Formal Reports

The design document, revised design document, users' guide, report on an-other's team's project, and response to the report must be *formal reports*.

This document lays out some of the requirements expected of formal reports and discusses good practice.

Content

Much of the content of a formal report is unique to the subject matter of the report. However, there are some items that should be part of any formal report. Generally these items fall into the category of bibliographic and meta data.

Bibliographic data allow other people to refer to the report non-ambiguously. Important bibliographic data include **the title**, **the date**, and **the authors**. In the case of formal reports for the team term project, the author may be the entire team, or an individual of the team. Regardless of the situation, the report should identify **the team's name** and **the team members**. Where documents are likely to be revised or updated, information such as a **version number** or last date of revision helps other people identify precisely what (version of the) document they are referring to.

Meta-data is a more general category than bibliographic data, and includes any data that help to classify the report. **Semester**, **course**, and **student number** of the authors are useful meta-data to include in most University formal reports. Revision history is another example of meta-data that is often found useful.

Bibliographic data usually occur on the title page. Other meta-data are often found either in the opening paragraph of the report (for instance, "This report is part of the Space Elevator project for CPSC 101 in Winter 2015. It constitutes the initial design document of Team Triple Triple"). It may also form a section at the of the report.
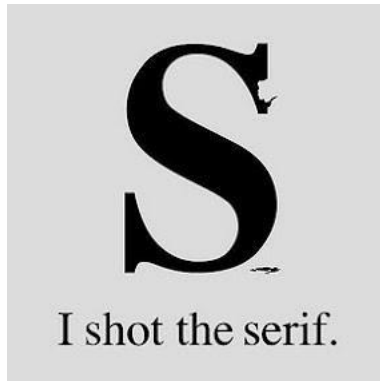
Figure 1: Serif versus sans-serif fonts (author unknown)

Appearance

Reports should appear professional. Minimally this means typing rather than handwriting the report, including a title page, and taking care with the binding.

Again, for the ease of others, pages should be numbered, and if the report is long, there should be a table of contents.

Typography

Microsoft Word™ or LaTeX make it easier to format documents and provide features such as page numbers. However, they also make it very easy to create ugly and hard-to-read documents. Here are some suggestions.

- *Use lots of white space.* In particular, use white-space to emphasize document structure. For instance, in a design document, consider having the description of each class start on a new page.

- Use few fonts. Choose the main font to be 11 or 12 pts in size, and use a font with serifs (such as Times New Roman or Palatino — see Figure 1 for an explanation of what a serif is). This document is set in Lucida, with the body in Lucida Bright and the headings in Lucida sans-serif. Use *italics* and **bold face** sparingly.

- Make the page numbers easy to spot. Check how textbooks do this.

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Document Handling

Learn to use "Save as..." rather than "Save" whenever working in a team environment, and be sure that every version of a document has a different name. This avoids a lot of confusion.

Git repositories or other version control systems also offer tools for managing documents in a team environment. It is good to become familiar with how these work. However, do not rely on them.

Make sure that there is regular backup of both documents and code.

Check list

Does your document have:

- a title page?
- a title?
- clearly indicated authorship?
- page numbers?
- a date?
- version information?
- information about the team and team members?