

REPORT FORMAT & TYPING GUIDE

Revised August 2010

1.0 INTRODUCTION

Due to our publishing procedures we must require that your final report or guide be submitted in the appropriate MS Word template which should be downloaded from the following website at the start of your project: <http://www.ceati.com/guidelines.php>.

This Format and Typing Guide is intended to assist CEATI Contractors in complying with the CEATI Standard Report/Energy Efficiency Guide Format, ensuring that final deliverables reflect a high degree of standardization. Should you require more details about the content of this guide, please contact CEATI Publishing at 514.866.5377 or publications@ceati.com

2.0 GENERAL REQUIREMENTS

2.1 Content Presentation

The final report or guide is one of the most important final deliverables, in that it provides tangible evidence of completion of the research project and, as such, must convey clearly and concisely significant information about the project. Final reports are circulated to all Project Funders and, subject to consortium approval, may be sold or otherwise made available to the greater public. Final deliverables should be of the highest possible quality, including electronic data such as pictures and graphs.

For a standard CEATI project, the resulting final report must be submitted in the CEATI Standard Report Template available at <http://www.ceati.com/guidelines.php>. In some cases, particularly if you are working on an Energy Efficiency Guide, you may instead be asked to comply with the Template for Energy Efficiency Guides available at the same location. For ease of formatting, it is recommended you download the template at the beginning of your project and compose the content directly in the template (rather than trying to reformat the document later).

2.2 Password Protection

Any electronic versions of the report, draft or final, sent by e-mail should be protected by alphanumeric password (letters and numbers together) of at least six characters. The password itself must be provided to CEATI in a separate message. To set up the password in MS Word, choose "Save As" command, then click on "Options," then type a password for opening the file and confirm it. Energy Efficiency Guides which will later be openly available to the public are excused from this requirement.

2.3 Draft Final Copy

Prior to submission of the Final Report/Guide, a draft final version must be issued to CEATI Program Management for review and comments. The draft final must be approved by the group Technology Coordinator and Project Monitors before the document can be finalized. For ease of

review, it must be provided to CEATI in electronic format, either on CD or sent password-protected through email in editable .doc (Microsoft Word) format. PDF format will not be accepted, except where it is supplied in addition to the editable document.

All figures and illustrations must be provided in the highest quality files possible, preferably in common format to facilitate translation where required.

The CEATI Technology Coordinator will review the technical content the report and provide consolidated review comments from the Project Monitors. CEATI Publishing may also provide editorial, formatting, and stylistic comments.

2.4 Final Report, Publishing Process

Once your report has been reviewed and approved by the Technology Coordinator and Project Monitors, and following your incorporation of their comments, it becomes Final. The Technology Coordinator will forward a copy of the Final Report/Guide to CEATI Publishing for an Internal Review. During the Internal Review, CEATI will closely examine the report for grammar, formatting, and sensitive issues. If any changes are required or problem areas identified, the Contractor will be contacted with a proposed solution. The Technology Coordinator and Project Monitors may become involved as well, if required.

Once the Internal Review is satisfactorily completed, a printing proof will be obtained, and a photocopy forwarded to you for your approval. After you provide your approval or recommend any small changes to the proof, CEATI will proceed to publish the report, and your holdback payment will be released.

2.5 Copyrighted Material & Referencing Permissions

All material borrowed from other sources, even if adapted, should be properly cited within the main body of the report and all sources should be listed in the Bibliography/References section. References should consistently follow an established citation style (APA, MLA, [IEEE](#), etc.) throughout the report. The contractor/author must obtain written permission from the copyright owner to use copyrighted illustrations, tables, or substantial amounts of text from another publication.

The copyright for the Final Report/Guide and its materials shall vest in CEATI. The CEATI copyright mention must be included on the Notice page (see the appropriate Template for more details).

3.0 FORMAT AND CONTENT REQUIREMENTS

The content of this section is specific to the CEATI Standard Report Format, and may not apply to the Energy Efficiency Guides (for example, Guides should not include List of Tables/Illustrations, a completely different font and page size are used, and page numbering is radically different, etc.). Authors of EE Guides may contact CEATI Publishing directly with any questions about their Template.

3.1 Font and Page Setup

A standard serif font must be used throughout the report. The CEATI preference, used in the Report Template, is Garamond 12 pt for Normal or Body text. Please inform CEATI Publishing if you do not intend to use this font, and for what reason.

The report must be written using Letter size paper settings (8.5" x 11"); tabloid or ledger size pages are acceptable where fold-outs are required.

Margins should be 1" all around, with the header and footer at 0.5".

3.2 Header/Footer

The header should contain the report title, left aligned, font size 10, italic. The header should appear on all pages, except the title page. The footer should contain a page number only.

Blank pages should also contain the header and footer, so please do not use Section Break – Odd Page between sections. (Section Break Next Page is our preference.)

3.3 Pagination

All front matter, through Section 1, must be paginated in lowercase Roman numerals. Although not paginated, the cover page is page i (in page setup, layout, select “Different first page,” this section only). Pagination should become Arabic numerals on the first page of the main body of the text. Each section is paginated separately and each new section starts on a right-hand (odd numbered) page.

Hence, all pages in Section 1 are numbered as follows, 1-1, 1-2, 1-3, etc; Section 2 is paginated 2-1, 2-2, and so on. Appendices are numbered A-1, A-2...B-1, B-2...etc.

Page numbers are centered in the footer (set to 0.5").

Bearing in mind that CEATI will have the report printed double-sided, the contractor should check that right-hand pages have odd page numbers, and left-hand pages have even page numbers. This applies for both front matter and the main text.

Blank pages are counted in the pagination, and show a page number.

3.4 Sequence

Each item of front matter begins on a new (facing and odd-numbered) page. The report must be typed according to the following sequence:

Inside Title Page
Notice
Abstract and Keywords
Acknowledgements
Executive Summary
Table of Contents
List of Tables (if needed)

List of Figures (if needed)
Main Text
Bibliography/References
Appendices (if needed)

See the Report Template for more details concerning the section format and content.

3.5 Abstract

The abstract is a brief description, rather than a summary, of a project. It focuses on the objectives of the project, the investigator's methods of approach, and what work was done. The abstract should not exceed 200 words, as it could be used in databases and as a report description in journals. It is important that the results of the research not be given away in this section, which will be made available to the public.

3.6 Keywords

Each final report must include, underneath the abstract and preceded by the tag "Keywords," at least three to five keywords indicating the main topics of the report; basic terms for indexing by abstracting services must also be noted.

3.7 Acknowledgements

Acknowledgements are limited to the principal persons or departments involved in the work. Acknowledgements should be kept on just one page, but must mention Project Funders (by their organization names, province/state, country—this information is available from CEATI Publishing and will be completed/verified during Internal Review) and CEATI technical advisors and their respective utility or corporation (please see the Report Template).

3.8 Executive Summary

The executive summary comes before the main body of the text and should not exceed two pages. This summary details the purpose and scope of the research project, the process involved in the study and its results and conclusions. It summarizes pertinent points of the report and must not be combined with the introduction or any other section of the text. Please do not copy and paste from your abstract or introduction or conclusions sections.

3.9 Table of Contents

The table of contents lists section numbers and titles for section headings and sub-headings, references and appendices together with their page numbers. The table of contents must be automatically generated by Word for accuracy purposes. (From the file menu, click Insert, Reference, Index and Tables, Table of Contents).

The title, Table of Contents, is centered at the top of the page. It is in boldface caps. One carriage-return below and flush with the right margin is the underlined word "Page." Section headings begin directly below that (please see the template).

3.10 List of Tables and Illustrations

If the report contains illustrations or tables, lists of both are required and should follow the Table of Contents. These lists are created similarly to the Table of Contents.

3.11 Main Text Sections Format

Single spacing is used between lines of text. All paragraphs are fully justified (block style with no indentation). One line of space (12 pt) is left between paragraphs. The section numbers for first-level headings of the main text should be bold and large and should be flush with the left margin.

3.12 Bibliography / References

A list of references in a separate section at the end of the report (the last section before the appendices) is preferred to a bibliography. A recognized citation and reference style (ie, IEEE, APA, MLA, Chicago, Engineering, Scientific, etc.) must be used consistently throughout the document. In the Reference section, the preference is for referenced materials to be listed in alphabetical order by surname of the author (a work for which no author is given is listed by the first word of the title). Internet sources should include the date on which the website source was last accessed. It is recommended that the author retain a PDF or printed copy of the website on record, as websites are known to change or disappear quickly and the version they have referred to may become obsolete. This should go without saying, but Wikipedia is NOT an acceptable source for a technical report.

3.13 Appendices

An appendix contains resource data too detailed to be included in the text, such as computer printouts, lengthy comparative data, glossaries, and nomenclature. Alternatively, the appendix may be used for information of a commercial or propriety nature which is deemed inappropriate to be placed directly in the body of the report, for instance, the text of a paper previously written by the author on a related topic which is relevant to the work. It is a separate section bound to the end of the report, or printed as a second volume. Please use Headings 7-9 to ensure correct numbering.