

REPORT FORMAT AND STYLE GUIDE

REPORT REQUIREMENTS

- The project group must submit the final report electronically.
- Textual material should be created in a format compatible with Microsoft Word 2000. Though, other word-processing programs may be converted, results may vary.
- Reports that are to be published on the web must be submitted as either a PDF or HTML file. If you are unable to meet these electronic transfer requirements, before submitting your report please contact the course instructor.

(One of the most rigorous reporting requirements comes from the New York State Energy Research and Development Authority – NYSERDA, www.NYSERDA.Org. The following is modified from <http://www.nyserda.org/exhibitc.pdf>, Nov. 2003)

Students need not include all sections, but should use this as a guide to the detail of their own choosing. However, each student should familiarize themselves with the details for future reference.

PURPOSE

This document explains how to prepare a technical report, describes editorial and production procedures and gives electronic data transfer information.

COPYRIGHTS

All material borrowed or adapted from other sources should be properly identified (i.e., document, source, date, and page). The project group must obtain and include in an appendix the copyright owner's written permission to use copyrighted illustrations, tables, or substantial amounts of text from another publication.

REPORT FORMAT AND SEQUENCE

The following items are required in all technical reports and should be paginated in the following sequence:

- Title page (no page number): as recorded on the web
- Notice (no page number): see below
- Abstract (iii): as recorded on the web
- Acknowledgments (optional) (iv)
- Table of Contents, including listings of figures and tables (v to vii)
- Executive Summary (S-1...)
- Report Body (Section – Page Number)
 - From EE402 Proposal: Technical Content
 - Identification and Significance of Problem
 - Technical Background
 - Technical Objectives
 - Added EE402 report content
 - Summary of design approach
 - Design and documentation
 - Design equations, schematics, etc.
 - Photo documentation
 - Test plan
 - Identification of performance metrics
 - Test approach
 - Design and Test Results

- Commercialization strategy (optional)
 - Anticipated markets, required resources, estimated return on investment
 - Appendix – Supporting Documents
 - EE402 Project Benefits – What did you gain from this experience?
 - Work Plan
 - Task list – original and final
 - Timeline – original and final
 - Project cost (Your actual costs)
- References or Bibliography

Title Page

The following information is required (see sample on last page):

- Report title and type of report (i.e., final, interim, or summary)
- Name of Technical Advisor(s)
- Project Group name and contact information
- Project Group members
- Project Group number or identifier

Notices

A legal notice or disclaimer is often required for public reports. When there are project cosponsors, use the following notice:

NOTICE

This report was prepared by _____ in the course of performing work for and sponsored by the State of New York and the _____ (hereafter the "Sponsors"). The opinions expressed in this report do not necessarily reflect those of the Sponsors or the State of New York, and reference to any specific product, service, process, or method does not constitute an implied or expressed recommendation or endorsement of it. Further, the Sponsors and the State of New York make no warranties or representations, expressed or implied, as to the fitness for particular purpose or merchantability of any product, apparatus, or service, or the usefulness, completeness, or accuracy of any processes, methods, or other information contained, described, disclosed, or referred to in this report. The Sponsors, the State of New York, and the project group make no representation that the use of any product, apparatus, process, method, or other information will not infringe privately owned rights and will assume no liability for any loss, injury, or damage resulting from, or occurring in connection with, the use of information contained, described, disclosed, or referred to in this report.

Abstract and Key Words – page [iii]

An abstract is a brief, 200-word description of project objectives, investigative methods used, and research conclusions or applications. This information will be used if the report is registered with the National Technical Information Service (NTIS). A list of key words that describe the project and identify the major research concept should be submitted with the report. Four to six precise descriptors are generally sufficient for indexing, registering, and distributing the report through NTIS.

Acknowledgments (optional) – page [iv]

Acknowledgments precede the contents and should be no longer than two paragraphs.

Table of Contents and Lists of Figures and Tables – pages [v. vii, ix, etc.]

The Table of Contents should list section numbers, titles, second-level headings, and their page numbers. Third-level headings also may be listed. If the report contains five or more figures or tables, they should be listed using the style of the Table of Contents. The following samples are boxed only to set them apart in this document.

Executive Summary – page [S-1]

The Summary, which immediately precedes the body of the text, should be written for a general audience. The Summary may be the only part of the technical report closely read by a number of people, many of whom lack a technical background. These may include industry executives, government officials, legislators, the general public, and media representatives. The Summary should be 500-1000 words long.

[EXAMPLE] TABLE OF CONTENTS	
<u>Section</u>	<u>Page</u>
EXECUTIVE SUMMARY	S-1
1 IDENTIFICATION AND SIGNIFICANCE OF PROBLEM	1-1
2 TECHNICAL BACKGROUND	2-1
3 TECHNICAL OBJECTIVES	3-1
4 SUMMARY OF DESIGN APPROACH	4-1
5 DESIGN AND DOCUMENTATION	5-1
[TASK 1]	5-
[TASK 2]	5-
6 RESULTS	6-1
TEST PLAN	6-
DESIGN RESULTS	6-
APPENDIX A – PROJECT BENEFITS	A-1
APPENDIX B – WORK PLAN	B-1
TASK LIST	
TIMELINE	
APPENDIX C – PROJECT COSTS	C-1

[EXAMPLE TABLE OF] FIGURES	
<u>Figure</u>	<u>Page</u>
1-1 Comparative Use Per Cubic Bed	1-2
2-1 View of Community from South	2-1
2-2 TEAM MEMBERS	2-5

COPY

- Page format:
 - Margins should be 1.25 inches left and right; 1 inch top and bottom.

- Use left-hand justification only.
- Text should be in a 10-point serif font (i.e., Times Roman, Bookman, etc.); captions, tables, and figures should be in a sans-serif font (i.e., Helvetica, Arial, etc.).
- Spacing should be 1.5 lines, printed on one side of the paper.
- Block-style paragraphs should be used, with no indentation (except for fifth-level headings, which should be blocked on the left; see Heading Styles, below).
- There should be two returns between a paragraph and the next heading.
- Material borrowed or adapted from external sources must be identified (i.e., document, source, date, and page). Written permission to use copyrighted illustrations, tables, or text taken from another publication must be submitted with the report.
- Avoid half-page and one-sentence paragraphs.
- Do not use contractions.
- When referring to a specific figure or table, spell out and capitalize the words "Figure" and "Table."
- Indented lists of material should be set off with bullets:
 - If a typographical bullet is unavailable, the bullet is a lower case "o," not zero.
 - One blank line should precede and follow a list.
 - Bulleted items should be indented left and right.
- All new sections should begin on a right-hand, odd-numbered page (e.g., 1-1, 2-1, A-1, etc.).
- Percentages should be written as follows: 1%, 76%, etc.
- Acronyms must be spelled out the first time used, followed by the acronym in parentheses.

HEADING STYLES

The heading styles illustrated below should be used. (Only section headings should be numbered.)

FIRST-LEVEL HEADING

Section 1

INTRODUCTION

The heading is upper case, centered, and boldfaced; the text is below the heading, at the left margin.

SECOND-LEVEL HEADING

The heading is upper case, at the left margin, and boldfaced; the text is at the left margin.

Third-Level Heading

The heading is upper and lower case, at the left margin, boldfaced, and underscored; the text is at the left margin.

Fourth-Level Heading. The heading is upper and lower case, at the left margin, boldfaced, and underscored, with a period at the end. The text continues on the same line as the heading. The remaining text goes back out to the left margin.

Fifth-Level Heading. The heading is upper and lower case, *indented*, boldfaced, and underscored with a period at the end. The text continues on the same line, with the remaining text indented left and right.

TABLES AND FIGURES

- Tables and figures must be numbered sequentially and titled individually.
- Place tables and figures as close as possible to the text in which they are mentioned.
- Distinguish tabular material from the text.
- Cite a source if the tabular material or figure content has not been generated by the project group.

- Figure captions should be complete sentences when appropriate.
- Use "Figure 1," not "Fig. 1," or "Table 1." in the text, as well as for captions. Examples:
 - Table 1 details demand-side management options.
 - As shown in Figure 1, the demand-side management program offers numerous options.
- Figure captions should be typed in boldface.
 - **Figure 1. Demand-Side Management Options in New York State.**
- Unless generated by the project group, a source should always be cited. The figure source should appear after the caption (e.g., Source: Lawrence Berkeley Laboratory); the table source should be noted with an asterisk and footnoted.
- Photographs and drawings should be limited in number, with the following guidelines. Black-and-white line drawings or good-quality, clear halftones (black-and-white photographs) may be used. Color artwork and photos are encouraged, but will most often be printed in black-and-white.

REFERENCES AND BIBLIOGRAPHIES

The format in Manual of Style (University of Chicago Press, Chicago, Illinois) should be used for reference listings and bibliographies. Author should list bibliographic entries alphabetically, as follows:

Hawkins, R.R. Scientific, Medical, and Technical Books Published in the United States of America. 2d ed. New York: Bowker, 1958.

SAMPLE TITLE PAGE

**CITY OF LOCKPORT INFLUENT HYDROPOWER
FEASIBILITY STUDY
Final Report**

Prepared for

**THE NEW YORK STATE
ENERGY RESEARCH AND DEVELOPMENT AUTHORITY
Albany, NY**

Lawrence J. Pakenas, P.E.
Senior Project Manager

Prepared by
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Michael Diel
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