

# Report Maker 3

## User manual

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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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# 1 What to expect from Report Maker

## 1.1 Why use Report Maker?

If you've ever made a report based upon an LCA study you know that one of the most time-consuming things that can happen is finding an error in your model just before having to present your report. You have to rerun all the calculations and copy or export all graphs and tables again to Word and Excel and adjust the layout. Also if you present draft results in a draft report, you know you will have to do the work all over again for the final version.

SimaPro Report Maker solves that - you create your report in MS Word or Excel, use all the powerful layout features MS Word and MS Excel provide, and paste your graphs and tables there. After you have made modifications to your models in SimaPro, you just press one button in your report and all graphs and tables are updated with the newest results. SimaPro automatically performs the calculations and Word and Excel import the graphs.

In short, you can use Report Maker to:

- Update draft reports
- Easily update reports after adapting a SimaPro model.
- Automatically update reports of recurring calculations (EPD calculations for example)

## 1.2 What does Report Maker do?

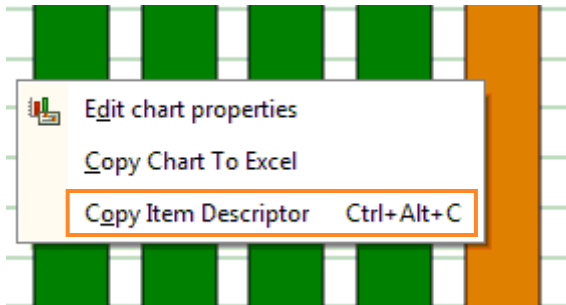
Report Maker allows you to incorporate text and LCA results (graphs and tables) from SimaPro in MS Word and Excel 2010 and up, and keep those updated as per your SimaPro model.

## 2 Getting started

Once you have installed Report Maker, new functions will be made available in SimaPro, Word, and Excel, as explained below.

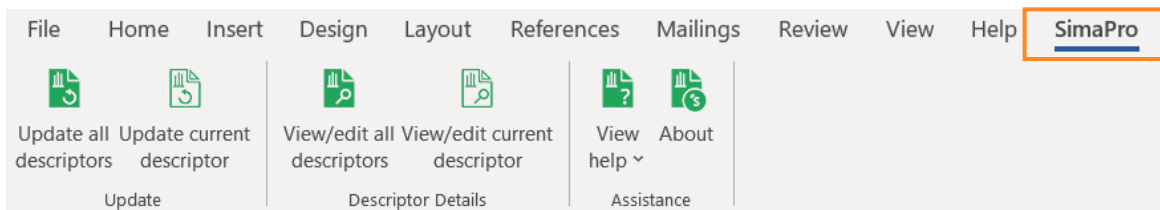
### 2.1 In SimaPro

You will see an extra menu item called "Copy Item Descriptor" if you right-click the background area of a graph, table, or text area. An item descriptor identifies a graph, table, or piece of text in SimaPro. You paste item descriptors into your document and Report Maker will later expand them to the described data.



### 2.2 In MS Word and Excel

An extra tab in the Office Ribbon will be added with the functions shown below.



These functions will help you keep your reports up to date with the changes you make in your SimaPro model. Instead of copying your graphs to MS Word or MS Excel, you can now only copy the item descriptor and paste that in your report.

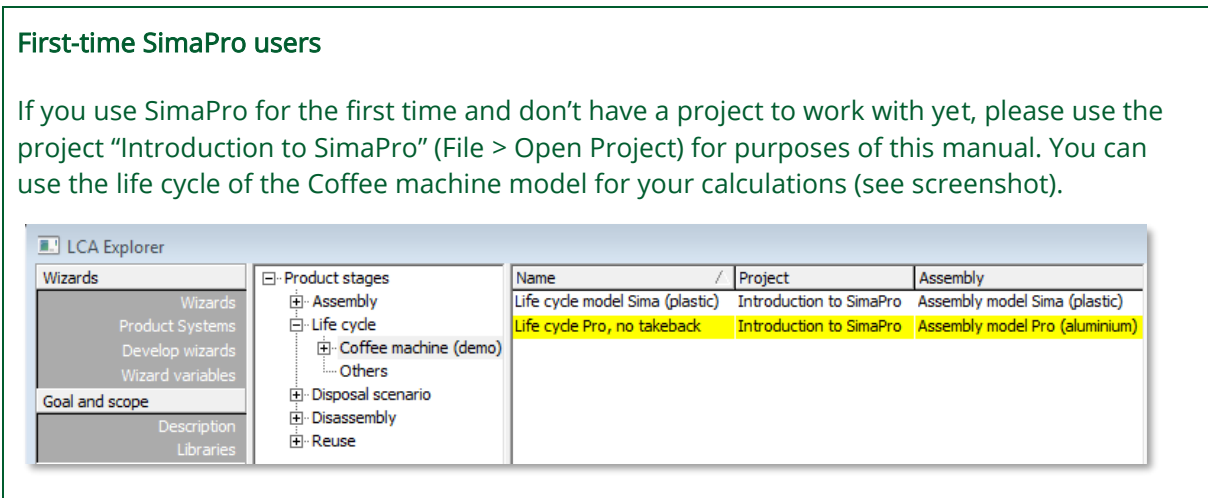
If you then click "Update Current Descriptor", SimaPro will calculate the results and the descriptor will be replaced by the graph, table, or text area. If you click "Update All Descriptors", all items in that document that have been copied from SimaPro will be updated with the new results.

Detailed steps on how to use these functions are outlined in the following sections.

# 3 How to use Report Maker

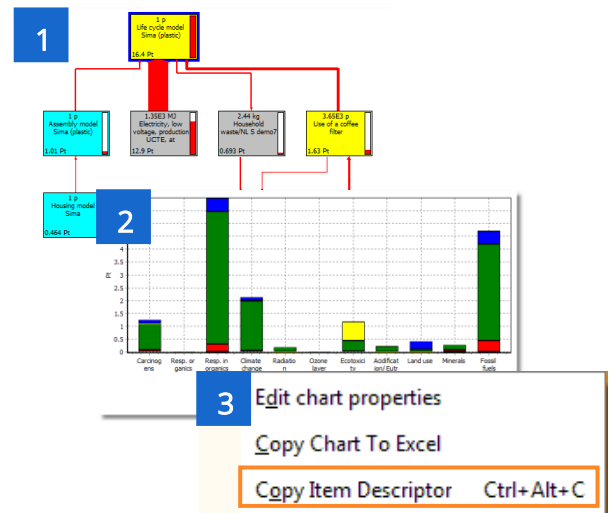
## First-time SimaPro users

If you use SimaPro for the first time and don't have a project to work with yet, please use the project "Introduction to SimaPro" (File > Open Project) for purposes of this manual. You can use the life cycle of the Coffee machine model for your calculations (see screenshot).



## 3.1 Copy the item descriptor from SimaPro

- (1) Create your model in SimaPro and run a calculation. Make sure that your calculation setup contains a method, even if you only want to create an inventory table.
- (2) Find a graph you would like to include in your report. Please note that Report Maker does not support copying Network/Tree views.
- (3) Right-click the white area around the graph (or table) and select the option "Copy Item Descriptor".



## 3.2 Create graphs and tables in your report

Open your document or worksheet, set the cursor where you would like to insert the graph, and paste this item descriptor (Ctrl+V or right-click > Paste). The item descriptor contains the instructions for SimaPro to recreate this graph or table again.

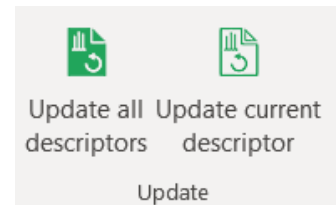
### Example of an item descriptor pasted in MS Word:

Impact assessment chart of damage results with Analyzing 1 p 'Life cycle Pro, no takeback'

### Example of an item descriptor pasted in MS Excel:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ref SimaPro <?xml version="1.0" encoding="UTF-8"?><!-35DEC3E7-B29D-4EA4-9836-85F7C3BEBF0E--><SimaPro majorVersion="1" minorVersion="0" comm													
2														

Next, click “Update All Descriptors” or “Update Current Descriptor” (your cursor needs to be in the item descriptor field) in the SimaPro Ribbon. SimaPro will start to calculate and after a few seconds up to a few minutes (depending on the size and the complexity of your model in SimaPro), your graph or table will appear.



The table or graph always appears above the item descriptor in MS Word. The table with results from SimaPro will appear below the item descriptor in MS Excel, **overwriting all data** that was previously shown in those cells. So leave enough space below an item descriptor - at least 12 rows more than the size of the table itself.

### Creating graphs or tables in Excel

In MS Excel, pasting item descriptors will only create tables. This allows you to use MS Excel’s formatting power to create the exact layout of the graph that you wish. To easily create a graph, select the cell with the item descriptor and choose Insert > Chart. A chart will be created automatically.

Please note that there is a difference between creating an item descriptor from a graph or from a table in SimaPro. An item descriptor from a table will also include the totals per column, whereas the item descriptor from a graph will not include the totals.

## 3.3 Update graphs and tables

After creating the tables or graphs using item descriptors, you can still go back to SimaPro and make changes to your model. Once you have finished the changes, return to your documents and click “Update All Descriptors” or “Update Current Descriptor” to get a newer version of your graph or table. This updated version will include all changes that you have made to your model in SimaPro.

### What can I change in my SimaPro model?

There are some limitations to the changes you can make to your SimaPro model, while still using the same item descriptors in your report. For example, the items and options you define in your calculation setup cannot be edited. Meanwhile, changes to the underlying product stages, processes, amounts, etc. will be incorporated and updated automatically in your report.

If you want to make changes to your calculation setup (for example, by choosing another impact assessment method), the item descriptor will not be updated. Instead, you have to create a new item descriptor and paste that in your report.

### Editing the graph layout in MS Word

Double-click a graph in MS Word to change its layout and design. This will enable the “Excel modus” in MS Word (some buttons will now be disabled in the SimaPro Ribbon) and now you can start changing the layout of your graphs. Please check the layout of a graph after updating it, as the formatting/layout of a graph may be lost in some cases, for example:

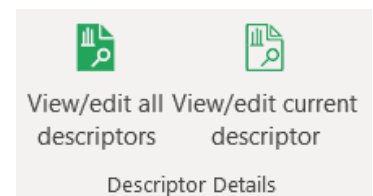
- if the number of columns or rows before and after the update is different,
- if the text from SimaPro that was entered by Report Maker but later manually changed by the user has been updated (for example, editing the wording in the legend).

### Moving a table in MS word

If you want to move a table in MS Word, then copy the item descriptor and paste it on the page where you want to have it. If you just move the table, the link to the item descriptor will be broken and the table will not be updated anymore.

## 3.4 View or edit item descriptor in MS Word and MS Excel

To see the exact settings that were used to create the graph or table in SimaPro, you can click “View/Edit All Descriptors” or “View/Edit Current Descriptor” (in this case your cursor needs to be in the item descriptor field).



Under the tab ‘Calculation settings’ you can see full details regarding what is being calculated, for example, what method was used or if the calculation includes long-term emissions or infrastructure processes.

View SimaPro item descriptors in current document

Description: Impact assessment chart of single scores with Analyzing 1 p 'Coffee pot'

Caption: Analyzing 1p 'Coffee pot'; Method: ReCiPe Endpoint (H) V.1.04 / World ReCiPe H/A / Single Score

Source Calculation settings

Calculation Setup General Selected impact categories Sorting

Method

Project Methods

Name ReCiPe Endpoint (H)

Normalization/weighting World ReCiPe H/A

OK Cancel



Under the 'Source' tab, you can change the database name, location, and server. This allows you to store the database and accompanying MS Word and MS Excel reports in a different location (for example to send it to a customer or manager) and still allow the reports to be updated. In MS Word, the caption of a graph or table can also be edited. Please note that the name of the project cannot be changed.

These are the only possible changes that can be done on this screen. If you want to change what is calculated, you need to make a new calculation in SimaPro, create a new item descriptor, and paste that in your report.

## 4 Advanced use

In combination with SimaPro Developer, Report Maker provides you with a powerful, interactive reporting feature. It allows you to adapt and recalculate SimaPro models by changing values within your report in Word or Excel.

SimaPro Developer allows you to make models with links to your data in Excel documents:

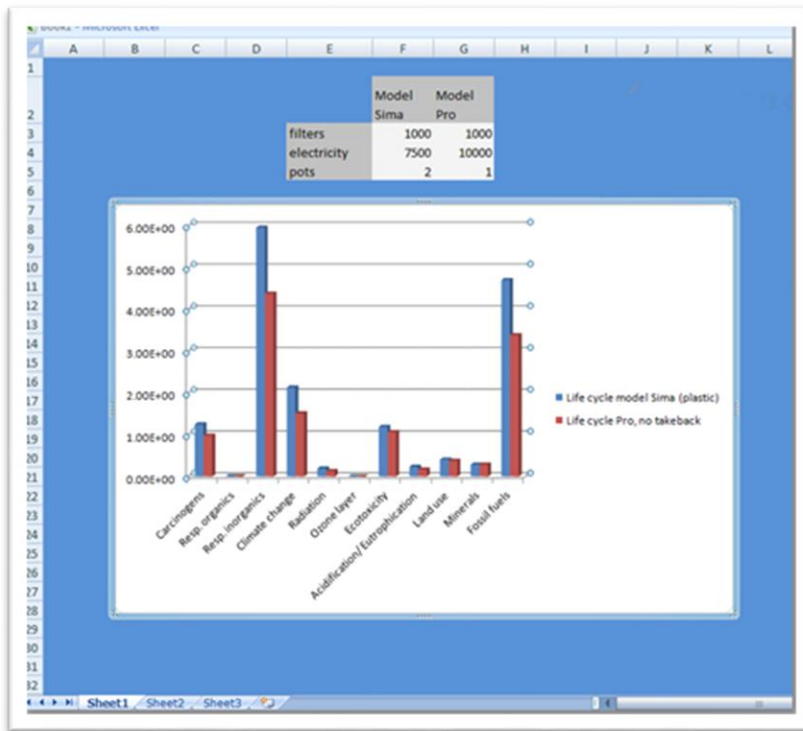
- directly to the [amount fields](#) of process records, or
- in the parameters section in the calculation setup ([importing parameter sets](#) from MS Excel in SimaPro). This is further explained in the next section.

If you link these fields in SimaPro to your MS Excel report or to an MS Excel document linked in your MS Word report, then you can change values in your report and use Report Maker to show the results in graphs and tables right away (even with SimaPro closed).

### 4.1 Using parameter sets

Report Maker offers a way to generate multiple documents from SimaPro parameter sets. This can be useful when one wants to generate reports for different scenarios (where a scenario can be a slightly different product of a slightly different production process for the same product of whatever other diversification).

SimaPro parameters sets allow you to define such scenarios and Report Maker allows you to create a report for each. This feature can, for instance, support your EDP reporting needs.



The steps below outline how to do this when using “imported parameter sets from MS Excel” in the calculation setup:

1. Create a parameterized model in SimaPro.
2. Create a MS Excel document with several sets of the parameters that you want to vary.
3. Create a calculation setup with an imported parameter set (for more help with this step, please check this [video](#)).
4. Run the calculation setup.
5. Copy the item descriptors for the graphs (or tables) that you want to use in your report.
6. Paste the item descriptor in your MS Excel worksheet (either on the same worksheet as where you defined your parameter values or another worksheet).
7. Now you can change the parameter values in your excel worksheet and press the "Update Current Item Descriptor" button. Your graphs will represent the currently calculated version of your model.

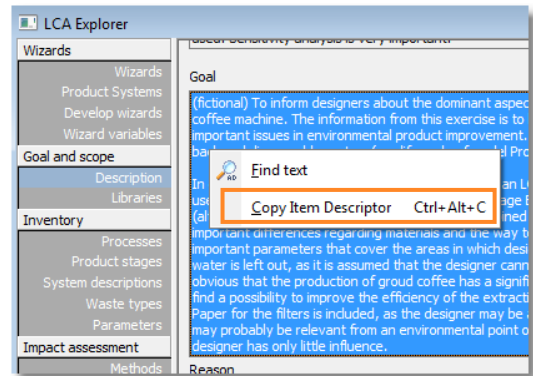
## 5 Tips and troubleshooting

### Creating and updating text from SimaPro

Apart from graphs and tables, you can also export text from certain text fields in SimaPro. For example, all text fields in the Description section (see screenshot) or process records can be incorporated in your reports.

### Saving changes in SimaPro

Make sure you save the changes you have made in SimaPro before clicking "Update All Descriptors" or "Update Current Descriptor" in MS Word or MS Excel.



### Using Report Maker and SimaPro simultaneously

Do not select "Copy Item Descriptor" while Report Maker is busy updating.

### Copying individual results

Individual data such as CO<sub>2</sub> emission to air can be used in Word by linking to the corresponding cell in Excel (Office functionality).

### Network/Tree and Monte Carlo

Currently, Report Maker does not support the inclusion of Network/Tree views or Monte Carlo (uncertainty analysis) results.

### The graph appears strange in MS Word

If a graph appears only partially or too large in MS Word, please double-click the graph to get into the Excel modus of Word and then click somewhere else in the document again. If the graph still doesn't show correctly, select the graph and delete it. Then, select the item descriptor and click "Update Current Descriptor" to re-create the graph.

### MS Word or MS Excel crash during an update of the item descriptors

After you click any of the update buttons, please do not use Word and Excel until the update has finished.

### Show/edit Item descriptor code

Pressing Alt+F9 will show the item descriptor code. If you make any changes in this code, you might not be able to update the graphs and tables anymore or the setup might have changed.

### Library switching function does not work

The library switch function which allows you to replace one library for another (e.g. Ecoinvent System library for Ecoinvent Unit library) in a calculation setup in SimaPro is **not** supported in Report Maker. In that case

### COM precautions with multiple SimaPro versions

Because a COM-interface can be registered only once on a computer, there might be a conflict between multiple suppliers of that COM-interface. In practice, it means that the last SimaPro that is installed will replace the COM-registration. You can influence this in SimaPro by doing an explicit unregister + register action of the SimaPro version that you want to handle all COM-functionality by clicking Help > Unregister COM server.

### Slow on computers with little memory

For computers with limited memory, please close all other applications (also SimaPro) when you update a MS Word or MS Excel document.

## 6 Backups

Report Maker itself does not store any information. All information you enter is stored in SimaPro, and the MS Word and MS Excel documents which are updated. So please make regular backups of your SimaPro database and your documents.

## 7 Updates

PRé regularly makes available SimaPro software and database updates to users with a valid service contract. If you do not have a valid service contract, please contact PRé or your local partner for your renewal options.

## 8 Support

If you live in a country where we have a partner, please contact our correspondence [partner](#) to receive support in your own language. You can contact SimaPro Support directly via:

- SimaPro: Help > Contact SimaPro Helpdesk (**recommended**)
- SimaPro Report Maker ribbon (in MS Word or Excel): About > Support Email
- Phone: +31 33 4504010
- E-mail: [support@simapro.com](mailto:support@simapro.com)