XSEDE Style Guide for the Interim Project Reports (IPR)

Statement of Importance

We found it necessary to create a style guide in order to ensure that our Interim Project Reports (IPR) are being written in a consistent and professional manner. Not only does this help us present our information with clarity, but it saves time and effort for those who compile the final document. From now on, please reference this guide before submitting your report to clarify any formatting or style questions you may have. If you have specific questions regarding your section of the report that cannot be answered by this guide, please email pm@xsede.org.

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Writing the Report

General Guidelines

1. Please do not change the formatting. We want the document to have a consistent look from section to section.
2. Each report involves a large number of people at various stages. It is therefore critical that if you are unable to contribute in the timeframe required that you find an alternate to cover your work.
3. Be careful with the use of links to web pages, e-mail, documents etc. Keep in mind that these reports are referenced years after creation and if the link destination changes then we will have broken links.
4. Please adhere to the multi-level numbering format in the Word template. When sections are numbered by hand, it leads to uneven spacing and can also damage the cross-references throughout the report.

Report Structure

The structure of the report should be as follows:

1. Title page
2. XSEDE Senior Management Team (SMT)
3. List of Tables
4. Guide to Reading the Report
5. Executive Summary
   a. Strategic Goals
   b. Summary & Project Highlights
6. Science and Engineering Highlights
7. Discussion of Strategic Goals and Key Performance Indicators
8. Community Engagement & Enrichment
9. Extended Collaborative Support Services
10. XSEDE Community Infrastructure
11. XSEDE Operations
12. Resource Allocation Service
13. Program Office
14. Appendices
15. Service Provider Forum Report
16. TAS Summary

For a more detailed understanding of the structure, please refer to a previous report.

Text

1. Reports should be written single-spaced, 11 pt. Cambria font.
2. Periods should be followed by a single space, not double.
3. Use the oxford comma when writing a series (i.e., x, y, and z).
4. Please use the Word styles for the headings, normal text, etc., as all content is transferred into a Word template in the final compilation of the report.
5. Write in the third person. Do not use "we" or "our," especially when referring to WBS names in reporting/planning documents (e.g., ECSS). Use the WBS name or use "team" or "group".
6. Check that all references link properly up and down.
When writing the L3 Highlights sections: Please include text describing any highlights that are really L2 area-wide highlights involving multiple (or all L3s) with perhaps a very brief summary of the highlights of the L3s. Any management personnel changes at the PM, L3, and/or L2 level that occurred during the reporting period should be mentioned here. Shade any highlights that you would like to suggest be considered for inclusion at the project level. The sub-header for these sections in the IPRs should state L2 acronym Highlights (i.e., CEE Highlights). In the Annual Reports they should state L2 acronym PYx Highlights (i.e., CEE PY3 Highlights). In the Annual Reports there will be an additional sub-header for next project year's plan: L2 acronym PYx Activities (i.e., CEE PY3 Activities).

Do not change the text of the KPIs without a PCR. In general, KPIs should be reviewed/modified during the annual Planning Process. For KPIs that are reported annually, enter a dash (-) in the appropriate table cell and add a table footer with an explanation that states: - available in RP2.

Failure to include any new acronyms used to the acronym list found in the appendices.

For help inserting reference links, please visit http://wordFAQs.mvps.org/FormatCrossReferences.html#FormatAll.

When including numbers in your text, one through nine should be spelled out, and 10 and above should be written in numeric form. The exception to this is when a number appears as the first word in a sentence. In that case the number should always be spelled out.

Table cells should be 100% (not into margins or fixed width >100%).

Table body should be Cambria 9 pt. font, table headers should be Cambria 10 pt. font.

Check for proper alignment across rows - the last column of owners need to line up with the components of a KPI for the earlier tables.

Calculate totals on all tables (KPI).

References below table should be indent .25 (not tab) and Cambria 9 pt. font.

Verify all calculations, both horizontally and vertically.

Verify that the numbers in the table match the text under the table and that the message is clear.

Table rows should not be allowed to break across tables and header row should be repeated if the table spans pages. Paragraph spacing before and after should be set to 0 pts.

Table footers should be formatted as follows:

- For any numbers in the table that needed an explanation, please use superscript numbers and provide the explanation in a table footer with the corresponding superscript number.
- For any KPIs not collected or reported in that reporting period, enter NA in the appropriate table cell and add a table footer with an explanation that states: NA Explanation. (i.e., NA: L2 Directors are currently responding to climate study recommendations; data will be available in RP2.)
- For KPIs that are reported annually, enter a dash (-) in the appropriate table cell and add a table footer with an explanation that states: - Data reported annually.
- Table footers should be Cambria 9 and single spaced.

Targets for KPIs representing a percentage should be followed by the percentage sign (%). The KPI name will also designate that the value is a percentage (%). The data reported in each reporting period should NOT be followed by a % sign.

Targets for KPIs reported hourly should be followed by "hrs."

If a target is on the 5-point scale, add "1-5 point Likert scale" to the Metric/KPI name cell.

When a new metric is added, table cells from previous reporting periods will contain an asterisk (*) to designate that data for that metric was not being collected or reported at that time.

Do not use spaces between target/dtr.

KPI table data needs to be centered so that it lines up with target values.

Table headers should be center aligned.

KPIs and Sub-goals should be aligned to the left in all tables; Program Year, Target, Q1-4 and Total values should be center aligned.

If it is discovered that a KPI value was entered incorrectly in a previous reporting period, it should be corrected, and the corrected value should be footnoted with an explanation of why the previously reported value was incorrect, e.g.:

1. Use only drawn images for the R, G, Y, W (stop light) circles found in the Word template.
2. Make sure text boxes with images/captions are sized appropriately in order to not cut off any text.
3. For the Science Highlights - each image needs to have a Figure caption and be surrounded by a text box (border). Images should be placed in the upper or lower corners. The exception to this is if a story does not fill a page, the image should be placed within the section with the story text.

Compiling the Document
1. A page describing how to read the document should always appear before Section 1 of the report.
2. Check that all references link properly up and down.
   a. For help inserting reference links, please visit http://wordfaqs.mvps.org/FormatCrossReferences.html#FormatAll
3. Consistent formatting should be applied between reports in order to avoid creating extra carriage returns that needed to be removed.
4. L2 Director’s Office text should be standard.
5. Automatic numbering should be used when compiling the final document to avoid breaking cross-references.
6. Footer should include report number (ex. PY6 IPR 1) and page number. Report number should be left aligned, page numbers should be spelled out and right aligned (e.x. “Page 9.”)