menu.
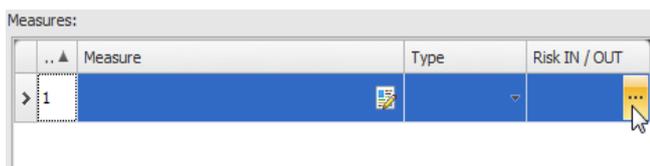
2. **Risk estimation**
   Afterwards define the **Risk IN**, which is the risk <u>before</u> you take any measure into account.
   Click on Risk **IN/OUT**
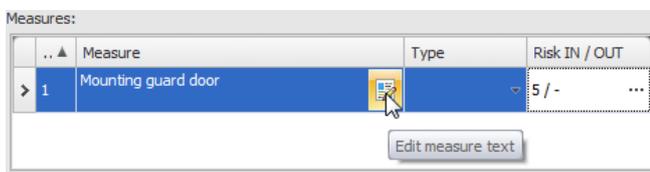
3. **Edit measure text**
   Click now **Edit measure text** and describe your measurement to reduce, for example: **Mounting guard door**.
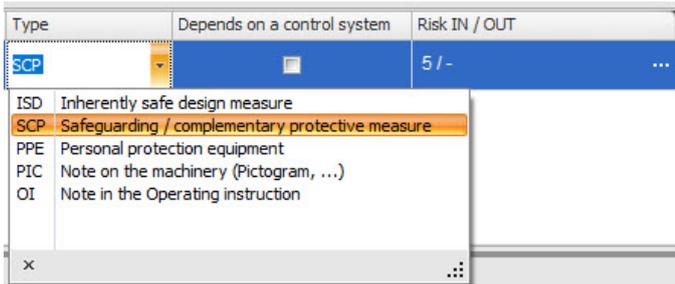
4. Edit type of measurement
Next, define the measure **type** in the drop-down menu.

> **Practical advice:** This feature provides more clarity about protective measures. For example, you are able to print all information on residual risk on a separate list. The chance that technical writers will forget important information on residual risk will be reduced.

5. Risk reduction
Is the risk adequately reduced through the measurements? This is the decisive question that arises.

In order to decide this, you need to rate **Risk OUT**, the risk that remains after you took measurements into account.

Click again on **Risk IN / OUT** and define the remaining risk.

If you think that the risk is already adequately reduced then no further measures are necessary.

If you feel that further measures are necessary, repeat the above procedure for all protective measures. It may be useful in our example to add an additional control-system position monitor. You rate this measure the same way. However, rate it based on the already reached risk value of the guard door.

If you have reduced the risk as far as you consider it necessary, click **Risk adequately reduced**! Now your hazards and your risk reduction measures are described as it is required according to the Machinery Directive 2006/42/EG or Machinery Regulation (EU) 2023/1230 and to ISO 12100.

4.3 Printout the risk assessment

Safexpert creates a uniform documentation based on the previous information according to the technical rule ISO/TR 14121-2:
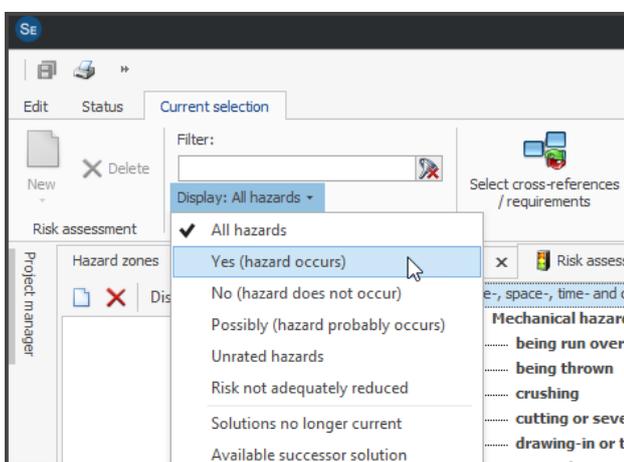
1. Select the point **Hazard occurs: Yes** in the context menu (right click on the hazard in the hazard tree)

   Dadurch reduzieren Sie den Ausruck auf die relevanten Gefährdungen.

2. Then click **Print** in the main menu.

3. Select the report template **Risk assessment (based on ISO/TR 14121-2:2012)**.

4. Click on **Print preview** to open a preview of the document.

   The watermark **INCOMPLETE** points out that the risk assessment in not yet completed.

   Of course, you can customize the template for the printout of the Risk assessment and personalize it with your logo.

   You can print and export your risk assessment to Word (RTF) or Excel!

You are now familiar with the process of risk assessment. Finally, we would like to introduce two possibilities to increase the overview of your risk assessment with the help of Safexpert. This creates an easy overview of your progress during the risk-assessment. These functions are very useful, if the risk assessment is performed within a team parallel to the design- and planning processes as required in the Machinery Directive or Machinery Regulation (EU) 2023/1230 and in the harmonized European standard EN ISO 12100.

Practical advice: Benefits of safety integration into the design processes

Your risk assessment meets the requirements of the Machinery Directive or Machinery Regulation only when it is organized as an "iterative" process. The "iterative" process needs to be implemented by all involved designers parallel to their daily planning activities. This is the best way to integrate the risk assessment into your work and also to avoid subsequently expensive adjustments!

4.4 Maximum overview of risk assessment
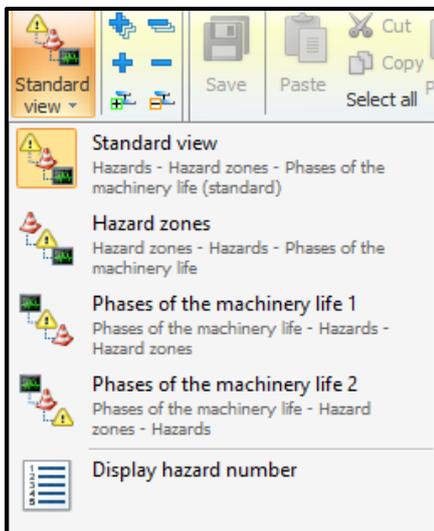
Different views for risk assessment

View by Hazard zones:

During the design phase you eliminate hazards by displaying the risk assessment by hazard zones, not by hazards alone. This allows you to detect all hazards and protective measures at certain hazard zones as well as to eliminate systematically all of the remaining risks

View by Phases of the machinery life:

When the risk assessment is displayed by phases of the machinery life, you are able to detect at a glance which hazards occur at a certain life phase. You can immediately see which hazards occur at a certain life phase for example when machinery is cleaned or during retrofitting. This eases the migration of residual risk into the operating instruction

Safexpert offers you the opportunity to display the risk assessment adapted to your specific needs.

You can choose between these views:

- Hazards (Standard view)
- Hazard locations
- Phases of the machinery life (two variations)

4.5 Is the risk assessment finished?
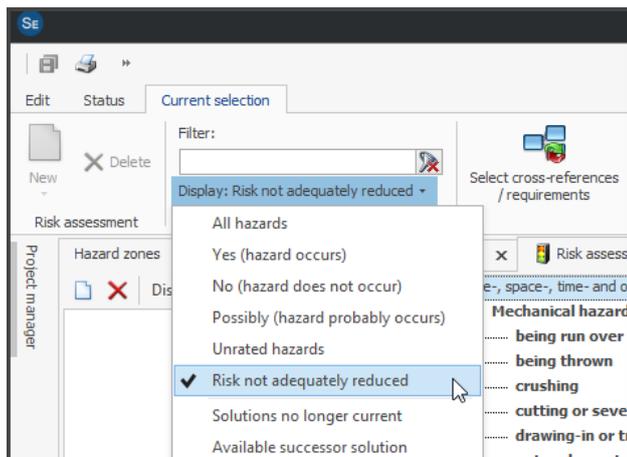
You can use the filter functions available in Safexpert to see quickly, how far your risk assessment is progressed or already finished.

With a mouse click you are immediately informed about all completed or unfinished items.

Practical advice: Before signing the declaration of conformity you or anybody else should check, whether the risks of all hazards have been adequately reduced!

5. Specially developed software functions help to make CE marking more efficient

Now you finished the introduction of risk assessment. In this quick start guide, you learned how to perform the risk assessment with Safexpert in accordance to EN ISO 12100. You should be able to perform this task in the future without any additional training. Experience shows that usually the effort for documenting risk assessment pays off with the first project. Above all, huge benefits of structured documentation with Safexpert are demonstrated for future projects.

In the module Safexpert Risk assessment we have hidden by intention all functions, which would make the system in the first step more complicated. We have responded to the wishes of users who simply want to carry out a risk assessment with Safexpert very quickly and without prior software training and still want to take advantage of special software.

Outlook into the future
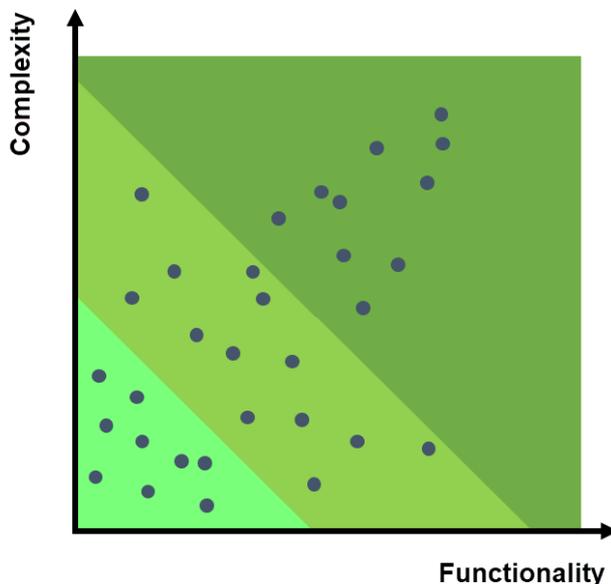
From experience we know that the requirements and wishes for a software system are growing successively. More functionality means, as shown in the picture, sometimes more complexity. Nevertheless, you may already be in urgent need of functions that are already included in the packages Safexpert Basic, Compact, Professional or one of our add-on modules.

The "checklist requirements analysis" on our homepage helps you to find the optimal module for you:

„What are the requirements of your CE software?"

Download: www.ibf-solutions.com/en/downloads

We wish you every success in implementing the risk assessment for your company!

We are looking forward to answering any further inquiries!

Your Safexpert team

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