

Chapter: 10 – Formal Reports

Formal Reports

In comparison to informal documents, formal documents usually:

- (1) cover more complicated projects
- (2) are longer than their informal counterparts
- (3) have a more diverse set of readers

ABC Format: Formal Document

■ **ABSTRACT:**

- Cover/title page
- Letter or memo of transmittal
- Table of contents
- List of illustrations
- Executive summary
- Introduction

■ **BODY:**

- Discussion sections
- [Appendixes—appear after text but support the body section]

■ **CONCLUSION:**

- Conclusions (for reports and proposals)
- Recommendations (for reports only)

Headings in a Report

FIRST-LEVEL HEADING

(all caps, bold, on a line by itself)

Second-level heading

(initial cap only, bold, on a line by itself)

Third-Level heading (initial cap only, bold, followed by two spaces, as part of the first line of the paragraph)

Second-level Heading in a Report

Third-level heading in a short report

Decimal Headings

```
1  xxxxxxxxxxxxxxxx
   1.1 xxxxxxxxxxxx
      1.1.1 xxxxxxxxxxxx
      1.1.2 xxxxxxxxxxxx
   1.2 xxxxxxxxxxxx
      1.2.1 xxxxxxxxxxxx
      1.2.2 xxxxxxxxxxxx
2  xxxxxxxxxxxxxxxx
   2.1 xxxxxxxxxxxx
      2.1.1 xxxxxxxxxxxx
      2.1.2 xxxxxxxxxxxx
   2.2 xxxxxxxxxxxx
3  xxxxxxxxxxxxxxxx
```

Parts of a Formal Reports and FYP

1. Cover/title page
2. Letter or memo of transmittal
3. Table of contents
4. List of illustrations
5. Executive summary
6. Introduction
7. Discussion sections
8. Conclusions and recommendations
9. End material

Cover/Title Page

- Project title
- Your client's or recipient's name ("Prepared for . . .")
- Your name and/or the name of your organization ("Prepared by . . .")
- Date of submission

Use a visual only if reinforces a main point.

Letter/memo of Transmittal

- Place Letter/memo immediately after the title page
- Include a major point from the report (Why you are writing/ What exactly of importance is within it)
- Follow letter and memo conventions (e.g. single-spacing; use only one page)

MEMO

TO: Karrie Camp, Vice President for Human Resources|
FROM : Abe Andrews, Personnel Assistant *aa*
SUBJECT: Report on Flextime Pilot Program at Boston Office
DATE: March 18, 2012

As you requested, I have examined the results of the six-month pilot program to introduce flextime to the Boston office. This report presents my data and conclusions about the use of flexible work schedules.

To determine the results of the pilot program, I asked all employees to complete a written survey. Then I followed up by interviewing every fifth person on an alphabetical list of office personnel. Overall, it appears that flextime has met with clear approval by employees at all levels. Productivity has increased and morale has soared. This report uses the survey and interview data to suggest why these results have occurred and where we might go from here.

I enjoyed working on this personnel study because of its potential impact on the way M-Global conducts business. Please give me a call if you would like additional details about the study.



Table of Contents

- It acts as an **outline**
- It should be a complete and accurate **listing** of the main and minor topics covered in the report.
- You don't want just a brief and sketchy outline of major headings.
- An effective table of contents fleshes out the details, so your readers know exactly what is covered in each section – saves their time and helps them find the information they want and need.

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List of Illustrations

- If your report contains several tables and figures, you will need to provide a list of illustrations.
- This list can be included below your table of contents, if there is room on the page, or on a separate page.
- As with the table of contents, your list of illustrations must be clear and informative.

Abstract (or Executive Summary)

- The abstract is a brief overview of the report's key points geared towards a varied audience from a low-tech reader to managers, supervisors, and highly placed executives.
- They need your help in two ways:
 - They need information quickly
 - They need it presented in a low-tech terminology
- You can achieve both these objectives through an abstract or executive summary.

Introduction

- Not to summarize the report
- Give information on, the report's:
 1. **Purpose:** State your purpose, as the first part of the introduction
 2. **Scope:** detail and description of your project should be written clearly
 3. **Format:** a brief preview of the main sections that follow

Conclusion/Recommendation

- Providing your readers with a sense of closure
- Discuss results based on findings of your study.
- Recommendations are actions suggested on the basis of your conclusion.
- Executive summary consists of a brief description of the most important conclusion and recommendation, whereas the conclusion/recommendation section is an expanded version of the executive summary.

Appendices

- A final optional component is an appendix.
- It allows you to include any additional information (surveys, results, tables, figures, previous report findings, relevant letters or memos, etc.) that you have not built in your report's main text.
- The contents of your appendix should not be of primary importance, which needs to be the part of the body of the report.
- An appendix is a perfect place to file nonessential data that provides documentation for future reference.

References (or Bibliography)

- The two parts to referencing are:
 - **citations** in the text of the report
 - **a list of references** in the final section
- A citation shows that information comes from another source. The reference list gives the details of these sources. You need to use in-text citations and provide details in the references section when:
 - you incorporate information from other sources; e.g.:
 - factual material
 - graphs and tables of data
 - pictures and diagrams

1. Writing an ABSTRACT

FORMAL REPORT WRITING

WHY?

- You may write an abstract for various reasons.
- The two most important are selection and indexing.
- Selection:
 - After reading the abstract, one can make an informed judgment about whether the dissertation/article/report would be worthwhile to read.
- Indexing:
 - Classifying information in order to make items easier to retrieve.

WHEN

- Submitting articles to journals, especially online journals
- Applying for research grants
- Writing a book proposal
- Completing the Ph.D. dissertation, M.A. thesis or project report.
- Writing a proposal for a conference paper
- Writing a proposal for a book chapter
- Abstracts are written at the end of the project.

Executive Summaries vs. Abstracts

- Executive summaries go by so many different names. Sometimes the executive summary is called an Abstract. You usually find that designation in scientific papers and academic efforts. You can also call the Executive Summary simply a Summary.
- Abstracts differ from executive summaries, because abstracts are usually written for a scientific or academic purpose.

Abstract Components (HOW)

Brief Background	(optional)
Reason for writing	What is the importance of the research? Why would a reader be interested in the larger work?
Problem	(Optional) What problem does this work attempt to solve? What is the scope of the project? What is the main argument/thesis/claim?
Methodology	An abstract of a scientific work may include specific models or approaches used in the larger study.
Results/ Findings/ Implementation	An abstract of a scientific work may include specific data that indicates the results of the project.
Conclusion and Implications	What changes should be implemented as a result of the findings of the work?

Sample Abstract

This study's **objective** was to/focuses on determine the strangeness measurements for red, green, and blue quarks. The Britt-Cushman **method** for quark analysis exploded/explode a quarkstream in a He gas cloud. **Results** indicate that both red and green quarks had a strangeness that differed by less than 0.453×10^{-17} Zabes/m² for all measurements. Blue quarks remained immeasurable, since their particle traces bent into 7-tuple space. This study's **conclusions** indicate that red and green quarks can be used interchangeably in all He stream applications, and **further studies** must be done to measure the strangeness of blue quarks.