

Chapter # 10

Formatting Reports And Documents

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Introduction

What will we learn from this chapter

- How to format informal and formal documents
- When to use informal and formal formats
- The nine parts of formal documents

Case Study on Reallytics.ai

- Reallytic.ai Deep Learning project manager asks for progress
- Data Engineers prepare a document.

Reports

Reports are used to record activities and share research for decision making and proposals, like reports, are part of the decision-making process.

Types of Documents

- Formal Documents
- Informal Documents

Formal Documents

- A formal document covers complex projects and is directed to readers at different technical levels.
- A formal document usually contains at least six pages of text excluding appendix
- It can be directed to readers either inside or outside your organization

Formal Documents

Formal Documents usually includes the following separate parts:

- Cover
- Letter/memo of transmittal
- Table of contents
- List of illustrations
- Executive summary
- Introduction
- Discussion sections
- Conclusions
- Appendixes and bibliographies.

Characteristics of Formal Documents

- Formal documents usually address complex problems, situations, or events.
- Formal documents are often written by a team
- Formal documents usually are created for multiple readers at different technical levels
- Formal documents are often bound or presented in some kind of cover

Informal Documents

- A somewhat short document, usually no longer than five pages of text, not including attachments.
- It has more substance than a simple letter or memo but is presented in letter or memo format.
- It can be directed to readers either outside or inside your organization. If outside, it may be called a letter report or letter proposal; if inside, it may be called a memo report or memo proposal.

Characteristics of Informal Documents

- Informal documents have a narrower focus, on a specific problem, situation, or event
- Informal documents may be written by a team, but they are often written by a single author
- Informal documents usually have few readers, or even just one reader
- Informal documents may be created in a preset form or a template.

When To Use Informal Documents

Guidelines for Informal Document

Plan well before writing:

There are some points that will help you to plan before writing:

- The document's purpose
- The variety of readers who will receive the document:
- The needs and expectations of readers, particularly decision makers
- An outline of the main points to be covered in the body
- Strategies for writing an effective document

Use Letter or Memo Format:

LETTERS:

- The greeting is sometimes left out or replaced by an attention line.
- A title often comes immediately after the inside address. It identifies the specific project covered in the document. You may have to use several lines because the project title should be described fully, in the same words that the reader would use.
- Spacing between lines might be single, one-and-one-half, or double, depending on the reader's preference.

MEMOS:

Longer than typical memos, and they tend to contain more headings than routine memos.

Make Text Visually Appealing:

Following are three and highlight important information:

- Bulleted points for short lists (like this one)
- Numbered points for lists that are longer or that include a list of ordered steps
- Frequent use of headings and subheadings

Use the ABC Format for Organization:

You must also organize information effectively for that there is an approach which we follow .This approach to organization includes three parts:

(1) Abstract

(2) Body

(3) Conclusion.

Create the Abstract as an Introductory Summary

Start with a capsule version of the information most needed by decision makers.

First section give readers three essential pieces of information:

1. Purpose for the document—Why are you writing it?
2. Scope statement—What range of information does the document contain?
3. Summary of essentials—What main information does the reader most want or need to know?

Put Important Details in the Body

Give details in the body of the document, where technical readers are most likely to linger a while to examine supporting evidence.

Use headings generously: Each time you change a major or minor point, consider whether a heading change would help the reader. Informal documents should include at least one heading per page.

Precede subheadings with a lead-in passage: Here you mention the subsections to follow, before you launch into the first subheading. (For example, “This section covers these three phases of the field study: clearing the site, collecting samples, and classifying samples.”)

Move from general to specific in paragraphs: Start each paragraph with a topic sentence that includes your main point, and then give supporting details

Separate Fact From Opinion:

1- Findings: Facts you uncover

2-Conclusions: Summary of the document that emphasizes the information most important to your readers

3-Recommendations: Suggestions or action items based on your conclusions

Focus Attention in Your Conclusion

The precise amount of detail in your conclusion depends on which of these two options.

Option 1: If your major conclusions or recommendations have already been stated in the discussion, then you only need to restate them briefly to reinforce their importance.

Option 2: If the discussion leads up to, but has not covered, these conclusions or recommendations, then you may want to give more detail in this final section.

Use Attachments for Less Important Details:

Place technical details in clearly labeled attachments that could include the following items:

1-Tables and figures: Illustrations in informal documents usually appear in attachments unless it is crucial to include one within the text. Informal documents are so short that attached illustrations are easily accessible.

2-Costs: It is best to list costs on a separate sheet. First, you do not want to bury important financial information within paragraphs. Second, readers must often circulate cost information, and a separate cost attachment is easy to photocopy and send.

Edit Carefully:

Keep most sentences short and simple.

- Proofread several times for mechanical errors such as misspellings (particularly personal names).
- Triple-check all cost figures for accuracy.
- Make sure all attachments are included, are mentioned in the text, and are accurate.

Formal reports

When to use formal documents:

- Associated with important projects
- Cover more complicated projects
- Are longer than their informal counterparts.
- Formal reports and proposals may have a more diverse set of readers.
 - Technical
 - Ones wanting quick overview
 - Laypersons
 - Executives.
- Situations where formal reports were appropriate and examples.
 - Salary study and recommendations
 - Analysis of marketing problems

Strategy for organizing:

- Universal approach to good organizations that apply based on 3 principles

Write different parts for different readers.

Place important information first.

Repeat key points when necessary.

- Apply to long formal documents even more than they do to short documents, for the following reasons:

A formal document often has a very mixed audience

Majority of readers of formal documents focus on specific sections that interest them most

Few readers have time to wade through a lot of introductory information before reaching main point.
They will get frustrated if you don't place important information first.

ABC format

3 main rules:

Start with an abstract for decision makers

Put supporting details in the body

Use the conclusion to produce action.

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)
-

Important points:

- First, the generic abstract section includes five different parts of the document that helps readers a capsule version of the entire document.
- Second, appendixes are discussed within the body part of the outline, even though they are placed at the end of the document.
- Third, remember that the generic conclusion section in the ABC format can contain conclusions or recommendation.
- Use of main headings in complex formal documents is important.
- It is important to help your readers navigate through the document.
- Dividers or colors on the edges of pages are good ways to help readers find the document sections that they are interested in.

Styles of pagination:

Following are some guidelines for commonly used pattern that is acceptable:

- Use lowercase roman numerals for some or all of the front matter that precedes(includes table of contents).
- Use Arabic numbers for items that follow the table of contents (all of which are listed in the table of contents)
- Continue the Arabic numbering for appendices if they are relatively short. Long sets of appendixes sometimes have their own internal numbering (A–1, A–2, A–3)etc.

Formal Documentation

Components

Nine Parts of Formal Documents.

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:

Components:

- Project title (exactly as it appears on the letter/memo of transmittal)
- Your client's or recipient's name ("Prepared for . . .")
- Your name and/or the name of your organization ("Prepared by . . .")
- Date of submission

STUDY OF WILDWOOD CREEK

WINSLOW, GEORGIA

Prepared for:
The City of Winslow

Prepared by:
Christopher S. Rice, Hydro/Environmental Engineer
M-Global, Inc.

November 28, 2012



Medford Taylor/National Geographic Image Collection

Letter/Memo of Transmittal

Guidelines:

- Place the Letter/Memo Immediately after the Title Page.
- Include a Major Point from Document.
- Acknowledge Those Who Helped You.
- Follow Letter and Memo Conventions.

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.



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12 Post Street
Houston Texas 77000
(713) 555-9781

Report #82-651
July 18, 2012

Belton Oil Corporation
PO Box 301
Huff Texas 77704

Attention: Mr. Paul A. Jones

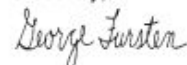
**GEOTECHNICAL INVESTIGATION
DREDGE DISPOSAL AREA F
BELTON OIL REFINERY
HUFF, TEXAS**

This is the second volume of a three-volume report on our geotechnical investigation concerning dredge materials at your Huff refinery. This study was authorized by Term Contract No. 604 and Term Contract Release No. 20-6 dated May 6, 2012.

This report includes our findings and recommendations for Dredge Disposal Area F. Preliminary results were discussed with Mr. Jones on July 16, 2012. We consider the soil conditions at the site suitable for limited dike enlargements. However, we recommend that an embankment test section be constructed and monitored before dike design is finalized.

We appreciate the opportunity to work with you on this project, and we would like to thank Bob Berman and Cyndi Johnson for the help they provided on-site. We look forward to assisting you with the final design and providing materials-testing services.

Sincerely,



George H. Fursten
Geotechnical/Environmental Engineer
GHF/dnn



Table Of Contents

- Make It Very Readable:
 - Space items well on the page
 - Use indenting to draw attention to subheadings
 - Include page numbers for every heading and subheading.
- Use the Contents Page to Reveal Document Emphases.
- Consider Leaving Out Low-Level Headings.
- Proofread Carefully.

CONTENTS

	PAGE
LIST OF ILLUSTRATIONS	1
EXECUTIVE SUMMARY	2
INTRODUCTION	3
Project Description	3
Scope of Study	3
Report Format	3
FIELD INVESTIGATION	4
Physical Tests	4
Air Temperature	4
Water Temperature	4
Water Flow	5
Water Appearance	6
Habitat Description	6
Algae Appearance and Location	7
Visible Litter	7
Bug Count	7
Chemical Tests	7
pH	8
Dissolved Oxygen (DO)	8
Turbidity	8
Phosphate	8
TEST COMPARISON	9
CONCLUSIONS AND RECOMMENDATIONS	10
Conclusions	10
Recommendations	10

APPENDIXES

A. Background on Wildwood Creek	11
B. Water Quality Criteria for Georgia	12
C. Location of City of Winslow Parks and Recreation Facilities	13

List Of Illustrations

ILLUSTRATIONS

FIGURES

Page

- | | |
|-------------------------------------------------|---|
| 1. Wildwood Creek—Normal Water Level..... | 5 |
| 2. Wildwood Creek—Flash Flood Water Level | 6 |

TABLES

- | | |
|-------------------------|---|
| 1. Physical Tests | 9 |
| 2. Chemical Tests..... | 9 |

Executive Summary

- A capsule version of the document.
- Guidelines:
 - Put it on one page.
 - Avoid technical jargon.
 - Include only the important conclusions and recommendations.
 - Avoid references to the document body.
 - Use paragraph format.
 - Write the executive summary last.

EXECUTIVE SUMMARY

→ The City of Winslow hired M-Global, Inc., to perform a pollution study of Wildwood Creek. The section of the creek that was studied is a one-mile-long area in Burns Nature Park, from Newell College to U.S. Highway 42. The study lasted seven months.

→ M-Global completed 13 tests on four different test dates. Wildwood scored fairly well on many of the tests, but there were some problem areas: for example, high levels of phosphates were uncovered in the water. The phosphates were derived either from fertilizer or from animal and plant matter and waste. Also uncovered were small numbers of undesirable water organisms that are tolerant of pollutants and can survive in harsh environments.

→ M-Global recommends that (1) the tests done in this study be conducted two more times, through Spring 2013; (2) other environmental tests be conducted, as listed in the conclusions and recommendations section; and (3) a voluntary cleanup of the creek be scheduled. With these steps, we can better analyze the environmental integrity of Wildwood Creek.

Introduction Guidelines

It is more about giving information on documents purpose, scope, format and project description with some guidelines.

Guidelines:

- State your purpose and lead into subsection
 - Should appear immediately after the main and follow it with the subsection.

- Include a project description
 - You must be very precise about the project here.
 - Depends very much on the type of project that you may be describing
 - The gathering of information is displayed in it.
 - Accuracy in this section helps in later misunderstandings.
 - Sometimes when the project description is too long for introduction, it is placed in the body of a document.

- Include scope information
 - Provides precise objectives of the project.
 - Use of bullets or numbers for necessary details.
 - Your description should be parallel to the body of your documents.
- Consider including information on document organization

If scope doesn't list information as it is presented in the document, it is a good practice to end introduction with short subsection on document organization where you can give readers a brief preview of main sections which ultimately acts as a table of contents for this very section.

INTRODUCTION

M-Global, Inc., has completed a follow-up to a study completed in 2004 by Ware County on the health of Wildwood Creek. This introduction describes the project site, scope of our study, and format for this report.

← Gives lead-in to Introduction.

PROJECT DESCRIPTION

By law, all states must clean up their waterways. The State of Georgia shares this responsibility with its counties. Ware County has certain waterways that are threatened and must be cleaned. Wildwood Creek is one of the more endangered waterways. The portion of the creek that was studied for this report is a one-mile stretch in the Burns Nature Park between Newell College and U.S. Highway 42.

← Briefly describes project.

SCOPE OF STUDY

The purpose of this project was to determine whether the health of the creek has changed since the previous study in 2004. Both physical and chemical tests were completed. The nine physical tests were as follows:

- Air temperature
- Water temperature
- Water flow
- Water appearance
- Habitat description
- Algae appearance
- Algae location
- Visible litter
- Bug count

← Uses bulleted list to emphasize scope of activities.

The four chemical tests were as follows:

- pH
- Dissolved oxygen (DO)
- Turbidity
- Phosphate

REPORT FORMAT

This report includes three main sections:

1. Field Investigation: A complete discussion of all the tests that were performed for the project
2. Test Comparison: Charts of the test results and comparisons
3. Conclusions and Recommendations

← Provides "map" of main sections in report.

Discussion Sections

It is the longest part of a formal document which is written for the most technically oriented members of the audience. As it is the longest, hence they should be organized carefully too. Common patterns of organization such as problem solving and chronological structure can be used to organize the entire body of document or a specific section but it also follows some guidelines.

Guidelines:

- Move from facts to opinions
 - Just like in ABC format, we go straight to essential parts which is abstract and then we discuss it with strategies and back up as it involves more opinions.
 - It is ethical as you are obliged to draw clear distinctions between what you draw or conclude.
 - It is practical as it gives readers a chance to draw conclusions for themselves.

- Use frequent headings and subheadings
 - Essential in document body with technical details.
 - An outline for readers to grasp the content.
 - Visually attractive.
- Use listings to break up long paragraphs
 - Long paragraphs irritate readers.
 - Use paragraphs for brief explanations.

- Use illustrations for clarification and persuasion
 - A simple table or figure
 - Visually attractive
 - Makes technical information accessible and easier to digest.
- Place extra detail in appendixes
 - It is common practice of placing cumbersome details in appendixes than weighing down the discussion in detail.
 - Easier for readers to access information without cluttering up text of formal report.

Conclusion and Recommendations

Conclusions summarize the content of your document. They emphasize the information that you feel is most important for your reader.

Recommendations, on the other hand, are actions you are suggesting based on your conclusions.

For example, your conclusion may be that there is a dangerous level of toxic chemicals in a town's water supply, and your recommendation may be that the toxic site near the reservoir should be cleaned immediately.

What distinguishes this final section of the document text from the executive summary is the level of detail and the audience. The section on conclusions and recommendations provides an exhaustive list of conclusions and recommendations for technical and management readers. The executive summary provides a selected list or description of the most important conclusions and recommendations for decision makers, who may not have technical knowledge.

End Material

- Appendixes
- References
- Bibliographies

These all are used in end material to provide proper citations to acknowledge from where the material is taken and provide a clear outline for your complete content.

APPENDIX B

Water Quality Criteria for Georgia

All waterways in Georgia are classified in one of the following categories: fishing, recreation, drinking, and wild and scenic. Different protection levels apply to the different uses. For example, the protection level for dissolved oxygen is stricter in drinking water than fishing water. All water is supposed to be free from all types of waste and sewage that can settle and form sludge deposits.

In Ware County, all waterways are classified as "fishing," according to Chapter 391-3-6.03 of "Water Use Classifications and Water Quality Standards" in the Georgia Department of Natural Resources *Rules and Regulations for Water Quality Control*. The only exception is the Chattahoochee River, which is classified as "drinking water supply" and "recreational."

THE END