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
2 INSTALLATION
  2.1 Introduction
  2.2 Unpacking and Inspection
  2.3 Preparation
    2.3.1 Mechanical
    2.3.2 Electrical
  2.4 Cables
  2.5 Accessories
  2.6 Fuses

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
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/81171/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.