

# 2017 Report Formatting Guide

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Revised 8/26/16

(replaces the 2016 Report Formatting Guide)

This Formatting Guide should be used in conjunction with the following documents, which are available at [nysERDA.ny.gov/Doing-Business-with-NYSERDA](http://nysERDA.ny.gov/Doing-Business-with-NYSERDA):

- 2017 NYSERDA Report Content Guide
- 2017 NYSERDA Marketing’s Template for Reports (including example)

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# 1 General Information

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This template is intended for reports and other deliverables. It is not required for proposals.

Please follow the instructions outlined in this document unless your contract specifies otherwise. In general:

- The first reference to NYSERDA in the text of the document should read “the New York State Energy Research and Development Authority (NYSERDA).” Subsequent references should read simply “NYSERDA” and not “the NYSERDA.”
- On the first reference to New York State, use “New York State;” for subsequent references, use “the State.”
- Acronyms and abbreviations must be spelled out and followed by the acronym or abbreviation in parentheses on first use.
- Avoid half-page or one-sentence paragraphs.
- Use one space after all punctuation including periods at the ends of sentences.
- Do not use contractions.
- Avoid using “we” or “I” aside from Acknowledgements.
- The report title and headings should be capitalized following title casing or AP Style, e.g., Basic Organization of a Report.
- All bulleted items (generally 3-10 bullets) or items in a numbered list start with a capital letter and end with a period (everything from one word to full sentences.)
- Do not hyperlink websites.
- Use the following format to refer to reports published by NYSERDA:

New York State Energy Research and Development Authority (NYSERDA). Year of publication. “Title of Report,” NYSERDA Report xx-yy. Prepared by organization, company or individual names and city/state location (optional). [nysesda.ny.gov/publications](http://nysesda.ny.gov/publications)

## 2 Basic Organization of a Report

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Consult the 2016 NYSERDA Report Content Guide at [nysesda.ny.gov](http://nysesda.ny.gov) for information on elements to include in reports including title page, Notice language, figures and tables etc.

## 3 Using Styles to Add Structure

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In Microsoft Word 2013, the “Styles” group is found on the “Home” Tab. To change the style of a section of text, simply select the text and click on the appropriate style. In addition to making appearance of the document consistent, “Styles” help in creating automatic a Table of Contents, bookmarks, and tags when Word files are converted to PDF documents.

MS Word has built-in “Heading” styles. They are called Heading 1, Heading 2, etc., and they are used in the report. A writer would use the “Heading” styles to indicate major headings in a document. For example, use Heading 1 in the Report Template to indicate a top-level heading. If there is a subheading for Heading 1, use Heading 2. If there is a subheading for Heading 2, use Heading 3, and so on to Heading 4. Structurally, the headings should be used in order. For example, authors, editors, and formatters should not use Heading 1, then Heading 3 simply because they like the way Heading 3 looks.

The “Body Text” style can be used to format the text in the body of the document.

The “List Bullet” style can be used when order does not matter in a list of three items or more. If the order of the list items matters, use the “List Number” style instead. Do not use the buttons on the ribbon under the Home tab to indicate a numbered or bulleted list. The “Body Before List” style should be applied to the line of text before the list that introduces the list.

## 4 List of NYSERDA Template Styles

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This section describes each style used in the Report Template, its name in the Report Template, and gives an example of how the style looks. These styles are the only ones that should be used; additional default styles in the Report Template cannot be removed. The Report Template styles should be used as-is and not modified. To see if the styles have been applied properly to a document, set up the Style Pane in Word 2007.

1. Click File under the ribbon.
2. Click Word Options, and click Advanced.
3. Under Display, type in 1.75 for the width of style pane.
4. Click ok.
5. In the document, under the View tab, click on Draft and the styles should appear in a panel on the left side. (Note: The style pane will not appear in other view modes such a Print Layout. Footers, for example, are only visible in Print Layout view.)

6. Once a style is properly applied, it will appear in the Style Pane. Only one style should be applied per line of text.

Notes:

- Do NOT format with Track Changes turned on or with Track Changes in a document.
- Format Painter is not the proper way to apply styles. Styles must be applied by putting the cursor on the line that needs a style and clicking that style within the Styles box.
- All styles are based on Times New Roman and Arial fonts.
- All styles are set to black color font (not automatic).
- You may have to modify the Normal style to be Arial 11 pt black for the template to work properly.
- Use title case (i.e., Saving the Environment) for all headings, which follows AP Style.
- Figures and Tables
  - Each figure and table is numbered sequentially, not Figure 1a, Figure 1b etc.
  - Write Figure 1, not Fig.1
  - Figures and tables should have a title and only use a caption to explain extra info.
  - The titles appear in the figures and table lists; the captions do not.
  - Figure title and caption appears above the figure.
  - Table title and caption appear above the table.
  - Figures in Executive Summary start with Figure ES-1, even if the exact figure is reused later in the main text. (Sometimes the Executive Summary becomes a stand-alone document.)
  - Figure and table lists are needed if a total of three or more figures and tables.

The following list contains the acceptable styles for the 2015 Report Template. Styles are arranged in alphabetical order.

**A&A**

Bibliography,References (note the spacing after this line is correct for the style)

Body before List (style to be used before the introductory phrase with a colon:)

Body Text

Caption for Figure.Table.Photo

Footnote Reference (That says Footnote Reference and it is for the number or letter associated with a footnote)

Footnote Text

# **1 Heading 1**

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(Heading 1 is set up to start on a new page)

# Heading 1 No Number

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## 1.1 Heading 2

### Heading 2 No Number—(only for Summary and Appendices)

#### 1.1.1 Heading 3

##### Heading 3 No Number—(only for Summary and Appendices)

###### 1.1.1.1 *Heading 4*

Hyperlink

- List Bullet
  - List Bullet 2
- 1. List Number
  - 1. List Number before Bullet 2

Normal (this style should not be applied but may appear for page breaks)

Page number style

*Source for Fig.Table.Photo*

**Table Header (centered in cells)**

Table of Authorities

Table of Figures

Table Text (centered in the cells)

**Title for Figure.Table.Photo**

**TOC 1 (1.1 Heading 1)—All level 1 headings i.e., Heading 1 and Heading 1 No Numbers**

TOC 2 (1.1 Heading 2)

TOC 3 (1.1.1 Heading 3)

TOC 4 (1.1.1.1 Heading 4)

# TOC Heading

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