

# Resource Guide

**How to Use the Technical Report Template**

**February 2026**



**NYSERDA**  
New York State Energy Research  
and Development Authority

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# Introduction

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This Resource Guide: How to Use the Technical Report Template explains how to prepare technical reports using the NYSERDA Report Template. It provides the document structure and formatting guidelines to use when creating a report for the New York State Energy Research and Development Authority (NYSERDA).

Read this guide to learn how to obtain the correct template for a NYSERDA report, how to set up helpful MS Word document formatting options, and how to use the template features to produce high-quality, consistent and accessible reports for NYSERDA.

**Note:** For experienced template users, there is quick reference list of requirements on the following page. (“Quick Checklist for Report Writers & Preparers”). For those without template experience, follow this guide.

## About the NYSERDA Report Template

The NYSERDA report template is a MS Word document shell that contains a set of pre-formatted content elements.. The template enables reports to be created with consistent design, layout, and formatting features that include styles, text, headers and footers, tables, and more.

**Note:** MS Word 2013 or later is required.

## Downloading the NYSERDA Report Template

Download the template. Save it to the same computer where you plan to create the report document (e.g., local computer, network directory folder, virtual computer, OneDrive, etc.).

Template Use	Template File Name	Download Location
Research and Technical Reports	NYSERDA Technical Report Template V1 (2026).dotx	<a href="https://nysesda.ny.gov/Doing-Business-with-NYSERDA/NYSERDA_Technical_Report_Template_V1_(2026).dotx">nysesda.ny.gov/Doing-Business-with-NYSERDA/NYSERDA_Technical_Report_Template_V1_(2026).dotx</a>

# Quick Checklist for Report Writers and Preparers

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Use this checklist to ensure the report has the correct components and to ensure the report is clear, consistent, and accessible

## Front Matter

- Include title page (authors, affiliations, dates, report ID).
- Add Record of Revisions (if required).
- Include Abstract.
- Include Keywords.
- Include Acknowledgments (if desired).
- Include Preferred Citation.
- Compile a complete Acronyms and Abbreviations list.

## Body Matter (Main Text)

- Include Summary or Executive Summary.
- Apply template formatting using Styles, maintain heading hierarchy (H1, H2, H3, etc.).
- Spell out all abbreviations and acronyms on first use, use abbreviations and acronyms consistently.
- Tables, Figures, and Images
  - ✓ Reference each table, figure, and image in the text.
  - ✓ Create tables in Word or Excel; avoid merged cells and multiple header rows.
  - ✓ Number all tables and figures sequentially (avoid multiple images in one figure, labeling a, b, c, etc.).
  - ✓ Shorten long titles by moving explanatory text to captions.
  - ✓ Ensure figures and images are hi-res (300 dpi+).
  - ✓ Include source credits, if needed (author-date).
- Number equations, examples, and case studies consistently.
- Cite all sources consistently using author-date (Chicago) style.
- Verify units, data, and statistics for accuracy, internal consistency, and correct citation.
- Citations: Footnotes should be used sparingly and only for brief information.

## Consistency & Technical Terms

- Use consistent word choices (avoid multiple terms for the same concept).
- Standardize style (hyphenation, capitalization, abbreviations, units).
- Avoid jargon and gendered language.
- Verify all cross-references (e.g., "See Section 4.2").
- Use global search/replace to check consistency.
- Check grammar and punctuation throughout for clarity and professionalism.
- Ensure paragraph structure supports readability (clear sentences, logical flow, avoid overly long sentences).

- Review for plain language and readability.
- Confirm consistent use of tense, voice, and number style.

## **Back Matter**

- Include only cited works in References; place all other materials in Secondary References.
- Alphabetize the reference list by author; for multiple words by the same author, list them from earliest to latest.
- Verify URLs and DOIs; add access dates.
- Label appendices clearly (Appendix A, B, ...) and update cross-references.
- Previously published material should be unchanged from previous publication. Include as added pages in the pdf.
- Consult the sample report if unsure about the formatting of references.

## **Final Pre-Submission Steps**

- Run Microsoft Editor for spelling and grammar. Use "Document stats" to review/reduce passive sentences.
- Run Accessibility Checker (Click "Review," "Check Accessibility").
- Ensure color contrast meets accessibility standards.
- Use noncolor cues in figures that rely on color (labels, patterns).
- Remove comments, tracked changes, and placeholder text.
- Ensure that all endnotes/footnotes include descriptive text to accompany a URL.

# Getting Started

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This section explains how to start a new report document and how to customize your MS Word Options settings. Customizing settings first makes report prep easier.

## Starting a New Report

Start a new NYSERDA report document based on the applicable NYSERDA report template file (see “Downloading the NYSERDA Report Template”).

The report template file ends with a “.dotx” file extension, which indicates it’s a template. Double-click the template file to start a new document based on the selected template.

Immediately save the new document using established report file naming conventions.

## Updating a Report from a Previous Year

If the report is an update from a previous year, either use the version in your archive or if produced by NYSERDA Marketing, request the most recent version.

## Setting Microsoft Word Options

This section explains how to set certain MS Word options to the recommended settings for high-quality reports. MS Word Options provide a variety of settings to help improve the report writing experience when using templates. The Word Options menu has a group of settings that control features such as Autocorrect, Save, Proofing, and Document Accessibility. These features can impact the usability of templates and therefore, it’s important to review these options and adjust if needed before starting work on a NYSERDA report or when applying a NYSERDA report template to an existing document.

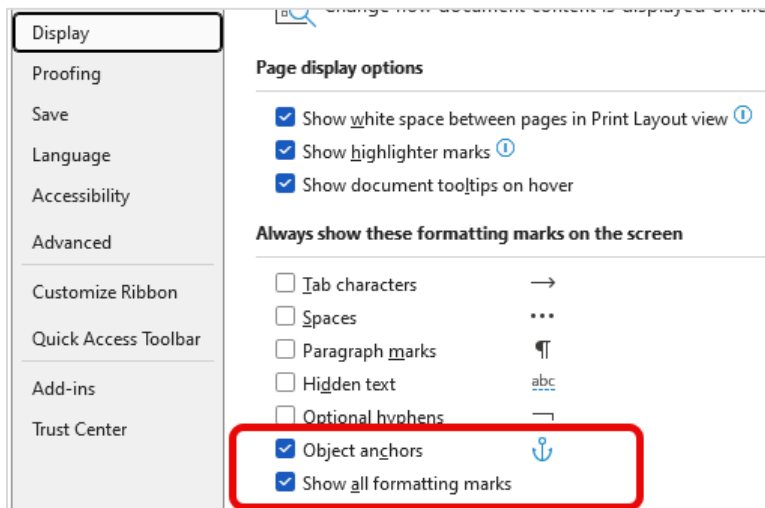
**Note:** Some MS Word settings apply on a per-document basis and may need to be set for each document.

## Display Options

In addition to default options already selected, you can select the following settings to help view hidden formatting when working on documents in MS Word. If desired, change the following optional Display settings on the Word Options screen.

1. Select **File > Options > Display**.

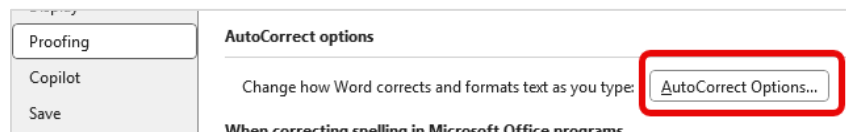
- **Object anchors:** (OPTIONAL) Displays a small anchor icon in the document margin to show which paragraph a floating picture, text box, or table is attached to. This helps by showing if an item on a page has been locked to make sure it stays close to specific text.
- **Show all formatting marks:** (OPTIONAL) Allows you to permanently display non-printing characters—such as spaces, tab marks, and paragraph marks—regardless of whether the "Show/Hide" button on the Home tab is turned on. This option helps to provide better control over document layout.



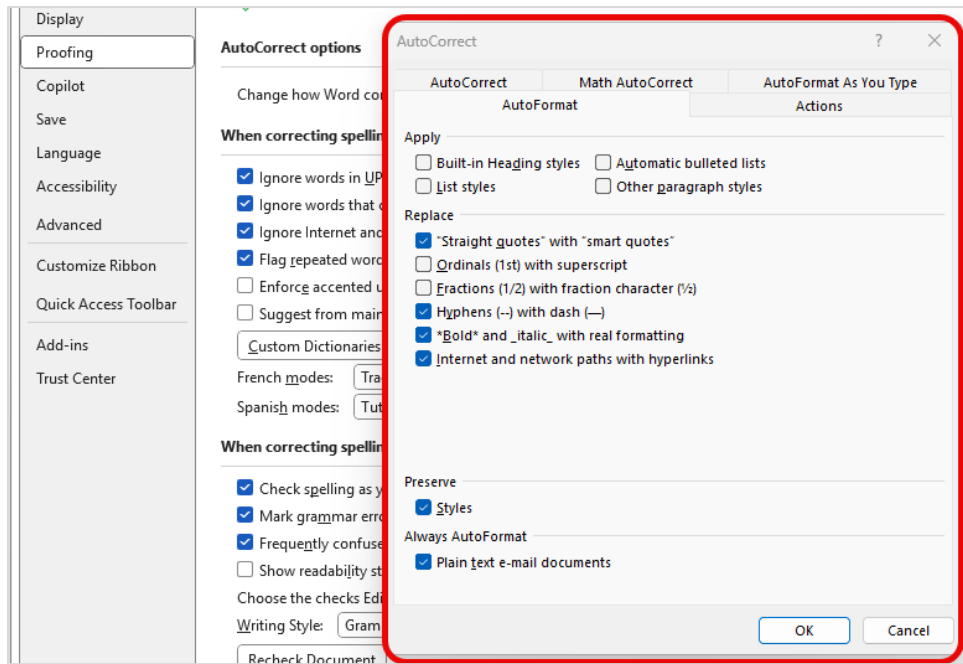
## Autoformatting Options

MS Word's autoformatting settings can conflict with the styles set up in the NYSERDA report template. Change the following Proofing settings on the Word Options screen.

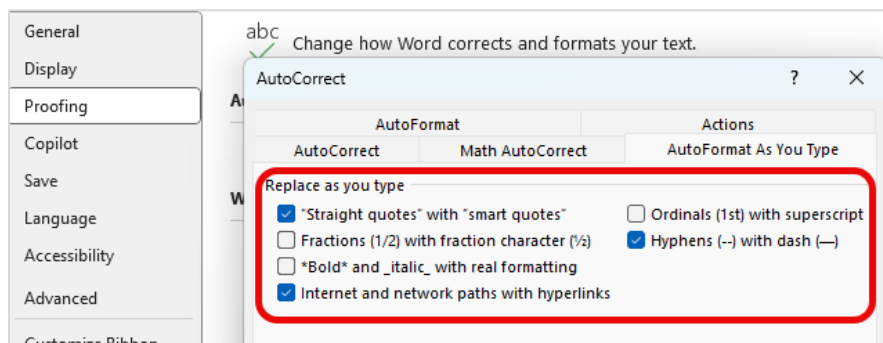
1. Select **File > Options > Proofing**.
1. Click **AutoCorrect Options**.



2. On the AutoFormat tab, ensure only the following settings are checked:
  - "Straight quotes" with "smart quotes"
  - Hyphens (--) with dash (—)
  - Bold\* and *\_italic\_* with real formatting
  - Internet and network paths with hyperlinks
  - Styles
  - Plain text e-mail documents



3. On the AutoFormat As You Type tab, ensure ONLY the following settings are checked and clear the other options on this tab if they are currently checked.
  - "Straight quotes" with "smart quotes"
  - Hyphens (--) with dash (—)
  - Internet and network paths with hyperlinks

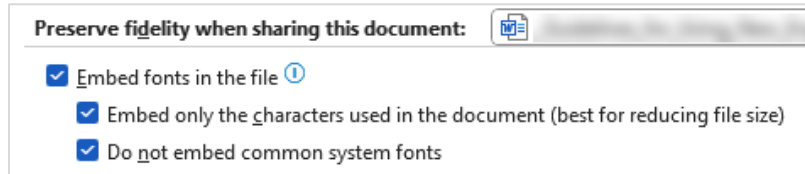


## Save Options

1. Select **File > Options > Save**.

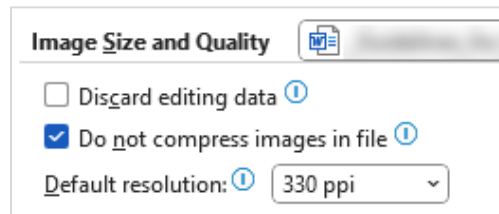
The Word Options dialog box displays.

2. Select the following options:
  - Embed fonts
  - Embed only the characters used in the document (best for reducing file size)



3. Click **Advanced**.
4. Under the Image Size and Quality area, click **Do not compress images in files**.

**Note:** This setting stops image compression, which can help keep graphics looking better. However, if you already saved a document with image compression, changing these settings won't reverse the compression. In this situation, you would need to choose this setting and then re-paste the image(s) into the document.



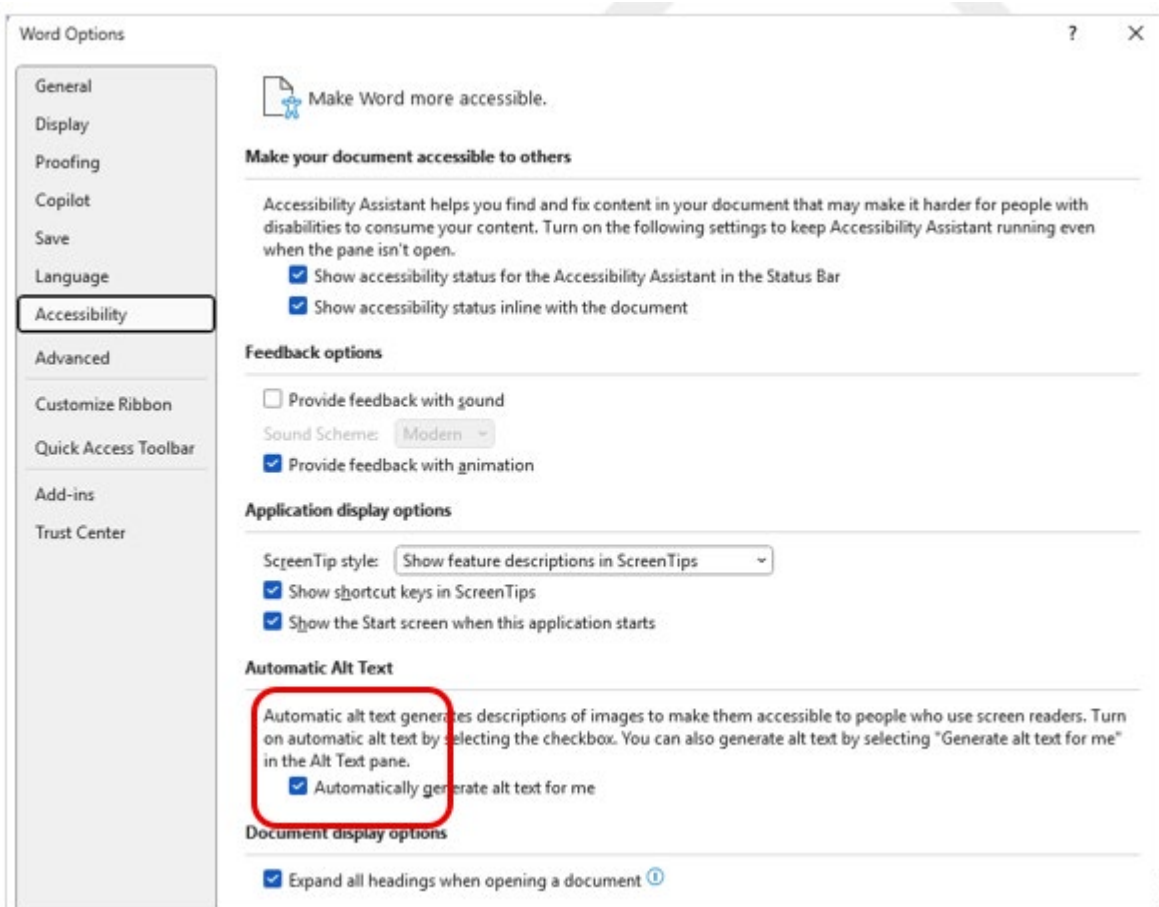
## Document Accessibility Options

The NYSERDA Report Template was designed with Section 508 Accessibility compliance guidelines in mind. The template layout, choice of text fonts, colors, and style settings use best practices to support many accessibility features. However, it's important to be aware of some common best practices to make reports more accessible:

- Use the Accessibility Checker tool in MS Word to analyze the report content for possible accessibility issues. On the MS Ribbon, click the Review > Check Accessibility to run the tool. **Note:** This tool does not check for all accessibility issues.
- Use the headings and styles that come with the template to organize your content in a way that makes sense.
- Write sentences in clear and easy to understand language when possible.

- Ensure figure text is legible and that the font point size is no smaller than 8 pts.
- Add alternative text (Alt Text) to images, figures and tables.
- Create simple tables that do not have merged cells or multiple table header rows.
- Refrain from using color as the only way to convey meaning when creating tables or figures.
- Review the Accessibility Options under File > Options > Accessibility to understand what Accessibility features are available in MS Word.

**Note:** Uncheck the “Automatically generate alt text for me” option in the Word options dialog box to avoid misleading alternative text. When “Automatically generate alt text for me” is selected, MS Word adds generic descriptions for each figure that are rarely accurate, and are not helpful or meaningful to people who rely on screen readers to understand the information.

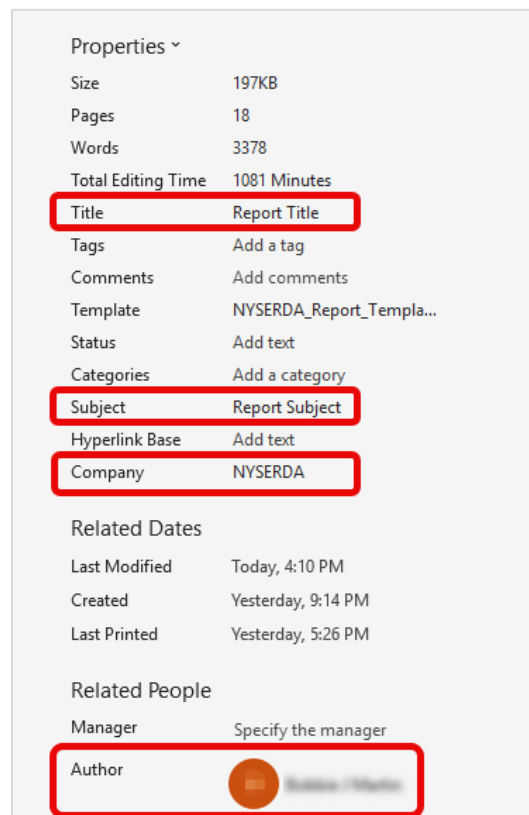


## Advanced Document Properties

When starting a new report or applying a NYSERDA report template to an existing document, ensure the following document properties are updated to follow [Section 508 Accessibility](#) best practices—Title, Subject, Company, and Author.

### To update the document properties:

1. From the MS Word Ribbon Menu, click **File > Info > Properties > Show All Properties**. The Properties section displays.



2. Complete the following properties and then save the document:
  - **Title:** Type the Report Title.
  - **Subject:** Type the main subject of the report.
  - **Company:** Type your organization's name, depending on the terms of your contract.
  - **Author:** NYSERDA

## Report Outline Structure

This section lists the required and recommended sections of a NYSERDA report organized by the order they show in the template. See also the “Quick Checklist for Report Writers and Preparers” on page 2 for more details about what is required in a report being prepared for NYSERDA.

**Note:** The NYSERDA Report Template uses numbered headings for its main and sub-level topics.

### Front Matter

- Record of Revision (when required)
- Title page
- Notice
- Preferred Citation (optional)
- Abstract (required for accessibility and searchability).
- Keywords (required for searchability).
- Acknowledgments (optional).
- Table of Contents (required; use the existing automated Table of Contents in the NYSERDA Report Template.)
- List of Figures (required if three or more figures [e.g., charts, photos, diagrams, etc.] are used)
- List of Tables (required if three or more tables are used)
- Abbreviations and Acronyms (required)
- Definitions (optional)

### Report Body

- Executive Summary or Summary
- Main Report Body
- References Cited and Bibliography information

### Back Matter

- Appendices (optional)

## Other Report Elements

- Copyright information for intellectual property (i.e., images, figures, tables or large pieces of text that have been previously published)—include written permission from the copyright holder at the end of the document and use appropriate language in the captions of the images, figures and tables such as “Reprinted with permission from [publisher’s name].”
- Alternative text that describes each image and figure (include Alt text for tables that are included as images)—and does not just repeat the title or caption. The alt text may be inserted into the document using the Alt text panel or provided in a separate file. (See Appendix C, “Best Practices to Make Word Documents Accessible” for more information.)

# Understanding Template Styles

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You can easily change the appearance of text, tables, and lists in your document by applying a style, which is a group of content formatting properties. Applying styles helps to structure content while maintaining consistency when working on lengthy reports. Styles also support the Table of Contents and contribute to document accessibility.

The NYSERDA Report Template uses a collection of pre-defined MS Word Styles to control how the report content should look. The following broad categories of styles are used:

- Paragraph Style—Affects the look of an entire paragraph and uses the following indicator in the Styles Pane (¶).
- Character Style—Affects the look of selected text within a paragraph and uses the following indicator in the Styles Pane (a).
- Linked Style—Affects the look of an entire paragraph or selected text within a paragraph. This type of MS Word style acts as both a paragraph and character style and uses the following indicator in the Styles Pane (¶a).
- List Style—Affects the look of bulleted and numbered lists.
- Figure Styles—Affects the look and layout of figure titles and captions
- Table Styles—Affects the look and layout of a table.

**Note:** Appendix B shows a full list of styles defined in the NYSERDA Report Template.

## Heading Styles

The NYSERDA Report Template has a pre-defined set of heading styles to apply to different parts of the document for format consistency throughout the report. Applying heading levels to a report ensures the section headings and subheadings appear in the Table of Contents and helps readers who need to navigate the report pages using assistive technology.

The Front Matter sections (before the main report body), such as Notice and Abstract, use unnumbered headings (i.e., Heading 1 No Number).

In the main body of the report, the Main Topic heading of each section uses numbered *Heading 1* style. Subtopic headings use *Heading 2* through *Heading 4* styles. Headings should not be stacked; instead, it is recommended to include text beneath each heading. Even adding one or two introductory sentences is helpful.

**Note:** The Heading 5 style is an unnumbered style that may be used sparingly if content under Heading 4 requires additional separation. Heading styles must be applied in a logical sequence, you cannot jump from a level 2 heading to a level 4 or 5 heading without using level 3 headings first. Do not apply heading styles beyond Heading 5. (Heading 7 through 9 styles are reserved for Appendix-related headings.)

## Body Text Style

Most paragraphs of text in a report use the “*Body Text*” style. In the NYSERDA Report Template, the gray text fields already have Body Text style applied; click in a gray text field to start typing.

Furthermore, if the body text prefaces a bulleted or numbered list, use the “*Body Text (before a list)*” style.

## Bulleted List and Numbered List Styles

The following styles are used to format text as bullet or numbered lists.

- This is *List Bullet* style.

1. This is *List Number* style.

This is *List Continue* style to use when there is a need for unnumbered text after a list number item.

2. This is *List Number* style.

- This is *List Bullet 2* style.

This is *List Continue 2* style to use when there is a need for unbulleted text after a list bullet item.

To restart a numbered list, right-click the numbered list item and select **Restart at 1**.

1. This is *List Number* restarted at 1.

2. This is *List Number* style.

- This is *List Bullet 2* style.

- This is *List Bullet 3* style.

## Other Commonly Used Styles

**Note:** Highlighting and using the **Bold** (B) or *Italics* (I) buttons on the MS Ribbon are not effective in creating accessibility tags; instead, use the Strong or Emphasis character styles to modify text.

- *Emphasis*: Character styles for *italicizing* (Emphasis) selected text.
- **Strong**: Character styles for **bolding** (Strong) selected text.
- Hyperlink: Character style for underlining text with hyperlinks.

## Applying Template Styles

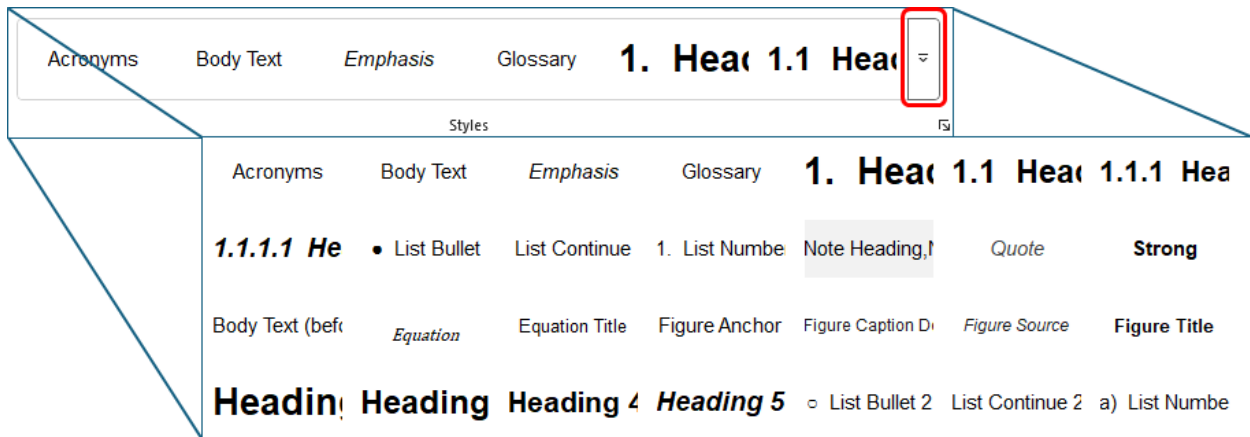
Use the Quick Styles Gallery or the Styles Pane to apply styles to different pieces of content in the report.

### Applying Styles with the Quick Styles Gallery

The Quick Styles gallery is set up to show the most used styles in the NYSERDA Report template. It's easier and faster to apply styles this way.

**To apply styles using the Quick Styles gallery:**

1. Select the content (text or paragraph) where you want to apply a style.
2. From the MS Word Home tab, click the Quick Styles Gallery drop-down list.



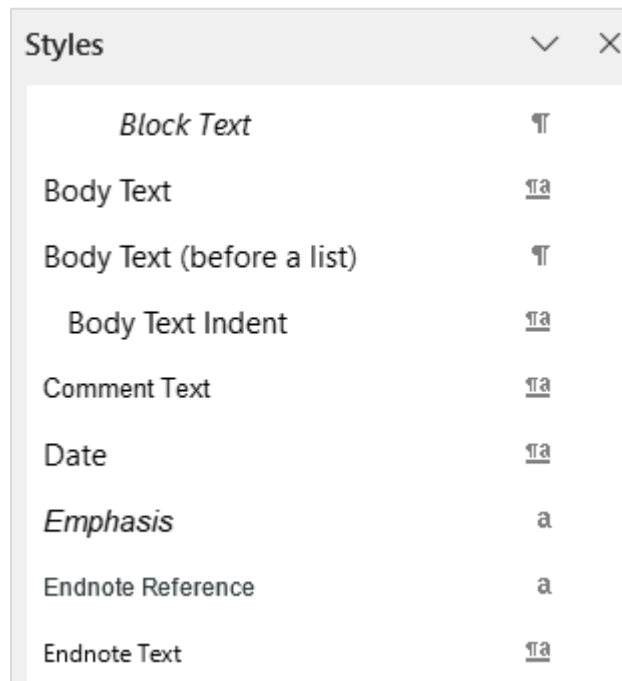
3. In the Quick Styles gallery, click the applicable style to apply.  
The selected content changes to match the applied style.

## Applying Styles with the Styles Pane

The Styles pane shows all the styles that are available for use in the template. Use the Styles pane instead of the Quick Styles gallery if you want access to all the styles or when you want to apply a style that isn't used very often.

### To apply paragraph or character styles using the Styles pane:

1. From the MS Word Home tab, click the Styles Pane drop-down list.



The Styles pane shows on the left or right side of the screen, depending on how MS Word is configured. The pane can be moved around (floating) or docked for convenience.

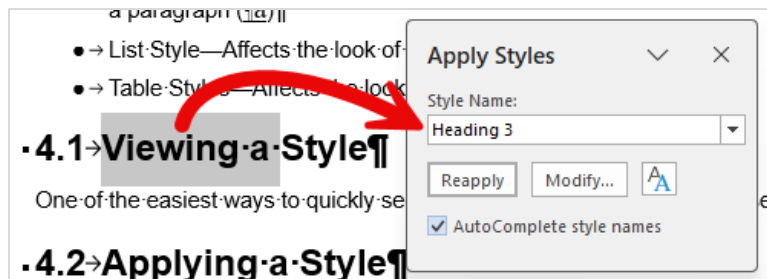
**Note:** To preview how each style looks, select the **Show Preview** check box on the Styles pane.

2. Select the content where you want to apply a style.
3. In the Styles pane, click the style to apply.
4. The selected content changes to match the applied style.

**TIP:** When applying paragraph styles (¶), you don't need to select the entire paragraph. Simply place the cursor within the paragraph and select the style. The style will apply from the beginning of the paragraph to the next hard return (¶). Character styles (a) require content selection prior to being applied. When applying styles to selected content, any intentional content modifications (sub script, super script, italic, etc.) will be overridden by the new style

## Viewing Applied Styles

One of the easiest ways to quickly see what style is currently applied to text in your report document is to click on the text and then press Ctrl + Shift + S.



Using this feature helps to figure out what styles to apply to new content or content pasted from an external source that has to be reformatted to use the NYSERDA Report template styles.

# Working with Figures, Equations, and Tables

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This section contains example document elements such as figures, tables, and equations as well as figure/equation/table titles that are already configured with the proper auto-numbered fields. To keep the format of the document consistent, you should copy an example element set from this section and paste it where you want it in the document. Then, make any necessary changes to the content.

**TIP:** Keep this section in your report document until the writing phase is complete so that you can copy and paste sample elements as needed. Delete the sample content in the template when it is no longer needed.

For example, in Figure 1, copy the example figure title, figure caption description, figure source, and the figure itself, then paste in the desired insertion point in the document and change the text and figure accordingly. Doing so keeps you from having to reapply styles every time you need to add a figure or table to the report.

This sentence provides an example of an inserted endnote or footnote so that the accompanying example text shows at the end of the document for footnotes, and the end of the page for footnotes.<sup>1</sup>

**TIP:** To update the numbering of all auto-numbered fields in a report document, press Ctrl + A to select entire document, then press F9 to update all sequential field entries (i.e., figure, table, and equation titles, TOC, LOF, LOT, cross-references, etc.). The auto-numbered fields will update to the correct sequential number.

## Example Figure-Related Styles

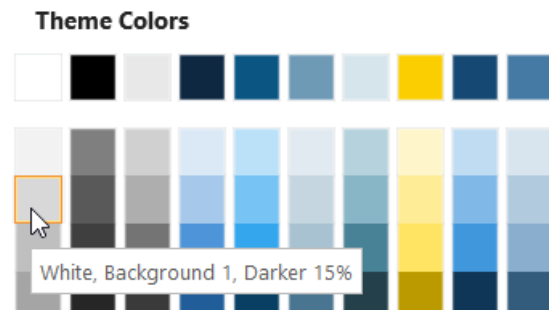
Figures with sequential numbering Figure 1, Figure 2, etc. are preferred. Use in-text cross-references to figures with only the figure label and number (i.e., Figure 1 shows). Additionally, provide Alternative Text to comply with ADA Accessibility requirements. Refer to ADA [Section 508 Standards](#) for the best way to represent data with reference to colors.

Copy and paste the below figure set where needed in the report and then modify the figure caption title, figure caption description, source, and the figure itself as needed. This helps ensure the correct styles are used for all figure elements.

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<sup>1</sup> This is what the Footnote Text style looks like when a footnote is used in the report. A footnote displays at the end of the page for the applicable footnote citation.

Figures should not have borders unless the figure is not easily distinguishable from the surrounding text. If a border is used, apply the following settings:



- Picture Border Color: White Background 1, Darker 15%
- Picture Border Line Weight: 3/4 pt

**Note:** Figure caption descriptions and are preferred but not mandatory for each figure. Figure source information is required any time the figure was created for a different document and reproduced in the current document.

### Figure 1. Sample Photo Figure

This is the *figure caption description* used to provide additional context for a figure. The figure example below has the *Figure Anchor* style applied, which provides more above and below space and left-aligns the figure. Apply the *Figure Anchor* style to any figures added to the report, including photos, charts, illustrations, etc.

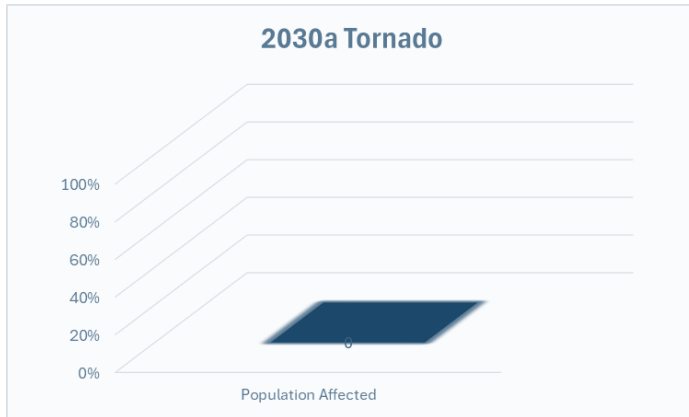
Source: State University (2024)



## Figure 2. Sample Chart Figure

This is the *figure caption description* used to provide additional context for a figure. Before publishing, ensure chart-like figures are added to the report as flattened images (all layers and sub components combined into a single ‘flat’ image). Figures need to be legible and include legends within the figure as necessary.

Source: Name (Date)



## Adding Alternative Text to a Figure

Alt text gives photos, graphs, charts, and other non-text figures clear, descriptive alternate text (alt text). Users with visual accessibility needs can utilize screen readers to see. Be sure to provide meaningful alt text that describes the figure completely. Visit [NYSERDA's website](#) for additional accessibility resources.

Alternative Text (Alt text) is a federal and State requirement for making documents accessible to individuals using assistive technology to read the document. It must be added to all images, figures, diagrams, charts, etc.

### To Add Alt Text to Figures:

5. Hover over image, right click, select **View alt text** from the menu.
6. An "Alt text" box will appear on the right side of the document.
7. Type a description into the box that adequately describes the visual.

## Example Equations

The NYSERDA Report template has equations and formulas centered on the page, with the equation sequence number included as an equation title on the same line and left aligned. New equations can be created by copying and pasting the below example Equation 1, then and customizing it in the new location.

**Note:** Ensure that the equation is not bold. Screen readers will read the bold, which can interfere with the equation flow.

Equation 1. 
$$a^2 + b^2 = c^2$$

If an equation or formula requires elements be defined, show the information in the following manner:

Equation 2. 
$$A = \pi r^2$$

where:

- A = the area of the circle
- $\pi$  (pi) = is a mathematical constant, approximately equal to 3.14159.
- R = the radius of the circle

## Example Tables

The tables used in NYSERDA reports are created with MS Word's built-in Table Grid style. Furthermore, the table header row is shaded a light blue color (RGB: 239, 246, 351 or Hex: #EFF6FB). The content in the tables have styles applied related to table text.

The example tables in the template and this document are simple and designed with ADA Section 508 Accessibility requirements in mind. The tables have only one table header row and no merged cells. Additionally, the table properties for each table are already set to "Repeat Header Row" and "Do not allow rows to break across pages."

See also: [Section 508 Accessibility Standards](#).

Copy and paste one of the sample table sets, then modify the table caption title, table caption description, table source, and the table itself, as needed. Each table requires its own table title, and uses automated, sequential table number fields (e.g., Table 1, Table 2, etc.).

**Note:** Table caption descriptions and are preferred but not mandatory for each table. table source information is required any time the table was created for a different document and reproduced in the current document.

**Table 1. Sample Table Showing Table-Related Styles**

This is the optional *table caption description* used to provide additional context for a table. This is the optional table caption description used to provide additional context for a table.

Source: Name (Date)

Table Heading Center	Table Heading Center	Table Heading Center	Table Heading Center
Table Text Left • Table Bullet • Table Bullet	Table Text Center	Table Text Center	Table Text Right
Table Text Left	Table Text Center	Table Text Center	Table Text Right
1. Table List Number 2. Table List Number 3. Table List Number	Table Text Center	Table Text Center	Table Text Right
Table Text Left	Table Text Center	Table Text Center	Table Text Right

**Tables Spanning Multiple Pages**

If a table spans across multiple pages, it is important for each page to show the table number so that the reader knows exactly which table they are viewing. To display the table number at the top of each continued page, separate the table into two or more tables as needed.

For each continued table, add a table header row and then copy and paste the following sample “table continued” title, which is set up to duplicate the table number from the previous page.

**Table 1. (continued)**

Table Heading Center	Table Heading Center	Table Heading Center	Table Heading Center
Table Text Center	Table Text Center	Table Text Center	Table Text Right
Table Text Center	Table Text Center	Table Text Center	—
Table Text Center	Table Text Center	Table Text Center	—

End of table.

**Note:** When a table needs to be continued on a new page, manually type the same table title number from the previous page. This way, the number shown in the “Table # (continued)” title matches the previous table.

## Table Notes

When table data requires additional explanatory information in the form of table notes, add a superscript letter at the end of the data. Under the table, apply the “Table Note” style to each note added. The Table Notes style is designed to change the appearance of table note text and applies alphabetic auto-numbering to each note as shown in the example Table 2.

### Table 2. Sample Table with Table Notes

This is an optional *table caption description* used to provide additional context for a table. The table caption description can also be used to add a general note that applies to the entire table. This is in contrast to using a superscript letter in combination with a Table Note (below) when a note applies only to specific content within a table.

Source: Name (Date)

Year	Weather Event	Population Affected
1950 <sup>a</sup>	Rain	35,000
1980	Hurricane	83,000
2010	Derecho	116,000
2030	Tornado	See note <sup>b</sup> .

<sup>a</sup>. This is an optional Table Note style used to provide additional context for superscripted “a” in the table content.

<sup>b</sup>. This is an optional Table Note style used to provide additional context for superscripted “b” in the table content.

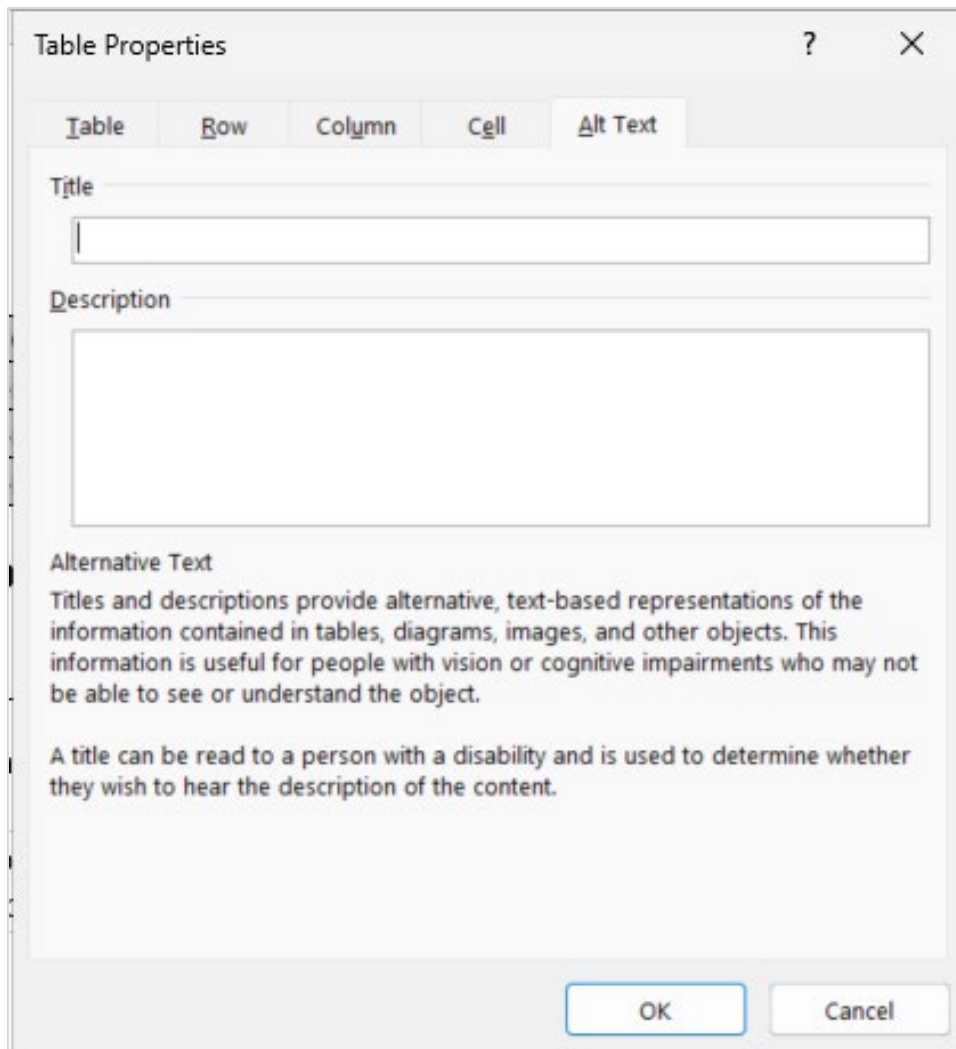
## Adding Alternative Text to a Table

Alternative text (Alt text) enables screen readers and other accessibility tools to recognize and read aloud tabular content for users with visual accessibility needs. Write descriptive, easy to read alt text for each table.

**Note:** Some accessibility checkers do not show alerts if a table is missing alt text. However, contrary to previous directives from NYSERDA, processes have changed with the updated Section 508 requirements, and now require alt text for tables in NYSERDA documents.

### To add alt text to a table:

1. Right-click on the desired table and select **Table Properties**.  
The Table Properties dialog box is displayed.
2. Click the **Alt Text** tab



3. In the Title field, type a brief, concise title for the table.
4. In the Description field, type a more detailed description of the table's purpose and content.
5. Click **OK** to save.

## Color Usage in Figures and Tables

NYSERDA follows New York State Brand Guidelines, which creates consistencies across all State agencies and authorities.<sup>2</sup> The NYSERDA Marketing team has the following general recommendations for use of colors in figures, charts, and graphs created for NYSERDA reports:

- Use high-contrast colors, legible text size, adequate negative space, and simple visual elements to convey a message.

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<sup>2</sup> New York State Brand Guide (2024).

- When possible, use the brand colors specified by NYSERDA.
- Use the following approved colors when creating figures for NYSERDA reports.

**Note:** The approved colors are for figures only. Do not use when creating tables.

Color	Hex Code
	#168D3C
	#0B5583
	#780000
	#B94F4F
	#DB6E00
	#8A4602
	#000000
	#7D7D7D
	#8B7FA0
	#0091FF

## Record of Revision

A record of revision documents changes made to a published document, detailing when the modifications occurred, what was altered, and on which page the changes are found. The record of Revision is required when changes are made to a previously published document, or when a serial publication is updated (quarterly reports, or annual reports providing status updates).

The Record of Revision should appear before the title page, and should be numbered as roman numeral i. Use *Heading 1 No Number* style for the title, and appropriate table styles for the body.



### Sidebar Topic Heading (half-page width)

A sidebar is a short topic description that is relevant to the main text but not part of the immediate content flow. Copy and paste this example sidebar where you want to use it in the

### Sidebar Topic Heading (full-page width)

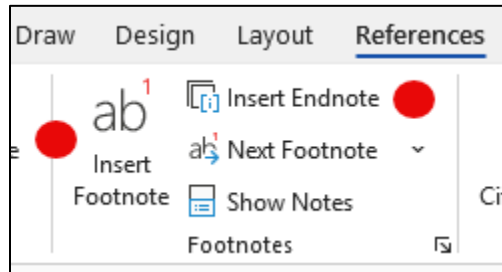
A sidebar is a short topic description that is relevant to the main text but not part of the immediate content flow. Copy and paste this example sidebar where you want to use it in the document and then modify the heading and text.

**Note:** you cannot format text around images within sidebars. All images will remain inline.

# Working with Footnotes and Endnotes

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Footnotes and endnotes have a numbered citation in superscript at the end of the referenced text, and a linked information statement at the bottom of the referenced page (for footnotes) or at the end of the document (for endnotes).



Endnotes are preferred when the footnotes at the bottom of a page extend beyond three or four lines of text.

## To insert a footnote:

1. Click at the end of the reference citation to which you want to add a footnote reference.
2. Click References > Insert Footnote.

MS Word inserts a footnote reference indicator and takes you to the footnote area near the bottom of the page to add more detailed information for the numbered footnote reference.

**Note:** To insert a footnote using a keyboard shortcut, press Ctrl + Alt + F.

## To insert an endnote:

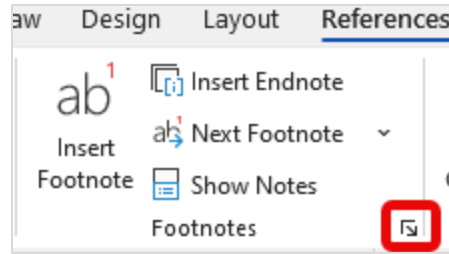
1. Click at the end of the reference citation to which you want to add an endnote reference.
2. Click References > Insert Endnote.

MS Word inserts an endnote reference indicator and takes you to the endnote area at the end of the document to add more detailed citation information for the numbered endnote reference.

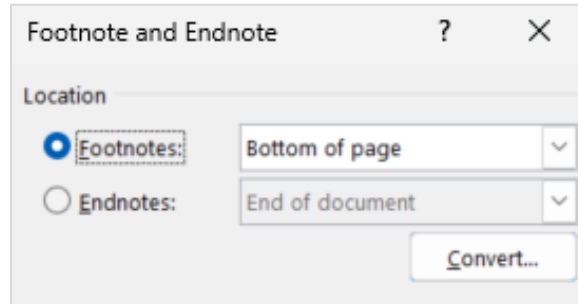
**Note:** To insert an endnote using a keyboard shortcut, press Ctrl + Alt + D.

## To convert footnotes to endnotes:

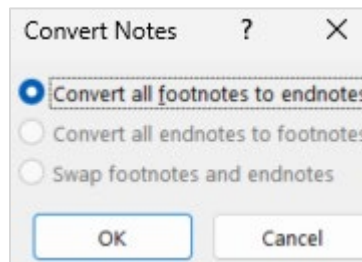
1. Select the **References** tab.
2. Open the Footnote/Endnote Dialog Box (click the small square in the bottom-right corner of the tab).



3. Select **Footnotes**.



4. Click **Convert**.



5. Select **Convert all footnotes to endnotes**, then click **OK**.

# Working with Citations and References

A References section is provided in the NYSERDA report template to add complete citations of cited works. NYSERDA's citation style is based on the *Chicago Manual of Style* (18th edition) and its Notes and Bibliography system as well as Marketing preferences. For more information, consult the [Chicago Manual Online: Chicago-Style Citation Quick Guide](#) under the Notes and Bibliography tab).

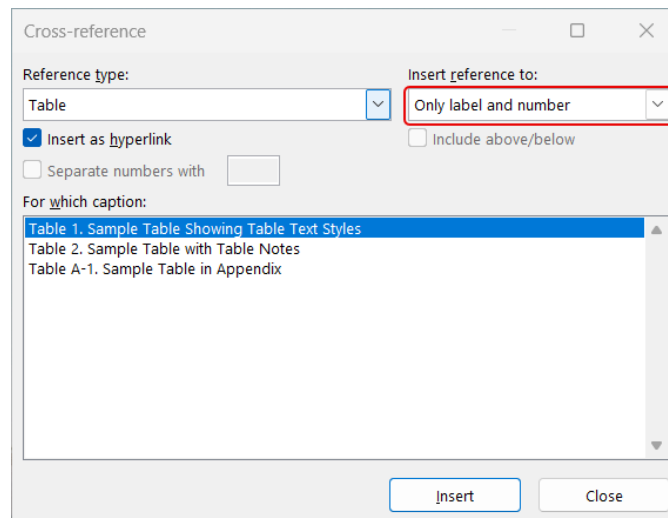
**Note:** See the example References list and the example Endnotes list in the NYSERDA Report template.

## Cross-References

In-text cross-references to figures and tables need to show only the label and number (e.g., Figure 2, Table 1).

To insert a cross-reference for a figure, equation, or table:

1. Click **Insert > Reference > Cross-Reference**.
2. Do one of the following:
  - For a figure cross reference, select Figure as the reference type and insert reference as Only label and number.
  - For a table cross reference, select Table as the reference type and insert reference as Only label and number.
  - For an equation cross reference, select Equation as the reference type and insert reference as Only label and number.



3. Select the corresponding figure, table, or equation you want to cross-reference from the list.
4. The resulting cross-reference shows in the document like the following examples:
  - As shown in Figure 2
  - Table A-1 contains a list of styles
  - The calculation in Equation 1 is used to determine

## References List

A formal acknowledgement is required for sources used in the report. These citations require inline author-year references and also a full citation in the reference list. Sources used to develop the content of the document, but are not cited for specific concepts or text should contain a full citation in the Other References section. In line citations are not required for this list.

Last Name, First Name. YYYY. *Title*. Source.

Microsoft. "Make your Word documents accessible to people with disabilities." Accessed August 10, 2025. [https://support.microsoft.com/en-us/office/make-your-word-documents-accessible-to-people-with-disabilities-d9bf3683-87ac-47ea-b91a-78dcacb3c66d#bkmk\\_textspacing\\_win](https://support.microsoft.com/en-us/office/make-your-word-documents-accessible-to-people-with-disabilities-d9bf3683-87ac-47ea-b91a-78dcacb3c66d#bkmk_textspacing_win)

New York State Climate Action Council. 2022. *New York State Climate Action Council Scoping Plan*. [www.climate.ny.gov/ScopingPlan](http://www.climate.ny.gov/ScopingPlan)

Organization Name. YYYY. *Publication Title*. Source.

State University. "All About Tornado Energy at State University." Accessed November 12, 2024. <https://www.stateuniv.edu/all-about-energy>.

Organization. "Website Page Title." Accessed [Date]. [URL](#).

# Submitting a Report to NYSERDA

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The information in this section is designed to assist contractors in submitting reports to NYSERDA.

## Report Submission Overview for Third-Party Contractors

Before submitting a report to NYSERDA, review the “Quick Checklist for Report Writers and Preparers” to ensure the report meets NYSERDA’s defined standards and guidelines.

When a report is ready for submission, email an electronic MS Word version of the draft report to the assigned NYSERDA project manager. The report must be an MS Word document with a “.doc” or “.docx” file format. Print drafts are not required.

**Note:** Do not submit an MS Word document that was converted from PDF format. Converting a document from PDF to MS Word introduces numerous formatting changes and oddities that make the document very difficult to work with effectively.

The contractor is responsible for addressing comments from NYSERDA and other stakeholders. When making corrections, the contractor must ensure that technical content is not compromised. After editorial corrections are made, the contractor must convert the report to pdf and ensure that the report meets accessibility standards are met. Both the Word document and the pdf should be emailed to the project manager.

NYSERDA’s project manager is responsible for publishing the finished report online and/or in print format unless there are special circumstances. Direct questions about technical content and submission deadlines to the assigned NYSERDA project manager. For any questions related to report formatting and electronic submissions, contact NYSERDA Marketing at [print@nyserda.ny.gov](mailto:print@nyserda.ny.gov).

Important Contact Information:

- The NYSERDA project manager should be the contractor’s primary point of contact.
- For additional questions, contact NYSERDA’s marketing department at [print@nyserda.ny.gov](mailto:print@nyserda.ny.gov).

## Appendix A. Word Shortcuts

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The following are some commonly used keyboard shortcuts to help you work more efficiently in MS Word.

<b>Task</b>	<b>Shortcut</b>
Heading 1 style.	Ctrl+Alt+1
Heading 2 style.	Ctrl+Alt+2
Heading 3 style.	Ctrl+Alt+3
Body Text style	Ctrl+Alt+B
List Bullet style	Alt+Q
List Number style	Alt+N
Table Heading Center style	Alt+H
Table Text Center style	Alt+T
Display the Apply Styles task pane.	Ctrl+Shift+S
Display the Styles task pane.	Ctrl+Alt+Shift+S
Cut the selected content to the Clipboard.	Ctrl+X
Copy the selected content to the Clipboard.	Ctrl+C
Paste the contents of the Clipboard.	Ctrl+V
Switch the text between upper case, lower case, and title case.	Shift+F3
Remove manual character formatting.	Ctrl+Spacebar
Apply superscript formatting.	Ctrl+Shift+Plus sign (+)
Insert a page break.	Ctrl+Enter
Insert an em dash (—).	Ctrl+Alt+Minus sign (on the numeric keypad)
Insert an en dash (–).	Ctrl+Minus sign (on the numeric keypad)
Insert a registered trademark symbol (®).	Ctrl+Alt+R
Insert a trademark symbol (™).	Ctrl+Alt+T
Update field codes (TOC, cross-references.)	Select desired text and press F9.
Turn change tracking on or off.	Ctrl+Shift+E
Insert a footnote.	Ctrl+Alt+F
Insert an endnote.	Ctrl+Alt+D
Insert a trademark symbol ™	Ctrl+Alt+T

Additional MS Word shortcuts are available on the [Microsoft Support Keyboard Shortcuts](#) page.

## Appendix B. List of Styles Available in the NYSERDA Report Template

The NYSERDA Report Template contains the following styles that can be applied to text in a report document. Some styles do not show in this list because they were used only for the template creation process and should not be applied to report content.

**Note:** The template has examples of most of the styles necessary to create a report. We recommend copying and pasting content from the template, then modifying the text to ensure the correct styles are used. However, advanced users of Word may find it easier to apply styles as they write.

Style Name	Description/Usage
Acronyms	Used to format content listed in the Acronyms section.
Block Text	Used to show italicized text centered on page with increased left and right margins.
Body Text	Used for main text in all sections, subsections, and appendices.
Body Text (before a list)	Used for main text immediately before a bulleted or numbered list in all sections, subsections, and appendices.
Default Paragraph Font	Used to remove any manual formatting on selected text.
Emphasis	Used to show selected text in italics.
Endnote Reference	Used to format the endnote reference number.
Endnote Text	Used to format the endnote text.
Equation	Used to format an inserted equation.
Equation Title	Used for the shortened figure caption and to automatically number equations in a document.
Figure Anchor (or Figure Placement)	Used to apply to a figure to replace any other formatting and center the figure on the page.
Figure Caption Description	Used to provide a longer figure caption that shows under the figure title.
Figure Source	Used to show the credited source for a figure.
Figure Title	Used for the shortened figure caption that shows in the List of Figures and to automatically number figures in a document.
Footnote Reference	Used to format the footnote reference number.
Footnote Text	Used to format the footnote text.
Glossary	Used to format content listed in the Definitions or Glossary section.
Heading 1	Used to format each major numbered section heading and uses an outline numbering style (e.g., 1.0 Introduction). Heading 1 style has an automatic page break before the Heading. Heading 1 shows in the Table of Contents.

<b>Style Name</b>	<b>Description/Usage</b>
Heading 1 No Number	Similar to Heading 1 but without outline numbering and there is no automatic page break before the heading.
Heading 2 through Heading 6	Used to format each additional numbered subsection heading and uses an outline numbering style (e.g., 1.1, 1.1., etc.). Headings 1 through 3 show in the Table of Contents.
Heading 2 No Number through Heading 6 No Number	Similar to Headings 2 through 6 but without outline numbering.
Heading 7 (Appendix A)	Used to format each major Appendix heading and uses an outline alpha-numbering style (e.g., Appendix A. Word Shortcuts).
Heading 8 (Appendix A.1)	Used to format each Appendix subheading and uses an outline alpha-numbering style (e.g., Appendix A.1).
Heading 9 (Appendix A.1.1)	Used to format each Appendix subheading and uses an outline alpha-numbering style (e.g., Appendix A.1.1).
Hyperlink	Used by MS Word when a hyperlink is inserted or applied manually to selected text.
List Bullet, List Bullet 2, List Bullet 3	Used to create a bulleted list. The first level uses ●; the second level uses ○, the third level uses –, and the fourth level uses ■.
List Continue, List Continue 2, List Continue 3	Used to show additional text under a list bullet or list number that aligns correctly with the list.
List Number, List Number 2, List Number 2	Used to create a numbered list.
Note	Used to add an informational note. The note is outlined with a light-gray border.
References List	Used to format and number the full reference citations in the References section.
Strong	Used to show selected text in bold.
Table Anchor	Used to format an insertion point for a table. (optional)
Table Bullets	Used to add a bulleted list (●) within a table.
Table Caption Description	Used to provide a longer table caption that shows under the table title.
Table Heading Center	Used to format table header text. Centers the header text.
Table Heading Left	Used to format table header text. Left-aligns the header text.
Table Heading Right	Used to format table header text. Right-aligns the header text.
Table Last Row	Used to add additional space beneath a table.
Table List Number	Used to create a numbered list with a table.
Table Note	Style used for notes related to content in a table; the alpha-numbered notes appear beneath the table.
Table Source	Used to show the credited source for data in a table.
Table Text Center	Used to format text within a table. Centers the text.
Table Text Left	Used to format text within a table. Left-aligns the text.
Table Text Right	Used to format text within a table. Right-aligns the text.

<b>Style Name</b>	<b>Description/Usage</b>
Table Title	Used for the shortened table caption that shows in the List of Tables and to automatically number tables in a document.
Title Page-Location	Used on Title Page only.
Title Page-Name & Title	Used on Title Page only.
Title Page-Organization	Used on Title Page only.
Title Page-Project Details	Used on Title Page only.
Title Page-Project Heading	Used on Title Page only.
Subtitle,Title Page-Sections	Used on Title Page only.
TOC 1, TOC 2, TOC 3	Used by MS Word to automatically generate the Table of Contents.
TOC Heading	Used to format the Table of Content heading.

## Appendix C. Best Practices to Make Word Documents Accessible

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The following information describes common guidelines to follow for making reports accessible to people using assistive technologies. This information is taken from the [Microsoft Support website](#).<sup>3</sup>

What to fix	How to find it	Why fix it	How to fix it
Use the built-in headings and styles from the template.	To check that the order of headings is logical, visually scan your document's table of contents.	To preserve tab order and to make it easier for screen readers to read your documents, use a logical heading order and the built-in formatting tools in Word. You can also use paragraph banners to organize your content.	<a href="#">Use built-in title, subtitle, and heading styles</a> <a href="#">Create accessible lists</a> <a href="#">Adjust space between sentences and paragraphs</a> <a href="#">Create paragraph banners</a>
Avoid common accessibility issues such as missing alternative text (alt text) and low contrast colors.	Use the <a href="#">Accessibility Checker</a> .	Make it easy for everyone to read your documents.	<a href="#">Check accessibility while you work in Word</a>
Include alt text with all visuals.	To find missing alt text, use the <a href="#">Accessibility Checker</a> .	Alt text helps people who can't see the screen to understand what's important in images and other visuals.	<a href="#">Add alt text to visuals</a>
Use a simple table structure for data only, and specify table column headings.	To ensure that tables don't contain split cells, merged cells, or nested tables, use the <a href="#">Accessibility Checker</a> . Visually scan your tables to check that they don't have any completely blank rows or columns.	Screen readers keep track of their location in a table by counting table cells. If a table is nested within another table or if a cell is merged or split, the screen reader loses count and can't provide helpful information about the table after that point. Blank cells in a table could also mislead someone using a screen reader into thinking that there is nothing more in the table.	<a href="#">Avoid using tables</a> <a href="#">Use table headers</a> <a href="#">Use built-in title, subtitle, and heading styles</a> <a href="#">Create paragraph banners</a>

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<sup>3</sup> Make your Word documents accessible to people with disabilities. [https://support.microsoft.com/en-us/office/make-your-word-documents-accessible-to-people-with-disabilities-d9bf3683-87ac-47ea-b91a-78dcac3c66d#bkmk\\_textspacing\\_win](https://support.microsoft.com/en-us/office/make-your-word-documents-accessible-to-people-with-disabilities-d9bf3683-87ac-47ea-b91a-78dcac3c66d#bkmk_textspacing_win)

<b>What to fix</b>	<b>How to find it</b>	<b>Why fix it</b>	<b>How to fix it</b>
Add meaningful hyperlink text and ScreenTips.	To determine whether hyperlink text makes sense as standalone information and whether it gives readers accurate information about the destination target, visually scan your document.	People who use screen readers sometimes scan a list of links.	<u>Add accessible hyperlink text and ScreenTips</u>
Ensure that color is not the only means of conveying information.	To find instances of color-coding, visually scan your document.	People who are blind, have low vision, or are colorblind might miss out on the meaning conveyed by particular colors.	<u>Use accessible font format</u>
Use sufficient contrast for text and background colors.	To find insufficient color contrast, use the <u>Accessibility Checker</u> . You can also look for text in your document that's hard to read or to distinguish from the background.	If your document has a high level of contrast between text and background, more people can see and use the content.	<u>Use accessible font color</u>
Avoid writing important information in the Header or Footer areas of the document.	Headers and Footers are visible only in the Print Layout view and the Print Preview. Double-click the Header or the Footer to activate and edit its content.	People who use screen readers miss out on important information as screen readers do not scan Headers or Footers.	Use built-in heading styles in the main body of the document. Include any redundant information in the Header or Footer section.