

FORMAT & TYPING GUIDE

for CEATI Reports

updated March 2018



Timeline of a **CEATI** INTERNATIONAL Report



- As you sit down to write the report, ensure you **begin by downloading the most recent CEATI template** at www.ceati.com/rfps.
- Using the template from the beginning of the project makes it easier for both you and our publishing team to format the document later.
- **Use the CEATI style set to make headings and subheadings** as detailed in our report template.
- **Make use of the “References” tab** as you’re writing the report to create figure captions, table headings, and in-text cross-references. This will ensure that these references remain accurate even if sections change.
- Use the “Citations & Bibliography” tab to **create references and in-text citations as you write**. The contractor is responsible for the accuracy of references and citations.
- You must **provide CEATI with a ready-to-print report** that has been edited for grammar and spelling, as well as for clarity, consistency, tone, and style.
- The report must be formatted correctly using the CEATI report format.
- The CEATI publishing department will do a quality-assurance review of the report once it has been sent to publishing.
- After our publications team reviews the report, you will receive all of the proposed changes and comments via a copy with “Track Changes” on.
- The contractor must **review the suggested changes, approve or reject each change, and address any comments** within the report.
- Our publications team reviews final contractor edits and does one last quality assurance review.
- You will be sent a hard copy of the report.
- **Thank you** for all of your hard work!

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Introduction

This Format and Typing Guide will assist CEATI Contractors in creating polished, professional, & standardized final deliverables. Should you require more details about the content of this guide, please contact CEATI publishing.

514.866.5377 / publications@ceati.com

Responsibilities of the Contractor

The contractor is responsible for creating a ready-to-print report that has been formatted according to the CEATI report template, has been referenced with a high degree of care and attention, and has been edited thoroughly.

As you write the report, ensure you:

- Provide citations and references (IEEE format) for all **copyrighted material**, including material that you have previously published.
- Edit** for tone, clarity, consistency, and style, as well as for grammar and punctuation.
- Format** the report using the CEATI report template, including:
 - the CEATI style set to create headings and sub-headings, and
 - the "Insert Caption" and "Cross-Reference" functions in Microsoft Word to create figure and table numbers and cross-reference those numbers in-text.
- Include the appropriate **content** for all sections of the report.

Copyrighted Material

The contractor must cite and reference all material and information from outside sources. CEATI performs a plagiarism check on all documents and does not tolerate any degree of plagiarism.

Any information that is copy-pasted from outside sources must be placed in quotation marks and referenced properly.

Any information that is paraphrased or adapted from other sources must also be properly cited and referenced but should not be placed in quotation marks.

References and in-text citations must follow an established citation style. CEATI prefers that contractors use the IEEE citation style. A document that provides examples of the main types of citations can be found here: <https://iee-dataport.org/sites/default/files/analysis/27/IEEE%20Citation%20Guidelines.pdf>

Contractors should record references and in-text citations during the writing process instead of after the report is already written. This ensures that all material from outside sources is recorded accurately.

To insert dynamic references, use the “Insert Citation” function in Microsoft Word to create in-text citations. Using this feature maintains link integrity as the text evolves.

Please note that material previously authored by the contractor and already published in another report or document must still be cited and referenced. When material is published, the author often does not retain all of the rights. Citing this material helps prevent copyright issues.

It is the contractor’s responsibility to ensure that all outside material is cited and referenced; that references and in-text citations follow a recognized citation style; and that in-text citations are properly numbered and matched to the References Section.

For an FAQ on plagiarism, please see the following document from IEEE.

“ Plagiarism in any form is unacceptable and is considered a serious breach of professional conduct, with potentially severe ethical and legal consequences.” [1]

[1] “A Plagiarism FAQ,” *IEEE Publications*, n.d. [Online]. Available: <https://www.ieee.org/publications/rights/plagiarism/plagiarism-faq.html>. [Accessed: Mar. 9, 2018].

Editing

Please note that **all reports must be submitted in English**. If written English is not the author's strong suit, it is required that an editor or technical writer be hired to review the document prior to submission at no additional cost to CEATI or the sponsors. The following are aspects of writing that must already be addressed by the contractor prior to submission.

- Clarity**
Aim to express ideas in the simplest way possible. It is helpful to consider your audience while writing; would your intended reader be able to easily understand the information the first time they read it?
- Consistent term use**
Any terms that are used repeatedly should be consistent throughout the whole document. Avoid overusing the thesaurus; consistent term use helps clarify ideas for your reader.
- Concision**
As much as possible, avoid repeating ideas and avoid writing unnecessarily long, convoluted, or wordy sentences. Always aim to use the fewest words possible while still conveying your idea clearly.
- Grammar & punctuation**
Grammar and punctuation mistakes should be caught prior to submission. Pay particular attention to the spelling of technical terms, comma and semicolon use, sentence fragments, and article use.
- Tone**
Keep your audience in mind while you are writing. For technical reports, the tone should remain professional without being wordy. Avoid using personal pronouns (I, we, us, our).
- Style**
Make sure your document has a consistent style. This is especially important for reports that are written by more than one contractor; pay particular attention to American vs. British spelling, sentence structure, and tone.
- Anonymity**
If a utility, company, or individual has spoken to you on the basis of anonymity, check the document to ensure that their name does not appear.

Formatting

The content of this section is specific to the CEATI Standard Report Format, and may not apply to the Energy Efficiency Guides. Authors of EE Guides may contact CEATI Publishing directly with any questions about their template.

Begin by downloading the most recent CEATI Report Template at www.ceati.com/rfps

Font and Page Setup

- Use Garamond size 12 font as the body text of the report.
- 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.

Header and Footer

- Headers and footers should be set at 0.5".
- The header should contain the report title, left aligned, font size 10, italic. The header should appear on all pages except for the title page.
- The footer should contain the page number in Garamond size 12.
- Blank pages should also contain the header and footer.

Pagination

- All front matter must be paginated in lowercase Roman numerals.
- The rest of the report is paginated with consecutive numbers, continuing from the previous section (so, if the last page of the front matter is numbered xii, Section 1.0 will begin on page 13).
- Page numbers are centered in the footer.
- Blank pages are counted in the pagination, and show a page number.

Sections

Each section, including sections in the front-matter, must begin on an odd-numbered page. Insert blank pages (with the header and footer) as necessary.

The report must be typed according to the following sequence:

1. Title Page
2. Notice
3. Abstract and Keywords
4. Acknowledgements
5. Executive Summary
6. Table of Contents
7. List of Tables (if applicable)
8. List of Figures (if applicable)
9. Main Text (starting at Section 1.0)
10. References
11. Appendices (if applicable)

Content

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 completed. The abstract should not exceed 200 words, as it could be used in databases and as a report description in journals. The results of the research must not be given away in the abstract, as it will be available to the public.

Keywords

Underneath the abstract, each report must contain a list of at least three keywords. These should indicate the main topics of the report; basic terms for indexing by abstracting services must also be noted.

Acknowledgements

Acknowledgements are limited to the principal persons or departments involved in the work. They should be kept to a single page, but must mention Project Funders (by their organization names, province/state, country) and CEATI technical advisors and their respective utility or corporation (please see the Report Template for more information).

Executive Summary

The Executive Summary comes before the main body of the text and must include the following four sections:

1. Background (~250 words)
2. Summary (~850 words)
3. Conclusions (~300 words)
4. Recommendations (~200 words)

The Executive Summary should not exceed three pages. It 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. This is an independent section that must not be copy-pasted from the abstract or introduction/conclusion sections.

Table of Contents

The Table of Contents lists section numbers and titles for section headings and sub-headings, references, and appendices, and their respective page numbers. The Table of Contents must be automatically generated by Microsoft Word using the "Table of Contents" function under the References tab. This ensures that if sections are added, deleted, or moved, that the table remains accurate.

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

www.ceati.com/rfps

List of Tables, List of Illustrations

If the report contains illustrations or tables, lists of both are required and should follow the Table of Contents in the document. These lists must be automatically generated by Microsoft Word using the “Insert Table of Figures” function under the References tab.

Table & Figure Captions

While writing the report, insert Table and Figure numbers using the “Insert Caption” function under the References tab in Microsoft Word. **Do not manually enter figure or table numbers.** Table captions are placed above the table and are left justified. Figure captions are placed below the image and are centered.

Cross-Referencing

When mentioning tables, figures, or section numbers in a report, use the “Cross-reference” function in Microsoft Word. **Do not manually enter cross-references.** This ensures that if figures, tables, or sections move, are deleted, or are added to, that the reference within the text of the report remains accurate.

Body Text

Use single spacing between lines of text with double-spacing (12 pt) between paragraphs. All paragraphs are fully justified (block style with no indentation). All section headings must be created using the style set implicit in the CEATI Report Template. Main headings should be Heading 1, subheadings should be Heading 2, and so forth. Appendix headings and subheadings are Heading 7 and Headings 8-9, respectively.

References Section

The list of references is a separate section at the end of the report. You must use a recognized citation and reference style (preferably IEEE) consistently throughout the document.

Internet sources must include the date on which the website source was last accessed. It is recommended that you retain a PDF or printed copy of the website on record, as websites are known to change or disappear quickly and the version you have referred to may become obsolete. It is the contractor’s responsibility to ensure all cited sources are credible. Wikipedia is NOT an acceptable source for a technical report.

Appendices

An appendix contains resource data too detailed to be included in the text, such as computer printouts, lengthy comparative data, glossaries, and nomenclature. It is a separate section bound to the end of the report. Use Headings 7-9 in the Report Template for these sections.

Images

If the report contains figures or images, they must be of printer quality. Blurry or small images, especially where information is difficult to read or discern, are not acceptable. It is recommended that any report pages containing images are printed to check for printed quality.

