

STYLE GUIDE FOR THE FORMAL REPORT

This Style Guide describes one of two options for the Team Formal Report. The second option is presented in Ch. 21 “Formal Analytical Reports”, in Fig. 21.3, pp. 519-30 and on p. 663.

1. Letter of Transmittal and Report Components

- 1.1. The report is submitted in a plastic cover or duo-tang folder. It is appropriately stapled.
- 1.2. The Letter of Transmittal (see p. 519) is not bound or attached to the report in any way. It is addressed to the instructor and signed by all team members. It has a proper salutation and provides valid contact information for the team leader.
- 1.3. The order of components in the report is as follows: Title Page (see p. 520), Table of Contents (p. 521), List of Tables and Figures (p. 521), Abstract (p. 522), Introduction (p. 523), several sections with informative headings (pp. 524-49), Conclusion (p. 530), References in the APA style (p. 615-63), Glossary and Appendices (optional, see p. 516).

2. Front Matter Supplements

- 2.1. The front matter supplements¹ (p. 514), with the exception of the Title Page, are paginated with lower-case Roman numerals (see p. 522).
- 2.2. The Title Page is counted as “i”, but it is not numbered (p. 520). The running head starts on this page. The Title Page should not be signed.
- 2.3. The Title Page provides the report’s title, the names of all authors, the name of the instructor who commissioned the report, the course number and title, the date the report was submitted, and the writers’ affiliation (Department of Mechanical Engineering, The University of British Columbia). The title should fully describe the report, but should not be too long.
- 2.4. The Title Page and Table of Contents are not included as entries in the Table of Contents (see p. 521).
- 2.5. The order and hierarchy in the Table of Contents are logical, and the scope is not too large.
- 2.6. In the Table of Contents, the Introduction is not subdivided at all.
- 2.7. Section topics and sub-topics are not under- or over-subdivided.

3. Abstract

- 3.1. The Abstract is paginated as “iv” or “v” (depending on the length of the Table of Contents and List of Tables and Figures).
- 3.2. This section summarizes the entire report but focuses on findings (p. 522).
- 3.3. It also provides some context (e.g., purpose of the project) as background information.
- 3.4. Findings correlate evenly to sections of the report and are written concisely.
- 3.5. The Abstract does not use the “we-view” and does not refer to the team or to the sections of the report. It focuses on the topic.
- 3.6. No asterisks, direct quotes, parenthetical citations, subheadings or figures are used.
- 3.7. The Abstract does not exceed 10% of the length of the report (it is no longer than a page).

¹ Front matter supplements are included before the introduction of the report.

4. Format and Page Design

- 4.1. The report does not exceed the allowed word count (2,000 words from the Introduction to the end of the Conclusion for a 4-member team).
- 4.2. Front and back matter supplements, footnotes, references and illustrations are not included in the word count.
- 4.3. Standard one-inch margins are used on all pages. The left margin exceeds the binder fold.
- 4.4. A running head is used on all pages of the report. It is placed in the header and left-justified. It contains the report title only (see pp. 521-530). It does not contain any numbers.
- 4.5. The report is **single-sided**. The spacing of the text is the same as in the formal report on pp. 519-30 but no less than 1.5 spaces.
- 4.6. Headings and secondary headings are used appropriately. Tertiary headings are not used. Headings are **bolded** but not underlined. They use **sans-serif** font (e.g. Arial, Tahoma); appropriate sizing (recommended: 14 pt. CAPS for primary, 12 pt. for secondary); no punctuation is used at the end of the primary or secondary heading.
- 4.7. It is recommended that each primary heading/section be numbered. It may begin on a fresh page with a brief section opening that summarizes the main points and previews the content of sub-sections.
- 4.8. It is recommended that each secondary heading be numbered and has an appropriate paragraph underneath it.
- 4.9. Sections of the report “body” are properly formatted so that no heading appears by itself at the bottom of a page.
- 4.10. A serif font, Times New Roman, no smaller than 11 pt. is recommended for the text of the report (with the exception of headings).
- 4.11. Starting from the Introduction, pagination uses Arabic numbers (2, 3, 4...) placed in the header and right-justified.
- 4.12. Pagination in Arabic numbers continues to the Conclusion and then through References and Appendices (until the last page of the document).
- 4.13. Paragraphs are separated by a blank line and left-justified. No indentation is used. The ragged-right margin is used.
- 4.14. The text on every page covers at least a quarter of the page.
- 4.15. Each team member should initial (in pen) the section of the report that s/he wrote (include your initials once, next to the heading at the beginning of your section). If two or more team members wrote the section (e.g., the summary or the conclusion), all of them should initial this section (include your initials only once on the margins).

5. Illustrations

- 5.1. Illustrations are large enough to see and read (see pp. 239, 243, and 245).
- 5.2. With the exception of the illustration that may be included on the Title Page, each subsequent illustration should be first mentioned in the text of the report, then included, labelled and discussed in some detail.
- 5.3. Illustrations should be clearly printed or drawn in a black pen. Text size inside an illustration should be no less than 10 pts.
- 5.4. Tables are labeled above, Figures are labeled below.

- 5.5. All borrowed illustrations should have a reference or source notation written out in full below their labels (see p. 245). The only exception is the illustration on the Title Page. The source for this illustration can be written in pen at the back of the page (at the top).

6. Introduction

- 6.1. The Introduction is no longer than a page (see p. 523).
- 6.2. It uses the direct pattern of organization.
- 6.3. It identifies the problem and contains a well-defined purpose statement.
- 6.4. It briefly explains the significance of the topic, context, scope, and methodology.
- 6.5. Methodology mentions the exploration of secondary sources available in the UBC library databases.
- 6.6. The introduction ends by mentioning the main sections of the report in the order they appear. It does not have any sub-headings, but it may contain a list.
- 6.7. Generally, the present tense of the verb is used.
- 6.8. Report findings or conclusions are not discussed in the Introduction.

7. Style and Tone

- 7.1. The report is written in an impersonal style and uses an appropriately formal tone.
- 7.2. It is written from the objective point of view (“we-view” is not used).
- 7.3. The quality of writing is consistently high throughout the report.
- 7.4. The text has been edited for clarity (see pp. 202-208).
- 7.5. The text is free from excessive wordiness, clutter or redundancy (see pp. 208-19).
- 7.6. Inclusive language is used throughout the report (see pp.228-29).
- 7.7. For an A-level report, there should be no more than one error on any page (see “A Quick Guide to Grammar, Usage, and Mechanics” on p. 664).
- 7.8. Each section has an opening statement that is comprehensive (it has more than two sentences).
- 7.9. The discussion is organized into one of the following recognizable patterns: comparison and contrast, cause and effect, description, increasing or decreasing order of importance.
- 7.10. Each paragraph in the discussion focuses on one main point.
- 7.11. The average length of the paragraph is appropriate (see p. 196).
- 7.12. Clear examples or cases are used to illustrate theoretical concepts. Interpretations and generalizations are drawn from facts, data, or evidence (see pp. 193-97).
- 7.13. Sentence structure can be diverse, but its length does not exceed 20-24 words.
- 7.14. Sentences that describe ideas borrowed from external sources should include proper citations in the APA format (Author, date).
- 7.15. Borrowed quotations are properly formatted and documented (Author, date, page number). They may only be used if they support the main idea of the paragraph (p. 652).
- 7.16. All sections have a brief closing paragraph. It summarizes the main points and has at least two sentences.

8. Conclusion

- 8.1. If numbered headings are used, then the heading “Conclusion” is numbered.
- 8.2. The text of the conclusion is drawn evenly from the body of the report and is sufficiently long (up to one page).
- 8.3. Subheadings may be used but are not recommended.
- 8.4. No new information is presented. However, the conclusion may look ahead into the future or make predictions. It may also indicate where readers can access further information about the topic.
- 8.5. It may include a brief list (that is embedded into the text and not placed at the end).
- 8.6. No asterisks, footnotes, tables or figures should be used in the conclusion.
- 8.7. In-text citations are not used in the conclusion.

9. Back Matter Supplements: Glossary

- 9.1. The glossary is included if the report contains more than five technical terms.
- 9.2. The glossary is placed at the end of the report; its location is announced when the first technical term is mentioned in the report (p. 409).
- 9.3. The first page of the text with a new technical term should have a footnote. The technical term is asterisked*. The footnote at the bottom of the page explains that asterisked terms are defined in the glossary at the end of the report.
- 9.4. On subsequent pages of the report, other new technical terms are asterisked*, but no footnotes that mention the glossary are included.

10. Back Matter Supplements: Appendices

- 10.1. Appendices are optional; however, they may be useful for including additional information and illustrations that did not fit into a specific section.
- 10.2. Appendices should be labelled above (p. 569).

11. Back Matter Supplements: References

- 11.1. The heading “References” should not be numbered.
- 11.2. References should be complete and formatted in the APA documentation style.
- 11.3. APA style indentation should be used appropriately (see p. 662-3).