**Module 5: Report Writing and Documentation**

The topics in this intentionally brief commentary are covered much more fully in your textbook than they are here. Once again, do not let your reading of this short commentary substitute for reading the assigned textbook chapters and the invaluable [UMUC Online Guide to Writing and Research](http://www.umuc.edu/writingcenter/onlineguide/).

**Topics**

1. [The Role of Reports in Organizations](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#I)
2. [Planning and Preparing a Report](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#II)
3. [Organizing Reports and Proposals](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#III)
4. [Conducting Research](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#IV)
5. [Integration of Source Materials](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#V)
6. [Resource Documentation](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#VI)
7. [Visual Aid Design](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#VII)
8. [Summary Comments](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#VIII)
9. [Questions to Consider](https://umuc.equella.ecollege.com/file/5c69afb4-60a4-4075-ab41-1e81c33346e8/1/WRTG394-0902.zip/Modules/M5-Module_5/S3-Commentary.html#IX)

**I. The Role of Reports in Organizations**

Reports are used for many purposes in organizations, including:

* monitoring operations
* implementing policies and procedures
* complying with regulations
* making proposals
* documenting work
* making decisions

The purpose and audience of a report will determine its content, format, organization, and style. Reports can be routine or special-purpose, internal (read within the organization) or external (sent to outsiders), voluntary (self-initiated) or required. Regardless of the type, reports are usually categorized as **informational** or **analytical**. The purpose of informational reports is primarily to present facts. An analytical report contains facts as well as interpretations, recommendations, and conclusions; an analytical report justifies a decision, supports a recommendation, and backs up a proposal.

**II. Planning and Preparing a Report**

No matter what the purpose, preparing a long, formal report usually involves these steps:

* planning the report process, including a work plan
* outlining issues to investigate
* conducting research
* documenting and using sources
* designing visuals
* organizing reports and proposals
* completing the components of a formal report

The [UMUC Guide to Writing and Research](http://www.umuc.edu/writingcenter/onlineguide/) contains excellent advice about planning the research process, investigating sources, taking notes, documenting sources, and writing the paper. So does the textbook. None of that advice is repeated here, so be sure to read both the Guide and the textbook thoroughly and carefully.

The [UMUC library home page](https://www.umuc.edu/library/) provides valuable resources. In addition to using the primary databases for articles and books in the University of Maryland system, be sure to explore the following topics:

* Secrets of my Research Success
* Research Skills Tutorial
* Guide to General Academic Research
* Business Tutorial
* Identify and Locate Scholarly Journals
* Search the Web and Evaluate Web Resources
* Citation Resources
* Academic Integrity

The first step in planning a report is to define the issue, problem, or purpose. Having determined the issue to investigate, the next step is to decide how to get the needed information: interviews, surveys, experiments or pilot studies, searches through the organization's records and databases, searches through databases of books and articles, or a search of Web resources. Evaluating the relevance and reliability of the information you discover is the third step in the research process. Before writing the report you will need to decide how best to organize the report to support your conclusions. The purpose, likely reaction of the audience, and the context will guide your choice of organization plan. Your next step is to design reader-friendly visuals (pictures, diagrams, charts, graphs, tables, and maps) that support your purpose. Most organizations have preferred formats for long reports; your final preparatory decision is finding out which components of formal reports are expected in your organization.

**III. Organizing Reports and Proposals**

As is true of all workplace documents, how a formal report is organized depends on its purpose and audience—not its subject. As explained earlier, the purpose, likely reaction of the audience, and the context will guide your choice of organization plan for a formal report.

The best organizational plan for **informational** reports is usually obvious: whichever way presents the information most usefully for the readers' needs. The options for informational reports are based on how the information is divided into topics:

* sequential order of steps in a process (step 1, step 2, and so forth)
* chronological order of a series of events
* spatial order (describe from left to right, front to back, top to bottom)
* geographical order (by states, regions, cities, districts, designated kinds of areas)
* subdivisions of the main topic (by categories, features, aspects)
* ordered by importance of the subtopics or categories

The best organizational plan for an **analytical** report is not as easy to select. The primary consideration for organizing analytical reports is whether the audience is likely to be receptive or hostile to your recommendations and conclusions. Use the **direct order** for an audience likely to be receptive to your recommendation; use the **indirect order** for a resistant audience. In the direct order, the main point (recommendations and conclusions) comes first. If hostile or skeptical readers know your recommendation at the beginning of a report, they are likely to mentally counter your reasons as they read and to not read your persuasive support with an open mind. Using the indirect order places your recommendations and conclusions last, with the facts and reasons first—thus making it more likely that a skeptical audience will read with an open mind. In both approaches you support your recommendations with objective data and sound reasons (not personal opinion); the difference is whether the recommendations precede the evidence and reasons (direct order) or whether the recommendations follow the evidence and reasons (indirect order).

But no matter what type of report you are writing (informative or analytical) or whether or not the audience is receptive, the heart of any report is made up of factual information. To report means to present facts. So be sure that you clearly present and explain the relevance of the data that you collected. And be sure that all conclusions and recommendations are fully supported by data presented in the report.

The following generic outline illustrates how to focus on recommendations by using the direct approach.

**Model Outline for Reports that Support Recommendations  
Direct Approach for Receptive Audience   
Introduction**  
Why we need to do something  
The benefits gained by following my suggestions (briefly)

**Recommendation(s)**

1. First recommendation
2. Second recommendation (if there is another)

(Do not support the recommendations in this section; support them in the Analysis/Justification section below. Just announce your recommendation(s) in this very brief section.)

**Analysis/Justification**

1. First Recommendation
   1. Reason One stated as topic sentence of paragraph or section Support with evidence and explanation of its relevance
   2. Reason Two stated as topic sentence of paragraph or section Support with evidence and explanation of its relevance
   3. Reason Three stated as topic sentence of paragraph or section Support with evidence and explanation of its relevance
2. Next recommendation
   1. Reason One stated as topic sentence of paragraph or section (continue as before)

**Conclusion**  
By doing what I recommend, we can ...

If resistant or hostile readers know your recommendations at the beginning of your report, they might mentally counter your evidence and reasons as they read. For such readers the indirect order is more effective because you present your evidence and reasons first before disclosing your possibly controversial recommendation.

The outline below illustrates how to arrange a report for a skeptical or hostile audience.

**Model Outline for Reports that Support Recommendations  
Indirect Approach for Skeptical or Hostile Audience  
Introduction**  
Why we need to do something  
The important things to consider (briefly)

**Analysis/Justification**

1. First issue/problem or set of facts and reasons to consider in deciding what to do  
   Discuss implications and relevance
2. Second issue/problem or set of facts and reasons to consider in deciding what to do  
   Discuss implications and relevance
3. Third issue/problem or set of facts and reasons to consider in deciding what to do

Discuss implications and relevance

—and so on

**Recommendation(s)**

1. First recommendation

Briefly explain how your recommendation is supported by the facts and reasons already presented

1. Second recommendation (if there is another)

Briefly explain how your recommendation is supported by the facts and reasons already presented

**Conclusion**  
By doing what I recommend, we can ...

The textbook presents variations on these basic models, depending on the purpose, audience, and workplace context of the report or proposal.

**IV. Conducting Research**

To optimize the positive results of good research practices, follow these steps:

1. **Confirm your Topic:** You may not always have control over this step, as your task may be assigned to you with little leeway for any adjustments. If you are working from an assigned topic, make certain you meet with the person assigning the task. Discuss your topic with your instructor to ensure that you understand what is expected of you, and that your topic meets the requirements of the assignment.
2. **Plan Your Strategy:** Too often writers jump in and begin random searches without a clear plan in mind. The Internet and online libraries provide vast resources, some of which are good references and others which definitely are not. Your goal is to find the best sources possible, which can be done through careful planning and decision-making. The UMUC library has a helpful tutorial on the research process titled [Secrets of My Research Success](https://www.umuc.edu/library/libhow/research_tutorial.cfm). As part of this module, please complete the tutorial.
3. **Evaluate Your Sources:** For your report to have credibility and validity, your sources must be good ones. Examine sources for currency and bias. Web sites designed to sell products are not going to have the same validity as a college or university Web site, or a research organization's site. Wikipedia, although popular among students, is not an acceptable academic resource and may not be used as a reference source in any college or university course.

The opinions of experts (also called authorities) can be invaluable. These people have unique knowledge on the subject and their support lends believability to the author's point. For instance, in a paper on why smoking is unhealthy, the U.S. Surgeon General and the chairs of either the American Lung Association or the American Cancer Association would be strong authorities. Their authority comes from their professional experience. People become authorities for different reasons. They may have academic or professional training and experience, or they may also be people with extensive personal experience. Another authority on this topic might be a lifelong smoker who now has extensive health problems.

**V. Integration of Source Materials**

Integrating sources in your report is the next step and requires careful consideration of your audience and purpose. You must now decide which sources best support your position, and how to integrate that source material into your paper. You can quote directly from the source, paraphrase the source, or summarize its content—but whichever you choose, be sure to cite that source within the text of your paper at the spot where you use it. Source placement within your writing is important, as you do not want your sources to dominate your paper, nor do you want only your ideas presented. Your sources validate the arguments or positions you are presenting.

**VI. Resource Documentation**

In this course we use the American Psychological Association (APA) documentation format to cite sources. It is critical that you cite your sources properly within the text of your paper to ensure credit is given where credit is due. Adhering to the rules of academic integrity is one of your responsibilities both as a student and as a professional. In the bibliography at the end of your paper, by using the correct format you will build a reputation as a writer who pays attention to detail; making mistakes in the format builds a reputation for being sloppy and undermines your credibility. The Effective Writing Center at UMUC provides exemplary resources for citing sources according to APA format. After you have completed the APA Tutorial, test your knowledge with the practice activity below. This is not a graded exercise, but simply an opportunity for you to practice documentation of your sources. It is critical you take the time to review this process to ensure you are meeting your obligations as a writer.

**VII. Visual Aid Design**

Visuals—whether graphs, charts, diagrams, or pictures—are very strong communicators of the messages within reports. Not only do visuals add interest to a report, they also communicate important information. They communicate the relative size of numbers, indicate trends, dramatize reasons, and persuade readers. Decide where the report needs visual support, and then decide which type of visual (graph, table, chart, diagram, or picture) will provide that support. Design visuals to emphasize key points and communicate essential information. By following the advice in your textbook, you can produce sophisticated visuals that not only enhance your reports but also communicate persuasive information.

**VIII. Summary Comments**

This brief treatment of report writing demonstrates the scope and variety of documents that fall into this category. We continue stressing purpose, audience, and context to help guide the writing of business documents. All three will play critical roles in designing and drafting professional reports.

**IX. Questions to Consider**

Now that you have completed this module, consider the following questions and be prepared to discuss them in a conference:

* How can your written reports influence your professional success?
* Why are unsolicited proposals more challenging to write than solicited proposals?
* If your report includes only factual information, is it objective? Why or why not?

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