

TYPES OF TECHNICAL REPORTS

Informal Reports

OBJECTIVES

By the end of this lecture, you will be able to :

- Identify the purpose and importance of reports.
- Identify and describe the various kinds of informal reports.
- Describe formal reports and the arrangement of their parts.
- Identify the elements of style suitable for effective report writing.

Introduction--- Reports

- make up the greater part of writing that takes place in businesses and corporations.
- written to communicate information on almost every phase and procedure of operation and on almost every subject.
- include damages, incidents, trips, meeting minutes, efficiency, costs, and so on.

Introduction (cont.)

- written for anyone who needs information.
- most common form of business and corporate writing because they are the most functional.
- almost any size --- two or three paragraphs long for simple or routine subjects, or volumes for multi-million dollar projects.
- written informally as interoffice memorandums, or they can take the form of letters.

Introduction(cont'd)

- Long or formal reports can take the form of bound documents with their own title pages and tables of contents.
- Brief or routine reports can be written on standard fill-in-the-blank forms supplied by your company.

Purpose of Informal Reports

- common to all reports is their purpose, i.e. to convey information *thoroughly*, *accurately* and objectively.
- written because people in authority need information, possibly to:
 - recommend a certain action
 - evaluate the efficiency of a new process or
 - keep track of daily activities.

Forms of Informal Reports

- Blank
 - Pre-formatted in fields
- Interoffice memorandum
 - Commonly referred to as memos
- Letter
 - Ordinary letter to convey information in informal style

Blank Form

- the simplest form of informal report.
- fill in the blanks on forms that are provided by your company and tailored to its routine informational needs.
- ensure information is never left out, easily located by readers, clearly focused and brief.

Interoffice Memorandum Form

- interoffice memorandums usually called memos is the least formal of the three report forms.
- should never be used for reports that are more than one or two pages long.
- used to communicate routine information
- be direct because they are intended for distribution *only* within a department or between departments.

Interoffice Memorandum Form(cont'd)

- supplies the reader with all the details he/she needs to know about the situation being reported on, the results, and the conclusions and recommendations.
- Headings/numbered lists are usually used to show divisions of information
- intended for company use only and should never be sent outside your organization.

Letter Form

- usually longer than memos and as such require more headings to make information easier to locate and break up long blocks of writing.
- contain some concise lists, both numbered and not numbered.
- composed of block paragraphs.
- intended for people both inside and outside your organization.

Types of Informal Reports

- Field trip reports.
- Progress and status reports.
- Periodic reports.
- Feasibility reports.
- Troubleshooting reports.

Field Trip Reports

- frequently used in business and industry to record the results of on-site inspections.
- scope and significance will determine whether they take the form of an informal or formal report.
- may contain information on:
 - observations on safety conditions,
 - equipment damages,
 - production operations or
 - even employee morale,
- can address the entire range or focus on one or two aspects.

Field Trip Reports(cont'd)

Components/Elements for field trip report:

- Purpose of inspection/visit.
- Identity of site or facility.
- Description of investigation/observation.
- Results/findings.
- Conclusions and recommendations.

Field Trip Reports(cont'd)

- A brief description of the purpose of the investigation is necessary.
- A description of the investigation is crucial.
- The results of your inspection follows the investigative description.
- List and record your observations clearly, objectively, and concretely.
- The conclusion and recommendations are purpose for writing this report.

Progress Reports

- give accounts of work that is currently being done but is not yet completed.
- communicate project problems, thus reducing the rippling effects those problems can have on scheduling, costs, and other operational factors.
- enable you to check on yourself so that you can better estimate what remains to be done and what resources, especially time you have to do it.

Progress Reports(cont'd)

Format for progress reports:

- Summary overview of the whole project.
- Work already completed.
- Work currently underway.
- Work remaining to be done.
- Final recommendations,

Status Reports

- describes what is being accomplished in the present and with existing conditions in general.
- just another type of progress report.
- emphasize is laid on the existing conditions.

Status Reports(cont'd)

Format for status reports:

- Summary overview of the whole project.
- Present conditions described in detail.
- Work completed and remaining.
- Final recommendations.

Periodic Reports

- allows management to keep track of ongoing operations on a periodic or regular basis.
- can be filed daily, weekly, monthly, quarterly, yearly etc.
- may even take the form of an elaborate and often costly formal report.
- can take almost any form depending on the project and the frequency of reports required.
- are routine.

Feasibility Reports

- Decisions have to be made every day, an investigation to decide on the most appropriate decision is called feasibility study and the report that conveys the study is called feasibility report.
- probably the most difficult type of report to write because it requires you to make decisions.
- Focus of feasibility reports should be the recommendations.

Feasibility Reports(cont'd)

components/elements in a feasibility report:

- Introduction
- Proposed actions
- Conclusion
- Final recommendations.

Feasibility Reports(cont'd)

The introduction of a feasibility report should include:

- Background and purpose of the report.
- Statement of the problem
- Extent of the study.
- Criteria used in the study.

Feasibility Reports(cont'd)

- The middle section should consist of a detailed discussion of the single action or several alternative actions under consideration.
- An effective feasibility report discusses all of the possible factors that might influence a decision on the best action.
- Your report should conclude with one or two paragraphs summarizing your conclusions and recommendations.

Troubleshooting Reports

- used by technicians to convey information regarding the analysis and correction of problems found in industrial products.
- The purpose of troubleshooting reports is:
 - To analyze the problems symptom's.
 - To locate the defect.
 - To correct the defect.

Troubleshooting Reports(cont'd)

Components/elements in troubleshooting reports:

- Introduction
- Body
- Conclusion
- Final recommendations

Formal Reports

Formal Reports

- Can be intended for company distribution but are more commonly intended for distribution outside the company.
- Is a distinct type of report because of its size and scope of undertaking, its importance, and its formal tone.
- Can be used for any reporting purpose as long as the size of the formal report is warranted.

Formal Reports(cont'd)

- Have title pages and table of contents
- Have type of preface in the form of a cover memorandum or a letter of transmittal depending on whether the letter is intended for interoffice distribution or for circulation outside the company.
- Can have appendixes or bibliographies.

Report Planning

Questions to ask when planning a report:

- Who is your audience?
- What information do they need?
- What is your purpose in writing this document?
- How should it be organized?

Report Design

- Almost all take a position and then validate that position with supporting evidence of various kinds.
- Divided into three sections.
 - Part 1- preliminary information.
 - Part 2 – Body of the report.
 - Part 3 – end matter of your report.



Report Design (Part 1)

The preliminary section of a formal report presents the following elements in the order below:

- Cover memorandum or letter of transmittal
- Title page
- Table of contents.
- Summary or abstract.

Cover memorandum or Letter of Transmittal.

- It supplies readers with an explanation of why you've written this report.
- Use cover memorandum if your report is for internal distribution.
- Use letter of transmittal if your report is for external distribution.
- They identify the subject of the report and usually states the reason for the report.

Title Page

- It supplies the following information:
- Clearly identifying the report's subject.
- Name of person or organization to whom the report is being submitted.
- Name of person or organization submitting the report.
- The date of submission.
- Should be descriptive enough to immediately provide the reader with a concrete idea of the subject.

Table of Contents

- List all headings within your report exactly as they appear in the body of your report.
- Page numbers are listed directly across from the headings.
- It lists the first page on which a given heading appears, *not* the last page.
- Its useful because it enables the reader to:
 - Locate information quickly.
 - Comprehend the scope of your report.
 - Quickly grasp the report's organization.

Summary or Abstract

- Second most crucial section in a formal report.
- Its purpose is to:
- Provide readers with a quick review of the major points of your report.
- Provide readers with a basic understanding of your report without reading it entirely.
- It gives readers a review of your entire report.
- They must be brief and thorough.
- Free of details.

Summary or Abstract(cont'd)

Major points of your report:

- The problem.
- The investigative procedure.
- The conclusions and recommendations.
- Keep it brief and concise

Report Design (Part 2)

- Contains all the information involved in the investigation.
- solution of the problem your report addresses.
- Contains the data, findings, and results of your investigations and tests.
- It include conclusions and recommendations.

Introduction

- Contains preliminary information necessary for understanding the data compiled in your report.
- Gives information about the problem analyzed in your report.
- Brief statement of your report's purpose and objectives.
- Published literature on the subject.

Report Body

- It tells what investigating, testing, analyzing and observing you've done.
- It outlines methods you used to investigate and analyze the problem.

Organization

Principles of organizing and outlining:

- Task
- Time
- Space
- Comparison/contrast

Information Sources

Sources available for verifying conclusions and recommendations:

- Tests or experiments
- Published material
- Personal experience
- On-the-job observations

Conclusions and Recommendations

- Contain clear and logical conclusions and recommendations.
- Conclusions are:
 - Final observations
 - Record your convictions and feelings about the subject you investigated.
 - Represent your formal reactions
 - Logical, clear and based on the findings recorded in your text.

Conclusions and Recommendations(cont'd)

Recommendations are:

- Actions not convictions.
- Focus on the future

Report Design (Part 3)

- Reserved for material that may not be directly related to your report but useful.
- It may include list of symbols, footnotes, bibliographies etc,
- It should be introduced by a page titled Appendix.

Report Style

Report Style

Once you're done with your report check for stylistic weakness, ensure that it is:

- Complete
- Uncluttered
- Impartial
- Interesting

Completeness

- Complete in content.
- Side effects.
- Must be an imaginative report. i.e. putting yourself in the place of your reader.

Uncluttering

- Readers needs must be considered if additional information, clarification and verification are necessary.
- Too much information may decrease your readers interest.
- Check for ideas that are not absolutely necessary.

Impartiality

- Reports require impartiality and objectivity.
- Logically determine a decision or an outcome.
- Present all sides of the question, even if they counter to your own interpretation of data.
- Base all interpretations and conclusions on the solid facts presented in the body of your report.

Interest and Enthusiasm

- Emphasize and highlight the importance and usefulness of your report.
- Be concrete and deliberate in describing the benefits of your report.
- Assume a neutral position regarding the facts and data you collect.
- Avoid words that tend to be emotional or prejudicial toward the facts.
- Use facts and figures instead of non-specific words.