

# MERCHANT'S STYLE GUIDE

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*A guide to the form and style for technical writing*

Rev. 16/2020

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Special thanks to Dr. Henry Cardenas (Louisiana Tech University), Dr. Steven A. Jones (Louisiana Tech University), Dr. Celia Lewis (Louisiana Tech University), and Dr. Tamara Powell (Kennesaw State University) for allowing us to use some of their material.

# Table of Contents

List of Illustrations .....	iii
List of Symbols .....	iv
Section 1: About This Guide.....	1
Section 2: Writing Guidelines.....	2
Section 3: Capitalization .....	6
Section 4: Titles and Heading Levels .....	7
Section 5: Lists.....	12
Section 6: Illustrations .....	16
Section 7: Memo Specific Guidelines.....	21
Section 8: Report Guidelines .....	24
References.....	32
Appendix A: Memo Masthead Example.....	34
Appendix B: Cover Page Example (Annotated).....	35
Appendix C: Title Page Example (Annotated) .....	36
Index .....	37

# List of Illustrations

## Figures

Figure 1. Graph With Unnecessary Borders Example.....	16
Figure 2. Graph Without Unnecessary Borders Example.....	17
Figure 3. Example of an Illustration Formatted to the Style Guide.....	18
Figure 4. Memo Heading Segment .....	20
Figure 5. Subsequent Memo Page Headers .....	21

## Tables

Table 1. Example #1 of a Table Formatted to the Style Guide.....	18
Table 2. Example #2 of a Table Formatted to the Style Guide.....	19

## List of Symbols

Corp.	Corporation
CTRL	the control key on a keyboard
dpi	dots per inch
e.g.	<i>exempli gratia</i> (Latin): “for example”
HEX	Hexadecimal color code (used in web pages)
i.e.	<i>id est</i> (Latin): “that is”
MLA	Modern Language Association
RGB	Red Green Blue color model (additive color model)
URL	Uniform Resource Locator, the address of a web page

## Section 1: About This Guide

Technical communication needs to be effective for both internal communications and crucial external communications (for example, business partners and customers). Readers need to quickly navigate corporate documents to find the information they need and, once found, to easily understand what they read. This is especially true for international readers. Thus, the writing must be clear and consistent.

Style guides also help an organization establish and protect a consistent brand identity.

Context determines some style choices; for example, the word billion and trillion mean different numbers in different countries, depending upon whether they use the long scale or short scale system for naming large numbers. Units of measurements can also differ between countries.

Since standard style guides give options for many elements and do not cover every situation, an organization style guide lists the decisions the organization has made for establishing a brand identity, as well as writing rules to ensure effective and efficient communication.

Writers, editors, and developers can use this document as a guide to writing style and usage. Writers and editors should review this guide so that they become familiar with the range of issues involved in creating high-quality, readable, and consistent documentation. Developers and third-party developers should follow this guide when writing any text that users see, as well as when writing documentation for their users.

In this *Guide*, style refers to recommended or accepted in-house usage, not to literary style. This style guide takes precedence over other sources or external examples. If you cannot find something in our style guide, check the references listed below.

- *Chambers Dictionary* (13th edition)
- *Merriam-Webster's Collegiate Dictionary*
- *The Elements of Style*
- *Purdue Online Writing Lab*: <<http://owl.english.purdue.edu/owl/>>
- *Technical Communication*, 11<sup>th</sup> edition by Mike Markel
- *MIL-STD-961E w/Change 2*
- *GPO Style Manual*

## Section 2: Writing Guidelines

Consistent formatting and syntax make documents easier to use because users do not have to learn how to find the information they need each time they read a document. The reader can predict where the information they need is located and how it will be presented. Thus, consistent word choices make a document easier to use because users will not have to keep up with the word changes; this also makes translation of the document easier (and cheaper).

Consistency also makes writing easier: you do not have to create a new design, organization, or vocabulary for the same writing need; the more often you use a set style, the faster you become at using it.

Aesthetics also contributes to readability. For instance, consider the following style rules:

- Try not to start a sentence with a number (spell out the number if you must start with it).
- Avoid excessive use of acronyms and abbreviations.
- Avoid excessive use of word combinations using the backslash (/).

If we ignored the above rules, we could end up writing sentences like the following:

199 MS/MA/ Ph.D. students/grads applied for an NSA pos. at a joint SRO LTU/GSU job fair.<sup>1</sup>

Not only is the sentence unappealing aesthetically, it is difficult to read as well as difficult (expensive) to translate into another language.

Also, organizations strive to maintain a consistent and strong brand identity and image. Thus, organizations require their documents to have one consistent distinctive voice. Organizations may adopt an editorial style guide (such as this one), write their own in-house style guide, or add an in-house supplemental editorial style guide (sometimes called an editorial stylebook or style sheet) to an adopted editorial style guide.

Proper grammar, spelling, and usage are critical in technical writing. Even minor errors can make a document inefficient at best and ineffective at worst, leading to miscommunication and mistranslation. Such errors are also unprofessional and reflect poorly not only on the writer but on their company or organization as well. Check, double-check, and check again your grammar, spelling, and usage before submitting any professional or technical document.

### 2.1 Typeface Choices

Below are font choices regarding font faces (families) and styles. The choices are based on web safe fonts in case your document is put up on the web, fonts that work well with each other, and

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<sup>1</sup> This translates to “One hundred ninety-nine masters of science, masters of art, and PhD students and graduates applied for a National Security position or for an intern position at a standing room at a joint Louisiana Tech University and Grambling State University job fair.”

what gives a professional impression. Web-safe fonts are fonts that are most likely already on a user's device, which reduces a page's loading time. Common fonts also help to make sure your page is seen correctly. For instance, differences in font families can help a reader to easily tell the difference between a page header and a line of text just being emphasized or a block of body text and lines of code that a reader needs to type.

### 2.1.1 Font Face: Heading and Body Text

Use the sans serif font Arial for headings and the serif font Times New Roman for the text, including tables, endnotes, page headers (not level headings), and footnotes. Using a sans serif font for headings and a serif font for body text helps to distinguish one from the other, especially to help distinguish text that is being emphasized from text that is a heading. Exception: for an IEEE document only use Times New Roman for both headings and body text. See below for font size decisions.

### 2.1.2 Font Face: Typed Code

Always use Courier or Courier New font to help indicate code a reader needs to type in a program or computer. Whichever font you choose, use consistently in a document. For example:

To start the Red Queen server, type the following command: `RUN RQ_Server`

Even better is to place, if possible or practical, the typed command on a separate line and tabbed. For example:

To start the Red Queen server, type the following command:  
`RUN RQ_Server`

### 2.1.3 Font Sizes

The font size for body text, including endnotes, figure and table titles, page headers (not level headings), tables, and typed code will be size 12. However, text in tables can be lowered to size 11 or size 10 (but no lower) if lowering the font size helps the table fit within the side or bottom margins of a page. Footnotes and source entries for figures and tables are in 10-point font.

Font sizes for heading levels are size 18 for top-section titles, 14 for level-1 headings, and 12 for all other headings. See section 4 for more information.

### 2.1.4 Font Style: Emphasized Text

Emphasized information should be *italicized*, **boldfaced**, or larger (by one font size). Do not get carried away with emphasizing; over-use of emphasis is counter-productive.

### 2.1.5 Font Style: Italics

In addition to emphasizing text, use italics for book and journal titles, and for foreign words.

### 2.1.6 Font Style: Underlining

Underlining obscures letter descenders (for example, g, p, q, and y); this can make reading text difficult, especially for dyslexic readers. Also, because of the Web, many skimming readers will



first think underlined texts are clickable links or Web addresses. Therefore, use underlining only for hypertext links in Web documents, unless used in quoted material or for illustrative purposes.

### **2.1.7 Font Style: Color**

All Times New Roman text will be black unless against a dark background where they will be white. Rare exceptions can be made, but there must be a specific reason for the color change. If an organization has an approved color list (as in an identity standards manual), you need to use colors from there.

**Level-1 heading text** will be LA Tech blue (official): RGB **0,48,135**. All other heading text will be black: RGB 0,0,0.

**Titles** will be LA Tech Red (official): RGB **203,51,59**.

See Section 4 for more information on formatting level headings and titles.

## **2.2 Hyperlinks**

Do not hyperlink text, except for documents produced specifically for Web pages or social media. For example, [david.merchant@Ubiquitous-corp.biz](mailto:david.merchant@Ubiquitous-corp.biz) is hyperlinked text. Either turn off your word processor's automatic hyperlink feature or right-click on the link and choose "remove hyperlink." The text will remain: david.merchant@Ubiquitous-corp.biz.

For Web documents, since users should not have to find out where to click, links should be colored and underlined. Be consistent in your use as varying colors for links in a document can confuse users. The preferred color for unvisited links is blue. Whatever color you choose for linked text try to avoid using it for any other body text in the Web document or site, and make sure the contrast between the link and the background is not too weak, to where the link text is difficult to read. This goes for the visited link color choice as well.

## **2.3 Accessibility Guidelines**

One of Mike Markel's eight measures of excellence mentioned in his textbook, *Technical Communication*, is accessibility. Accessibility refers to the ability of readers to find the information they need quickly and easily. This goes beyond using headings properly, dividing the information into small, independent chunks, and ordering information logically, but also designing for readers with disabilities. Some guidelines to consider:

- Use correct standard American English spelling, punctuation, and grammar
- Avoid long noun strings, overly long sentences, and overly short sentences.
- Avoid unnecessary jargon, slang, or archaic language.
- Avoid unexplained terminology.
- Avoid sports-specific and culture-specific references as they depend upon your reader being knowledgeable of the sport or the culture referenced to understand the references; otherwise, your reference will have no meaning (or a different meaning) to them.

- While analogies are used often by scientists to help clarify abstract ideas, avoid using figurative language such as clichés, hyperbole, idioms, litotes metonyms, personification, and puns as these can be difficult to translate properly.
- Generally, do not use text below 10-point type size.
- Avoid full justification.
- Use “/” sparingly to combine words as this can be misread by a busy, skimming reader.
- Avoid excessive use of acronyms and abbreviations.
- Generally, the spacing between letters should be kept at the word processor’s standard default setting. Both closely and widely spaced typefaces are often difficult to read.
- Avoid combining red and green colors in lettering as this is difficult for the color-blind to read. Do not use color as your only indicator of emphasis or importance. Avoid using basic blue (default for linked text in most browsers) for non-linked text.
- Ensure you have enough contrast between text and background. A color contrast analyzer can be downloaded from <http://www.paciellogroup.com/resources/contrastanalyser/>.
- Ensure that boldfaced text does not become so thick that it reduces the white space within characters, making it difficult to distinguish between some characters.
- Limit using UPPERCASE. Most readers do not read every letter of a word—they recognize words by their shape. Putting words in all uppercase makes all words take on a brick shape. This can be especially difficult to read for dyslexics.
- Limit underlining. Underlining obscures descenders, the portions of letters that extend below the body of the letters (for example, g, p, q, and y). This can make reading difficult, especially for skimmers or dyslexics. Reserve underlining for links in interactive or Web documents.
- Use images or diagrams to assist in explaining complex things, but make sure that all visuals are crisp, clear, and relate directly to the text.
- The paper stock should be good quality, non-glare, and thick enough to ensure there is no show through. Glare from glossy paper can lessen legibility.

## 2.4. List of Symbols

As an aid to both multicultural and non-subject-matter-expert readers, define the abbreviations, acronyms, initialisms, and symbols used in a report that you think your reader may not know, may misunderstand, or may have a vague understanding of in a glossary or a list of symbols. Avoid excessive use of acronyms and abbreviations. However, standard mathematical operators ( $\sqrt{\quad}$  or  $\div$ , for example) do not need to be included. Special operators do, however.

**Exception:** an abbreviation, acronym, initialism, or symbol used only once in a report does not have to be placed in a List of Symbols page. The abbreviation, acronym, initialism, or symbol still must be spelled out or defined when it is used.

## 2.5 American Versus British or Other Spelling Conventions

For words that have more than one correct spelling depending upon whether you are using American conventions or British conventions, spellcheckers will not normally tell you which one is preferred. Most American-based corporations require American conventions.

## Section 3: Capitalization

### 3.1 Capitalizing Corporation Names and Programs

Capitalize the corporation name (for example, Ubiquitous' health plan, Louisiana Tech's academic programs), capitalize the word Corporation when using it as shorthand for the full corporate name (the Corporation's health plan), and capitalize the word Program when part of a proper name (the Nemesis Program). Do not capitalize the word corporation or program when it is used in a general sense (most corporation's health plans ...).

### 3.2 Capitalizing Headings

Put figure, table, and level heading titles in title case as recommended by *The United States Government Printing Office Style Manual*: Capitalize all words in titles, except for a, an, and, as, at, but, by, for, in, it, nor, of, on, or, the, to, and up.

**Exceptions:** Always capitalize the first and last word in the title, the first word following a colon, words that follow hyphens in compound terms, and all prepositions that belong to a phrasal verb. For example:

**Raccoon City: The Ten Top Restaurants**

The word *the* in the title follows a colon and is thus capitalized.

**How to Back Up a Flash Drive**

The preposition *up* is part of the phrasal verb *back up* and is thus capitalized.

**What the Red Button Is For**

The preposition "for" is the last word in the title (yes, sometimes you can end a sentence with a preposition, especially when the preposition is part of a phrasal verb).

### 3.3 All Caps—Capitalizing Titles

Only the report cover title and report title page title are in all caps. All caps is harder to read for people with dyslexia. Plus, because of social media, all caps is now associated with shouting.

### 3.4 Abbreviations

Follow American Standard English and MLA guidelines for capitalizing abbreviations. Generally, if the word being abbreviated is a proper noun, the abbreviation is also capitalized. There are some exceptions; for example, "World Wide Web" is capitalized but its abbreviation, when used as part of an internet address, is not (www.domain.com). When in doubt, check the *Merriam-Webster's Collegiate Dictionary* (primary source) or the *American Heritage College Dictionary* (secondary source). Check *Merchant's English Usage Guide for Technical Writers* for information on using abbreviations in technical writing. As stated earlier, avoid excessive use of acronyms and abbreviations; also, you normally do not use contractions in technical writing.

## Section 4: Titles and Heading Levels

A document **title** tells your reader what the subject or purpose of your document is. A document title also helps categorize your document. A section title tells your reader what the subject or purpose of your section is. Do not use titles, though, for business letters (do use subject lines).

**Headings** help make information in your document more accessible. Organize levels logically by level of subordination; dividing a document into sections means you are going from important or general information to less-important or more-specific information. You need to discuss the important or general information before going to the less-important or more-specific information. At the very least, you need to introduce the less-important or more-specific information, placing the information into context. **When dividing a section, you need at least two subsections.**

**Do not skip levels;** for example, the next level after a level-2 heading is a level 3, not a level 4. Try not to use more than three levels. If you need more than three, think about reorganizing the information.

Do not begin the sentence after a heading with a pronoun referring to the heading (such as “this” or “it”).

**Refer to 3.2 for capitalization guidelines.**

### 4.1 Heading Placement

**Do not** place two headings (same level or not) back to back with no text between them; However, you do not have to have text between a title and a level-1 heading.

**Do not** orphan or "bump" (separate) headings from the text that they introduce. Doing so is bad form, decreasing the professional appearance of the document.

### 4.2 Color

See your organization's *Identity Standards Manual* or *Graphics and Identity Standards Manual*. This *Guide* uses RGB **203,51,59** for memo, report (cover page and title page), and section titles and RGB **0,48,135** for level-1 headings, with all other headings in pure black

### 4.3 Titles

Titles are used in memos for the memo title (not subject), report title pages, and top-level sections in reports.

#### Memo Title

- **Boldface**, 20 points, Arial; font color RGB **203,51,59**; use title capitalization as discussed in section 3.2.

- Left-aligned.
- Blank 12-point size line before memo title (between the logo and memo title).
- Blank 12-point size line before the next line of text (heading segment).
- No ending punctuation.

### **Report Title (Cover Page and Title Page)**

- **Boldface**, 26 points, Arial; font color RGB **203,51,59**; all caps.
- Centered.
- Blank 12-point size line before the next line of text.
- No ending punctuation (except if ending with a quoted title or trademark that includes important punctuation like a question mark or exclamation mark).

### **Section Titles (Top-Level Section/Chapters)**

- **Boldface**, 20 points, Arial; font color RGB **203,51,59**; use title capitalization as discussed in section 3.2.
- Centered.
- Blank 12-point size line before the next line of text.
- No ending punctuation (except if ending with a quoted title or trademark that includes important punctuation like a question mark or exclamation mark).

## **4.4 Level 1**

- Level-1 headings are the first heading levels in a memo or the first heading levels in a top-level section (chapter) in a report.
- **Boldface**, 14-points, Arial; font color is RGB **0,48,135**; no indentation; left-align.
- Uses title capitalization as discussed in section 3.2.
- No indentation, align with the left margin.
- Blank 12-point size line before the next line of text.
- No ending punctuation (except if ending with a quoted title or trademark that includes important punctuation like a question mark or exclamation mark).

## **4.5 Level 2**

- Level-2 headings are subsections for level-1 sections only.
- **Boldface**, 12-points, Arial; font color is **black**; no indentation; left-align.
- Uses title capitalization as discussed in section 3.2.
- No blank line before the next line of text.
- No ending punctuation (except if ending with a quoted title or trademark that includes important punctuation like a question mark or exclamation mark).

### 4.6 Level 3

- Level-3 headings are subsections for level-2 sections only.
- **Boldface**, *italicized*, 12-points, Arial; font color is **black**; no indentation; left-align.
- Uses title capitalization as discussed in section 3.2.
- On the same line as the body text; ending punctuation (at least a period).

### 4.7 Level 4

- Level-4 headings are subsections for level-3 sections only. However, try to not divide your document where you need level 4 subsections.
- *Italicized*, 12-point font, Arial; font color is **black**; Indented 0.5 inches (except when used in lists) from the left margin.
- Uses title capitalization as discussed in section 3.2.
- On the same line as the body text; ending punctuation (at least a period).

### 4.8 Parallelism

For descriptive headings, be consistent (parallel) in the phrasing. For instance, do not have some level-2 headings in noun phrases and then switch to participial phrases for other level-2 headings in the same level-1 section.

*Poor:* **Creating Headings in a Word Document**  
**Footer Creation in a Word Document**

*Better:* **Creating Headings in a Word Document**  
**Creating Footers in a Word Document**

### 4.9 Examples: Titles

Below are examples of formatting for headings. See 4.10 for use of headings in lists.

## Memo Title Example

**REPORT COVER TITLE EXAMPLE**

**REPORT TITLE PAGE EXAMPLE**

**Top-Section Title Example**

## 4.10 Examples: Standard (Non-List) Headings

Below are examples of formatting for headings. See 4.11 for use of headings in lists.

### Top-Section Title Example

#### Level-1 heading Example

Notice that when a level 1 section begins, there is a blank 12-font line before and after it.

Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Sed Tali'Zorah vas Neema do eiusmod elit:

- Chiktikka vas Paus
- Keelah se'lai
- Bosh'tet

Notice that a first-order list has a blank size-12 font Times New Roman line before and after it.

Gort quis nostrud “treguna, mekoides, et tracorum satis dee.”

#### Level-2 heading Example

Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort quis nostrud “treguna, mekoides, et tracorum satis dee.” Sed do eiusmod elit.

**Level-3 heading Example.** Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort nostrud “treguna, mekoides, et tracorum satis dee.”

*Level-4 heading Example.* Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort quis “treguna, mekoides, et tracorum satis dee.”

## 4.11 Examples: Headings in Lists

Below are examples of formatting for headings in lists. See above for examples of standard (non-list) headings. Level-1 headings are never used in bulleted or numbered lists.

### Top-Section Title Heading Example

Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua et tlhIngan Hol:

1. 'IqnaH
2. 'IqnaH QaD
3. DenIb Qatlh

Notice that a first-order list has a blank size-12 font Times New Roman line before and after it.

Ut “Klaatu barada nikto!” Gort quis nostrud “treguna, mekoides, et tracorum satis dee.”

## Level-1 heading Example

Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort quis nostrud “treguna, mekoides, et tracorun satis dee.” Sed do eiusmod elit:

### 1. Level-2 heading, First-order list, Item 1

Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort quis nostrud “treguna, mekoides, et tracorun satis dee.” Sed do eiusmod elit.

- **Second-order list, Item 1.** Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort quis nostrud “treguna, mekoides, et tracorun satis dee.” Sed do eiusmod elit.
- **Second-order list, Item 2.** Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort quis nostrud “treguna, mekoides, et tracorun satis dee.” Sed do eiusmod elit.

### 2. Level-2 heading, First-order list, Item 2

Lorem ipsum dolor sit amet, incididunt ut labore et dolore magna aliqua. Ut “Klaatu barada nikto!” Gort quis nostrud “treguna, mekoides, et tracorun satis dee.” Sed do eiusmod elit.

Gort quis nostrud “treguna, mekoides, et tracorun satis dee.”

**Notice** that all list items that have a level heading require a blank size-12 Times New Roman font line before them. You can use level-2 headings in a primary list (first-order list), but **not** *within* nested lists. Depending upon aesthetics and what section heading the list begins in, a first-order list can use a level 2 or a level-3 heading. **Do not** use level-4 headings in lists. See the next section for more information about lists, including nested lists.



## Section 5: Lists

Lists are useful for conveying sequential or itemized information. With paragraphs in list format, bullets or numbers can help readers to distinguish one part of a discussion from another. This visual form also helps the reader to see the structure of the discussion. The list format also makes finding specific information easier (for instance, the reader is only interested in quickly rereading or copying information from one stage of a discussion). Other uses for lists are checklists, making it easy for readers to check off information. However, do not overuse lists.

### 5.1 General Guidelines for All Lists

Follow these guidelines to format and organize lists so that information is easy to find, and the discussion easy to follow.

- A list requires more than one item.
- In lists of names, use alphabetical order to make it easier for a reader to scan and find a specific name unless there is a good reason to do otherwise (explain the reason when introducing the list).
- If you begin a list with “for example,” “including,” or “such as,” do not use “etc.” or phrases like “and so forth” since it is already implied.
- All items in a list should be syntactically alike if possible; that is, all should be noun forms, phrases, or full sentences—whatever the context requires.
- When the sentence introducing the list ends with a noun or with the adverbial phrase “as follows,” use a colon at the end of the introductory sentence.
- Do not use a colon when the sentence introducing the list ends with a verb, a preposition, or an infinitive.
- Use serial commas for lists.

If you have a lot of information for each list item, consider using subheadings (subdividing the section) for each item instead of a list. However, if you are using subheadings and want to return to the main division discussion, the reader may have a difficult time realizing you have exited a subdivision.

For example, you are subdividing a level-2 section into several level 3 discussions but after the last level 3 discussion you want to return to the level 2 discussion—your reader may think you are still continuing the level 3 discussion at first. You can either use wording to let the reader know you have returned to the discussion, or see if you can rewrite the level-2 section such that there is no need to continue it after the last level 4 discussion, or you can use a list for the level 3 discussions—ending the list will visually let the reader see that you have returned to the discussion that preceded the list.

## 5.2 General Formatting Guidelines for Vertical Lists

Most lists will be vertical lists. They usually consist of sentences or paragraphs. These guidelines are for first-level, or first-order, lists. Guidelines for nested lists are in 5.5. Guidelines for inline lists are given in 5.6.

- Include a blank size-12 Times New Roman font line before the first list item and after the last list item for first-level (first-order) lists. See 5.6 regarding spacing with nested lists.
- Indent the first list at 0.25 inches: the first line indent will be at 0.25 inches, and the hanging indent (the spacing between the list bullet or number and the list text) will be at 0.5 inches. See 5.6 below for indents with nested lists.
- Usually for a vertical list with short list items, putting an extra blank line between items is not recommended. For lengthy list items (for example, whole paragraphs), including a blank 12 point size line between list items may be helpful to the reader.
- Start each item with an uppercase letter unless the items are syntactically part of the introductory sentence (see example below).
- If items are complete clauses, phrases, or sentences, end each item with a period or question mark, as appropriate, unless all the list items are syntactically part of a sentence (see example below).
- If the items are syntactically part of the sentence, use appropriate sentence punctuation; separate items in the list by commas or semicolons, as appropriate, and end with a period.

To successfully complete the assignment, students must

- read the assignment sheet,
- start the assignment early, and
- go to the Writing Center as needed.

## 5.3 Guidelines for Choosing Bullets, Letters, or Numbers

Use bullets for lists that are not ordered or are ordered alphabetically but otherwise do not need to show a hierarchy, ranking, or sequence.

You can use letters for both unordered and ordered lists. Use letters for lists that are unordered but where you will need to refer to list items later; finding “example F” is easier than finding the sixth example as the reader then has to count the bulleted items until they get to the right one which takes more time and there is always a chance of miscounting. Otherwise, use letters for ordered lists where you want to rank by a letter grade or if the ordered list is nested within another ordered list (for more information, see section 5.6).

Use numbers to show hierarchy, ranking, or sequence. Use Arabic numerals for first-order lists (lists that are not nested within another list). Nested ordered lists require the use of Roman numerals and letters (for more information, see section 5.6).

## 5.4 Guidelines for Bulleted Lists

Use bullets for lists that are not ordered or are ordered alphabetically but otherwise do not need to show a hierarchy, ranking, or sequence. Use only the default Microsoft Office bullet types. See section 5.6 for bullet style choices.

## 5.5 Guidelines for Lettered or Numbered Lists

Numbered lists must be preceded by introductory text that explains the rationale for the numbering. For embedded numbered lists, use parentheses around the numerals and either commas or semicolons, as appropriate:

T-viral infection symptoms include (1) high fever, (2) incessant itching, and (3) insatiate hunger.

For vertical numbered lists that are not nested, use Arabic numerals followed immediately by a period: 1.

## 5.6 Guidelines for Nested Lists

Use nested lists sparingly. Deeply nested lists (more than two levels) can be cumbersome for your reader, especially if the lists nested are paragraph lists. Try to organize the information so that the lists do not need to have several layers of nesting.

Indent the first list at 0.25 inches: the first line indent will be at 0.25 inches, and the hanging indent (the spacing between the list bullet or number and the list text) will be at 0.5 inches. Indent lists nested within the first list at 0.5-inch intervals (see examples below).

For the first-order list, include a blank size-12 Times New Roman font line before the first list item and after the last list item.

For nested lists (second order, third order, and so on), while including a blank size-12 Times New Roman font line before the first list item and after the last list item is not required, if adding the blank lines help a reader to scan and read the list, you should add them. If the nested list items require level headings, then each level heading will have a blank size-12 Times New Roman font line before them (see section 4 for examples).

Nested bulleted lists nest as follows (including bullet style choices).

- First-order list.
  - Second-order list (first nested list).
    - Third order list (second nested list).
      - Fourth order list (third nested list; try to avoid nesting this deeply).

For nested numbered lists, you can choose Roman numerals, Arabic numerals, or letters, as long as the first level uses Arabic numerals, and each remaining level does not use the same numeral type as the level preceding it or following it:

1. First-order list.
  - A. Second-order list (first nested list).
    - I. Third order list (second nested list).
      - a. Fourth order list (third nested list; try to avoid nesting this deeply).

You can combine numbered lists with bulleted lists and vice versa. However, remember that all numbered (and most lettered) lists need to be preceded by introductory text that explains the rationale for the numbering.

1. First-order list.
  - Second-order list item.
  - Second-order list item.
  2. Second-order list.

See 5.8 for information regarding the use of level headings in lists.

## 5.7 Guidelines for Inline Lists

Inline lists should use first, second, and third, or use numerals surrounded in parentheses, to enumerate items in a single sentence:

The supervisor wants reports on the ductility of iron and copper under (1) lunar surface conditions, (2) Martian surface conditions, and (3) both Martian moons' surface conditions.

Enclosing in parentheses helps readability for a scanning reader.

## 5.8 Headings

Do not use level-1 headings in a primary list. You can use level-2 headings in a primary list (first-order list), but **not *within*** nested lists. Depending upon aesthetics and what section heading the list begins in, a first-order list can use a level 2 or a level-3 heading. Do not use level-4 headings in lists. See section 4 for examples.

## Section 6: Illustrations

Illustrations are important to technical communication. Illustrations include tables, charts, and graphs as well as figures, schematics, drawings, graphics, and photographs. A table is a data structure that organizes information into rows and columns. It allows information to be quickly accessed from specific rows. Lists are usually not considered to be illustrations.

*Always* introduce illustrations *before* you discuss them. You also must discuss illustrations: tell the reader how they should interpret the illustration. Pretend that your reader is blind and using a text reader—what information that is only included in the figure would they miss? Illustrations support the text, they help the reader follow and understand the text more effectively. Do not put in illustrations that are not introduced and discussed except in report covers or illustrations for brochures; however, they still need to have a purpose and not there merely for decoration.

Treat illustrations not created by you or not created in-house as a visual quote: you must reference the owner. If you adapted an illustration, you need to indicate that (Adapted from:).

Since figure titles are capitalized, capitalize “Figure” when including the number such as “in Figure 5 below.” However, if you write “in the figure below” then do not capitalize it.

### 6.1 Illustration Formatting Guidelines

Follow the guidelines below to consistently format and present illustrations.

#### 6.1.1 General Guidelines

- Center illustrations.
- Insert illustrations as close as possible to the text they represent; also, they should be inserted *after* they are first introduced in the text, not before.
- Do not wrap text around illustrations. If an illustration is too large to fit across a page horizontally, it can be placed vertically (90 degrees perpendicular to the horizontal).
- Give all tables the designation “Table.” Everything else is designated as “Figure.”
- Put titles in title case as discussed in section 3.
- Try to keep the full title for the illustration, tables or figures, to ten words or fewer.
- Put titles in noun form; use participles instead of relative clauses. For example: “Probes Succeeding in Reaching Mars” rather than “Probes That Succeeded in Reaching Mars.”
- The source information, if applicable, for each illustration should be centered underneath and single-spaced should it exceed one line of text. The word *source* is capitalized, **boldfaced**, in Times New Roman, and font size 10. Do not include HTTP:// in the URLs. Do not have the URL an active hyperlink (underlined, blue, clickable). Place a colon after the word “Source.” Punctuate the end of the source information. For example:

**Source:** Valentine, Alice. “2010 Security Update.” 2010 *Annual Report*, Arlay Labs, 2010, [www.arklaylabs.com/research/](http://www.arklaylabs.com/research/).

- Number illustrations sequentially; number tables and figures separately. For example, the first table in the document is Table 1, even if it comes after a figure or two in the document. Do not use decimal numbering (for example, Figure 1.1 or Table 1.1). Do not punctuate the end of the title. Do not use a colon after the figure or table number. For example:

*Correct:* **Table 1. T-Virus Effectiveness Over Time**

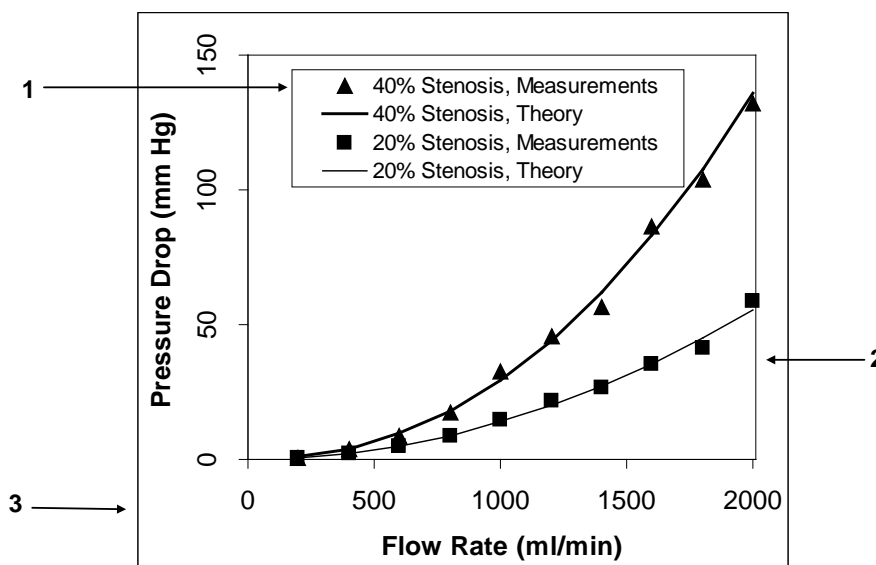
*Incorrect:* **Table 1.1. T-Virus Effectiveness Over Time**

*Incorrect:* **Table 1: T-Virus Effectiveness Over Time**

### 6.1.2 Figure Guidelines

- The title of “Figure,” with a name that identifies it, should be centered horizontally directly below the figure. Use font size 12, **boldface**, no italics.
- If the figure you are using has the title in the image, crop it out if you can since you are putting that information in your figure title. This is especially important if the title includes a figure number which does not match the figure number you are giving the figure. If you cannot crop it out, consider putting an empty textbox over it, with a filled background color that matches the figure as close as possible.
- The best location for a plot legend is usually on the plotting area itself, but in a location that is away from any of the plotted data.
- Graphs with several curves, the uppermost curve corresponds to the uppermost legend entry.
- Make sure all the figures are clear, easy to read.
- Extra borders for graphs and plots are unnecessary; they are distracting and can get in the way of important information. Compare, for example, the two plot styles shown in below.

*Incorrect:* Graph with unnecessary borders.

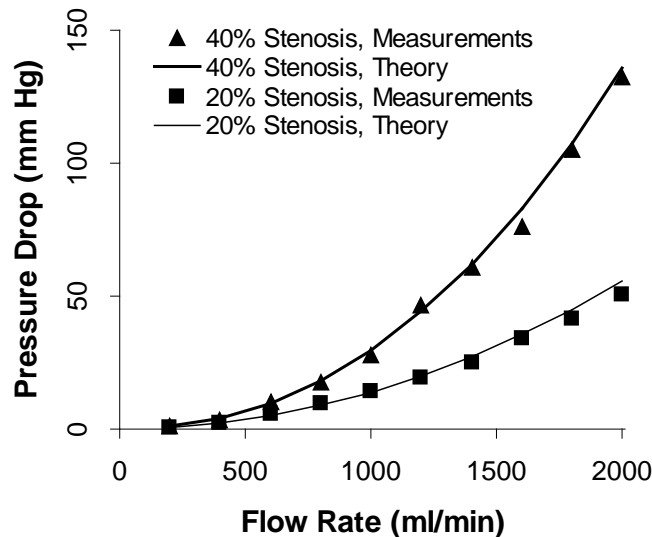


**Figure 1. Mean Pressure Drop—Mean Flow Characteristic for All Coronary Stenotic Models**

The data and other information are better emphasized when the following are eliminated:

1. The border around the legend (labeled “1” in the incorrect example above).
2. The border around the plotting area (labeled “2” in the incorrect example above).
3. The border around the complete plot (labeled “3” in the incorrect example above).

*Correct:* Graph without unnecessary borders.



**Figure 2. Mean Pressure Drop—Mean Flow Characteristic for All Coronary Stenotic Models**

### 6.1.3 Illustration (Figure) Example

An example of an illustration formatted to the above guidelines.



**Figure 3. Galaxy M81 Photographed in Ultraviolet Light**

Source: “Galaxy M81 in Ultraviolet Light.” *Mission: Science*, NASA Jet Propulsion Laboratory, 19 March 2015, [missionscience.nasa.gov/](http://missionscience.nasa.gov/).



### 6.1.4 Table Guidelines

- The title of “Table,” with a name that identifies it, should be centered horizontally directly above the table since readers tend to scan tables from top to bottom (but put source information directly below the table). Use font size 12, **boldface**, no italics.
- **Table borders:** Grid, Style plain single line, color black, width 1 point.
- **Table cell margins** should be “0.08” for the left and right margins and “0.00” for the top and bottom margins.
- **Column heads** in table header rows should be as brief as possible. Abbreviations are acceptable in column heads. Align text to the left, keep text level; however, text may be placed vertically (90 degrees perpendicular).
- Give **table row headings and column headings** a different background color than the rest of the table. Check your organization’s identity standards manual for approved color choices. Use a lighter color with black text. Make sure the contrast between the background and the text is such that the text is easily readable. Set table header rows to repeat if the table splits across multiple pages. **This guide uses RGB 191,191,191 (HSL 170,0,191)** for table row headings and column headings.
- Evenly distribute data columns and rows when feasible.
- Text within a table shall be in Times New Roman, font size 12; however, the font size can be decreased to font size 11 or 10 (no smaller) if that helps the table to fit within the margins of the page or to not be split across two pages.

### 6.1.5 Illustration (Table) Examples

Below is an example of a table formatted to the above guidelines.

**Table 1. [Example #1] Prevalence of Types of Medication Errors**

<b>Mode of Error</b>	<b>Percentage</b>
Administering	58.0%
Documenting or Transcribing	22.0%
Dispensing	17.0%
Monitoring	1.5%
Patient Compliance	0%
Prescribing	1.6%
<b>Total</b>	<b>100.0%</b>

Notice that while figure titles go below the figures, table titles go above the tables.

**Source:** Frith, Karen, H., et al. "Nurse Staffing Is an Important Strategy to Prevent Medication Errors in Community Hospitals." *Nursing Economic* 30.5, 2012, pp. 288-294. *CINAHL Complete*. Accessed 23 Apr. 2015.

Give some thought to how the information is to be listed. For example, in the table above, the information is listed alphabetically. However, you could also list the information in descending order by percentage (Table 2 below), or in procedural order (Table 3 below). The ordering depends upon what is being emphasized. Listing in descending order by percentage enables the reader to quickly tell which mode of error is the greatest source of error and immediately which is the next major source of error. Listing in process or procedural order can help a reader to quickly tell if the errors tend to group around a particular process. Make sure you explain the



ordering either in the title of the table or in the text (especially if including the explanation makes the table title too long).

*If you change the order from the original table* (the one you did not create, but are quoting), you must add “Adapted from” in your source line. Compare the two tables below to the one above.

**Table 2. [Example #2] Prevalence of Types of Medication Errors by Percentage**

<b>Mode of Error</b>	<b>Percentage</b>
Patient Compliance	0%
Monitoring	1.5%
Prescribing	1.6%
Dispensing	17.0%
Documenting or Transcribing	22.0%
Administering	58.0%
<b>Total</b>	<b>100.0%</b>

**Adapted from:** Frith, Karen, H., et al. "Nurse Staffing Is an Important Strategy to Prevent Medication Errors in Community Hospitals." *Nursing Economic\$* 30.5, 2012, pp. 288-294. *CINAHL Complete*. Accessed 23 Apr. 2015.

**Table 3. [Example #3] Prevalence of Types of Medication Errors by Procedural Order**

<b>Mode of Error</b>	<b>Percentage</b>
Prescribing	1.6%
Documenting or Transcribing	22.0%
Administering	58.0%
Dispensing	17.0%
Monitoring	1.5%
Patient Compliance	0%
<b>Total</b>	<b>100.0%</b>

**Adapted from:** Frith, Karen, H., et al. "Nurse Staffing Is an Important Strategy to Prevent Medication Errors in Community Hospitals." *Nursing Economic\$* 30.5, 2012, pp. 288-294. *CINAHL Complete*. Accessed 23 Apr. 2015.

### 6.3 Referring to Illustrations (and Equations)

When referring to a table, figure, or an equation in-text references, use lowercase. For example, “The effectiveness of the T-Virus over time is shown in table 1.” You can abbreviate figure to “fig.” and equation to “eq.” (“eqs.” for the plural) as long as it is not the first word of the sentence.

## Section 7: Memo Specific Guidelines

Follow these guidelines specific to memos to consistently format and organize memos.

### 7.1 Document

In addition to the general document guidelines discussed in section 2, follow the memo specific guidelines below.

- Use the organization's letterhead in the page header of the first page of the memo.
- For normal internal communications, include below the letterhead "interoffice" External memos will have "memo." However, some report memos will have the report type here; for example, Internal Proposal Memo and Memo of Transmittal. See Section 4 above for formatting memo titles.
- Have an effective subject line: specific while concise.
- Use headings to separate sections.
- Memos do not need to include trademark or copyright notices for brand names.

### 7.2 Heading Segment

The heading segment, which comes after the masthead<sup>2</sup> logo, should be in two columns, each left justified. Include CC and Through fields as required.

## Interoffice Memo

3

**To:** Mr. David M. Merchant, English Instructor<sup>4</sup>

**CC:**<sup>5</sup> Dr. Albert Wesker, Head Researcher

**Through:** Dr. William Birkin, Director of Research and Innovation

**From:** Jill Valentine

**Subject:** Report on Confluent English Courses into Undergraduate and Graduate English  
Major Curriculum at Louisiana Tech University

**Date:** May<sup>6</sup> 5, 2010

---

The purpose of this memo is to present...

**Figure 4. Memo Heading Segment**

<sup>2</sup> See Appendix A for a masthead example.

<sup>3</sup> Insert a blank 12 font line.

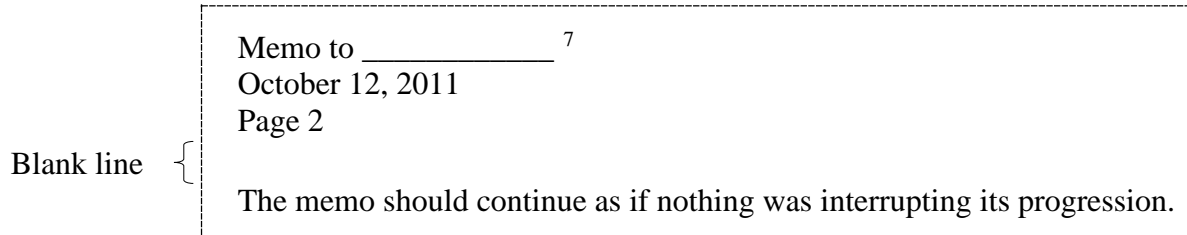
<sup>4</sup> Include full names and titles of the writer and readers; if space is tight, use first initials instead of full first names.

<sup>5</sup> Depending upon the audiences for the memo, the memo may require a **CC** or a **Through** field, or both, after the **To** field; some memos may not require a **CC** or a **Through** field; if that is the case, delete this line (do not leave a blank line—move the remaining fields up).

<sup>6</sup> Write out the month (do not abbreviate). Also, do not use "th" or "rst" after the day.

### 7.3 Subsequent Page Headers

In a page header justified with the left margin, starting with the second page, identify who the memo is addressed to, then on the next line the date the memo is being sent, and on the third line the page number:



**Figure 5. Subsequent Memo Page Headers**

### 7.4 Page Numbering

No page numbering on the first page. Starting with the second page, the page number should appear left justified, with Arabic numbering (start with “2”).

### 7.5 Purpose Statement

All memos over one page in length will have a statement of purpose that explains in one to two sentences what your purpose for the memo is. (One sentence is preferred.) For one page memos, a purpose statement is optional. You may want to open by referring to the request for the document you are about to describe. Some examples:

- This memo recommends that...
- This memo explains the advantages of...
- The purpose of this memo is to present my findings...
- This memo is in response to your request on July 20,...
- In response to your request of December 21, I have analyzed the feasibility of...

### 7.6 Summary

Memos three pages or longer require a summary. For shorter memos, a summary is optional. Exceptions: incident or problem reports do not need a summary; extended definition memos do not need a summary either as the introduction section serves the same purpose.

### 7.7 Discussion (Main Body) of Memo

The main section is the discussion, conveying the detailed version of your message.

---

<sup>7</sup> Put only the immediate audience's full name with their title; however, if space is tight, you can use first initials instead of full first name.

## 7.8 Memo Closing

While memos do not have complimentary close and signature lines as letters and emails do, they usually end with one or more recommendations or a statement of what you want the reader to do next. End with a goodwill statement or a positive, forward-looking statement (for example, “Thank you...I look forward to...”), or both, as appropriate to your audience, purpose, and context. Often you should include a line that states if the reader has any questions to please contact you, giving your contact information (one phone number and one email address usually).

To practice using a corporate email (you will not have your Tech email after you graduate and you should not use a private email for work-related communication, you will use a fake corporate address (a Ubiquitous-corp.biz email address):

firstname.lastname@Ubiquitous-corp.biz

Notice the hyphen.

Do not hyperlink text, except for documents produced specifically for Web pages or social media.

## 7.9 Memo References

Referenced information used in your document is best summarized or paraphrased. Keep quoting to a minimum. Whether quoted or paraphrased, all use of references should be cited to avoid plagiarism. Use the guidelines below to correctly format reference pages.

- Use the MLA (Modern Language Association) style hanging indentation for all entries listed (See Appendix B for examples).
- A reference section is just the next section in a memo; do not start on a separate page if there is room to start it beneath the memo closing section.
- Single-space *within* entries, with double-space (size 12 font) *between* entries. Double-space means there is a blank line between lines of text.
- The majority of academic, governmental, and professional Websites have publisher information. Usually this information can be found at the bottom of the Website; otherwise, check the “About” or “Contact” sections.
- Make sure your reference section includes all references used (whether quoted from or not) in your memo.
- Et al. is not placed in italics in normal use; it does not have a period after *et* but does have one after “al”: “Ada Wong et al. argued...”

## 7.10 Attachments

Whenever additional detailed information (For example, lists, graphs, tables, and schematics) is attached to a memo, refer to your attachment(s) in the body of the memo and add a notation after your closing:

Attached: Red Queen Defense Systems Schematics

## Section 8: Report Guidelines

While a memo of transmittal is not part of your report, it is attached to the report copy that is sent to the person originally requesting the report (see section 7 for memo guidelines).

You *must* use section breaks to help you meet the numbering style requirements. Keep in mind that while you will repeat some information two or more times in the report, do not just merely copy and paste: each section has a distinct purpose and different primary and secondary audiences. Therefore, you may need to rephrase, rewrite, and sometimes expand on what you have written before to address the needs of each section and its audiences.

### 8.1 Page Numbering

While the letter or memo (as appropriate) of transmittal is clipped or attached to the front of the copy of the report being sent to the person who first requested the report, it is not included in the report pagination. Follow the guidelines below for paginating the white paper or technical report.

- *No* page numbering is visible on the cover page and title page.
- In the front matter, page count starts with the title page (though no page number is visible on the title page). Pagination for the front matter appears centered in a footer in lowercase Roman numerals, 12-point font size. Thus, the abstract, which comes after the title page, is the first page in the front matter to have visible page numbers and will have “ii” (without the quote marks) centered in the footer. The next page will then be “iii” (without the quote marks) until you get to the body of the document (executive summary).
- Starting with the executive summary and continuing throughout the paper or report, the page numbers should appear justified with the right margin in a header, in size 12-point font (Times New Roman), starting with the Arabic numeral 1.

### 8.2 Page headers

No page headers are visible in front matter pages. For pages with page headers, (the main body of the document) follow the guidelines below.

Starting with the executive summary, headers in the body of your document need to include the report title on the first line and the section title and page number on the second line (single-spaced), with all lines justified to the right. For example:

*Feasibility Study on Confluent Literary Studies*

Introduction—2

Use an em dash with *no* spacing before or after the dash.

Each section will have its section title in the page header (this will require using section breaks). You can find help on creating section breaks at the Microsoft Word Help Online resources at [davidmmerchant.com/writing-help/](http://davidmmerchant.com/writing-help/). Include in the header a blank 12-point line after the section

title and page number line. This ensures that there will be a blank line between the header and the first line of text (or top of the first image) of the page.

### 8.3 Cover Page

The first page of the front matter is the cover page. A cover page protects the document, presents the Corporation's branding, and for confidential or secret reports, shields the nature of the report from accidental viewing by unauthorized readers. An example is found in Appendix B.

- On the first line, type “**APPROVED RESEARCH PROJECT**” (without the quotes) in boldfaced Arial (size 26), all caps, in RGB **203,51,59** font color.
- Add two blank 12-point Times New Roman lines, then type the due date centered in 14-point Times New Roman font (non-boldfaced).
- At the center of the page (that is, center vertically as well as horizontally), place the Louisiana Tech College of Liberal Arts logo.
- Add *two* blank 12-point Times New Roman lines after the logo and then type your name in **boldface** 14-point Times New Roman font.
- Add two blank 12-point Times New Roman lines after your name and then type the course title (ENGL 303) and the section number in **boldface** 14-point Times New Roman font (you will have two blank lines between your name and the course title). Separate the course and section number by a hyphen:
- *Do not* show page numbers at the bottom or top of the page.

### 8.4 Title Page

The title page gives the title of the report, who it is for, who wrote it, and when it was written. An example of a title page is found in Appendix C.

- One-third of the way down the page, type the title of your paper or report in **boldfaced** Arial (size 26), all caps, using RGB **203,51,59** font color. For white paper, titles include the phrase “WHITE PAPER ON” and then your topic. For technical reports, title conveys your topic, ending with a colon and the phrase “A RECOMMENDATION REPORT,” or “A FEASIBILITY STUDY” (whichever is appropriate). If your title wraps, include more than one word on the last line.
- Add two blank 12-point lines and type “Prepared for:” in 12-point Times New Roman font (non-boldfaced), then type in “Mr. David Merchant, English Instructor” (without the quotes). Center it with your report title.
- Double-space, then type “Prepared by:” in 12-point Times New Roman, then your name in 12-point font (non-boldfaced), Align this information with the “Prepared by:” information and center it with your title.
- Double-space, then type the date the report is due in 12-point Times New Roman font. Center the date within the page margins.
- Use two-columns or a table, centered, to format the “Prepared for,” “Prepared by,” and the due or submission date elements of the title page.

- Even though the title page is the first page in the front matter (numbering for the front matter starts with the title page), **do not** show the page number anywhere on the page.

## 8.5 Table of Contents

Having a correct and properly formatted table of contents is important for your documents' accessibility. It also aids your documents' professional appearance. Format as follows:

- Type the words “Table of Contents” as a top-section title (see Section 4 for section title formatting) at the top of the page.
- All top-level sections (“chapters”) will be listed in the table of contents.
- All entries should be non-boldfaced, 12-point Times New Roman font, with no indentation or centering.
- Single space entries.
- Sub-entries shall be in 12-point Times New Roman font, with a 0.5-inch indentation from the left margin.
- Sub-entries should only list level-1 sections; you do not need to list all level-1 sections, just those you think your audiences will be most interested in finding quickly.
- Put entry titles in title case as discussed in section 3.
- All page numbers (entries and sub-entries) are not boldfaced and reach the right margin. Place a sequence of non-boldface dots (periods) starting, after a horizontal space, at the end of the heading and ending right before the page number.
- Use page number for the first page of the entry; **do not** show the page range.

See the table of contents for this *Guide* for a formatting example. Search Microsoft's website or search YouTube for information on creating a table of contents using Microsoft Word.

## 8.6 List of Illustrations

A list of illustrations helps readers to quickly locate important illustrations. They usually have two subsections: the first for listing figures with the second for listing tables. As this is a table of contents of illustrations, page numbers for each illustration must be included. If you only have figures, then rename this section List of Figures (you will not need any subsections). If you only have tables, rename this section List of Tables (you also will not need any subsections).

- Type the words “List of Illustrations” as a top-section title (see Section 4 for section title formatting) at the top of the page.
- Exception: if the report only contains figures, call it a “List of Figures”; if it contains only tables, call it a “List of Tables.”
- Put entry titles in title case as discussed in Section 3. Left align all entries titles.
- Page numbers are not boldfaced and must reach the right margin. Type a sequence of dots starting at the end of the heading and ending right before the page number.
- **List all figures first** in the order they appear in the report, stating the page number for each. Include each figure's title. All entries are single-spaced and in 12-point Times New

Roman font (non-boldfaced). Before the entries, type the word “Figures” as a level-1 heading (only if you have both figures and tables and, thus, need subsections).

- **List all the tables last** in the order they appear in the report, stating the page number for each. Number them in numerical order of appearance. Include each table’s title. All entries are single-spaced and in 12-point Times New Roman font (non-boldfaced). Before the entries, type the word “Tables” as a level-1 heading (only if you have both figures and tables and, thus, need subsections).
- Do not include any figures and tables that are in the appendix.

## 8.7 Glossary (Includes Symbols)

To aid multicultural and non-subject matter expert readers, define abbreviations, acronyms, and symbols used in your document.

Format the Glossary section as follows:

- Type the words “Glossary” as a top-section title (see Section 4 for section title formatting) at the top of the page.
- Do not put in bulleted or numbered list format.
- List the symbols, abbreviations, acronyms, and initialisms alphabetically by their definition.
- Put the word or phrase being defined (put a colon at the end) in **boldface**, 12-point Times New Roman font. Define the word or phrase using normal (not boldfaced), 12-point Times New Roman font.
- Using **boldface**, 12-point Times New Roman font, spell out abbreviations, acronyms, and initialisms first and then include, in parentheses, the abbreviation, followed by a colon. Define the term using normal (not boldfaced), 12-point Times New Roman font.
- Using **boldface**, 12-point Times New Roman font, spell out symbols, followed by a colon. Define the term using normal (not boldfaced), 12-point Times New Roman font. Place the symbol after the colon using normal (not boldfaced), 12-point Times New Roman font. Do not add a closing period after the symbol.
- Double-space between entries; in other words, include a blank 12 font size line between each entry (see the example below).
- Using hanging indents: the first line of the definition is left-justified to the margin, while subsequent lines are indented 0.5 inches.

Glossary items *must be listed* in alphabetical order for the glossary to be considered accessible (one of the Eight Measures of Excellence). The entire entry uses a hanging indent and a blank line between entries. Putting the entries in alphabetical order, boldfacing terms, using hanging indents, and having a blank line between terms makes it easy for a reader to quickly find the term they are looking for; we want to keep distractions from reading the body text to a minimum.

Below is an example of glossary items formatted correctly.



**Antiviral:** Any antimicrobial drug used for treating viral infections destroys viruses. Specific antivirals are used for specific viruses. An antiviral works by inhibiting the virus' life-cycle.

**Japan Aerospace Exploration Agency (JAXA):** The Japanese national aerospace and space agency. It was formed in 2003 from the merger of the Institute of Space and Astronautical Science, the National Aerospace Laboratory, and the National Space Development Agency of Japan.

**Pound Sign (British):** £

**Technical Association of the Pulp and Paper Industry (TAPPI):** The association for the worldwide pulp, paper, packaging, and converting industries and publisher of *Paper360* and the *TAPPI Journal*.

Boldface terms, symbols, and abbreviations included in your glossary when they *first* appear in your paper or report. For the *first* term boldfaced in the document, explain to your reader what boldfacing a term means by including a footnote as explained in your textbook on page 358. To repeat, you only need to footnote the *first* term boldfaced in your document (in other words, the footnote will only occur once).

## 8.8 Abstract

As your audiences for the abstract are subject-matter-experts familiar with the subject, technical language is allowed here. The abstract should be a descriptive or topical abstract; thus, do not explain the criteria used, just provide the major findings, including your recommendations. Just describe the topics covered. Format the abstract as follows:

- Title the page “Abstract” (without the quotation marks) as a top-section title in **boldfaced** Arial (size 20), RGB **203,51,59** font color, using title capitalization rules (see Section 3).
- Below the page title, using a soft break (use Shift + Enter or Shift + Return) include the title of your report, enclosed in quotation marks in the same top-section title format (**boldfaced** Arial (size 20), RGB **203,51,59** font color, using title capitalization rules).
- After a 12-point, Times New Roman blank line, type in 12-point black Times New Roman font “Prepared by:” (without the quote marks) followed by your full name and title. If spacing is tight, replace your first name with your first initial. Center the line and make sure there is a blank 12-point line above and below it. If the line wraps, make sure the second line lines up with your first name or first initial.
- Format the body of the abstract as one paragraph.
- **Keywords:** in a horizontal listing, list terms that you expect a researcher to *likely use* when searching for your report electronically. You can include acronyms (without spelling them out). Include one blank 12-point line before the Keywords. Use normal (non-boldfaced, non-italicized) 12-point font. Left justify. Do not end a list of terms with a period, or include “and” before the last term. For example:  
Keywords: antibiotic, Aqua Cure, first aid spray, open wounds, ointment

- Do not use footnotes as users of abstract databases may not have immediate access to the full report.
- Do not use complex mathematical notations as abstract databases may not render them correctly.

Word count for the abstract (includes keywords) should be from 100 to 300 words.

It will probably be easier to write the abstract last as it is conceptually closer to the conclusion (the recommendation) than the introduction.

## 8.9 Acknowledgments

Title the page “Acknowledgments” (without the quotation marks) as a top-section title. Below the page title, briefly write your acknowledgments. Make sure a blank 12-point line is between the page title and the acknowledgment text. Provide a paragraph thanking and/or acknowledging the contributions of sponsors, advisors, and others that helped. However, do not include writing team (which includes editors, fact checkers, and proofreaders).

## 8.10 Remaining Sections

Each section begins on its own page: at the top of the page, type the title (for example, Executive Summary) as a level-1 heading. Each section may require subsections which may have their own subsections such as a level-2 subsection divided into two or more level-3 subsections. See section 4 for information on formatting section and subsection headings. Remember that each section has a different page header requiring the use of section breaks for each level-1 section (see 8.2 above)

## 8.11 References

As professionals, we need to provide readers with consistent, complete, and correct references. There is no one reference style guide that is better than the other. Corporations pick one to maintain consistency. English 303 uses MLA style for references, with changes noted below (where references are placed and spacing within entries).

### Formatting

Referenced information used in your document is best summarized or paraphrased. Keep quoting to a minimum. Whether quoted or paraphrased, all use of references (especially anything quoted, text or illustration) should be cited to avoid plagiarism. Use the guidelines below to correctly format reference pages.

- A reference section for a report is a separate section, starting on its own page, unlike the reference section in a memo which is just another level-2 heading.
- Single-space within entries, with double-space (put a blank size 12 font line) between entries.

- Use the MLA (Modern Language Association) style hanging indentation for all entries listed.
- The majority of academic, governmental, and professional Websites have publisher information. Usually this information can be found at the bottom of the Website; otherwise, check the “About” or “Contact” sections.
- Make sure your reference page(s) includes all references used (whether quoted from or not) for all sections of your document.
- Et al. is not placed in italics in normal use; it does not have a period after *et* but does have one after *al*: “Ada Wong et al. argued...”

Reference authors by last name. For example, do not write “Richard Nussbaum states that...” Instead, write “Nussbaum states that...” Exception: when you have two authors with the same last name, include the first name or first initial to help distinguish them. Remember that inline citations are pointers: they are not full citations, instead, they point to the full citation in the references section. Since in MLA authors are listed alphabetically by last name, having the last name in the inline citation helps the reader to quickly scan the reference section to find the full citation information. This is also why MLA citations use hanging indents: to make scanning the references more efficient.

### **Quoting**

Keep quotes as short as possible. However, keep quotations to a minimum. Use quotations when presenting something that is an opinion; use paraphrases when expressing a fact. When paraphrasing, try to use less than 25 percent of the original wording.

*Poor*: Frederick et al. have shown that “bacteria can be coated through layer-by-layer assembly.”

*Best*: Fredrick et al. have shown that layer-by-layer assembly can be used to coat bacteria.

The statement “bacteria can be coated through layer-by-layer” is not a subjective opinion but an objective observation and so should be paraphrased rather than quoted. Keep in mind that while common knowledge does not need to be cited, new information (such as from a new study, observation, or experiment) is not common knowledge.

### **Web References**

You can use information retrieved from online research databases and indexes that a library pays for (such as *EBSCOhost* or *Engineering Village*). Of course, make sure you cite them correctly.

However, World Wide Web references have some issues when it comes to technical documents. While there are plenty of good resources on the web, web pages have two major issues. First, most web pages are not refereed. This makes it difficult to determine their accuracy. Second, web pages are also temporary or move, making it difficult to find the information later.

Therefore, if the web page is a PDF of an article that is published from a refereed journal, then you should cite or reference the journal article, not the web page. If you are referencing an instructors’ notes published on the web, usually that information can be found in a textbook—use the library to find an appropriate text to reference instead.

You may also wish to cite material on the website of a company, such as one which manufactures a piece of equipment used in the study. Most of this information will be available in publications produced during the development of the product or in the product's user's manual. In either case, it is better to cite the published work or the user's manual directly. However, that is not always easily done—in that case, go ahead and cite the company's website. You can also take a screenshot of the material you are citing and place that in your appendix.

## 8.12 Appendices

Each appendix should be its own document. No more than one document can be in an appendix. (For example, if Appendix E is a copy of a questionnaire, then Appendix F is the results of that questionnaire.)

Any figures or tables in an appendix need to be numbered separately from the body of the white paper. This is because the information in an appendix is supplemental and while may still be important, is not essential to the white paper; a white paper should be able to be understood if the appendices were removed. Number the figures or tables in an appendix document as if the document was a stand-alone document. Do not include figures and tables in the appendix in the white paper's list of illustrations.

Label each appendix item with a letter of the alphabet: starting with the letter A, label the first page of each appendix document with its corresponding letter. Follow that letter with the actual title of the document the appendix houses (for example, **Appendix B: Questionnaire on Researching Credible Solutions to Viral Infections in Adolescents**). Put the label as a top-section title. Be sure to record the labels for the Appendices in the Table of Contents appropriately.

If the document that the appendix houses is a previously written memo, it must maintain its original design, except for headers and footers. Headers and footers must be removed so the formatting established in the report's design can be continued without disruption (maintaining document consistency and coherence). However, if the document placed in the appendix has a letterhead or masthead, then the letterhead must be retained within the body of the document, not the header; move, via copy and paste, the English 303 letterhead from the first page header into the body text:

1. First, double-click the cursor in the header.
2. Select the letterhead and copy it (CTRL + C).
3. Delete the letterhead,
4. Paste (CTRL + V) the letterhead into the body beneath the appendix label.

Remove the References sections from the original documents included in your appendices. This step is necessary since the References document of the report will have all the research sources you have used in the research and writing of your final report. You should, then, make sure your reference page(s) includes references for all documents included in the report.

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## Appendix A: Memo Masthead Example

	<b>E 303: TECHNICAL WRITING</b> School of Literature and Languages Louisiana Tech University	
<b>Memo of Transmittal</b>		
8		
<b>To:</b> <sup>9</sup>	Mr. David M. Merchant, English Instructor	
<b>From:</b>	Jill Valentine	
<b>Subject:</b>	Analytical Report for Validation of Confluent English Courses into Undergraduate and Graduate English Major Curriculum at Louisiana Tech University	
<b>Date:</b>	May 5, 2010	
10		
11		

<sup>8</sup> One blank line: one font-size 12 Times New Roman blank line.

<sup>9</sup> Depending upon the audiences for the memo, the memo may require a **CC** or a **Through** field, or both, after the **To** field; some memos may not require a **CC** or a **Through** field; if that is the case, delete this line (do not leave a blank line—move the remaining fields up).

<sup>10</sup> One blank line above the divider line: one font-size 12 Times New Roman blank line

<sup>11</sup> One blank line after the divider line and before starting the body of the memo (usually the purpose statement): one font-size 12 Times New Roman blank line

## Appendix B: Cover Page Example (Annotated)

# E 303 TECHNICAL WRITING APPROVED RESEARCH PROJECT

Two blank lines, Size 12, Times New Roman

November 9, 2018

Normal (not boldfaced) text

Logo is exactly centered: horizontally and vertically. Use the logo for cover pages, not the logo in the letterhead. See the Style Guide & Template section on Moodle.



Two blank lines, Size 12, Times New Roman

**Kirsten Willis**

Boldfaced text

**ENGL 303-002**

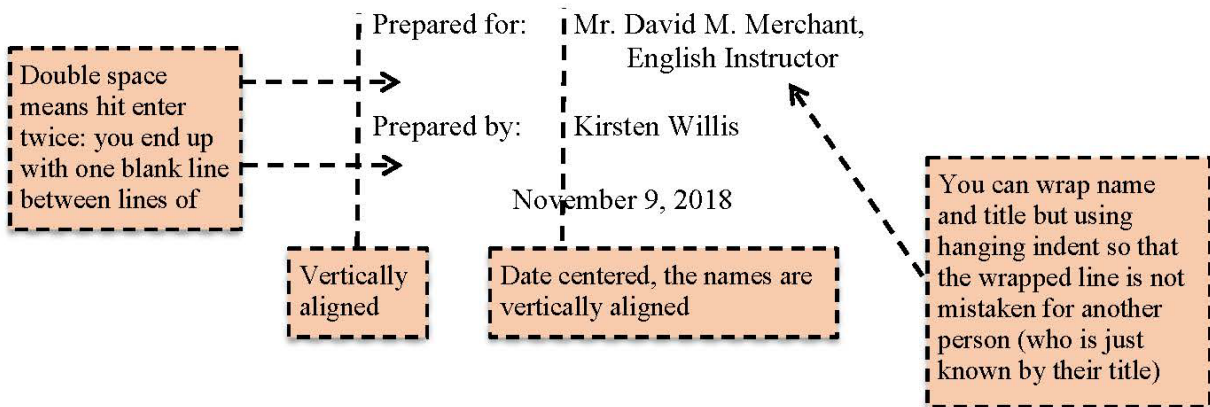
No page number visible on this page



## Appendix C: Title Page Example (Annotated)

# WHITE PAPER ON VACCINE POLICY REGULATIONS

Two blank lines, Size 12, Times New Roman



No page number visible on this page

## Index

---

### A

Abbreviations.....	2, 5
Abstract .....	28
Accessibility Guidelines .....	4
Acronym .....	2, 5, 27
<i>Acronyms</i> .....	27
Aesthetic appeal .....	2
All Caps .....	6
Appendices .....	31
Attachments .....	23

---

### B

Bullet (Lists) .....	<i>See Lists, See Lists</i>
----------------------	-----------------------------

---

### C

Clichés.....	5
Color .....	iv, 4, 5
<i>Column heads</i> .....	19
Confused Words .....	5
Courier .....	3
Cover Page.....	24, 25
Criteria .....	28

---

### E

Email address.....	23
Equations and formulae	
abbreviations .....	20
referencing in text.....	20
Et al. ....	23, 30
Etc. ....	12
Executive Summary .....	24, 29

---

### F

Figurative language .....	5
---------------------------	---

---

### G

Graphs .....	17, 18
--------------	--------

---

### H

Heading Segment (Memo).....	21
Headings .....	7
Color.....	7
Examples.....	10
In Lists Examples .....	10
Level 1 .....	8
Level 2 .....	8
Level 3 .....	9
Level 4 .....	9
Lists .....	11, 15
Orphaned .....	7
Parallelism.....	9
Hyperlink.....	4, 16, 23
Hyperlinks .....	4

---

### I

Illustrations.....	16
Initialism .....	5, 27

---

### K

<i>Keywords</i> .....	28
-----------------------	----

---

### L

Legibility Guidelines.....	4
List of Illustrations .....	26
List of Symbols .....	27
Lists	
Bullet Styles.....	14
Bulleted Lists.....	14
General Guidelines.....	12
Headings .....	15
Inline .....	15
Nested Lists.....	11, 14, 15
Numbered Lists.....	14
Vertical Lists.....	13

---

### M

Memo Closing.....	23
-------------------	----

Memo Masthead Example.....	34
Memo of Transmittal.....	24
Memo Specific Guidelines .....	21
Memo Summary .....	22
MLA.....	iv, 6, 23, 30
Modern Language Association .....	See MLA
Multicultural .....	5, 27

---

## P

Page Headers .....	22, 31
Page Numbering .....	22
Parallelism .....	9
Purpose Statement.....	22

---

## R

References .....	31
Memo.....	23
Report .....	29
Report Page Headers .....	24
Report Page Numbering .....	24
Report Specific Guidelines .....	24

---

## S

Section Breaks .....	24
----------------------	----

Source .....	16
Spacing Between Letters .....	5
Symbols.....	5, 27

---

## T

Table borders.....	19
<i>Table cell margins</i> .....	19
Table of Contents .....	26, 31
Title Case .....	See Capitalization
Title Page .....	24, 25
Titles .....	7
Color.....	7
Examples.....	9
Parallelism.....	9
Trademark .....	8

---

## U

Underlining .....	5
Upper case.....	6

---

## W

Web Documents .....	4, 5
White Paper Guidelines.....	24
Word Count .....	29