TECHNICAL REPORT

PLEASE FOLLOW THIS LINK FOR AN EXAMPLE: <https://www.prismnet.com/~hcexres/textbook/report_design.html>

Here are some notes on the format for the long formal report.  These notes and comments are coordinated with examples in the “Report Format and Final Packaging” section of the *Online Technical Writing* textbook.  Look also at the descriptions of each part in the Online Textbook, and at the annotations in the “frames” of the sample reports.  If you do not have access to the sample and/or do not understand these comments, consult your instructor.

**Letter or memo of transmittal:** For internal reports, a memo can be substituted for the letter used in the model.  Some organizations are moving increasingly to electronic transmission of all information, in which case an e-mail would be used for the transmittal, and the report itself would usually be an attachment.  In any case, the transmittal gets the report  into the hands of the person who is your first audience—it reminds the reader why he/she has it, gives a brief descriptive summary of what the report says, and uses the typical suck-up ending to ingratiate you with the reader.  Address your transmittal document to your instructor, but write it for your selected audience.

In some cases (though these are increasingly rare), the transmittal will follow the title page.  This obviously would not be preferred if the report would be destined to be forwarded to another audience, as in such a case the transmittal would simply be removed and replaced with another forwarding document.  The transmittal document is also usually removed for filing.  For your purposes, place the transmittal document first.

NOTE: The transmittal is not counted as a page of the front matter; start counting pages with the title page.

**Title page:**  More often than not, the order of information would be Title, Prepared for, Prepared by, and Date, in four centered blocks spaced evenly on the page.  If the report is going outside the organization, addresses would usually be included with both the Prepared for and Prepared by blocks.  For internal reports, the organization and address are often moved to the Date block, and only position titles included with Prepared for and Prepared by.

The very brief abstract on the sample title page is included to provide readers with a descriptive forecast of the report, so they will have some idea what to expect (this descriptive abstract is often similar to the description of the report that appears in the transmittal).  This is not the same as the informative abstract or executive summary, and is used by readers for a different purpose.  This one helps readers decide whether or not to pay any attention to this report; the summary is used by readers who need to know what the report says but may not have the time or inclination to read the whole thing.  Though there is some repetition, both summaries/abstracts are important and serve different needs, so both must be included in your report.

**Table of Contents:**  Note the standard outline approach used in the table of contents.  All headings (usually of all levels) are listed, with the number being the page on which the heading itself appears.  Do not list page ranges here, but just the page on which the heading is printed.  Note also that front matter is paginated with small Roman numerals, that only pages following the table of contents usually have numbers on them, and that the body of the report always starts on Arabic numbered page one (1).  For front matter, count your leaves—though the pages prior to and including the first page of the table of contents do not usually have numbers on them, they are still pages (except for the transmittal, which may be eliminated later anyway) so count them before putting the numbers on the rest of the front matter.

NOTE: As for pagination in text, you may choose to follow the style in your online text or to use either MLA or APA manuscript style for pagination.  Also, be aware that Word does not allow you to change the style or placement or sequence of page numbers part way through a document, so it may be wise for you to set up two documents, one for front matter and another for body and back matter, so that you can use automatic page numbering in Word.  Be sure, however, that you put the two documents together before you try to submit the assignment so you submit the whole report (otherwise you may end up submitting only part of the report and will not pass).

**List of Figures:**  If there are any graphics, of any kind, in the report, they are listed independently of headings for quick and easy reference.  This list generally begins on a new page, numbered and included in the Table of Contents.  However, if the List of Figures will entirely fit on the last page of the Table of Contents, sometimes it can be included there and not listed in the Table of Contents, but that would depend on house style.  For this house style, list figures, if you have any, on a separate page rather than on the Table of Contents.

**Abstract or Informative Abstract or Executive Summary:**  A very brief summary of important points in the report is included in the front matter to provide an overview for any readers who may not have the time or inclination to read the whole thing (and also as a reference tool that may be useful later or when the report is filed).  A descriptive abstract is predictive (“This report will discuss investment options and evaluate the most useful…”), but an informative abstract or executive summary is informational (“The most common or popular investment options include IRA retirement savings accounts; market investments such as stocks, bonds, and mutual funds; standard bank savings accounts and certificates of deposit; and insurance and annuity policies.  Based on the client’s situation, the most useful are…”).  A descriptive abstract, being less detailed, is generally much shorter than an informative abstract or executive summary.  The descriptive abstract is what you will include on your title page.  The informative abstract/executive summary is a separate part of your front matter.

NOTE:  There may be additional front matter used depending on the nature of the report; see your online text.  Also, always check house style to find out what is normal for the organization where you work and follow house style.  Your report for this class must include the front matter described here.

**Body of the Report:**  The body of the report always starts on page 1.  Usually, the title is repeated at the top of the page, followed by a heading for the introduction.  Many organizations are leaning toward the use of a running head (including the full title, or a shortened title, and page number in the header to appear on each page, as in APA manuscript style) because this helps to keep reports manageable, especially in print rooms that may be handling several reports at a time.  If this is the case, the complete title may or may not appear on the first page of the body.  If it does, the running head is sometimes dispensed with on that page only, and the page number may be moved, on the first page only, to the bottom center rather than in the header.

The standard “rules” for headings, sub-headings, etc. apply: all headings look alike but different from sub-headings (and sub-sub-headings and so on); the more important the heading level, the more it stands out from the text; headings should, as much as possible, be in parallel grammatical form; sections are always divided into at least two subsections, or none at all (never divide a section of any level into just one subdivision; to do so is just to re-name the section, not divide it); and as a general rule headings should not be “stacked” (i.e., one level heading should not immediately follow another level heading; introduce a section before subdividing it).  Never, ever, end a page with a heading of any level—it’s better to leave a bit of white space and move the heading to the next page where it can actually head something.  You may use the heading design specified in your online text or design headings of your own, provided they stand out from the text, higher level headings look more important than lower level headings, and you do not do something ridiculous (such as using 48-point size headings or printing headings in yellow or leaving six or seven spaces around a heading or something).

Speaking of white space, use it to your advantage.  Single space within paragraphs but double space between is becoming a default standard, so the white space offers the eyes an opportunity to take a break.  If you double space your text, leave extra space around headings to provide separation of sections through use of white space.  Also, white space around headings helps them stand out from the text (keep spacing even, or more before the heading than after so it’s more connected to the text it fits with, and BE CONSISTENT!).

The introductory part of a section is a good place to put transitions.  Tell your readers not only what’s ahead in this particular section, but also how it fits with what came before.  This will help you to tie the whole thing together, even though each section probably will (or should) be unified and understandable in and of itself.

Graphics, if you use them, can be inserted into the text or assembled in an appendix.  The “rules” for using graphics also apply:  always refer to graphics in the text of the report, and tell the reader where to find them when you want the reader to look at them; make sure that the graphics are useful, not just let’s-do-it-just-because-we-can throw-aways; make sure that the graphics make sense in and of themselves, but that they are also integrated into the text; be sure to clearly number, name, and label all graphics.

“Conclusions” and “Conclusion” are not necessarily the same thing.  Not all reports will draw conclusions or make recommendations; some may simply present, explain, or analyze information.  However, every report must end (conclude).  In the case of feasibility and recommendation reports, “Conclusions” and “Recommendations” may be separate sections, or they may be combined into one section at the end.

**End Matter:**  Pagination continues uninterrupted from the body into the back matter.  If the report used any research, add a list of sources in the documentation style of choice (most often MLA or APA style).  Your report here must use either MLA or APA style to list sources (do not use the style shown in your online text; consult the *OWL* for MLA or APA guidelines, and use your chosen style exactly throughout the report as you credit sources).  Any appendices, glossaries, indices, etc. also go here.

That’s about all there is to it really—pretty simple, eh?  Just be clear and concise, spell the words right, use standard punctuation, write in complete sentences, organize related things together, keep paragraphs short and manageable, and be sure to write for your target audience, and you’re all set.  Don’t forget, however, that the house style of any organization trumps all of these rules, so be sure to find out how it’s done wherever you happen to be working when you write a report.

**ASPECTS TO CONSIDER**

As you write and assemble your report, think about the following.

**Title**--Is the title clear?  Does it accurately indicate the topic or focus of the report?  Is it brief yet informative?  Does the title page include title, audience, writer, date, and descriptive abstract?

**Headings**--Do the headings guide the reader through the information presented?  Are they parallel in grammatical construction?  Do they cue the reader in to what ideas will be presented in the sections of the report?  Are they clearly worded?  Do they stand out clearly from the rest of the text?  Do headings look alike, but different from subheadings?  Is there text after every heading, with no stacked headings?

**Content**--Is the focus of the report sufficiently limited?  Is the information presented complete enough to answer any questions the reader may have on this topic?  Is the information supported, defined, and explained enough to be understandable and informative to the target audience?  Are quotes used only as necessary to support and illustrate ideas, and not "stacked" as a substitute for text?  Is borrowed information properly documented?  Are any graphics referred to in text and easy to locate?

**Organization**--Is similar information grouped together?  Are sections understandable in isolation as well as integrated into the whole?  Is information presented in a logical order--i.e., is the reader given background information before specifics, or are ideas which form the foundation of the report presented before they are developed or built upon?  Are sections introduced before they are subdivided?  Are any sections that are divided into subsections divided into at least two subsections?

**Style**--Is wording clear and understandable?  Are sentences reasonably short and not crowded with new information?  Are paragraphs of a manageable length, neither so short as to seem choppy nor so long as to be overwhelming?  Does tone seem appropriate to the subject, intent, and audience of the report?  Is the level of technicality appropriate for the intended audience?  Is the level of technicality consistent throughout the report text?  Is the report grammatically correct?

**Format--**Are all the required parts of the report (transmittal document, title page, table of contents, list of figures if needed, informative abstract/executive summary, report text, sources) included?  Is the report set up neatly and consistently on the page? Is the format easy to follow?  Is pagination accurate (small roman numerals for front matter, arabic numbers for the rest, first page of text body page 1)?  Is the title repeated on the first page?  Are sources credited in MLA or APA style?  Is the text double spaced throughout, or single spaced within paragraphs and double spaced between, with appropriate use of white space around headings and subheadings?  Does format make the report easy to read?  Does format facilitate locating information?  Are summaries clear and useful?  Is the report designed to be useful for both primary and secondary audiences?