final/technical report style guide

ENERGY RESEARCH AND DEVELOPMENT DIVISION (ERDD)

JUNE 2013

Prepared for: ERDD Contractor/Commission Agreement Manager
Prepared by: California Energy Commission
Energy and Research Development Division

CALIFORNIA ENERGY COMMISSION

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what's inside

The Energy Research and Development Division (ERDD) offers this style guide instructions in union with the ERDD template for technical reports.

All questions and comments are encouraged and welcomed.

Please contact our division at (916) 327-1551 or send an email to ERDD@energy.ca.gov.

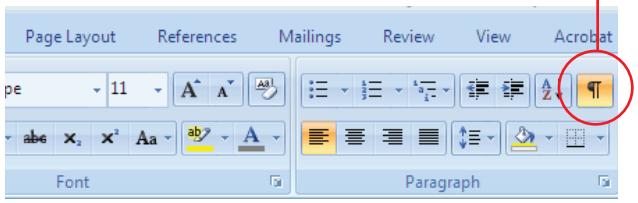
Thank you.

what's inside 1
set-up tips 2
styles window 3
outline of report 4
cover 5
prepared by 6
acknowledgements 7
preface 8
abstract 9
table of contents 10
list of figures/tables 10
executive summary 11
blank page 12
body of report 13
glossary 15
references 16
appendices 17
finalizing report format 18

set-up tips:

To ensure a successfully formatted report, first review the following set-up tips:

First, select '**Show/Hide ¶**' icon to show paragraph marks and other hidden formatting symbols located on the 'Home' tab. This will prevent deleting Section Breaks that change the layout or formatting of a page or pages in the report.



Section Breaks are used to change the layout or formatting of a page or pages in your document. For example, you can use sections to rotate a page to landscape or portrait orientation.

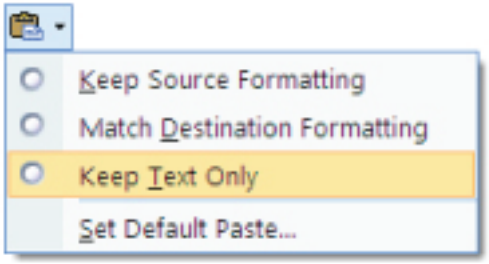
Save Photos in their original or raw digital format (if available) as well as in JPEG or PNG. Do not use TIF or GIF files unless no other option is available. Graphics and photographs should be saved at a higher resolution, at least 300 dots per inch (dpi). Do not use low-resolution (72 or 96 dpi) graphics found on websites, as they do not reproduce well in printed documents.

Make sure **Bracketed Text** are filled in with the correct information, i.e. [fill-in text], then remove brackets.

Use the **Active Voice** whenever possible:
ACTIVE VOICE: The petroleum industry builds new storage facilities.

PASSIVE VOICE: New storage facilities are built by the petroleum industry.

While working on the report, if a section or paragraph is cut & pasted into the document, the **Paste Option** icon will appear.



RIGHT click and select 'Keep Text Only'.
This will revert any formatted text to the format pre-selected for ERDD final/technical reports.

Use **Footnotes** (not endnotes) in reports. Place footnotes at the bottom of the page on which they appear, after periods or commas.

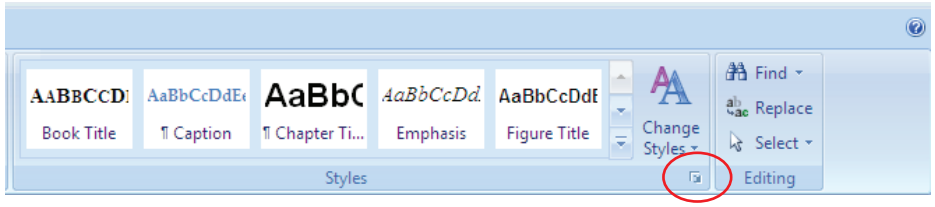
Insert footnotes using Word footnote feature:
Insert > Reference > Footnote.

Do not use footnotes in report or chapter titles, and do not footnote headings or subheadings.

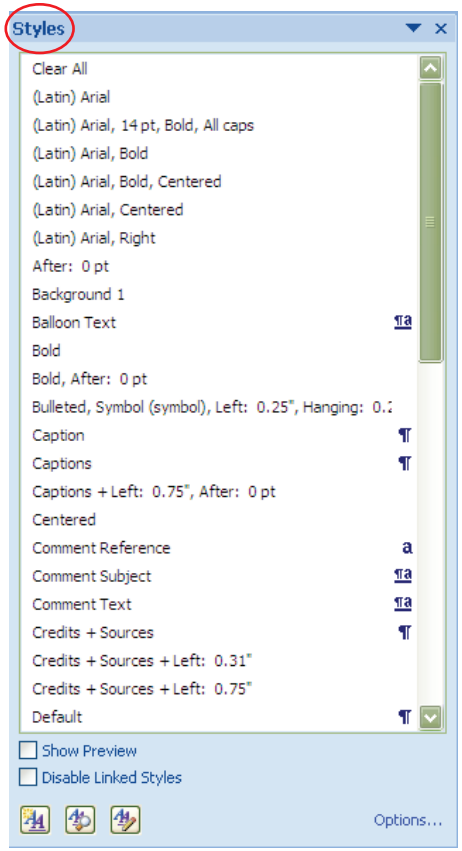
styles window

Each text within the live document is assigned a "style" or a set of formatting characteristics, such as font name, size, color, paragraph alignment and spacing. When styles are used to format documents, it can quickly and easily apply a set of formatting choices consistently throughout the document, saving time and making documents look good.

To change text to match the appropriate style, select text, then select Name of Style in the 'Styles' window.



To view the styles window, click here on the 'Home' tab. This 'Styles' window will appear.



Here are the common **List of Styles** used thoughout the report:

Name of Style	Style Application	Typeface	Sample
Captions	Photo caption below image.	Arial, 10pt, Align Text Left	Sample
Credit + Source	Photo credit source below photo caption.	Arial, 8pt, Align Text Left	Sample
Figure Title	Descriptive title of the photo. Photo titles are labeled sequentially.	Arial, 10pt, Center, Bold	**Sample**
Header 2	The first sub-heading in a Chapter Subheadings may be written in scientific numbering format.	Arial, 14pt, Align Text Left, Bold	**1.1**(TAB)**Sample**
Header 3	The sub-subheading in a Chapter.	Arial, 12pt, Align Text Left	1.1.1(TAB) Sample
Header 4	The sub-sub-subheading in a Chapter.	Arial, 11pt, Align Text Left, Italicized	*1.1.1.1*(TAB)*Sample*
Heading 1, Chapter Titles	Chapter titles, Appendix titles.	Arial, 18pt, Align Text Left, Bold	**CHAPTER 1: Sample Title**
Normal	Body of Text.	Palatino Linotype, 11pt, Align Text Left	Sample
Reference – Bibliography	Text of references.	Palatino Linotype, 11pt, Align Text Left with 0.5" Hanging Indent	Sample
Table Title	Title of the table.	Arial, 10pt, Center, Bold	**Sample 1:**

outline of report

This is the outline of the technical report template. Each section is detailed throughout the template.

cover
prepared by
acknowledgements
preface
abstract
table of contents *
list of figures/tables *
executive summary
blank page *
body of report
glossary
references
appendices

* Information on formatting these sections is located in the **Finalize Report Format** section, pages 18-21.

cover

Choose ‘interim’ OR ‘final’ report.

Insert title of report in all caps, subtitle if needed.

Insert contractor company, then remove brackets.

Insert JPEG here.

Energy Commission will provide information.

Energy·Research·and·Development·Division¶
INTERIM/FINAL·PROJECT·REPORT¶

¶
¶

TITLE·HERE¶
¶
Subtitle·Here¶

¶
¶
¶

Prepared·for:→ California·Energy·Commission¶
Prepared·by:→ [Company]¶

¶
¶

Insert·Logo·Here¶

MONTH·YEAR¶
CEC-500-YYYY-XXX¶

prepared by

Fill in the top portion of this page.

Energy Commission Contract Manager will provide the bottom portion information.

Disclaimer is mandatory.

PREPARED BY:

Section Break (Next Page)

Primary Author(s):
First Name Last Name
Second Author
Third Author

Company
123 Address
City, ST 12345
Phone: XXX-XXX-XXXX | Fax: XXX-XXX-XXXX
http://www.company.com (optional)

Contract Number: XXX-XX-XXX

Prepared for:

California Energy Commission

XXXXXXXXXXXX
Contract Manager

XXXXXXXXXXXX
Office Manager
Energy XXXXXXXX Research Office

Laurie ten Hope
Deputy Director
ENERGY RESEARCH AND DEVELOPMENT DIVISION

Robert P. Oglesby
Executive Director

DISCLAIMER

This report was prepared as the result of work sponsored by the California Energy Commission. It does not necessarily represent the views of the Energy Commission, its employees or the State of California. The Energy Commission, the State of California, its employees, contractors and subcontractors make no warranty, express or implied, and assume no legal liability for the information in this report; nor does any party represent that the uses of this information will not infringe upon privately owned rights. This report has not been approved or disapproved by the California Energy Commission nor has the California Energy Commission passed upon the accuracy or adequacy of the information in this report.

acknowledgements

ACKNOWLEDGEMENTS¶

Type here.¶

.....Page Break.....¶

i¶

This page comes after the credits page, is the first text page of the document, and precedes the Preface, Abstract, and Table of Contents.

The Acknowledgements page expresses appreciation to those who participated in generating the report. It may be a paragraph or a bulleted list of names and, if appropriate, their affiliations. If there is a long list of participants who are to be acknowledged, put the names and affiliations in two or three columns (reducing font size so that the names fit on one page).

Acknowledgements are optional.

Write in third person, i.e., "The author would like to thank..."

Page numbering begins on this page with lowercase Roman numeral (i).

preface

Default ERDD language is mandatory.

Fill in the bracketed portion of this page, then remove the brackets.

PREFACE

The California Energy Commission Energy Research and Development Division supports public interest energy research and development that will help improve the quality of life in California by bringing environmentally safe, affordable, and reliable energy services and products to the marketplace.

The Energy Research and Development Division conducts public interest research, development, and demonstration (RD&D) projects to benefit California.

The Energy Research and Development Division strives to conduct the most promising public interest energy research by partnering with RD&D entities, including individuals, businesses, utilities, and public or private research institutions.

Energy Research and Development Division funding efforts are focused on the following RD&D program areas:

- Buildings End-Use Energy Efficiency
- Energy Innovations Small Grants
- Energy-Related Environmental Research
- Energy Systems Integration
- Environmentally Preferred Advanced Generation
- Industrial/Agricultural/Water End-Use Energy Efficiency
- Renewable Energy Technologies
- Transportation

[Report title in italics] is the [final or interim — select one] report for the [project name] project (contract number XXX-XX-XXX, work authorization number [insert #] or grant number [insert #]) conducted by [research entity]. The information from this project contributes to Energy Research and Development Division's [insert RD&D program area from bulleted list above] Program.

For more information about the Energy Research and Development Division, please visit the Energy Commission's website at www.energy.ca.gov/research/ or contact the Energy Commission at 916-327-1551.

Page Break

ii

abstract

ABSTRACT

Type here.

Keywords: Type keywords here

Please use the following citation for this report:

Last name, First name; Second author; Third author. (Company Name). YYYY. *Title of Report.* California Energy Commission. Publication number: CEC-500-YYYY-XXX.

Page Break

iii

*All Energy Commission reports are **required** to have a short abstract:*

- *The abstract is less than 300 words with no acronyms.*
- *The abstract is written at a basic technical level with any technical terms defined.*
- *The abstract is readable to the legislators, policy makers, stakeholders, researchers, academia, investors, and the general public.*
- *The abstract includes:*
  - *Major Results and Benefits to California Ratepayers*
  - *Purpose and Methodology*
  - *Problem Statement, Conclusions, and Recommendations*

Keywords: The abstract page must contain five or more keywords that will help search engines and other databases find the report subject matter. Do not repeat words. No period at end of list of keywords

- *This report should not refer to other reports unless it is essential to clarify the document purpose. If the report is a supporting document to another report, that information should be noted. Do not, however, include citations within the abstract.*

Year published.

Energy Commission will provide this information.

- *If applicable, please make the following statement after the last paragraph of abstract:*

"Photos without citation are sources by author."

TOC/LOF/LOT

The Table of Contents (TOC), List of Figures (LOF) and List of Tables (LOT) sections are automatically generated through heading links after report is completed.

See **Finalizing Report Format**, *pages 18-20.*

TABLE·OF·CONTENTS·¶

Acknowledgements ..... i¶
PREFACE ..... ii¶
ABSTRACT ..... iii¶
TABLE·OF·CONTENTS ..... iv¶
LIST·OF·FIGURES ..... iv¶
LIST·OF·TABLES ..... iv¶
EXECUTIVE·SUMMARY ..... 1¶
Introduction·(Heading·2) ..... 1¶
Background·(Heading·3) ..... 1¶
CHAPTER·1:··Title·of·Chapter ..... 3¶
1.1 → Heading ..... 3¶
1.1.1 → Heading ..... 3¶
1.2 → Heading ..... 3¶
CHAPTER·2:·Note·That·There·Is·No·Blank·Page·Between·Chapters ..... 4¶
2.1 → Heading ..... 4¶
2.1.1 → Heading ..... 4¶
2.2 → Heading ..... 4¶
GLOSSARY ..... 6¶
REFERENCES ..... 7¶
APPENDIX·A:·Title·of·Appendix ..... 1¶

LIST·OF·FIGURES¶

Figure·1:·Descriptive·Photo·Title·Here ..... 3¶
Figure·2:·Average·Rack·Prices·for·"CARBOB"·Gasoline ..... 4¶

¶

LIST·OF·TABLES¶

Table·1:·Title·of·Table·Goes·Here → 4¶
Table·2:·Title·of·Table·Goes·Here → 5¶

¶ ..... Section Break (Next Page) .....

iv¶

executive summary

The Executive Summary is a final report in miniature, and should include the following:

- *A brief overview of the report no longer than ten pages.*
- *General terms, for a non-technical audience with any technical terms explained to the reader.*
- *Readability to the legislators, policy makers, stakeholders, researchers, academia, investors, and the general public.*

Includes:

INTRODUCTION
Problem Statement and Background Information

PROJECT PURPOSE
Goals and Objectives, and Involvement from Stakeholders

PROJECT RESULTS
Methodology, Analysis of Results, Conclusions, and Recommendations

PROJECT BENEFITS
Current, Future, or Potential Benefits to California Ratepayers

EXECUTIVE·SUMMARY¶

- Introduction¶
  Type·here.¶
- Project·Purpose¶
  Type·here.¶
- Project·Results¶
  Type·here.·¶
- Project·Benefits¶
  Type·here.¶

¶.....Section Break (Next Page).....

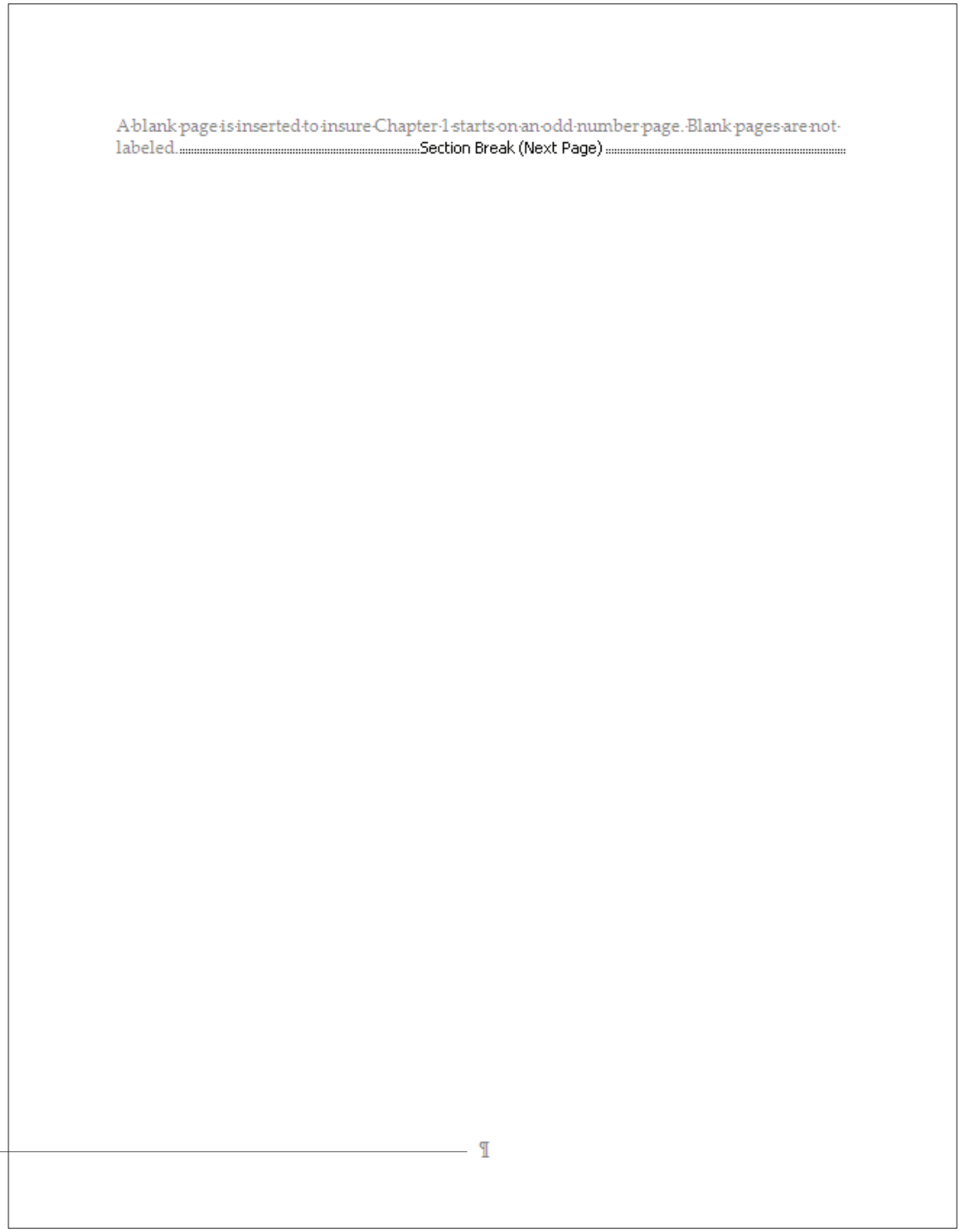
1¶

The Executive Summary always begins on page 1.

blank page

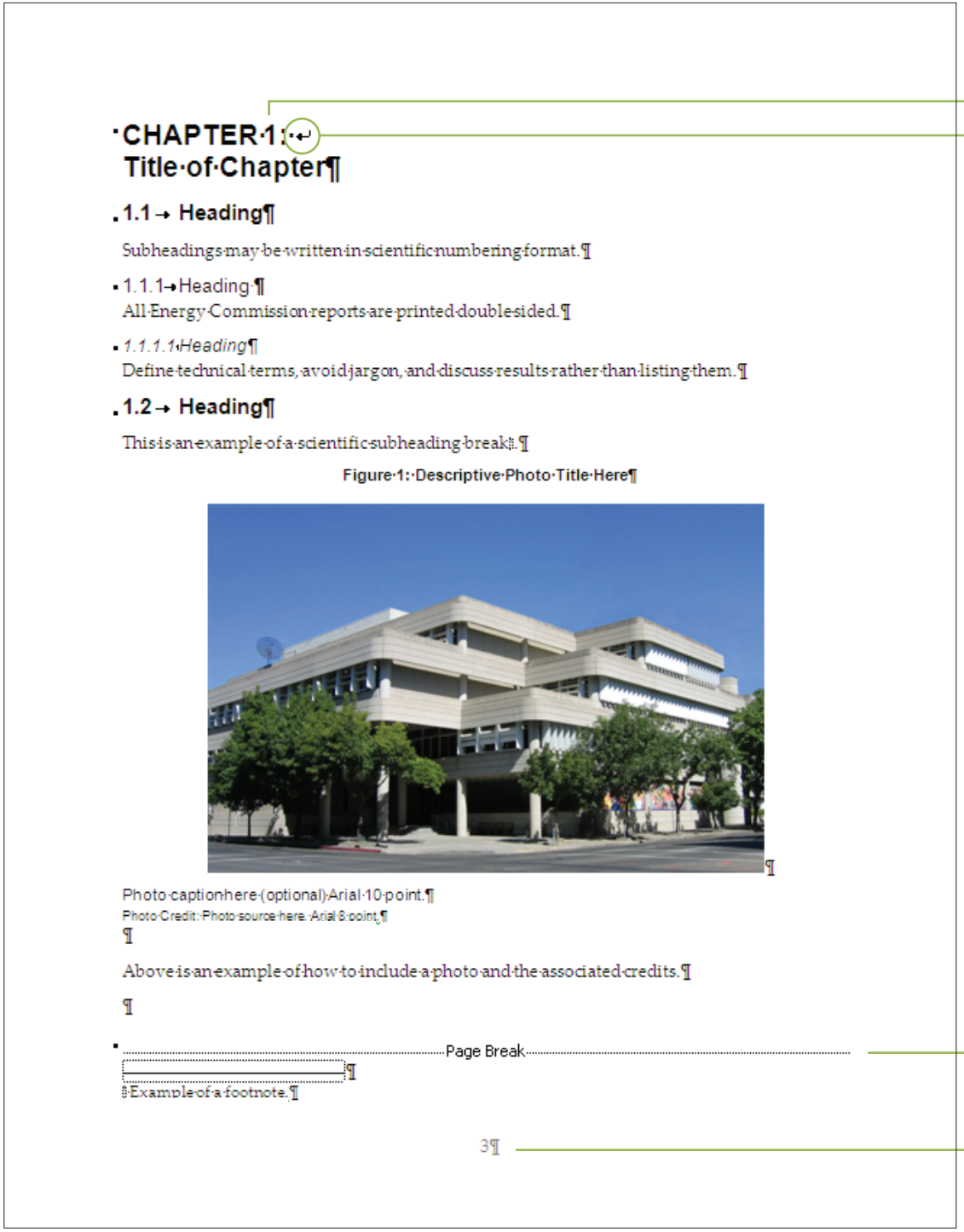
A blank page is inserted to ensure Chapter 1 starts on an odd number page.

See **Finalizing Report Format**, *page 21.*



Blank pages are not page numbered.

body of report



CHAPTER 1:
Title of Chapter

1.1 Heading

Subheadings may be written in scientific numbering format.

1.1.1 Heading

All Energy Commission reports are printed double-sided.

1.1.1.1 Heading

Define technical terms, avoid jargon, and discuss results rather than listing them.

1.2 Heading

This is an example of a scientific subheading break.

Figure 1: Descriptive Photo Title Here

Photo caption here (optional) Arial 10 point.

Photo Credit: Photo source here Arial 8 point.

Above is an example of how to include a photo and the associated credits.

Page Break

Example of a footnote.

3

Chapters should be numbered (CHAPTER 1:, CHAPTER 2:, etc. in upper case) followed by a colon, a shift-return (soft return), and then the chapter title in title case.

Shift Return is used to ensure corrected format in TOC.

Use scientific or technical section numbering for subheadings within chapters. (1.1, 1.1.1, etc.)

Heading format is described in the **List of Styles** table, page 3.

Insert a **Page Break** to insure each chapter will begin on an entirely separate page.

Chapter 1 always begins on the right-hand side.

Here is another example of a Chapter Page. Please note the formatting for chapter titles, headings, tables, and pictures are consistent throughout the entire document.

There is not a blank page between chapters.

CHAPTER 2:
Title of Chapter

This is optional introductory text before Headings.

2.1 Heading 2

2.1.1 Heading 3

Below is an example of how to include a table.

Table 1: Title of Table

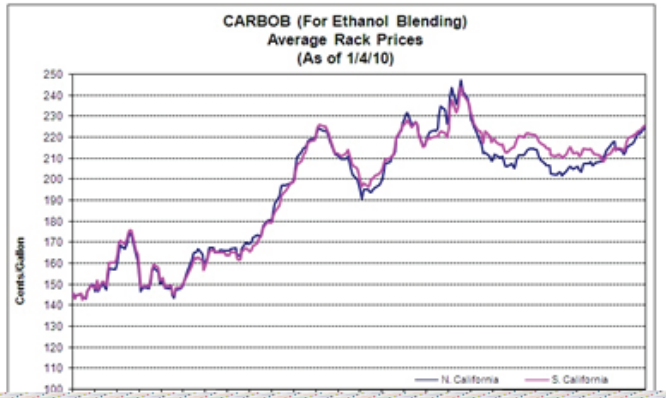
Heading	Heading In Bold	Heading In Bold	Heading In Bold	Heading
Info	Data	Data	Data	Numbered Data Right-align

Source: Table source here. Analysis point.

2.2 Heading 2

Charts are also considered Figures, and should be numbered sequentially.

Figure 2: Average Rack Prices for "CARBOB" Gasoline



glossary

GLOSSARY

This is an example of Body (Normal) Text. It is Palatino Linotype, 11 point, and aligned left.

A glossary is required.

Below is an example of terms and definitions in a table format.

Term	Definition
EPIC	Electric Program Investment Charge
Smart Grid	Smart Grid is the thoughtful integration of intelligent technologies and innovative services that produce a more efficient, sustainable, economic, and secure electrical supply for California communities.
Type here	Type here

Page Break

6

*All ERDD reports are **required** to have a glossary.*

Please provide a Glossary with definitions for each acronym or term. Use Microsoft Word table feature to create a two-column format with the acronym or abbreviation in the left column and the definition in the right column.

Glossary Table example.

references

The References section at the end of the report must list all documents cited in the body of the report. List references in a standard alphabetical format. Check that all of the references contained in the body of the report are accurate and that the full citation for each reference is listed in the References section.

List any documents referred to in the appendices in a reference section in that appendix; that is, each appendix carries its own Reference section.

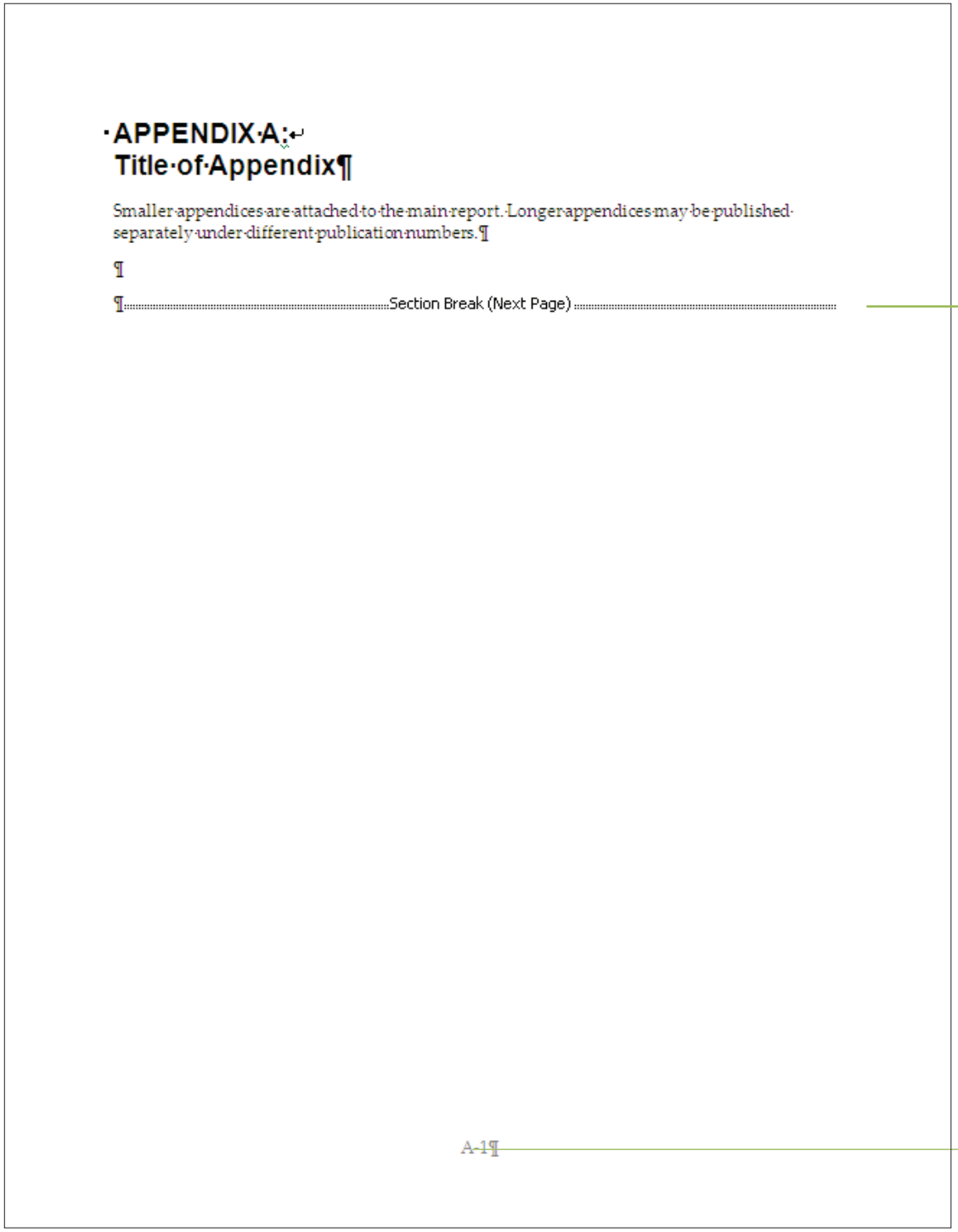
REFERENCES¶

Last·Name,·First·Name.·Text·and/or·information·you·wish·to·refer·thoughout·your·report.·
Publication·Company.·YYYY.¶

¶ Section Break (Next Page)

7¶

appendices



An appendix is supplementary material that is produced by the report author.

Designate appendices by capital letters (Appendix A, Appendix B, Appendix C, etc.), not numbers.

Insert a **Section Break** at the end of each appendix to insure each appendix starts with a new page number.

See below.

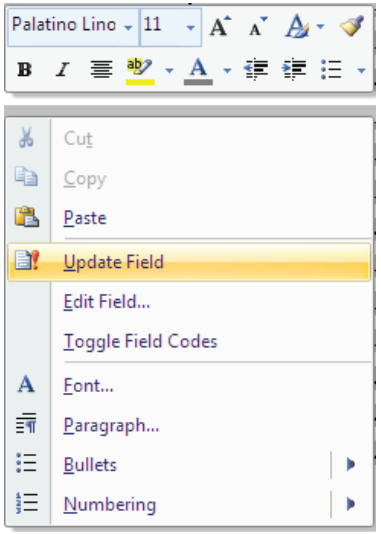
Page numbers are labeled by capital letter designated by each appendix.

finalizing report format

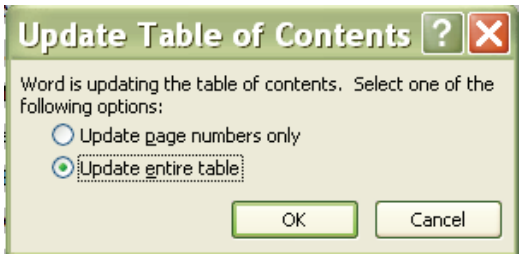
TABLE OF CONTENTS

Now that the content of the report is complete, the Table of Contents will need to be updated:

RIGHT click in the body of the table.
Select UPDATE FIELD



Select UPDATE ENTIRE TABLE



Click OK.

TABLE OF CONTENTS

Acknowledgements i
PREFACE ii
ABSTRACT iii
TABLE OF CONTENTS iv
LIST OF FIGURES iv
LIST OF TABLES iv
EXECUTIVE SUMMARY 1
Introduction (Heading 2) 1
Background (Heading 3) 1
CHAPTER 1: Title of Chapter 3
1.1 Heading 3
1.1.1 Heading 3
1.2 Heading 3
CHAPTER 2: Note That There Is No Blank Page Between Chapters 4
2.1 Heading 4
2.1.1 Heading 4
2.2 Heading 4
GLOSSARY 6
REFERENCES 7
APPENDIX A: Title of Appendix A-1

LIST OF FIGURES

Figure 1: Descriptive Photo Title Here 3
Figure 2: Average Rack Prices for "CARBOB" Gasoline 4

LIST OF TABLES

Table 1: Title of Table Goes Here 4
Table 2: Title of Table Goes Here 5

iv

TABLE OF CONTENTS

Acknowledgements i
PREFACE ii
ABSTRACT iii
TABLE OF CONTENTS iv
LIST OF FIGURES iv
LIST OF TABLES iv
EXECUTIVE SUMMARY 1
Introduction (Heading 2) 1
Background (Heading 3) 1
CHAPTER 1: Title of Chapter 3
1.1 Heading 3
1.1.1 Heading 3
1.2 Heading 3
CHAPTER 2: Note That There Is No Blank Page Between Chapters 4
2.1 Heading 4
2.1.1 Heading 4
2.2 Heading 4
GLOSSARY 6
REFERENCES 7
APPENDIX A: Title of Appendix A-1

LIST OF FIGURES

Figure 1: Descriptive Photo Title Here 3
Figure 2: Average Rack Prices for "CARBOB" Gasoline 4

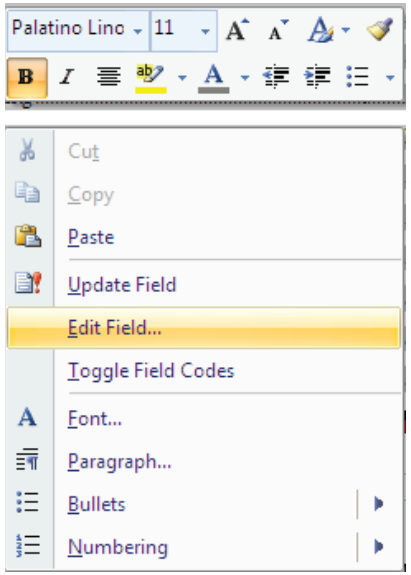
LIST OF TABLES

Table 1: Title of Table Goes Here 4
Table 2: Title of Table Goes Here 5

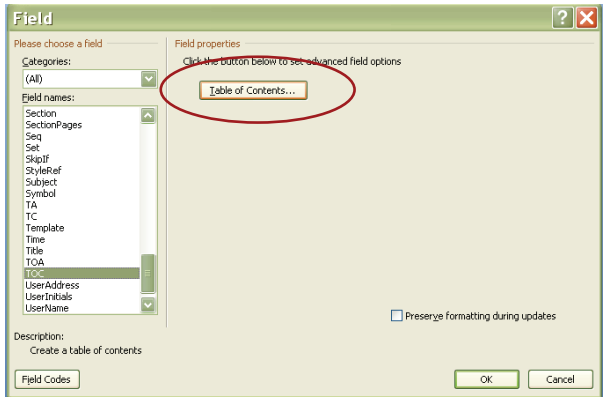
LIST OF FIGURES/LIST OF TABLES

To update:

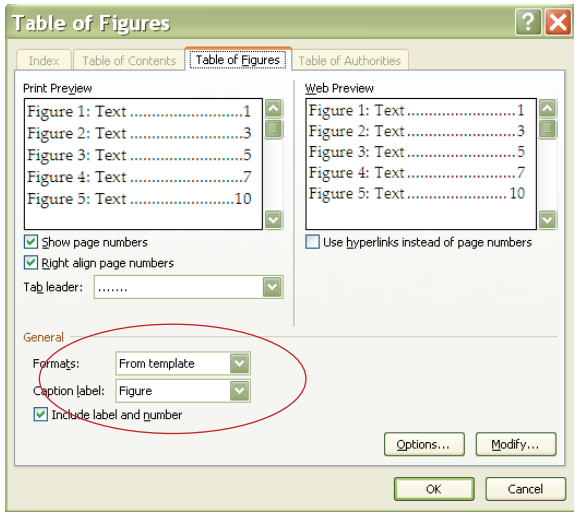
RIGHT click in the body of the list.
Select EDIT FIELD...



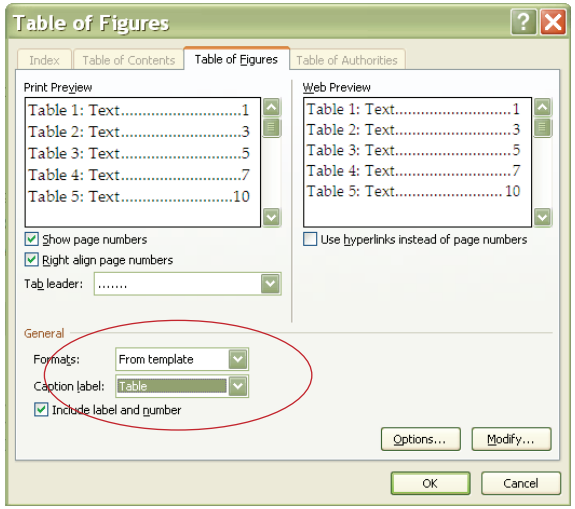
Select TABLE OF CONTENTS...



To update **List of Figures**, make sure FIGURE is selected in the 'Caption label' drop-down box.



To update **List of Tables**, make sure TABLE is selected in the 'Caption label' drop-down box.



Click OK.

TABLE OF CONTENTS

Acknowledgements ..... **i**

PREFACE ..... **ii**

ABSTRACT ..... **iii**

TABLE OF CONTENTS ..... **iv**

LIST OF FIGURES ..... **iv**

LIST OF TABLES ..... **iv**

EXECUTIVE SUMMARY **1**

Introduction (Heading 2) 1

Background (Heading 3) 1

CHAPTER 1: Title of Chapter **3**

1.1 Heading 3

1.1.1 Heading 3

1.2 Heading 3

CHAPTER 2: Note That There Is No Blank Page Between Chapters **4**

2.1 Heading 4

2.1.1 Heading 4

2.2 Heading 4

GLOSSARY **6**

REFERENCES **7**

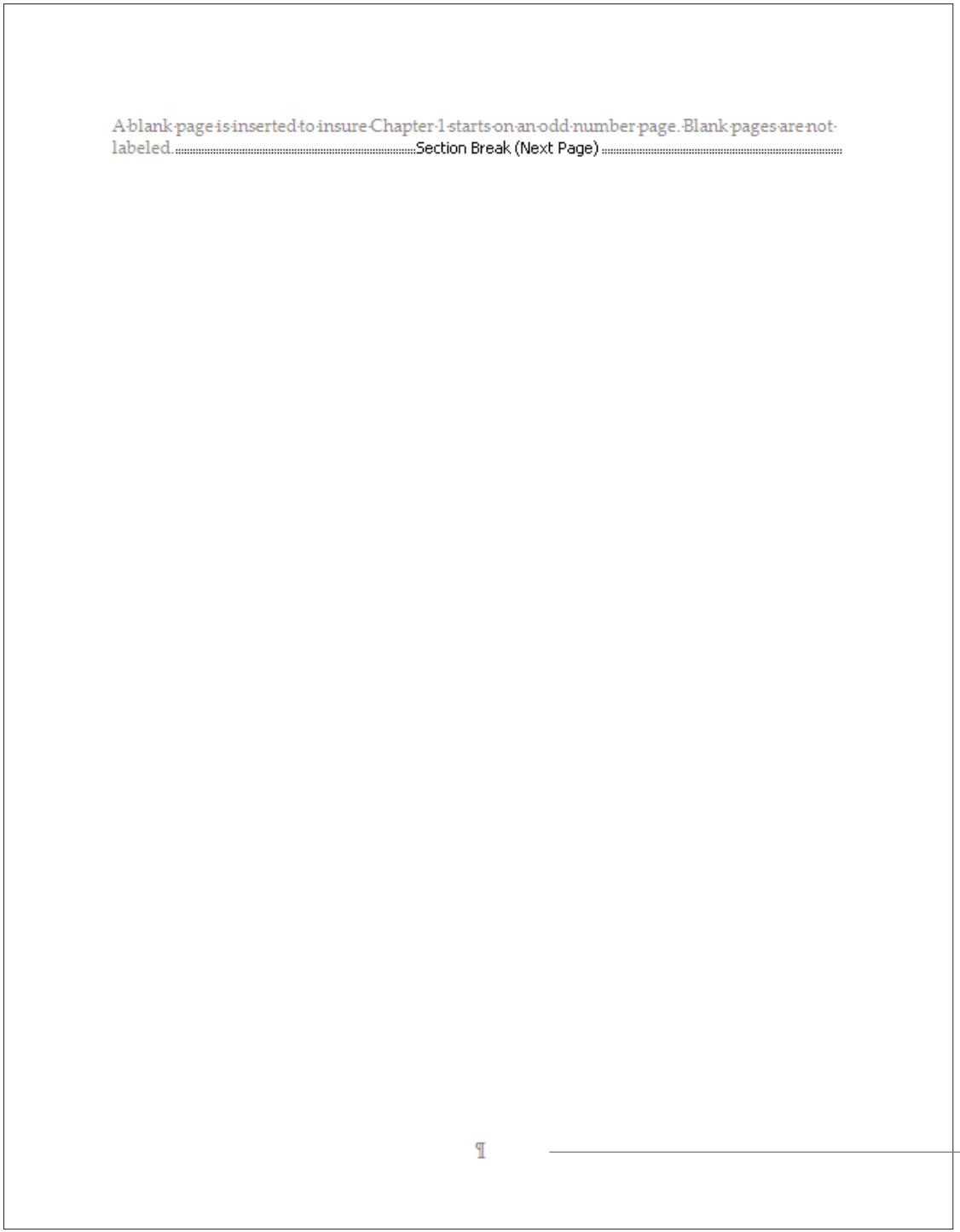
APPENDIX A: Title of Appendix **A-1**

LIST OF FIGURES

Figure 1: Descriptive Photo Title Here 3
Figure 2: Average Rack Prices for "CARBOB" Gasoline 4

LIST OF TABLES

Table 1: Title of Table Goes Here 4
Table 2: Title of Table Goes Here 5



BLANK PAGE

A blank page is inserted to ensure Chapter 1 starts on an odd number page.

After completing the report text, update the TOC, LOF, and LOT. If Chapter 1 begins on an odd page, the final/technical report is complete.

If Chapter 1 begins on an even page, delete this blank page. Then update TOC, LOF, and LOT again.

Congratulations!

The final/technical report is complete.

Blank pages are not page numbered.