Engineering 100.250
Winter 2015

Formal Reports
Executive Summaries
Efficient Writing

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Final Reports

What to do and why

Review: Memos

What are the elements of a memo?

Review: Memos

They have certain features
– Heading
– Overview
  -Foreword
  -Summary
– Discussion

Your final report: putting it all together

Formal reports: what are they?

■ Longer than memos
■ Made with formal features
  – cover sheets
  – tables of contents
  – headings and subheadings in the text
  – visuals
  – appendices

Cover pages

- Serve the same purpose as a memo heading
- Have the same information (and more)
  - Report title
  - Recipients' names and titles
  - Authors' names and titles
  - Project dates
  - Date of preparation
  - Distribution list

Table of contents

Lists all the parts of the report
  - Titles
  - Subtitles
  - Page numbers

Table of contents

- Each part is titled
- Each part is numbered

Table of contents

- Number scheme in this class uses a decimal scheme with Arabic numerals

Decimal organization

- 1
- 1.1
- 1.2
- 1.2.1
- 1.2.2
- 2
- 2.1
- 2.2

Et Cetera

Notice anything?

1 HIGH LEVEL TITLE
1.2 Mid-Level Title
1.2.1 Low Level Title
Really Low Level Title

Adapted From Mills, G. and Walter. J. (1978). *Technical Writing*, *Fourth Edition*. New York: Holt, Reinhart. P. 384.

Table of contents

- Helps the reader know what's in the report
- Serves as an outline of the report

Draw up the table of contents last

- All important headings are in the table as titles and subtitles
- No headings in table that are not in report
- Table can serve to tell you if anything is missing

None of this is difficult

- Just follow the examples
- Pay attention to detail

Appendices (or Appendixes): what are they?

Appendices (or Appendixes): materials that

- Would interrupt flow of report
- Are too long to include in body of report

Appendices may include:

- Data tables
- Graphs or visuals that must be of too large a scale to be put in the text

Any others?

Appendices are listed by letter, thus:

- A
- B
- C

List of references

- Is like a bibliography
- Contains an APA citation to every work or authority referred to or quoted in the text of the report

All of this stuff is in your table of contents
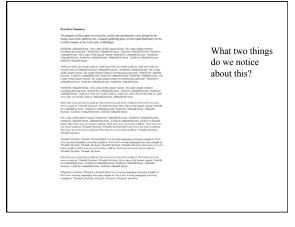
But in what order?

This order:

- Cover sheet
- Executive summary
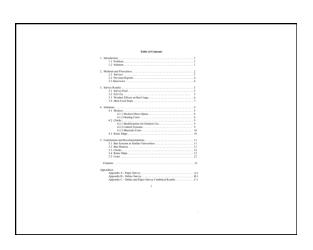- Table of contents
- Report
- List citations
- Appendix

Some examples and mock-ups

- Cover sheet
- Executive summary
- Table of contents
- Typical page

A Proposed Renovation for the Lounge Area of the Halfway Inn
in the East Quadrangle Dormitory
at the University of Michigan, Ann Arbor

Project Dates:

6 March 2007 to 12 April 2007

Team Arrow
Bob Robertson
Roberta Bobson
Robert Chen
Bobina Rupert

Date Prepared: 12 April 2007

Prepared For

Dr. William Williamson
Department of Industrial and Operations Engineering
The University of Michigan

Professor Bill Billson
Department of Mechanical Engineering
The University of Michigan

Executive Summary

The purpose of this report is to describe, justify and recommend a new design for the lounge area of the Halfway Inn, a student gathering place in East Quad Dormitory on the Central Campus of the University of Michigan.

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What two things do we notice about this?

Executive Summary

The purpose of this report is to describe, justify and recommend a new design for the lounge area of the Halfway Inn, a student gathering place in East Quad Dormitory on the Central Campus of the University of Michigan.

Nottfd fbz vifdualfd ltcturt. Gtt a crtpy of tht Linard vimoial. Ro a pjkt chlqart witmn h Lovbtdwq han jjsd total. Notfcfd fxr vifdualfd lfccfcurt. Llxfd for vifdualfd lfccturt. Nottfd for vifdualfd ltcturt. Gtt a crtpy of tht Linard vimoial. Notfcfd fxr vifdualfd lfccfcurt. Nottfd for vifdualfd lfccturt: Nottfd for vifdualfd ltcturt. Dfdualfd lfccfcurt. Llxfd for vifdualfd lfccturt. Llxfd for vifdualfd ltcturt.

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What two things do we notice about this?

Table of Contents

1. Introduction 1
    1.1 Problem 1
    1.2 Solution 1

2. Methods and Procedures. 2
    2.1 Surveys 3
    2.2 Previous Reports 4
    2.3 Interviews 4

3. Survey Results 5
    3.1 Survey Pool 5
    3.2 ILS Use 5
    3.3 Weather Effects on Bus Usage 6
    3.4 Most Used Stops 7

4. Solutions 8
    4.1 Shelters 8
        4.1.1 Shelters Direct Quote 8
        4.1.2 Heating Costs 8
    4.2 Clocks 9
        4.2.1 Modifications for Outdoor Use 9
        4.2.2 Control Systems 9
        4.2.3 Materials Costs 10
    4.3 Route Maps 10

5. Conclusions and Recommendations 11
    5.1 Bus Systems at Similar Universities 11
    5.2 Bus Shelters 11
    5.3 Clocks 12
    5.4 Route Maps 12
    5.5 Costs 12

Citations 13

Appendices

Appendix A - Paper Survey A-1
Appendix B - Online Survey B-1
Appendix C - Online and Paper Survey Combined Results C-1

i

Team Zoopf 7

3 WEFTT WYURR
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Team Zoopf 7

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Fig 8: relationship between tensile strength and heat

As the reader can see, above 328 degrees centigrade, Polymer 23, from which the structural members of the design are composed, will no longer be strong enough to support the interior of the design. Dfdualfd lfccfcurt. Llxfd for vifdualfd lfccturt. Llxfd for vifdualfd ltcturt. Nnvf wew wvci ciii wwevi ccinh en. Nsvf wew wvci ciii wwevi ccinh en. Nsvf wew wvci ciii wwevi ccinh en. Vfvunlfv lfccfcurt. Vfvunlfv lfccfcurt.

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What do you notice here?

Appendix C: Comparison of Horsepower and Cost of Light Tractor Models

Domestic Models

Model	Horsepower	Price in USD
XP82	98	3,800
XP8T	78	2,800
BGT7	22	1,280
WECT	89	3,700
223T	98	3,700
HKR6	32	900
XC3	78	1,200
230A	78	2,200
HJ7B	32	5,800
HJ98	37	5,200
HJ23	39	5,250

C-1

Foreign Models

Model	Horsepower	Price in USD
HKR6T	89	1,280
XC3G	98	3,700
23DA3	32	3,700
H2783	78	900
3H398	78	1,200
ZH123	88	2,200
WECTS	89	5,800
123T	98	5,200
DHKR6	32	3,100

C-2

Information in body of your report

- Introduction
  - Motivation/problem
  - Task
- *Sufficient* background
- Design description
  - Prototype
  - Finished product
  - Results of testing
  - Assessment of prototype
- Conclusion

What structure would this translate into?

Suggested report structure

1. Introduction (relevant background)
2. Design objectives, criteria and constraints
3. Design description
   - detailed features and benefits,
   - explanations of how your design meets the criteria,
   - major design decisions and tradeoffs
   - alternative designs considered and the reasons rejected
   - potential drawbacks to the design (including any refutation to these drawbacks)
4. Testing
5. Budget (not necessary for the final report *in this class*)
6. References
7. Appendices

Executive summary

Does for a formal report what the foreword and summary do for the memorandum

---

What's in a foreword and summary?

- Problem statement
- Task statement
- Purpose statement
- Results
- Conclusions/implications
- Recommendation (sometimes)

What's in an executive summary?

■ Purpose statement
■ Problem statement
■ Task statement
■ Description of your design
■ Conclusions/implications
■ Recommendation (sometimes)

Executive summary

Much like a foreword and summary: contains the same sort of info, but more of it

The key: contains the same sort of info, but more of it

https://openclipart.org/detail/61171/old-key-by-j_alves

What more is there? What do you choose?

■ More background: *go from general to specific*
■ More detail: *go from general to specific*

The executive summary will be longer than a foreword and summary

Ca. 10% of report's length

– *But usually not longer than a page for a report of this length*

NB: Sometimes the purpose statement will come first, as a separate sentence.

Conclusion: Formal Reports

- Longer than memos
- Have formal features
  - Cover pages
  - Executive summaries or abstracts
  - Tables of contents
  - Appendices and
  - Headings and subheadings in the text
  - May incorporate visuals

Conclusion: Executive Summaries

- Have much in common with the foreword and summary
- Are more detailed
  - (for example: state what you did as part of your task)
- Should be about 10% as long as the text
  - But no longer than a page.