



# REPORTS

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Preparation for Editing and Posting

- This page is a reminder to create a cover for your report.
- Schedule a time to discuss a cover design with Graphics. Provide sufficient time for production.
- If you are using this template for a document other than a standard report, such as a guidebook or a StoryMap, please talk to Editorial and Graphics about which sections of the template can be deleted.
- Before beginning to work on your report, delete these bullets and the page break below, which will make the title page (currently page 2) the first page of your document.

DRAFT

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the [Getting to Know the Process](#) section of this guidebook to make sure that you are applying them correctly.

To create a custom document, one that does not follow the look of a standard report template, you should have already met with managers of Editorial and the Graphics team. Documents that are different from the template require additional time to develop.

## STARTING OUT

Download the report template from our intranet site (<https://intranet.ctps.org/templates-home>) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. ([See \*How Should I Name My Document?\* on page 10.](#)) Page numbers in the footer are applied automatically.

### Cover

When you begin your report, schedule a time to meet with Graphics to discuss a cover that they will prepare for your report.

### Page 1—Title Page

- Replace all text within the brackets, including the brackets themselves, with the appropriate text. If you are unsure which agency or contract numbers to place on this page, ask your group manager.
- Keep your report title short. If you need to, you may make the subtitle longer and more descriptive.
- After you delete the first page (the placeholder for the cover), this will become Page 1, but numbering won't appear until Page 2 (numbering for the first page is invisible).
- Add your report's title and the report's date in the header.

### Page 2—Map Page

When you meet with Graphics about the cover, also ask them to create a map pertinent to your project. You should meet with Graphics when you begin your report to provide them with sufficient time to create both the map and the cover.

### Page 3—Nondiscrimination Page

Use the text provided in the template.

### Page 4—Abstract

The abstract is a short, stand-alone summary of your report. An abstract should clearly and briefly identify the purpose, problem, methods, results (if any), and a conclusion. Your abstract will be used as the summary text that accompanies your report on the website.

### Page 5—Table of Contents

You are not responsible for creating the table of contents. Editorial will manage and update this page for you at the end of the editing process. Appendices, though listed here, should be generated and compiled in a separate document.

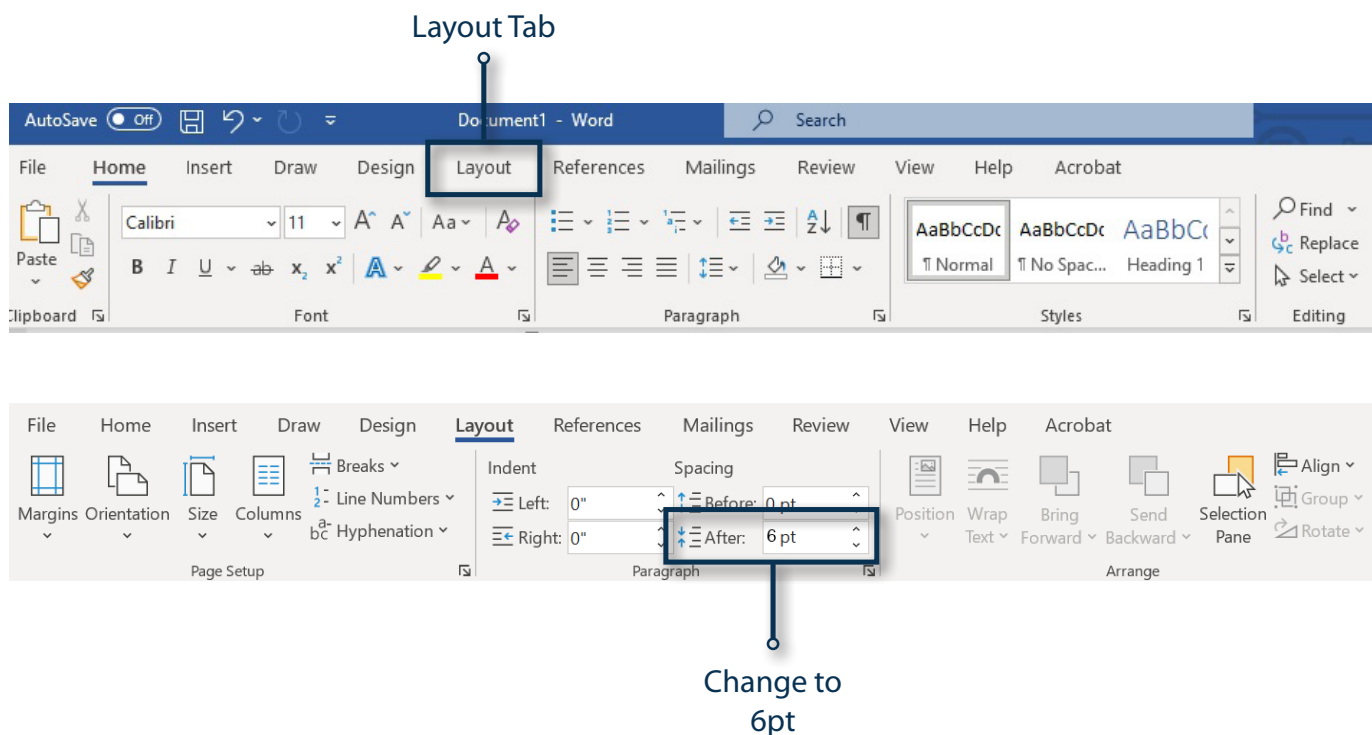
### Page 6—Executive Summary

The executive summary should provide a clear and concise (generally not more than a few pages) overview of what the report is about and why it was done, what is most important or unique about the report, and the report's primary findings and recommendations.

## FORMATTING THE MAIN DOCUMENT

- New chapters always begin on a new page, and on an odd page. Insert a Page Break at the end of each chapter (never use Section Breaks.)
- Formatting of table of contents, chapters, and pagination will be handled during the final round of editing.
- Heading 1 and Heading 2 are preceded by section and subsection numbering, respectively. The remaining five headings are not.
- Numbering within the Report will follow the chapter number. For example, a subsection within Chapter 1 will be 1.1. Any further subsections will add another number (for example, 1.1.1). The first number will ALWAYS be the same as the chapter number, and the second number will be the subsection number.
- For purposes of organization and HTML conversion, use as few heading levels as possible.
- You may insert Page Breaks if you need them. Do not use Section Breaks.
- To insert a footnote, use the Insert Footnote button under the References tab on the Ribbon. Be sure to apply Footnote Text style for your footnote text.

- For any point(s) in a bulleted or numbered list that runs longer than one line, take these steps:
  - Go to the Layout tab on the Ribbon;
  - Then go to the Paragraph group in the center;
  - Select all bullets except for the final one in the list; and
  - Adjust the After spacing to 6pt.



Please see the Editorial group if you have any questions.

## FORMATTING FIGURES AND TABLES

Please consult the [Tables and Figures section of this guidebook on page 65](#) for complete details about proper formatting.

- Generate ALL tables in Excel, then insert them into the document using the instructions in the Tables section of this guidebook.
- Use the Figure/Table Title style on the titles of figures and tables. The figure or table number should be on the first line in sentence caps, then the title on the second line. Use soft returns (Shift + Enter) when adding new lines to maintain the formatting. See below for an example:

**Table 1 [Shift+Enter]  
This is the Title of the Table**

- To create and maintain automatic table and figure numbering, copy the figure or table number and title lines from the template and paste them before each new table or figure that you add. Numbers will not update until you view the print preview. Use a soft return [Shift + Enter] after Table and number to ensure style remains consistent. Like Table of Contents, table/figure numbers use Quick Parts Field Code, which will allow the user to create an automated numbering system. In order for this to work correctly, the field command must be a part of the text, which is why copying and pasting from the original template table/figure title header (i.e., Table X or Figure X) is important.
- If tables or figures (such as maps or photos) are full page, create a placeholder page instead of inserting them into the Word document. To create a placeholder page, add a blank page where the table(s) or graphic(s) will be inserted. DO NOT use section breaks. On this placeholder page, write the title/name of the accompanying file for the page. Graphics will insert the table(s) or graphic(s) in the PDF when they prepare it for posting.
- ALT-Text must accompany each figure and table. ([See What is ALT-text and Why Do I Need It? on page 16](#) for guidance.) Please see Editorial if you would like to have a sample of ALT-Text.
- Citation information that includes a source must accompany every table (unless the table is the author's own work that was done for the report). Source information should be included for tables from other CTPS documents.
  - Use the Figure/Table Citation style for this text. Please see the [Tables section](#) of this guidebook for further guidance about proper formatting. See the example below:

[Notes, if any.]  
[Caption footnotes, if any.]  
[Acronyms and abbreviations, if any.]  
[Source(s): \_\_\_\_.]

- All acronyms and abbreviations used in the table must be defined alphabetically along one line separated by periods (e.g., CTPS = Central Transportation Planning Staff. MAPC = Metropolitan Area Planning Council. MPO = Metropolitan Planning Organization.)

## CONVERTING A MEMO INTO A REPORT

If you began writing a memo and later decided to convert it to a report, simply cut and paste the text into the report template. Keep a few things in mind, however:

- Section headers will be promoted one number when you switch from memo to report. You will need to reformat all Heading 1 headers into Chapter headings in the report. Heading 2 will become Heading 1 in the report, and so forth.
- All chapter headings should include “Chapter,” the chapter number, and the title (for example, “Chapter 1—Shared-Use Mobility”).
- Numbering within the report will follow the chapter number. For example, subsections within Chapter 2 will be numbered 2.1, 2.2, 2.3, and so on. Further subsections will follow the subsection number. For example, under subsection 2.1, the sections would be numbered 2.1.1., 2.1.2, 2.1.3, and so on.

## PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always turned on during the editing process of your draft. If applicable, Editorial will create a client review draft before finalizing the document. Once any changes have been incorporated, Editorial will turn off Track Changes when your document is finalized.
- Submit all ALT-Text to Editorial in a separate document either with your document or as soon as possible after submitting. If you need assistance, ask Editorial.
- For MPO meeting materials, Graphics will notify you and MPO Activities of the location of the final document. MPO Activities will post the document. For all other website postings, Graphics will notify you directly. [Refer to the instructions on the intranet regarding web postings.](#)