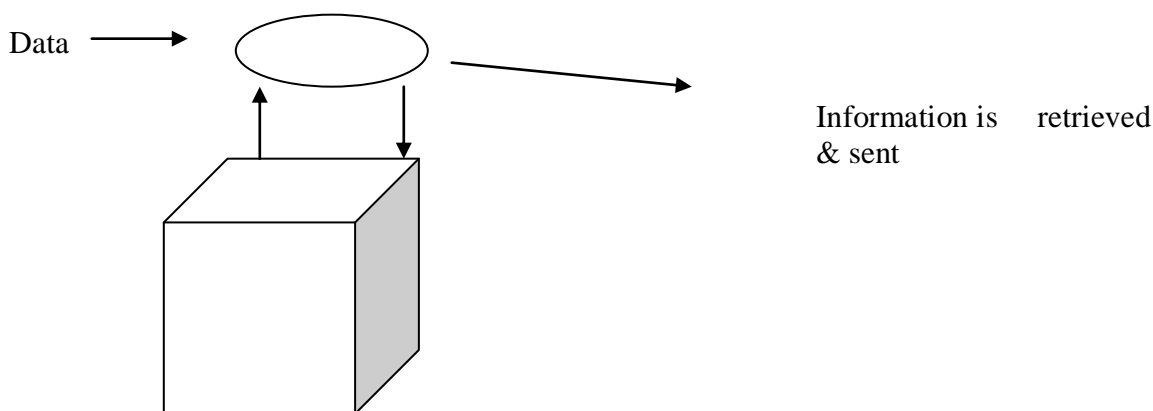


Lecture 6: Information Storage & Retrieval. Report Writing and Form Design

1. Information Storage and Retrieval
2. Reports for Decision Making: Types of Reports
3. General Points of Style
4. Report Formats: the Short Form
5. Report Formats: the Long Form

1. **Information Storage and Retrieval:** In all areas of our lives, our decisions are influenced by the facts available to us. We remember that *data* is gathered and processed in order to provide *information*. Data processing involves:
 - *Duplication:* copies are made for those who need the information ('public' information, such as newspapers, adverts, etc., and business information – reports, sales documents, etc.)
 - *Transmission:* information is sent to people who need it, in formats appropriate to their needs, and is properly received/acknowledged by them (feedback is part of the process of communication!)
 - *Storage:* not all information is needed straight away, or it might be needed again later, so it has to be filed away for various lengths of time (from days to years). The same item of information may be stored in different files, once by each person or group who might need it.
 - *Retrieval:* information on file is obtained for use and further data processing by 'retrieving,' or getting it out of file.



Aspects of information storage and retrieval include

- Report writing
- Form design
- Classification and indexing methods
- Filing procedures
- Retention periods (length of time files are kept)

Today we are going to focus on reports as sources of information for decision making. As we know, people in business need to obtain and utilize information quickly. Report is a

general term for ‘telling,’ or ‘reporting’ of information, which may be presented in a variety of formats.

2. Reports for Decision Making: Types of Reports. Report formats differ depending on their purpose and nature. Reports may be:

- *Formal, or informal*
- *Routine* (daily, weekly, monthly, quarterly, annual, etc.), or *occasional*
- *Professional, or for a wider audience*

Uses of Reports. Reports are meant to be *useful* by providing information for decision making. They may be used

- to assist management in decision making based on clearly written, concise information which may consist of:

- Information, retrieved from files or other sources
- Narrative or description, i.e. of one-off events or procedures (accident, installation of new equipment, etc.)
- Analysis
- Evaluation and recommendation

- as a permanent record and source of reference

- to convey information to other interested parties

The *use, or purpose* of the report *must be clear* to both the person requesting the report and to the report writer. Routine reports have their purpose and use specified in procedure manuals. Occasional reports often require *‘terms of reference’* explaining the purpose of the report and any restrictions on its scope.

3. General Points of Style: The general principles of business communication, such as *conciseness, completeness, courtesy, correctness, clarity, logical organization* and *attractiveness* all apply in report writing.

Readability (clarity) may be facilitated by various display techniques, such as headings, references, font types, spacing, etc.

Since reports provide objective information regarding facts or processes, passive constructions (emphasis on the process, not the doer of the action) are typical in report writing.

4. Report Formats: the Short Form. Short reports may be *formal* or *informal*. *Formal* reports are strictly schematic, with a wide use of impersonal constructions. *Informal* reports are less rigid in structure and slightly more personal in style.

The short formal report is usually split into logical sections, each referenced and headed appropriately:

Title (usually centered)

- I. Terms of Reference
- II. Procedure (or Method)
- III. Findings

1. Section heading (if required)
2. Section heading
 - (a) sub heading
 - (i) sub point

- IV. Conclusions
- V. Recommendations (if asked for)

SHORT FORMAL REPORT

Title: At the top of every report (or on a title page for lengthy ones) should be the *title* (i.e., subject) of the report, *who* has prepared it, *for whom* it is intended, *the date* of completion, and *the status* of the report (i.e. 'Confidential' or 'Urgent').

I. TERMS OF REFERENCE

The purpose and scope of the report. This section may sometimes be called 'Introduction' and may include the details set above under 'Title'; the title then would give only the subject of the report.

II. PROCEDURE or METHOD

This outlines the steps taken in the investigation, collection of data, etc. For example, telephone calls or visits made, documents consulted, computations or analyses made, etc., should be briefly described, and the names of other people involved mentioned.

III. FINDINGS

Information itself is set out, with appropriate headings and subheadings, if the report covers more than one topic. Organization: as with a letter or memorandum, the content should be complete, concise, and clearly structured in any relevant logical order of development.

IV. CONCLUSIONS

This section allows for a summary of main findings (if the report is complex and lengthy). For a simpler report it may include *action taken* or *decisions reached* or the overall 'message' of the report.

V. RECOMMENDATIONS

(if stipulated by the terms of reference)

The Sort Informal Report is used for less complex information, so the structure of the short informal report is also less complex, without any elaborate referencing and layout. There are usually three main sections, each of which may be headed in a way appropriate to the context in which report is written.

TITLE

1. Background/Introduction/Situation

2. Findings/Analysis of Situation
 3. Action/Solution/Conclusion

SHORT INFORMAL REPORT

TITLE: Again, the subject title, 'to', 'from', 'date', and 'reference' (if necessary) should be provided, perhaps in the memo format.

1. Background or Introduction or Situation: this sets the *context* of the report, i.e. its purpose and any other relevant details. This section may also contain the equivalent of 'terms of reference' and 'procedure' ('method').

2. Findings, or Analysis of the Situation: the detailed information gathered is set out in well structured paragraphs. Subheadings may be unnecessary in the short informal report.

3. Action or Solution or Conclusion: the main findings should be summarized and conclusions drawn, together with a note of the outcome of events, or action required, or recommendations with regard to solutions sought.

The Memorandum Report: In informal reporting situations within an organization, the 'short informal report' may well be presented in A4 memo format, which incorporates title headings and allows flexibility of content layout. Example of memo report:

<p>To: Mac McNally Executive Vice President</p> <p>From: Tom Swanson Director of Sales</p>	<p>Date: May 2, 2000</p> <p>Subject: Periodic Sales Report for April 2000</p>
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SALES VOLUME

District	Consumer	Manufacturing	Government
I	K 400,000	K 800,000	K 1,700,000
II	500,000	900,000	2,900,000
III	600,000	800,000	4.800,000*

* Includes billing for first quarter

COST OF SALES TRAINING

District I	K 42,000 (includes cost of video equipment)
District II	K 21,000
District III	K 32,000

Recommendations

1. Split District III into two districts, effective July, 2000.
 2. Appoint Manager of Sales. All district supervisors to report to this manager.
 3. Appoint Sales Training Director for all Districts.
 4. Increase Sales Training budget by 20 percent.
 5. Add one secretarial position to the Director of Sales office.
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The Form Reports: Some routine (particularly periodic) reports have standard content requirements, and can therefore be preprinted with appropriate format and headings, and filled in when the need arises. Often companies develop forms to facilitate the periodic reporting of information such as sales, inventory, number of transactions, and so forth.

General principles of form design: The purpose served by a form is to ensure an effective transfer of necessary information.

A good form is one which is designed so that information can be easily:

- Transmitted
- Interpreted
- Filed (size, etc.)
- Retrieved

Form design should focus on:

- Content
- Layout
- Make-up
- Printing
- Paper

5. Report Formats: the Long Form

In most organizations, decisions are based on information gathered from a variety of sources. This information is usually presented to the decision maker in the form of a long report that contains carefully substantiated data, conclusions, and recommendations.

Types of Long Reports: There are several different types of long reports. Each type is designed for a different goal. Therefore, when you write a long report, it is important to identify your goal early in the planning stage. The different types of long reports are as follows:

- *Informative long report:* This type of report presents information needed to make a decision.
- *Analytical long report:* This type of report provides in-depth data about a particular situation. For example, a company might wish to analyze the feasibility of marketing a new high intensity bulb, or of purchasing a new piece of equipment from another firm. Such a report would analyze the financial,, personnel, risk, and other factors involved.

- *Comparative long report:* A comparative report compares two or more alternatives. Advantages and disadvantages of each alternative are outlined.
- *Argumentative long report:* this type of report strongly recommends a specific course of action and provides documentation to support it.
- *Persuasive long report:* A more subtle approach is used in the persuasive report than in the argumentative report. Here data and information are provided to encourage the reader to take favorable action.

Quite often, a single report combines one or more of the types listed above; for example, a report may not only inform but also persuade.

The Format of the Long Report: All of the types of reports listed above follow the same format. The elements of this format are as follows:

- *Letter of transmittal:* the letter of transmittal introduces the report. It cites the authorization, purpose, limitations, and sources of information for the study. In some cases,, the research findings also may be referred to briefly in this letter, and there may also be acknowledgement of assistance received.
- *Title page:* the title page of the report contains the report title, the name(s) of author(s), the date of the report, and the name(s) of the individual or organization to whom the report is directed. All individuals listed should have their titles and affiliations noted.
- *Letters of authorization and acceptance:* letters that authorized the report and approved the study may be included if appropriate.
- *Table of contents:* this lists the section titles and page numbers for easy reference.
- *Summary:* A long report usually has a summary placed before the main body of the report. This allows the busy reader to quickly review the problem, objectives, and solutions so that he or she can make informed decisions.
- *Body:* the body of most long reports is divided into four sections:
 - *Introduction:* this section provides background information. If it is preceded by a summary section and a letter of transmittal, this section may be shortened. The topics covered could be a brief history of the problem, a review of the literature search, methods used in analyzing the problem, and references to data and forms presented in later sections.
 - *Discussion:* This section should be the largest part of the report. Findings, interpretations, and implications are presented here. Whenever possible, topic headings should be used. Tables and figures aid the reader in interpretation.
 - *Conclusions and recommendations:* Using the objective data presented in the discussion section, the writer should present carefully substantiated conclusions and thoroughly justified recommendations. Because the reader often is an executive who wishes to grasp the ‘big picture’ quickly, conclusions and recommendations appear immediately after the introduction.
 - *Addendum:* this section includes all supplemental information: appendixes, examples of measurement instruments used, calculations and statistics, supporting data and/or visuals, and the bibliography.

Summary**Short Reports:**

1. Short reports facilitate decision making in business.
2. The information presented in a short report should be clear and concise.
3. Periodic reports are submitted on a routine basis. They may be completed daily, weekly, monthly, quarterly, or annually.
4. Headings facilitate the reading of periodic reports.
5. Forms for easy fill-in are sometimes used for periodic reports.
6. More and more periodic reports are computer-generated.
7. The formal short report format: Title, Terms of Reference, Procedure, Findings, Conclusions, and Recommendations (if required).
8. The informal short report format: Title, Background, Findings, Conclusion.
9. Memos are the universal method of documenting important information quickly and concisely.
10. The format for memos begins with a standard four-part heading: 'To:', 'From:', 'Subject:', 'Date:'.
11. The subject line of a memo usually replaces the introductory paragraph.
12. Memos are used to confirm assignments, record minutes, document information for file purposes, fix responsibility, transmit information, and record items for completion (action items).

Long Reports:

1. *Long reports are written to inform, analyze, compare, argue, or persuade.*
2. Identification of the goal of a long report determines which type of report is most appropriate.
3. The main elements of a long report are the letter of transmittal, title page, letters of authorization and acceptance, table of contents, summary, and body.
4. The body of a long report usually includes an introduction, discussion, conclusions, recommendations, and addenda.
5. The summary of the long report is often placed before the body to provide the reader with an immediate overview.