Communication and Documentation: Additional Notes on Written Reports

Written reports
- for a defined audience
- about a defined topic
- in a defined format
- They are
  - permanent
  - authoritative
  - detailed

Classes of reports
- Development or Project reports
  - by-products of a process
- Production reports
  - principal products of an application system
- Academic reports
  - principal products of an enquiry process
- Development reports
  - by-products of a process
  - produced irregularly
  - at milestones rather than periodically
  - required opportunistically
  - only produced if circumstances require it
  - four classes of report

Report types
- technical reports
  - how to do something
- analytical reports
  - why something happened/will happen
- status reports
  - how well things are going
- proposals
  - speculations about, or justifications for action

Report structure
- Letter of transmittal
- Cover page
- Table of Contents
- Management Summary
- Introduction
- Body of report
- Recommendations
- Appendices
Letter of Transmittal
- tells the requesting authority of report completion
- identifies the report
- identifies the author(s)
- references the authorising document
- enumerates the report components

Cover page
- Report Title
- Sponsoring organisation
- Authors
- Authors’ affiliation
- Date and Version

Table of Contents
- Sequential list of sections and topics
- a navigation aid to the report
- Number, Heading, page number
- left and right justified

Management Summary
- half to one page in length
- highlights the important decisions
- identifies:
  - total costs
  - total time required
  - management action needed
  - benefits and liabilities

Introduction
- sets the scope of the report
- references the authorising decision
- defines the objective of the report
- defines the background to the report
- references methods and techniques used

Body of the report
- the substantive work is reported here
- divided into numbered chapters or sections
- within sections, topic-related paragraphs
- section, sub-section, paragraph headings
- hierarchical numbering
- use figures, pictures and tables for explanation
Paragraph content
- technical and status reports
  - facts only
- analytical reports
  - facts and recommendations (professional opinion)
- proposals
  - professional opinions, excuses, rational speculations

Graphics support
- images convey information too
- images can transcend language and culture
  - words must be interpreted in a context
- images are thought to be objective (but may not be)
- higher information density in images than words
- colour and scale influence interpretation

Recommendations
- only included when specifically asked for
- usually only for analytical and proposal types
- justifications refer to report sections
- supporting data as Appendices

Use of reports
- written reports for formal communication
- professional staff are always reporting
- some things always change:
  - requirements
  - users
  - tools and platforms
  - budgets ……
- version control is critically important

Report aesthetics
- visual presentation style
  - is it easy to look at?
- writing style
  - is it easy to understand?
- report structure
  - is it easy to use?
- successful reports answer YES to all

The Documentation Process

1. Specify the document
2. Draft and edit the document
3. Review the document
   - Not OK
   - OK
4. Publish the document
5. Maintain the document
Specify the Document

- Conceptual decisions
  - Break documentation down by task
  - Use a minimalist design
  - Develop a concept of audience
  - Identify the purpose for each document
- Physical decisions:
  - Organise the documentation
  - Choose appropriate media
  - Decide on typography, layout, colour and page size
- Implementation decisions:
  - Plan for updating, Develop a cost/time schedule

Draft and Edit the Document

- Overcome writer’s block
- Be aware of how readers read
- Use reader-based writing techniques
- Use an appropriate document format
- Create your reference aids
- Develop effective graphics

Overcome Writer’s Block

- Internal writer’s block
  - Be prepared to write poorly and edit well
  - Don’t feel you have to start at the beginning ... start where you feel most comfortable
  - Tape what you want to tell them ... transcribe it and then edit
  - Stop in the middle of a section at the end of a day ... makes it easier when you get back to it
- External writer’s block
  - Become an expert on the subject matter
  - Give sources enough time to prepare
  - Offer sources a variety of ways of getting information to you
  - Use management leverage

Review the Document

- Purpose - to let users try it out to see whether it is effective and can stand alone
- Layout - it can just be in draft form
- Coversheet - the users should know the duration of the review, and how to return their comments to the authors
- Feedback - let the users know how their comments were used .. provide them with a summary report

Publish the Document

- Planning - make sure printers know the type of work you are giving them and are ready for it
- Deadlines - leave plenty of time for this stage ... it can take up to 25% of the documentation effort
- Clarity - the clearer your production instructions the better your final product

Maintain the Document

- Maintain a master copy of the document that notes all corrections and updated information;
- Date each correction and change and the reason for it;
- Version control is important;
- Maintain a document distribution list ... make sure that the user acknowledges that they have received the updates and have updated their document.
Hints on Maintenance

- Binding
  - large, updated often .. ring binding
  - small .. easier just to reissue
- Section numbering schemes
  - allow individual sections to be replaced
  - with page numbering all pages would have to be renumbered and replaced
- Version numbers and update dates on document.
- Change bars
- Reader comment sheets
- Update checklists .. lists all areas of a document that need to be changed if any one section changes
- Author and production notes .. lists any special methods used in writing or producing the document

References