

Getting started with SimaPro Collect

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About SimaPro

SimaPro was developed by PRé with the goal of making sustainability a fact-based endeavor. PRé has been a leading voice in sustainability metrics and life cycle thinking development for nearly 30 years, pioneering the field of environmental and social impact assessment. We develop tools that help you create value and drive sustainable change.



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Table of contents

- 1 Introduction 4
- 2 Creating your survey 5
 - 2.1 Adding general information 5
 - 2.2 Adding sections 5
 - 2.3 Adding questions per section 6
 - 2.4 Adding conditions 7
- 3 Adding respondents 7
- 4 Creating your invite and sending the survey 8
- 5 Tracking progress and sending reminders 8
 - 5.1 Reviewing answers 9
 - 5.2 Sending reminders 9
- 6 Closing the survey 10
- 7 Viewing and analyzing results 10

1 Introduction

SimaPro Collect allows you to create, send and track surveys to optimize data collection for your sustainability projects. This guide is meant to help you with creating your first survey.



To get the most out of Collect, you might want to integrate it with a model in SimaPro Flow or upload a model you have built in SimaPro desktop. This model is then expanded on with Collect, where the data which is collected can be used directly in the LCA model in Flow.

This guide is meant to help you, the Expert user, with creating your first Collect survey.

Please note that while working with SimaPro Collect, you might use a component of SimaPro Flow, which is currently in [beta](#). That means that it is still being tested and is not fully supported. We welcome your feedback to make it better!

For additional support, please visit the [SimaPro Help Center](#), or contact us directly by going to *Support* in the left-side menu and click *Contact Support*.

2 Creating your survey

When starting a Collect survey, please:

1. Go to <https://apps.simapro.com/> and *log in*.



2. Click on the green +.
3. Then, select *Collect survey*.
4. Enter the title of the survey, press enter to save and continue

2.1 Adding general information

When you have given the survey a title, additional options and settings will appear:

[Survey preferences](#)
[Add survey introduction](#)
[Due date](#)
[Add conditions](#)
[Edit email template](#)
[Help](#)

- *Survey preferences*: you can setup preferences so you can customize the way the surveys looks for your audience.
- *Add survey introduction*: you can add an introduction that will appear at the top of your survey (before all questions). Click *Preview survey* to see how that will appear for the respondent.
- *Due date*: select the *Due date* in order for survey respondents to know when the deadline is for submitting the survey.
- *Add conditions*: you can add conditional logic to some questions so that respondents are directed to a specific question based on their answer. This is explained further in section 1.4.
- *Edit email template*: you can customize the invitation you send out to respondents to take part in our survey. This is further explained in section 3
- *Help* will lead you to the SimaPro Help Center.

2.2 Adding sections

You can split your survey into any number of sections, in order to group questions covering the same topic. The advantage of using sections is that you can define survey respondents per section. So you may want to send the entire survey to some respondents, while only certain sections of the survey to others.

1. Click *Add section* and enter a section title. Press *Enter* to save. (Click the field again to edit the text if needed).
2. You can add an introduction to your section (optional).
3. Repeat the steps above to add more sections.
4. In the *Edit Survey* section you can reorder the questions or sections by using the  and dragging and dropping.

2.3 Adding questions per section

1. Click *Add question*.
2. Enter *Question* (tip: press Shift+Enter to start a new line within the question).
3. Choose *Question is mandatory* if you want the respondent to definitely fill in the question.
4. Choose *Allow attachments* if you want the respondent to be able to attach documents.
5. Enter *Question text* if you want to add explanatory text displayed directly beneath the question. This is an optional field.
6. Enter *Guidance* if you want to add additional explanatory text which is hidden until the respondent hovers over  in the survey. This is an optional field.
 - a. You can also add multiple attachments as guidance. Click *Save and Add Guidance Documentation*>Select files>Open.
7. Select *Answer format*. Available answer formats are: percentage, yes/no, whole number, decimal, multiple choice (one or more answers), text and grid.

Deleting an answer option or question

To delete an answer option, drag it from  and drop it in the Trash.

8. For a number of answer formats, you have the option to *Add ranking*. This feature comes in handy when viewing and analyzing results as you can define a scale to rate how 'good' or 'bad' a respondent's answer is.
9. Finally, click the *Save question* button.
10. Repeat the steps above to add more questions.
11. Click the *Preview survey* button at any time to view what the survey respondent will see.

Reordering questions

You can reorder questions from the *Edit survey* dashboard by dragging and dropping the question box from 

2.4 Adding conditions

After you have created survey questions, you can add conditional logic to questions with the answer format multiple choice and yes/no. With conditions the respondents are directed to a specific question based on their answer. Note! You can only add one conditional link per question.

1. Click *Add conditions* in the top menu.
2. Click the drop-down field *When* to select the question you want to add a condition to.
3. Select "Is" or "IsNot".
4. Select the answer that the condition should apply to.
5. Click on the *drop-down* field then show to select the question the respondent should be directed to.
6. Click *Add condition*.
7. You can now see the condition you just added under the *Active conditions* section.

Conditions tips !

Note! You cannot edit conditions; in that case, delete the condition and create a new one.

Applying conditions means that some questions will be hidden from some respondents. This may affect the numbering sequence of the survey questions. The *Auto Numbering* can be edited in *Survey preferences*.

3 Adding respondents

1. Click *Manage users* and then + *New user* to create a new respondent.
2. While you are creating users, you can already assign them to a specific survey section or all sections.
3. You can also add respondents from the list of existing users. First select which section(s) they should be added to and then select the checkbox next to the respondent's name.
4. Once you are done, click *Continue* to return to the survey. You will notice that the relevant respondent names are shown below every section.
5. To further add or edit survey respondents, you can click *Manage users* again.

User licenses

One SimaPro user license allows you to send a survey to up to 30 respondents at a time. If you would like to send surveys to more respondents, you can purchase additional user bundles. Please [contact us](#) for more information.

4 Creating your invite and sending the survey

1. Click *Edit email template* to review the default invite that is sent to respondents.
2. Make your changes and click *Save*.
3. It is recommended to click *Send test mail* to receive an email preview of what the respondent will see.
4. To finally send out the invite, click *Send survey*.
5. You will get an overview of all respondents added to your survey.
6. SimaPro Collect will run a check to validate whether all respondents have email addresses. If some fields are empty, you first have to enter those respondents' emails before you can send the survey.
7. Click *Send*.
8. Once the survey is sent out, it will move from the *Draft* to the *In progress* section of the *Survey overview* dashboard.

You can still add respondents to a survey after it has been sent out:

2. Create new users via *Manage users* (as explained previously) and assign them to survey sections.
3. Then click the *Add respondents* button, select the newly created users and click *Add respondents*.
4. The invite will be sent out only to the users you have selected.

5 Tracking progress and sending reminders

1. From the *Survey overview* dashboard go to the *In progress* section, and click *View survey progress* of the survey you would like to track.
2. Next to the respondents' names under each section, you will find an icon that reflects their progress :
 -  respondent has been added but not yet sent an invite
 -  If empty, it means that the respondent has not yet answered any question in that section. The pie will 'fill up' to reflect the progress of that respondent.
 -  respondent has answered all questions in that section, but not yet submitted the survey.
 -  respondent has submitted the survey but did not answer all questions in that section.

-  respondent has submitted the survey and completed all questions for that section (not necessarily entire survey).
3. You can click on those icons to view each respondent's answers.
 4. To send reminders to respondents to fill in your survey, click *Add respondents*. You will get a list of only those respondents who have not yet submitted the survey. Select who you want to contact and click *Add respondents*.

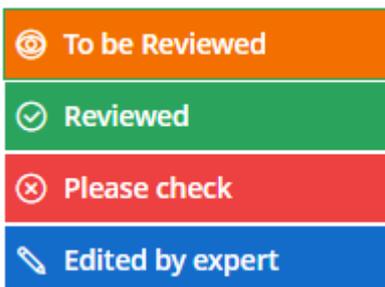
Edit email invitation

If you want to send a different email than the initial survey invite, make sure to edit the email template before you resend the invites!

5.1 Reviewing answers

If your respondent has answered the survey you can use the *review statuses*. The review statuses are tags that can be used for answered questions in Collect. It can be used when reviewing the answers a supplier or manufacturer has filled in. The survey must first be published by an Expert user and then sent and closed by the respondent for you to be able to edit the statuses.

The different statuses are:



To be reviewed means that the Expert user has not yet reviewed the answer. Both respondent and Expert user can edit the answer when it is open for them.

Reviewed means that the expert accepts the answer. Neither the respondent nor the Expert user can edit the answer after this status is selected.

Please check is a message from the Expert user to the respondent, for the respondent to check the answer when it is re-opened.

Edited by expert means that the Expert user has edited the respondent's answer. Only the Expert user can edit the answer.

5.2 Sending reminders

To send reminders to respondents to fill in your survey, click *Add respondents*. You will get a list of only those respondents who have not yet submitted the survey. Select who you want to contact and click *Add respondents*. *Note!* If you want to send a different email than the initial survey invite, make sure to edit the email template before you resend the invites!

6 Closing the survey

It is up to you when you would like to close the survey - it will not close automatically after the due date has passed. In practice, closing the survey means the respondents cannot submit their answers anymore and can only view the survey. To close your survey:

1. From the *Survey overview* dashboard go to the *In progress* section, and hover over the top of the survey (box) you would like to close.
2. Click 
3. You will get a confirmation message. Click *Yes*.
4. The survey will now move from the *In progress* section to the *Completed* section.

7 Viewing and analyzing results

You can view the intermediate results while the survey is still in progress:

1. From the *Survey overview* dashboard go to the *In progress* section
2. Click *View survey progress* of the survey you would like to track
3. Click *View results*.

Once the survey has been completed, you can view results:

1. From the *Survey overview* dashboard go to the *Completed* section.
2. Click *View results* to view the aggregated results.
3. Click *Download results* to export your survey results to Excel (in .csv format).
4. To view the answers submitted by a certain respondent, click *Back to survey* and click the lock icon next to the respondent's name.

Good luck and enjoy the SimaPro online platform!

For additional support, please visit the [SimaPro Help Center](#).