Formal Reports

- When to Use Formal Reports
- Strategy for Organizing Formal Reports
- Guidelines for the Nine Parts of Formal Reports

Formal Reports

- Formal Report
  - Covers complex projects and is directed to readers at different technical levels.
  - Usually contains at least 6 to 10 pages of text, not including appendices.
  - Directed to either inside or outside your organization.

When to Use Formal Reports

- Complicated Projects
- Longer than six pages
- Expected by readers

Strategy for Organizing Formal Reports

- Write different parts for different readers
- Place important information first
- Repeat key points when necessary

Strategy for Organizing Formal Reports

- Follow ABC Format for Formal Report
  - Abstract
    - Cover/title page
    - Letter or memo of transmittal
    - Table of contents
    - List of illustrations
    - Executive summary
    - Introduction

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Strategy for Organizing Formal Reports

- Follow ABC Format for Formal Report
  - Body
    - Discussion sections
    - Appendices – appear after text but support Body section
  - Conclusion
  - Conclusions
  - Recommendations

Guidelines for the Nine Parts of Formal Reports

- Cover/Title Page
- Letter/Memo of Transmittal
- Table of Contents
- List of Illustrations
- Executive Summary
- Introduction
- Discussion Sections
- Conclusions and Recommendations
- End Material

Guidelines for the Nine Parts of Formal Reports

- Cover/Title Page
  - Project title
  - Client’s name (“Prepared for…”)
  - Your name and/or the name of your organization (“Prepared by…”)
  - Date of submission

Guidelines for the Nine Parts of Formal Reports

- Letter/Memo of Transmittal
  - Place Letter/Memo Immediately after Title Page
  - Include a Major Point from Report
  - Acknowledge Those Who Helped You
  - Follow Letter and Memo Conventions

Guidelines for the Nine Parts of Formal Reports

- Title Page

Guidelines for the Nine Parts of Formal Reports

- Letter of Transmittal
Guidelines for the Nine Parts of Formal Reports

- Table of Contents
  - Make It Very Readable
  - Use the Contents Page to Reveal Report Emphases
  - Consider Leaving Out Low-Level Headings
  - List Appendices
  - Use Parallel Form in All Entries
  - Proofread Carefully

Guidelines for the Nine Parts of Formal Reports

- List of Illustrations
  - Number
  - Title
  - Page number

Guidelines for the Nine Parts of Formal Reports

- Executive Summary
  - Put It on One Page
  - Avoid Technical Jargon
  - Include Only Important Conclusions and Recommendations
  - Avoid References to the Report Body
  - Use Paragraph Format
  - Write the Executive Summary Last
Guidelines for the Nine Parts of Formal Reports

- **Introduction**
  - State Your Purpose and Lead-in to Subsections
  - Include a Project Description
  - Include Scope Information
  - Consider Including Information on Report Format

- **Discussion Sections**
  - Move from Facts to Opinions
  - Use Frequent Headings and Subheadings
  - Use Listings to Break Up Long Paragraphs
  - Use Illustrations for Clarification and Persuasion
  - Place Excessive Detail in Appendices

- **Conclusions and Recommendations**
  - Conclusions
    - Convictions or beliefs based on the findings in your study
  - Recommendations
    - Actions you are suggesting based on your conclusions

- **End Material**
  - Appendices
  - Glossary
  - Bibliography
  - Index