

# PUBLISHING GUIDELINES

## Technical Report and Technical Update Guidelines

2025



### TECHNICAL REPORT AND TECHNICAL UPDATE TEMPLATES

Consistent formatting contributes to a strong corporate image and helps capture business-critical content in a way that is vital for building comprehensive knowledge management systems. To provide a basis for this consistency, prepare documents using the Technical Report Template or Technical Update Template in Microsoft Word 2007 or later.

While the majority of EPRI research results produced through Technical Publishing are *Technical Reports*, informal reports of continuing research, meetings, or topical studies may also be published. These are called *Technical Updates*.

The Technical Report and Technical Update templates can be accessed at <https://www.epri.com/suppliers>.

### PUBLICATION REQUIREMENTS

The following is required for submission of all Technical Reports and Technical Updates:

- Electronic files prepared for the text and graphics. Extraneous files (for example, progress reports tracking project development) should not be included.
- Source files for graphics may be requested if necessary.

#### Software

Software used to prepare EPRI Technical Reports and Technical Updates must be compatible with Microsoft Word 2007 or later.

### RESEARCH CONTRACTOR PUBLICATION RESPONSIBILITIES

The Research Contractor is responsible for:

- Confirming that EPRI has the right to publish all material contained in the report.
  - If third-party copyrighted information is included, appropriate permissions from the copyright owner authorizing EPRI to publish, reproduce, and distribute the material must be submitted with the report.
  - Copyright confirmation is also required for third-party material published previously in EPRI reports.
- Providing graphics that will support high-quality display online and in print.
  - Scanned images must be 300 dpi or higher to provide high quality, readable images.
- Submitting virus-free electronic files in preliminary form for review and comments 60 days prior to the expiration of the contract agreement or as otherwise specified in the Statement of Work.
  - Antivirus software is commercially available.

## REPORT ORGANIZATION

EPRI Technical Reports and Technical Updates contain *front matter*, *main text or body of the report*, and *optional back matter*.

- Research Contractors usually prepare most of the front matter, text, and back matter for Project Manager review and approval.
- EPRI Publishing prepares report covers, works with the submitted file to either flow it into the EPRI template or tweak an existing template-compliant file to standardize the look of each report, revises publication dates and EPRI information on the Title and Acknowledgment pages, and proofs and prepares documents for online and on-demand delivery.
- EPRI Project Managers or EPRI Publishing-approved editors prepare the Abstract and the Executive Summary.

### Front Matter

#### Title Page

- Title: A maximum of 90 characters or less (including spaces) is recommended. Acronyms and abbreviations should be avoided.
- Subtitle: Strongly advised. A maximum of 150 characters including spaces is recommended for the title and subtitle together.
- Product ID Number
- Type of Report: Technical Report, Interim, Topical, Technical Update or Proceedings.
- Publication Date: The month and year that the report is published.
- EPRI Project Manager: First initial and last name.

#### Disclaimer Page

- Technical Publishing will insert the appropriate disclaimer wording depending on the classification of the report.

#### Acknowledgments Page

- *EPRI-prepared reports* should display “EPRI prepared this report.” followed by the Principal Investigators.
- *Research Contractor-prepared reports* should include:
  - Company name and address.
  - Principal Investigators: First initial and last name.

- All reports should include literature citation information. For example:

This publication is a corporate document that should be cited in the literature in the following manner:

*Fuel Reliability Program: Fuel Design Evaluation Handbook: Tools for Assessing Fuel and Core Component Performance*. EPRI, Palo Alto, CA: 2011. 1022424.

**Note:** Use this style when citing EPRI reports in the Reference section of the report.

#### Abstract

- An Abstract is required for all TR and TU reports. One of our editors will develop an abstract upon request, or the preparer of the report can write one. Six or fewer keywords are required.

#### Executive Summary

- An Executive Summary is required for Technical Reports and optional for Technical Updates.

#### Table of Contents/List of Figures/List of Tables

- These are automatically generated using macros in the template.

#### User-Defined Sections

- These user-defined sections can be used to include information such as Acronyms and Abbreviations, Nomenclature, and Glossaries. They should be added to the Front Matter between the Executive Summary and the Table of Contents.
- If the final report contains or describes patentable inventions or discoveries, a Patents Page should be included in the Front Matter. This page should describe the invention or discovery and indicate where it can be found in the report.

### Text and Back Matter

Content and headings in EPRI Technical Reports and Technical Updates that document research projects or software vary, depending on the type of research reported. It is highly recommended but not required that papers in Conference Proceedings follow these guidelines.

Optional Back Matter sections are Appendices and an Index.

**Note:** Text will reflow when put into the EPRI template, requiring careful proofing of the index entries in template-compliant material. If indexes have been created electronically, this information must be communicated to EPRI Publishing. Manual compilation of index entries is discouraged.

### Structural Guidelines

- **NEW:** As of 2023, EPRI reports have sequential page numbers and figure/table numbers. They are no longer created based on the section number.
- When possible, create tables in MS Word, and use consistent font and border styling. *(The EPRI templates contain a default table style with alternating shading that should be used. See the table on Page 1 for reference.)*
- **NEW:** Number tables and figures as 1, 2, 3... throughout the document. Make sure that any in-text references match the captions.
- Figures and tables should be placed after the paragraph in which the first in-text reference occurs.
- References should be consecutively numbered in text to match the References section. For example, the first reference is [1], the second is [2], and so on. Multiple references are written as [1,2,3].
- Create footnotes using the MS Word Insert/Footnote function. Use numbers, not symbols, for footnotes.
- Create equations using Equation Editor, which is included with Word.

### Stylistic Guidelines

For most questions regarding style, refer to the [EPRI Editorial Style Guide](#). For topics not covered there, refer to the most recent edition of *The Chicago Manual of Style*.

- Figure labels and captions should be in “sentence” style; that is, only the first word should be capitalized. Use a period at the end of a caption only if the caption is a complete sentence.
- Headings should be in “headline” style, that is, use initial caps for everything except articles and four-letters-or-less prepositions.
- Use units consistently and provide SI equivalent units for English (British) units. This also applies to tables and figures. A conversion table can be placed in the first section of the report that provides the appropriate conversion factors for measurement units contained in the report. For example, 1 inch = 25.4 mm, 1 mm = 0.039 inch. This eliminates the need to provide conversions throughout the report.
- Spell out all acronyms and abbreviations when first used in the document.
- Use numbered lists only when the sequence of the items is important.
- When using in-text references, do not refer to the references as “According to References 1 and 2...” Instead, generalize the statement and give a reference number to it. For example, “The industry needs to have a more standard lubrication practice for circuit breakers [1,2].”
- Use no space on either side of em dashes (—).
- Use no space on either side of en dashes (–).
- Use one space after the period at the end of a sentence and after a colon.
- When creating subscripts and superscripts, use the subscript or superscript functions in Word.
- Use the MS Word Insert/Symbol menu instead of creating symbols.

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