Reports

Reports provide audience members with information and recommendations based on that information. Reports are written by multiple members of a team for multiple audience members, so each section of the report must be clearly identifiable so that the various audience members will find their particular sections.

1. **Purpose:** Why are you writing the report and what are your goals? Purpose will determine whether you will write a formal or informal report.

2. **Audience:** Who is going to read the report? Primary audience members are the decision makers and secondary audience members are the technical staff. Consider the following:
   A. Stakeholders: The people who are affected by the report.
   B. Context: The background information relevant to the audience and the report.
   C. Usability: The degree to which the document is usable for the audience.

3. **Professionalism:** Professionalism is communication through readability, which is determined by language and organization. Specifically, you need to be clear, concise, and coherent.
   A. Language: Your writing should be clear and concise.
      I. Writing conventions: You should practice correct usage, grammar, and punctuation.
      II. Logical flow: Your report should proceed in a logical fashion with developed, unified, and cohesive paragraphs.
      III. Perspective: "I" or "We"
      IV. Sentence structures: Active sentences are clearer and more accountable than passive constructions.
      V. Word choice: Avoid using clichés, slang, and offensive language.
      VI. Technical language: Adapt your language to your audience.
      VII. Style and tone: Use a professional tone and formal style.
   B. General Organization: Your audience will have an expectation of form.
      I. Formatting: Follow the form that is used in your field or in your company. Most reports need the title of the report and year in the page header.
      II. Highlighting techniques: Provide your audience with titles, headings, and subheadings.
      III. Bold and italics: Use for those words or phrases that require extra attention.
      IV. Transitions: Use for smooth movement from texts to figures, providing clear signals and identifying structures.
      V. Fonts: Use one font consistently.
      VI. Bullets: Use to organize large lists or large clauses.

4. **Front Matter:** Front matter is created after the body and back matter of the report. Front matter is the first portion of the report and contains the title page, abstract, table of contents, list of figures, list of tables, forward, preface, and list of abbreviations and symbols.
   A. Purpose:
      I. Explains the topic of the report.
      II. Explains how the report is organized.
      III. Provides the purpose of the report.

B. Page Numbers:
   I. The numerical system for pages in the front matter is small Roman numerals.
   II. The title page, though unnumbered, will be i. The back of the title page, still unnumbered, is ii.
   III. The abstract begins on iii. The back of the abstract is iv, but it is unnumbered.
   IV. The table of contents begins on v.
C. Title Page: The formatting of the title page may vary, depending upon your company's requirements.
   I. Include the full title of the report.
      a) The title should reflect the topic, scope, and objective.
      b) Do not abbreviate in the title.
      c) Put the time period in the subtitle.
   II. Include the names and titles of the writers, investigators, and compilers.
   III. Include the dates and the time period represented by the report.
   IV. Provide the name of the company or individual receiving the report.
D. Abstract: An abstract is a condensed version of the report. It summarizes the major points of the report and is meant to provide enough information so that it can easily stand alone.
   I. Abstracts are usually about 250-300 words.
   II. Begin with a topic sentence that provides the purpose and the scope of the report.
   III. Provide the methods that you used.
   IV. Include results, conclusions, and recommendations.
E. Table of Contents (TOC): The table of contents provides the reader with a list of headings and page numbers for each section of the report.
   I. All chapters and section titles in the report should match the TOC.
   II. Provide listings for major and subordinate headings that are separated by typeface and indentions.
F. List of Figures: A list of figures is used when a report contains more than five figures.
   I. List figures by title and page number.
   II. Number figures consecutively with Roman numerals.
   III. A list of tables is used if there are more than five tables in your report.
   IV. Number tables consecutively in Arabic numbers.
G. Forwards: Forwards are optional and should be written by someone other than the author of the report. Forwards may lean toward academic or scientific reports.
   I. The forward should provide background information.
   II. The author of the forward should be an expert in the field or an executive in the company.
   III. The author's name and date should be beneath the forward on a separate line.
H. Preface: A preface is also optional. The preface is an introductory statement written to announce the purpose and scope of the report. A preface should do the following:
   I. Provide the background and purpose of the report.
   II. Specify the audience of the report.
   III. Acknowledge any direct or indirect assistance.
   IV. Cite permission for copyrighted work.
I. List of Abbreviations and Symbols: This list is used to clarify symbols and abbreviations. You may either create a "Symbols and Abbreviations" page and list each symbol and

abbreviation along with its meaning, or you may divide the page into a "Symbols" page and an "Abbreviations" page.

5. **Body:** The body contains the description and explanation of the purpose, scope, and methods and contains an executive summary, introduction, text, conclusions, and recommendations.
    A. Executive Summary: The executive summary is a more complete overview than the abstract.
        I. Use a heading that titles the executive summary as such.
        II. The length of the executive summary is ten percent of the length of the report.
    B. Introduction: The introduction is meant to provide your reader with general information.
        I. The purpose of the introduction is to provide the audience members with general information that will provide them with an understanding of the organization of the report.
        II. Use headings and subheadings.
        III. Content:
            a) Paragraph One: Provides the purpose of the report and introduces the subject. You may also include a summary of the background information and an overview of any methods.
            b) Paragraph Two:
                i. Provides more detail on the background information of the report, such as the problem or justification.
                ii. Includes the scope of the report, providing your audience with an idea of the detail of the information and what specifics are being addressed.
            c) Paragraph Three: Provides any major findings or recommendations. You may use plural first person to indicate the collaboration ("we found" or "we recommend").
            d) The last section will provide a preview of the contents to follow. You will put the information in the order that you will present it in the report.
    C. Text Content Information: There are no set formulas for presenting the text, but do consider the audience.
        I. Provide the information in the order that is the most logical for your report.
        II. Provide ample explanation for complex information.
        III. Provide headings and subheadings.
        IV. Introduce your graphics and provide explanation for the graphics. Identify each figure with a title and number above or below the figure.
    D. Conclusions and Recommendations:
        I. Pulls the report together.
        II. Comes out of the findings discussed in the body of the report.
        III. Provides recommendations for future actions.
    E. References:
        I. Cite any and all sources that you have summarized, paraphrased, or quoted.
        II. Cite any figures that you have used as a source and any data used to create graphs or charts.
        III. Follow the citation style that your company uses.

6. **Back Matter:** Contains all supplemental documents: Bibliography, Appendices, Glossary, Index, etc.
    A. Bibliography: The bibliography is the alphabetical listing of the sources that you may have used in your report. The purpose of the bibliography is to provide your reader with additional information and to credit your sources.
        I. The bibliography may be more exhaustive than the reference page because you will be listing every source that you examined.
    B. Appendices: The appendices are meant to supplement the body by providing additional information.
        I. The first page of the appendix is placed on a new page after the Bibliography.
        II. Label the individual appendices as Appendix A, Appendix B, etc.
        III. If the report has only one appendix, you will number the pages 1, 2, and 3; however, if there is more than one appendix, you will provide double numbered pages correlating to the letter (B-1, B-2, etc.) of each appendix.
    C. Glossary: The glossary is the alphabetical listing of definitions of terms that you have used in your report.
        I. Define the terms concisely and simply.
        II. Each entry should begin on a new line.
    D. Index: The index is an alphabetical listing of all topics and subtopics found in your report. If your report will become a reference document, you will want to include an index.
        I. Cite the pages where major topics can be found.
        II. Perform a word search to find page numbers for major topics.
        III. The index is the last section of your report that you create.