

Elements and Kinds of Formal Reports I



CMNS 3100

Source: Riordan, "Technical Report Writing Today"



In Nutshell

- Formal format presents documents in way that makes them more official.
- Often used with longer documents.
- Used also in documents that establish policy, make proposals, or present results of research



Formal Format: Title Page -- Overview

- Title
- Author
- Date, report number
- Report recipient
- Page Design



Table of Contents

- Lists all main sections
- Lists all subsections



Summary

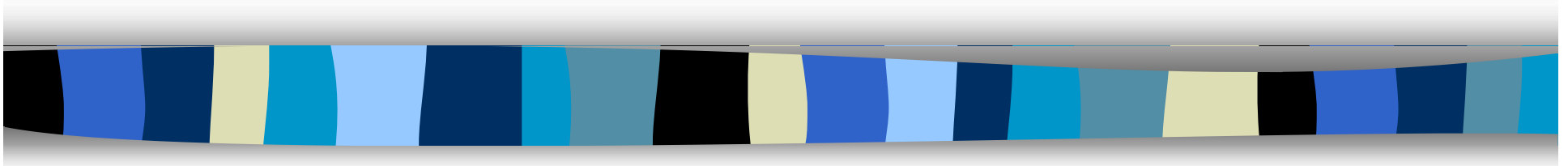
- Executive summary
- Abstract
- Proportional reduction
- Goal: after your readers finish the summary, they should know your conclusions and your reasons.



Introduction – basic elements

- Contains all the usual intro topics
- Gives each of them a head
- Background
- Scope
- Purpose
- Method
- Recommendations

Formal Report Worksheet



Source: Riordan, "Technical Report Writing Today"



Part 1: Determine the audience

- Primary?
- Secondary?
- Level of understanding?
- How will this report be used?
- Will it be the basis for a decision?



Part 2: Figure out THE LOOK

- Plan visual aids that will convey report's basic info.
- Integrate them properly into the text (see “Integrated Graphics” PPT/handout)
- Prepare style sheet for up to four levels of heads and for margins, page numbers, and captions to visual aids.
- Decide whether each section should start at the top of a new page.



Part 2, cont'd

- Create title page
- Prepare table of contents
- Prepare list of illustrations
- Present figures first, then tables



Organizing Findings

- Determine order of statements (purpose, scope, procedure, etc.) in the introduction
- Prepare glossary if necessary
- List conclusions
- List recommendations
- Explain rationale
- Write summary
- Prepare appendices



Recommendation and Feasibility Reports



In a Nutshell

- Feasibility studies and recommendations present a position based on credible criteria and facts.
- Feasibility studies use criteria to investigate an item in order to tell the reader whether or not to accept.
- Recommendations use criteria to compare item A to item B in order to tell the reader which one to choose.



Report's strategy

- Brief intro to set the scene
 - Background
 - Data collection
 - Criteria used
- Discussion of data, often subdivided by criteria
- A helpful visual aid
- A brief, clear conclusion



Criteria?

- Name: identifies area relevant to situation
- Standard: establishes limit of the criterion
- Rank: explains relative importance in decision consideration
- Class project examples



Proposals

- Goal is to persuade readers to accept course of action ...
- ... as a way of solving a problem
- ... as a way of filling need
- External proposals show that your way is best.
- Internal proposals show that situation's bad and your plan can make it better.



Internal Proposal

- Define problem
- Construct visual aids
- List parameters
- Outline methodology for investigating situation
- Prepare a list of problem dimensions
- Solutions/Benefits/Implementation
- List rejected alternatives.



External Proposal

- Write a statement of client's needs
- Prepare a 2-column list showing client's needs and how your proposal meets them.
- Explain financial details
- Explain your expertise
- Schedule implementation and any inconveniences that will cause.



Proposals: Basic Issues

- The problem: how some some fact adversely affects expectations
- The solution: how actions will neutralize that fact
- The benefits of the situation: what desirable outcome each person/group will obtain
- The implementation: who will do it and how, and how long will it take



Introduction

- Statement of purpose – single sentence
- Explanation of methods of investigation
- Statement of scope: cite criteria you used to judge data
- Explanation of problem



Background

- Discuss problem, situation, etc.
- Define nature and significance
- Explain history



Conclusion

- Summarize key information about each criterion covered in report
- Placed **TOWARD THE FRONT OF REPORT** (so busy reader can access quickly)