OSRIN Writer's Style Guide

Oil Sands Research and Information Network

School of Energy and the Environment

University of Alberta

November 2013 Update

Oil Sands Research and Information Network

OSRIN is a university-based, independent organization that compiles, interprets and analyses available knowledge about returning landscapes and water impacted by oil sands mining to a natural state and gets that knowledge into the hands of those who can use it to drive breakthrough improvements in reclamation regulations and practices. OSRIN is a project of the University of Alberta's School of Energy and the Environment (SEE). OSRIN was launched with a start-up grant of $4.5 million from Alberta Environment and a $250,000 grant from the Canada School of Energy and Environment Ltd.

OSRIN provides:

- **Governments** with the independent, objective, credible information and analysis required to put appropriate regulatory and policy frameworks in place
- **Media, opinion leaders and the general public** with the facts about oil sands development, its environmental and social impacts, and landscape/water reclamation activities – so that public dialogue and policy is informed by solid evidence
- **Industry** with ready access to an integrated view of research that will help them make and execute environmental management plans – a view that crosses disciplines and organizational boundaries

OSRIN recognizes that much research has been done in these areas by a variety of players over 40 years of oil sands development. OSRIN synthesizes this collective knowledge and presents it in a form that allows others to use it to solve pressing problems. Where we identify knowledge gaps, we seek research partners to help fill them.

Citation

This report may be cited as:

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Copies of this report may be obtained from OSRIN at osrin@ualberta.ca or through the OSRIN website at http://www.osrin.ualberta.ca or directly from the University of Alberta's Education & Research Archive at http://hdl.handle.net/10402/era.17507.

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This Guide is based on RRTAC, 1998. *Reclamation Research Technical Advisory Committee Report Preparation Manual*. Alberta Land Conservation and Reclamation Council, Edmonton, Alberta. 49 pp.

1 INTRODUCTION

This Style Guide is designed to assist the author or researcher in preparing reports for the Oil Sands Research and Information Network (OSRIN). It is important that OSRIN reports conform to high standards of scientific content, literacy, format and consistency. **The guiding principle is not that you should be able to get information into the report, but that the reader should be able to get the information out**. The reader's prime needs are that the report is well organized and the text is lucid and concise.

You will be provided a copy of the Word version of the OSRIN Report Template which contains all of the key Styles for headings, paragraphs, Table of Contents, etc. Every effort should be made to use this template as it will speed up the review and publication of the report.

1.1 Updates in this Version

Most of the updates in this version are geared at reducing formatting variations as these seem to cause the majority of revisions in draft reports. For example, we have:

- removed the requirements for different formatting for different reference types
- simplified the table and figure heading formats

2 REPORT ORGANIZATION

Each OSRIN report will contain the following basic information, in addition to the technical content.

2.1 Title Page

This will be prepared by OSRIN. Authors will need to provide the report title, the last name(s) of the author(s) and their initial(s), and the affiliation of the author(s) as they wish them to appear on the title page and in the citation. An author's name, rather than an institution or company name, is preferred for ease of citation.

The title should be brief, concise but informative indicating the nature and major disciplines involved in the report. Including "oil sands" in the title helps people using web-based searches to find your report.

2.2 Program Information, Report Citation and Disclaimer

OSRIN will include a brief description of the program, the report citation and availability, and where applicable a disclaimer after the title page.

2.3 Table of Contents

The Table of Contents follows the first two pages described above and shows the page numbers for the first three (3) heading levels. All headings in the Table of Contents are in normal font (no bold or italics).

Front matters (Report Summary and Acknowledgements where applicable) are included in the Table of Contents. The page numbers for the List of Tables and List of Figures (if applicable) are also shown in the Table of Contents.

Level 1 headings are in UPPERCASE. The section number is flush with the left margin and the section text is indented 0.5 inches.

Front matters are also in UPPERCASE and are placed flush with the left margin. The word Appendix is in UPPERCASE and is placed flush with the left margin. The title of the Appendix is in Title Case. Front matters and Appendices do not have section numbers (i.e., APPENDIX 1 **not** 6. APPENDIX 1).

Level 2 headings are in Title Case. The section number is indented 0.5 inches from the left margin and the section text is indented a further 0.5 inches.

Level 3 headings are in Title Case and indented 1.0 inches and the section text is indented a further 0.5 inches.

Periods are used as the leader between the text and the page number. Page numbers are flush at the right margin.

2.4 List of Tables

Page numbers for Tables are identified in a separate list on a separate page following the Table of Contents. Tables are numbered sequentially and the Table number is shown at the left margin. Table titles are written out in Sentence case and are indented 0.5 inches from the left margin.

If the table has a title and a short description of content then only the title is included in the List of Tables.

Periods are used as the leader between the text and the page number. Page numbers are flush at the right margin.

To automatically generate the List of Tables you should tag the Table caption with the *Caption Table* style included in the OSRIN Report Template. Additional text related to the Table (e.g., descriptive information) can be tagged with the *Caption additional text* style.

If you have no Tables in your report you should delete this section from the OSRIN Report Template.

2.5 List of Figures

Page numbers for Figures are identified in a separate list on the same page as the List of Tables (separate the two lists by at least a 12 pt space). Figures are numbered sequentially and the Figure number is shown at the left margin. Figure titles are written out in Sentence case and are indented 0.5 inches from the left margin. All maps, photos, graphs and diagrams are listed.

Periods are used as the leader between the text and the page number. Page numbers are flush at the right margin.

To automatically generate the List of Figures you should tag the Figure caption with the *Caption Figure* style included in the OSRIN Report Template. Additional text related to the Figure (e.g., descriptive information) can be tagged with the *Caption additional text* style.

If you have no Figures in your report you should delete this section from the OSRIN Report Template.

2.6 Report Summary

The Report Summary starts on a new page after the Table of Contents (and List of Tables and List of Figures if applicable).

The Report Summary is a short (three-page maximum) summary of the information in the report and is located after the Lists of Tables and Figures (if applicable). The Report Summary is intended to be a plain language summary of the purpose, methods, findings and recommendations (if applicable).

2.7 Acknowledgements

The Acknowledgements starts on a new page following the Report Summary. Funding from the Oil Sands Research and Information Network is already acknowledged in the OSRIN Report Template. Additional credit for funding, donations in-kind (e.g., provision of materials, research sites or equipment), assistance of persons who helped the author, and use of illustrative material is to be added by the author.

2.8 Body of the Report

The organization of the body of the report will be left to the authors. Authors are encouraged to discuss organization with the OSRIN Executive Director, especially if there are any unique organizational designs required.

General contents for the body of the report will include: purpose of the project, methods, description of the study area (if applicable) and results. All sections of the body of the report are continuous, i.e., the main sections **do not** start on new pages.

2.9 Conclusions

A separate section for conclusions is required. Conclusions should be listed concisely and should clearly relate to the project objectives.

2.10 Recommendations

The Recommendations should be related to the Conclusions. They can be divided into two primary sections: those addressing future investigations to fill in missing information; and those addressing how to implement the findings of the report. The latter should very clearly state that these are the recommendations of the authors, not necessarily those of OSRIN or any other sponsoring/funding agencies.

Conclusions and Recommendations may be combined into one section but care should be taken to clearly distinguish which is which in the text.

2.11 References

The References section should include all published and unpublished material cited in the body of the report. References which the author feels are relevant to the work but are not cited in the body of the report may be listed in a sub-section labeled Additional References or Additional Reading.

2.12 Glossary

You are strongly encouraged to include a Glossary in the report. The section can be sub-divided into two parts – one for the Glossary of Terms and one for Acronyms. If only a few acronyms are used they can be combined into the Glossary of Terms section.

Use the *Glossary Term* and *Acronym* styles in the OSRIN Report Template to format these sections.

2.13 Appendices

Detailed information that does not readily form part of the narrative sections of the report can go into Appendices. Examples include background information, analytical data, lengthy tables (that are summarized in the body of the report), and photographs. The Appendix should have some text that explains its purpose and content. For example, if Appendix 2 presents live-trapping data it would have the following text before the data are listed:

> The tag number, date of capture or recapture, age, sex, and habitat type for each small mammal live-trapped are presented for each species in Table 12 to 16.

Appendices are included after the References section and each Appendix starts on a new page. Appendices are numbered sequentially in the order they are referenced in the body of the report.

To ensure the Appendices are included in the Table of Contents and formatted appropriately you should use the *Heading 6* style included in the OSRIN Report Template. The Appendix title is preceded with the word APPENDIX written in UPPERCASE and the Appendix number followed by a colon.

The title is indented two spaces and is in Title Case. For example

APPENDIX 1: Title of Appendix

2.14 List of OSRIN Reports

OSRIN will append a list of previous reports – you do not need to do anything.

3 REPORT FORMAT

The OSRIN Report Template includes built-in Styles that will help meet our formatting requirements. As noted in Section 1, OSRIN will provide the Template to assist you in following the appropriate style writing the report.

3.1 General Formatting

3.1.1 *Page Layout*

Pages should be set up in 8.5" by 11" portrait format, with 1" margins on all sides. Large tables or figures may be set out in 11" by 8.5" landscape format.

Page numbers should be placed at the bottom of the page and centred. Page number 1 is the Introduction page. All front matters pages are numbered in lower case Roman numerals starting with the Disclaimer and Citation page.

3.1.2 *Section Numbering and Format*

Sections are numbered and formatted as follows.

1 MAIN HEADING

The Heading text is UPPERCASE and **Bold** and is indented 0.5 inches. The Heading number is **bold**, flush at the left margin and has no period at the end. To ensure the UPPERCASE format is transferred to the Table of Contents you must type in the heading text in UPPERCASE.

1.1 Second Level Heading

The Heading text is Title Case, **bold** and is indented 0.5 inches. The Heading number is **bold**, flush at the left margin and has no period at the end.

1.1.1 *Third Level Heading*

The Heading text is Title Case, **bold** and *italics* and is indented 0.5 inches. The Heading number is **bold**, flush at the left margin and has no period at the end.

If a fourth level heading is required it should be in Title Case with the number flush at the left margin with no period at the end and Heading text indented 0.7 inches (to accommodate the longer number string) with no special formatting, as follows:

1.1.1.1 Forth Level Heading

Fourth Level headings do not appear in the Table of Contents.

3.1.3 *Paragraph Layout*

All paragraphs are flush left at the margin and are left justified (**do not** use full justified paragraphs and **do not** indent sections and paragraphs).

The OSRIN Report Template has paragraph text spacing set at 1.1 (slightly more than single spaced). Use a 6 point space between paragraphs.

Double spaces are placed between sentences in a paragraph.

3.1.4 *Font*

Use Times New Roman 12 point for all Headings and text.

3.2 References

3.2.1 *Reference Section Format*

References are to be listed alphabetically by author last name. Start by sorting based on the first author's last name, then if necessary move to the second and subsequent last names. Note there are no spaces between author initials. For example,

Johnson, A.C., 2005.

Johnson, A.C., F.L. Alberta and W.D. Fredericks, 2010.

Johnson, A.C. and B. Charles, 1997.

Johnson, A.C., W.D. Fredericks and F.L. Alberta, 2001.

Gray, M., Z. Xu and J. Masliyah, 2009.

Gray, M., Z. Xu and S. Stevens, 2010.

Where one author is cited for multiple references these should be listed in ascending date order. For example,

Johnson, A.C., 2005. XXXX.

Johnson, A.C., 2009. XXXX.

References should be clear and complete to allow readers to easily retrieve them. **Do not** use abbreviations for sources (e.g., use Canadian Journal of Soil Science **not** Can. J. Soil Sci.).

Author names and the year of publication are written as follows.

- If a single author use
  Johnson, A.C., 2010.
- If multiple authors use
  Johnson, A.C., F.L. Alberta and W.D. Fredericks, 2010.

Wherever possible use an author rather than an organization. For example

Johnson, A.C., 2010. Tree Growth on Saline Overburden Dumps. CANMET, Devon, Alberta. **not** CANMET, 2010. Tree Growth on Saline Overburden Dumps.

If the date is unknown or not shown put n.d. after the author(s) name(s). If there are multiple references from the same source with no date then use n.d.(a), n.d.(b), etc. For example,

Alberta Environment, n.d.(a). 2009/10 lakes sampled for water quality. http://environment.gov.ab.ca/info/library/8047.pdf. [Last accessed December 19, 2012].

Alberta Environment, n.d.(b). Long-Term River Network 2009/10 Sample Sites. http://environment.gov.ab.ca/info/library/7713.pdf. [Last accessed December 19, 2012].

Government of Alberta, n.d. Alberta's oil sands. Resourceful. Responsible. Government of Alberta, Edmonton, Alberta. ISBN 978-07785-7348-7. 24 pp.

Reference titles are written in Sentence case (except proper names). However, titles of conference proceedings or books should be written in Title Case. The title of a paper in a proceedings, or a chapter in a book, is written in Sentence case followed by IN: and the title of the proceedings or book in Title Case. For example,

Johnson, A.C., 2010. Dewatering of oil sands fine tailings. IN: Reclamation of Oil Sands Tailings. Proceedings of the 25th Annual Canadian Land Reclamation Association Meeting, June 17-20, 2010, Sudbury, Ontario.

Seely, B., P. Arp and J.P. Kimmins, 1997. A forest hydrology submodel for simulating the effect of management and climate change on stand water stress. IN: A. Amaro and M. Tomé (eds.) Proceedings of Empirical and Process-based Models for Forest, Tree and Stand Growth Simulation. September 21-27, 1977, Oeiras, Portugal. Edições Salamandra, Lisboa. pp. 463-477.

If there is a colon in the title it should be followed with a capital letter. For example,

Golder Associates, 1998. The effects of consolidated tailings release water and deposits on terrestrial and wetlands ecosystems: Summary Report #1. Report prepared for Suncor Energy Inc., Oil Sands, Fort McMurray, Alberta, Canada.

Journal citations should be written with the full name of the journal followed by the issue number, a colon and the page range. For example,

Mossop, G.D., 1982. Geology of the Athabasca oil sands. Canadian Journal of Chemical Engineering 60: 538-545.

The reference should clearly note if the article is an abstract only. This may be the case in a journal or in a proceedings. For example,

Rogers, V.V., M. Wickstrom, K. Liber and M.D. MacKinnon, 2002b. Mammalian toxicity of naphthenic acids derived from the Athabasca Oil Sands (AOS). Toxicologist 66(1-S): pp. 64-65 [meeting abstract].

Thesis references should include the granting institution, the faculty (if known) and the degree type. For example,

Bishay, F.S., 1998. The use of constructed wetlands to treat oil sands wastewater, Fort McMurray, AB. M.Sc. Thesis. University of Alberta, Department of Biological Sciences, Edmonton, Alberta, Canada. 149 pp. http://hdl.handle.net/10402/era.3650 [Last accessed December 19, 2012].

If the author(s) of the article are editors then note this in the citation (as Ed. or Eds.). Similarly, if the source document has an editor or editors this should be noted. For example,

> Brient, J.A., P.J. Wessner and M.N. Doyle, 1995. Naphthenic acids. IN: Kirk-Othmer Encyclopedia of Chemical Technology, 4th Ed. Kroschwitz, J.I. and M. Howe-Grant, (Eds.). Vol. 16. John Wiley and Sons, New York, New York. pp. 1017-1029.
>
> Sego, D. and N. Beier (Eds.), 2010. Second International Oil Sands Tailings Conference. December 5-8, 2010, Edmonton, Alberta. University of Alberta, Geotechnical Center and Oil Sands Tailings Research Facility, Edmonton, Alberta. 397 pp. ISBN 978-1-55195-271-0.

The publishing organization should be provided, including their city, province/state, and country if outside Canada. Do not abbreviate province and state names when citing publication sources (e.g., use Toronto, Ontario not Toronto, ON).

Where applicable the publication number should be provided. If an ISBN number is available it too can be provided.

Where known, references should show the number of pages (use pp. not p.). For example, 217 pp. or pp. 217-221. Be careful when citing single page references – for example, p. 217 is a reference found on page 217 whereas 217 pp. is a reference with 217 pages.

All text is written in normal font except Latin species names.

Following are some examples of reference format.

> Alberta Environment, n.d.(a). 2009/10 lakes sampled for water quality. Alberta Environment, Edmonton Alberta. http://environment.gov.ab.ca/info/library/8047.pdf. [Last accessed December 19, 2012].
>
> Alberta Environment, n.d.(b). Long-Term River Network 2009/10 Sample Sites. Alberta Environment, Edmonton Alberta. http://environment.gov.ab.ca/info/library/7713.pdf. [Last accessed December 19, 2012].
>
> Brient, J.A., P.J. Wessner and M.N. Doyle, 1995. Naphthenic acids. IN: Kirk-Othmer Encyclopedia of Chemical Technology, 4th Ed. Kroschwitz, J.I. and M. Howe-Grant (Eds.). Vol. 16. John Wiley and Sons, New York, New York. pp. 1017-1029.
>
> Golder Associates, 1998. The effects of consolidated tailings release water and deposits on terrestrial and wetlands ecosystems: Summary report #1. Report prepared for Suncor Energy Inc., Oil Sands, Fort McMurray, Alberta, Canada.
>
> Golder Associates Ltd., 2003a. RAMP 2003 Annual Report. Regional Aquatic Monitoring Program, Calgary, Alberta.
>
> Golder Associates Ltd., 2003b. RAMP 5 Year Report. Regional Aquatic Monitoring Program, Calgary, Alberta.
>
> Gray, M., Z. Xu and J. Masliyah, 2009. Physics in the oil sands of Alberta. Physics Today 62(3): 31-35.

Howat, D.R., 2000. Acceptable salinity, sodicity and pH values for boreal forest reclamation. Alberta Environment, Environmental Sciences Division, Edmonton Alberta. Report # ESD/LM/00-2. ISBN 0-7785-1173-1 (printed edition) or ISBN 0-7785-1174-X (on-line edition). 191 pp. http://environment.gov.ab.ca/info/library/6862.pdf [Last accessed December 19, 2012].

Jia, B., 2010. Distribution of oil sands formation water in bitumen froth. M.Sc. Thesis, Department of Chemical and Materials Engineering, University of Alberta, Edmonton, Alberta. 90 pp. http://hdl.handle.net/10402/era.28676 [Last accessed December 19, 2012].

Oil Sands Water Release Technical Working Group, 1996. Approaches to oil sands water releases. Alberta Environmental Protection, Edmonton, Alberta. 34 pp. http://environment.gov.ab.ca/info/library/6839.pdf [Last accessed December 19, 2012].

3.2.2 *Personal Communications*

Personal communications should be listed in the references section and should clearly identify the person, their position/function/specialization and where applicable their employer or organization. Wherever possible use the person's full name not initials. The date of the communication should be indicated.

The format for personal communications is

> Johnson, Albert, 2010. Land Reclamation Specialist, Company X, Fort McMurray, Alberta. July 7, 2010.

3.2.3 *Internet References*

References found on the internet rather than in paper format are cited in the same way as the traditional references. The "author" for internet citations should be the host organization unless an individual is cited. If the page has a "last updated" date (e.g., http://environment.alberta.ca/01501.html) then this can be used as the Year for the citation; otherwise use n.d. in the reference. The website URL should be included (as an active link) and the date the site was last accessed should be provided in the format shown below. Authors should review all links just prior to submitting the report to ensure they are still active. For example,

> Alberta Energy, n.d. *Facts and statistics*. http://www.energy.gov.ab.ca/OilSands/791.asp [Last accessed November 20, 2013].

You are also encouraged to show web links to cited documents. For example,

> Howat, D.R., 2000. Acceptable salinity, sodicity and ph values for boreal forest reclamation. Alberta Environment, Environmental Sciences Division, Edmonton Alberta. Report # ESD/LM/00-2. ISBN 0-7785-1173-1 (printed edition) or ISBN 0-7785-1174-X (on-line edition). 191 pp. http://environment.gov.ab.ca/info/library/6862.pdf [Last accessed November 20, 2013].

The [Last accessed] date should be recent (within a few months of the time of submission of the draft to the OSRIN Executive Director). If there is a lengthy period between the Draft and final versions of the report the website links and [Last accessed] dates should be confirmed and updated, respectively.

3.2.4 *Reference Citations in Report*

References should be cited in the text using the following conventions:

- A single author is cited as
  - "Johnson (2010) stated that …" or
  - "There are several accepted sampling methods (Johnson 2010) …"
- A reference with two authors is cited as
  - "Johnson and Tyler (2010) stated that …" or
  - "There are several accepted sampling methods (Johnson and Tyler 2010) …"
- A reference with three or more authors is cited as
  - "Johnson et al. (2010) stated that …" or
  - "There are several accepted sampling methods (Johnson et al. 2010) …"
  - Note that Johnson, Anderson and Fraser (2010) and Johnson, Anderson and Zephyr (2010) would be both cited as Johnson et al. (2010) and so would require an a and b designation, respectively, to distinguish them
- Multiple references are cited in alphabetical order **not** date order with the references separated by commas; for example, "There are several accepted sampling methods (Alberta Environment 1998, Johnson et al. 2010, Penny 2008) …"
- Multiple references by the same author are cited in ascending date order; for example, Johnson (1997, 2008, 2010)
- Multiple references by the same author in the same year are cited as Johnson (2010a, b) where the applicable reference is labeled "a" or "b" in the References section; do not repeat the year (e.g., not 2010a, 2010b)
- Corporate authors can be cited by the full company name (preferred) or by an acceptable short form. For example, Syncrude Canada Ltd (1999) or Syncrude (1999). In the latter case the Glossary should include the short name and the full name.
- References with no dates are cited as n.d. (e.g., Alberta Environment (n.d.)); where there are multiple references from the same entity with no dates then cite them as Alberta Environment (n.d.(b))
- Personal communications should be cited as (Johnson pers. comm.)

3.3 Lists

3.3.1 *Bulleted Lists*

Bulleted lists are an effective means of drawing the reader's attention to specific points and/or of separating out lists with longer text strings. Simple lists (e.g., one line text) do not need spaces

between bullets or between the preceding text and the first bullet. However bulleted lists with longer text may be easier to read if there is a space between list items.

Bullets should be solid dots, indented 0.5 inches from the left margin and the text indented at 0.8 inches (use the *Bullet* style in the OSRIN Report Template).

- Bullet one text, wrapping to the second and subsequent lines directly underneath the start of the first line of text
- Bullet two text

Bullet text may or may not have periods at the end. However once you choose a format then it should be maintained for all of the text in that bullet list (and preferably for all bullet lists).

There may be cases where a second level of bullet is required. In that case the second level bullet is an open dot, indented 0.8 inches from the margin (to line up with the text of the first level bullet) and the text indented at 1.0 inches (use the *Bullet second level* style in the OSRIN Report Template).

- Bullet one text
  - Second level bullet text, wrapping to the second and subsequent lines directly underneath the start of the first line
- Back to level one bullet text

3.3.2 *Numbered Lists*

Numbered lists are a better tool to use when it is likely you or the reader may wish to reference a specific list item (for example, a list of recommendations).

Short lists can be included within the body of a paragraph. Most often the list is preceded by a colon and items are separated by semi-colons. List numbers should be written with enclosing parentheses: for example, there may be three main points: (1) first; (2) second; and, (3) third.

More extensive lists can be itemized in paragraph form. Numbered lists are set up with the number indented 0.5 inches from the left margin and the text indented at 0.8 inches (use the *Numbered Text* style in the OSRIN Report Template). Simple lists (e.g., one line text) do not need spaces between bullets or between the preceding text and the first bullet. However numbered lists with longer text may be easier to read if there is a space between list items.

1. List item one
2. List item two

If a second level is required for the numbered list lower case letters are used, and are indented at 0.8 inches with the text indented at 1.0 inches (use the *Numbered text level 2* style in the OSRIN Report Template). For example,

1. List item one
   a. Second level list text
2. List item two

Remember to rest the list starting number for each new list.

3.4 Tables and Figures

Tables and Figures should be located as close to the initial reference in the text as possible (i.e., do not place all Tables or Figures at the end of a section or the report). Small Tables or Figures can be placed directly into the text; larger or more complex tables may need to be placed on a page by themselves. Do not anchor the Table or Figure to the text or the page – this will facilitate any editing required.

Tables and Figures are numbered sequentially throughout the report (e.g., Table 1, Table 2, etc), **not** by section number (e.g., not Figure 1-1, Figure 3.1-1).

Tables and Figures are referenced in text in two ways:

- Figure 1 shows … and Table 2 lists the …
- The LFH layer contains valuable vegetative propagules (Table 1) …

If you need to refer the reader back to an earlier Table or Figure then you should tag the Table or Figure caption as a Bookmark and hyperlink the text back to the bookmarked Table or Figure (e.g., Each of the sites shown in Table 1 were sampled for the following parameters …).

3.4.1 *Tables*

Table headings are placed at the top of the table and the text is indented at 0.8 inches (use the *Caption Table* style in the OSRIN Report Template) as follows:

Table 1. Text for the Table is descriptive of the contents, and may or may not include information such as the units used in the table.
The Table heading is in Sentence case and a Tab is entered between the Table number and the start of the Table caption. (Note: This type of additional or explanatory information is not part of the Table Caption but is indented to match the caption text (use the *Caption additional text* style in the OSRIN Report Template).

Longer Tables should have the header row(s) repeated on each page so the reader can see what the information in table columns relates to. The header row text should be bold and centred.

It is quite common to want to draw attention to lists in tabular format without needing to call the text a formal Table. If there is any chance you will need to refer to the table at some other point in the text (for example the Conclusions or Report Summary) then it is better to make it a numbered Table. Note that these informal tables do not have table captions and therefore do not show up in the List of Tables.

These informal tables should also be set up so that the header row is repeated at the top of each page (if the text runs over one page) and each table row should be set up so it does not split across a page. The header row text should be bold and centred.

For example:

There are pros and cons to various oil sands tailings management options:

Tailings Management Option	Pros	Cons
Option 1		
Option 2		
Option 3		

3.4.2 *Figures*

Complex figures should have headings which are placed at the bottom of the Figure in the same format as Table headings (use the *Caption Figure* style in the OSRIN Report Template). For example,

Figure 12. Map of the study area.
The Figure heading is in Sentence case and a Tab is entered between the Figure number and the start of the Figure caption. (Note: The type of additional or explanatory information in this paragraph is not part of the Table Caption but is indented to match the caption text (use the *Caption additional text* style in the OSRIN Report Template).

Smaller figures with detailed explanations in the text do not need to have headings and therefore do not show up in the List of Figures.

3.5 Maps

Maps should include a legend, a North arrow, a distance scale and include names of key features (e.g., lakes, rivers, towns, specific landscape or landform features). Maps should be an appropriate size to be able to discern the features being portrayed.

3.6 Photographs

Photographs should be captioned or described in the text. Photographs can be inserted as jpeg files or pdf files. The photograph can be formatted to allow text to flow around it. To do this, insert the photograph, right click on it, select Format Picture, Layout, Square and then move the picture so that text flows on one side (generally the right-side). Set the Properties of the graphic to allow a wide margin between the graphic and the text.

Dating the photograph will help readers with context, especially if you are presenting a time series.

If someone else took the photograph, or it is a stock photograph, you should give credit to the source.

You should indicate whether or not readers can copy and use the photograph.

3.7 Acronyms

Acronyms are an effective tool for reducing length of reports and, if used properly, can improve readability. Commonly used acronyms can be found in

> OSRIN, 2010. Glossary of Terms and Acronyms used in Oil Sands Mining, Processing and Environmental Management - January 2013 Update. OSRIN Report No. SR-1. 119 pp. http://hdl.handle.net/10402/era.17544

The first time an acronym is used the full text should be written out and the acronym placed in brackets; for example, the *Environmental Protection and Enhancement Act* (EPEA). If sections of the report are quite lengthy you may wish to repeat this combination of text and acronym in each section.

Acronyms do not have periods separating the letters. For example, USA **not** U.S.A.

Never use a combination of part of an acronym and the full text; for example **do not** write the EPE Act.

Where two things have the same acronym it is best to write out one in full and use the acronym for the other to avoid confusion. You should use the acronym for the phrase that is used most often in the report. For example,

> The Canadian Environmental Assessment Agency (CEAA) administers the *Canadian Environmental Assessment Act*.

An alternative that may work, depending on the content of your report, would be to use

> The Canadian Environmental Assessment Agency (the Agency) administers the *Canadian Environmental Assessment Act* (the Act).

All acronyms used in the report should be included in the Glossary.

3.8 Company and Organization Names

You should use the correct name for a company. Pay particular attention to Limited vs. Ltd. and Corporation vs. Corp. for companies. You should also refer to an organization, especially a government organization, by its full name. For example,

> Alberta Environment and Sustainable Resource Development, Clean Energy Branch

Government organization names (and to a much lesser extent corporate names) may change over time. Do not undertake a global replacement for a name or acronym in a document when the name changes during report preparation as the old name (acronym) may be appropriate (especially for citations). For example, one would use:

> Alberta Environment and Sustainable Resource Development (AESRD) co-chairs the Reclamation Working Group of the Cumulative Environmental Management Association (CEMA). Based on a recommendation by CEMA the department issued the Guidelines for Reclamation to Forest Vegetation in the Athabasca Oil Sands Region, 2nd Edition (Alberta Environment 2010).

You may use abbreviated names or acronyms for company and organization names following the same rules as for acronyms above. When abbreviating company names it is always best to use a name that the company itself uses or that is in common use – do not make up an abbreviation. For example,

Alberta Environment and Sustainable Resource Development (ESRD)

Canadian Natural Resources Limited (CNRL or Canadian Natural)

Cumulative Environmental Management Association (CEMA)

Department of Energy (DoE)

Department of Fisheries and Oceans (DFO)

Government of Alberta (GoA)

Syncrude Canada Limited (Syncrude)

University of Alberta (UofA)

3.9 Numbers and Units

3.9.1 *Numbers*

Numbers from one to nine should be written out in text unless there is a series of numbers in the sentence some of which are greater than nine or are not whole numbers. For example you should write "we sampled for three days the first week, seven days the second week and two days the third week" but "we sampled 9 mL the first week, 10.2 mL the second week and 3 mL the third week".

Numbers that are 4 digits or longer should use commas to separate 000's; for example, write 2,617 not 2617 and 103,457 not 103 457.

Number less than one should be preceded by a 0; for example write 0.45 g not .45 g.

When referring to a range of numbers use "to" to separate the numbers not a dash; for example write 17 to 20 mg not 17-20 mg or 17 – 20 mg. For further clarity you can repeat the units for each of the two parts of the range (e.g., 17 mg to 20 mg).

Care should be taken when using ranges of numbers to describe decision criteria. The end points of the ranges should be distinct rather than overlap. For example, the range shown in the left-hand column allows the reader to clearly determine the Class based on the EC value whereas the right-hand column causes confusion if the value is 4.0 dS/m.

EC (dS/m)	Class	EC (dS/m)
>2.0 to 4.0	1	2.0 to 4.0
>4.0 to 6	2	4.0 to 6.0

3.9.2 *Units*

Use the metric system for all units. The following conventions are to be followed:

1. Symbols are written in lower case; exceptions include L for litre and C for Celsius.
2. Leave a space between the number and the unit (use a required space – Ctrl-Shift-space to ensure the number and unit remain together); for example 25 L not 25L. An exception to this rule is that there is no space between a number and the % unit; for example, 25% not 25 %.
3. Do not pluralize symbols; for example 30 km, not 30 kms.
4. Do not place a period after symbols except at the end of a sentence.
5. Use symbols in place of text when combined with a number; for example, 31 ha not 31 hectares.
6. Combined units can be written with a slash (/) or superscripted minus sign (¯) but once an option is selected it should be used consistently for all units throughout the report; for example 100 g/m^2 or 100 $g\ m^{-2}$.
7. Years may be referred to as yr or a but once an option is selected it should be used consistently for all units throughout the report; for example 25 kg/yr or 25 kg/a or 25 $kg\ a^{-1}$.
8. Litres should be written as L, not l.
9. Grams should be written as g not gm.
10. The prefix for million should be M not MM.
11. Use µg not ug (use the Insert Symbol feature in Word).

Notwithstanding the convention to use metric, readers may be confused about the use of T for tonnes therefore it does not hurt to reinforce in the text or a footnote that T means tonnes or metric tons.

3.10 Symbols

If your report requires special symbols (e.g., in equations or a special unit of measurement) then you should ensure the symbol is compatible with OSRIN's version of Word. Submitting a test version of the symbols will save considerable time later on.

3.11 Formulas and Equations

Formulas and equations should be centred and any explanatory notes should be written out below the formula and indented to separate them from regular text. For example (FTFC (Fine Tailings Fundamentals Consortium) 1995),

$$C \times T = c \times s$$

Where C = concentration of non-settling solids in total oil sands solids (kg/kg)

T = feed rate of total oil sands solids (kg/s)

c = concentration of non-settling fines in tailings water (kg/kg water)

s = rate tailings water is co-deposited in the beach (kg/s)

Formulas and equations can be numbered if you will be referring to them later in the text. For example,

$$C \times T = c \times s \quad (1)$$

3.12 Dates

Dates should be written out in full wherever possible (e.g., March 16, 2010). If space doesn't permit (for example in Tables) dates may be written in short form (e.g., Mar 16, 2010) or in numeric form (e.g., 3/16/2010 or 3/16/10). Numeric form dates should appear as mm/dd/yy.

3.13 Footnotes

Footnotes should be used sparingly. If they are used then number them sequentially throughout the report (Word does this for you automatically if you use the Insert, Footnote feature). Use Times New Roman 10 pt font.

3.14 Enhancing Readability

Some special formatting tools make text easier to read. These tools often get applied after the report has been written and is being reviewed prior to submission. However, implementing the tools on an ongoing basis makes for less work at the review stage.

3.14.1 *Keep Paragraphs Together*

Many times two paragraphs need to be kept together on the same page for ease of reading. Examples include the lead in paragraph for a bulleted or numbered list, the Table and its caption, the Figure and its caption, or the table header row and the first row of table data.

The best way to do this is to use the *Keep with Next* feature in Word. Click on the first paragraph, click on Format, click on Paragraph, and then under Line and Page Breaks click Keep with Next. This is better for subsequent editing than using one or more Returns.

3.14.2 *Keep Words and Units Together*

It is much easier to read text when numbers and their associated units are kept together on the same line. The best way to do this is to place a Required Space between the number and the unit using Ctrl-Alt-Space. This is better for subsequent editing than inserting a Hard Return or a Soft Return.

For example, without a Required Space

… text is full length of the line and 3.97

kg of soil were collected.

But with a Required Space

… text is full length of the line and

3.97 kg of soil were collected.

3.14.3 *Hyphenation*

Automatic hyphenation is turned off in the OSRIN Report Template as hyphenation is generally unnecessary. However, there may be cases where a hyphen will improve readability by reducing the amount of white space at the end of a line of text. This is especially so when there are multiple lines in a row with large amounts of white space. To correct this you may use the Optional Hyphen feature by inserting a Ctrl-hyphen where you want the hyphen to appear. Using the Optional Hyphen feature, rather than manually inserting a hyphen and a paragraph return, ensures that future edits to the text don't result in the manually hyphenated word remaining in the middle of the row of text.

3.14.4 *Dashes*

There are two different types of dashes that can be used in writing, and they can be misinterpreted if used incorrectly. The two types of dashes are known as the em-dash (–) and the en-dash (-), because of their different widths.

The em-dash is best used to separate parts of a sentence – for example, if you wanted to flag something in the middle of a sentence. Word does this automatically if there is a space before the dash and some text afterwards. If you don't put a space before, or there is no text afterwards Word inserts an en-dash. Also, if you add the dash into existing text Word always inserts an en-dash. To overcome this default setting you can insert an em-dash by clicking on Insert, Symbol and selecting the em-dash.

The en-dash is used to show negative numbers (- 0.5 kg), subtraction in formulas, and compound words (e.g., long-term).

3.14.5 *Internal Hyperlinks*

Using the Hyperlink feature helps readers by allowing them to jump to another part of the report you have referenced (e.g., the Glossary or a previous section). However hyperlinks should be used sparingly. You can hyperlink to a section (Insert, Hyperlink, Place in This Document) or you can tag specific text using the Insert, Bookmark feature.

3.15 Emphasizing Text

There are various tools to draw the reader's attention to certain words or phrases in your report. Generally these should be used sparingly as they may detract from the overall ease of reading if used too often. Never use underlining as a means to draw the reader's attention.

3.15.1 *Italic Font*

Italic font may be used to:

- List Latin species names; for example *Pinus banksiana*, *Ursus americanus*
- Indicate titles of books, articles or legislation. For example, the *Conservation and Reclamation Regulation*
- Draw attention to a word or phrase, for example a word like *Mature Fine Tailings (MFT)* that can be found in the Glossary
- Represent a quote (this is preferred to the use of "quotes around text")

3.15.2 *Bold Font*

Bold font may be used to emphasize key words; for example, the study evaluated the effectiveness of both **mineral soil** and **peat:mineral mixes**.

3.15.3 *Indented Text*

Indented text draws attention. It is most effective when the text is indented at both margins (at least 0.5 inches and up to 1.0 inches).

Indented text is particularly useful for quotes (can be combined with italic font as noted in section 3.15.1 above).

3.15.4 *Call-out Boxes*

Call-out or highlight boxes are useful for showing examples. They can be indented at both margins, framed in a box and/or highlighted with a lightly shaded background. Different colours can be used in the boxes to represent different sets of information (see this used effectively in Creasey, R., 2012. Workshop on the Information that Professionals Would Look for in Mineable Oil Sands Reclamation Certification. OSRIN Report No. TR-25. 52 pp. http://hdl.handle.net/10402/era.28331).

Creating a Call-out Box

The easiest way to create a call-out box is to use a one-cell table. Shading can be added by selecting Table, Table Properties, Borders and Shading, Shading and selecting the lightest grey available. Remember to leave space (at least 6 pt above and below the call-out box.

3.16 Preferred Spelling and Phrases

Table 1 shows the versions of words and phrases that are required to be used in OSRIN reports. We will make changes to report text to match these requirements.

Table 1. Required spelling and phrases

Use this	Rather than this
and	& (unless the ampersand is formally part of a name)
because (or since)	due to the fact that
before	prior to
centre	center
data are	data is
e.g., (periods after each letter and a comma at the end)	eg or e.g.
Energy Resources Conservation Board	Alberta Energy Resources Conservation Board
et al. (for reference citations; period after al. – see section 3.2.4)	et al or et. al.
EPEA[1]	AEPEA
fibre	fiber
Fort McKay	Ft. McKay
Fort McMurray	Ft. McMurray
groundwater	ground water
i.e., (periods after each letter and a comma at the end)	ie or i.e.
jack pine	Jack pine or jackpine
kilometre	kilometer
litre	liter
metre	meter
naphthenic acids	napthenic acids

[1] The *Environmental Protection and Enhancement Act*. It is acceptable to write Alberta's *Environmental Protection and Enhancement Act*

Use this	Rather than this
now (or currently)	at this point in time
oil sands[2]	oilsands
% (no space between number and the symbol) or percent	per cent
tailings[3]	tails
to	in order to
topsoil	top soil
vs. (period at end)	vs
water body	waterbody
watercourse	water course

Table 2 shows preferred versions of words and phrases for OSRIN reports. As long as the same spelling is used throughout the report we may choose not to change your text to the preferred version.

Table 2. Preferred spelling and phrases

Prefer this	Rather than this
Analyzed	Analysed
Byproduct	By-product
Colour	Color
e-mail	email
in-situ	in-situ or insitu
Long-term	Longterm or long term
Modelled/modelling	Modeled/modeling
Oil sands process-affected water (OSPW)	Oil sands process affected water (OSPW) Process-affected water (PAW) Process affected water (PAW)

[2] **NOTE:** OSRIN does not use tarsands or tar sands as these do not correctly reflect the nature of the deposits.

[3] **NOTE**: OSRIN does not use *sludge*.

Prefer this	Rather than this
Root zone	Rootzone
Socio-economic	Socioeconomic
Sulphur/sulphate	Sulfur/sulfate
Watertable	Water table

4 SUBMISSION, REVIEW AND REVISION

4.1 Submission Checklist

Prior to submitting your report to OSRIN you should do a final review of both content and format of the report. It is often best to have someone new look at the report at this time as they are more likely to spot typos and formatting errors.

The following checklist will guide you to some of the key formatting things to check:

- ✓ Author(s) last name and initial(s), affiliation and title provided
- ✓ Table of Contents, List of Tables and List of Figures provided and updated
- ✓ Page numbers inserted at bottom of page and centred
- ✓ All text is left-justified
- ✓ Superscripts and subscripts
- ✓ Preferred spelling and phrases used
- ✓ All Tables and Figures in the body of the report have a citation in the body of the report
- ✓ All acronyms spelled out the first time they are used
- ✓ All references cited in the body of the report are included in the references section and the dates (and letters where applicable) are correct
- ✓ All hyperlinks cited in the report are active and a [Last accessed date] is provided for items in the references section.
- ✓ Internal cross-references (e.g., to sections in the report) are correct
- ✓ References section included, reference format correct and references in correct order, all references in the list are cited in the body of the report (or a separate Additional Reading section is provided)
- ✓ Glossary of terms and acronyms provided and in alphabetical order

4.2 Report Submission

Submit your report in Word format (**not** pdf) to facilitate editing. Large documents may need to be provided in a .zip file, or on a memory stick or CD rather than as an e-mail attachment.

OSRIN may request large tables or figures be printed for review.

Your company/institution logo should not be on the report. Your company/institution name should not be in a header or footer.

4.3 Report Review

OSRIN staff will review the report and may opt to have external reviewers look at it as well. You should allow at least one month for the review when developing your research proposal.

Major editorial suggestions (such as additional wording, or wording that may change intent) will be provided in Track Changes; otherwise formatting and grammar changes will be made directly in the text with Track Changes turned off. Content comments or questions may be included in Track Changes (usually in the form of Comments) or may be included in a separate comments document.

4.4 Report Revisions

You should allow time and budget in your proposal to accommodate at least one round of revisions to the report. These revisions may be both related to technical content and to formatting/spelling/language.

Revised reports shall again be submitted in Word format.

OSRIN reserves the right to make further changes to format and spelling as required to meet our quality specifications.

4.5 Final Report

OSRIN will provide you with Word and pdf copies of the final report that will be published and the link to the pdf version of the report.

5 REFERENCES

Alberta Environment, 2010. Guidelines for reclamation to forest vegetation in the athabasca oil sands region, 2nd Edition. Prepared by the Terrestrial Subgroup of the Reclamation Working Group of the Cumulative Environmental Management Association, Fort McMurray, Alberta. 332 pp. http://environment.gov.ab.ca/info/library/8269.pdf [Last accessed June 29, 2012].

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6 GLOSSARY

C	Celsius
CEAA	Canadian Environmental Assessment Agency
EPEA	*Environmental Protection and Enhancement Act*
ISBN	International Standard Book Number A unique identification number for books and book-like products.

jpeg	Joint Photographic Experts Group. JPEG is the most common format used for storing and transmitting photographs on the web.
L	Litre
MFT	Mature Fine Tailings
OSRIN	Oil Sands Research and Information Network
pdf	Portable Document Format. A standard file format accessible through free software available from Adobe Systems Inc.
SEE	School of Energy and the Environment
T	Tonnes
URL	Uniform Resource Locator. An internet address.

LIST OF OSRIN REPORTS

OSRIN reports are available on the University of Alberta's Education & Research Archive at https://era.library.ualberta.ca/public/view/community/uuid:81b7dcc7-78f7-4adf-a703-6688b82090f5. The Technical Report (TR) series documents results of OSRIN funded projects. The Staff Reports series represents work done by OSRIN staff.

OSRIN Technical Reports – http://hdl.handle.net/10402/era.17507

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Jones, R.K. and D. Forrest, 2010. Oil Sands Mining Reclamation Challenge Dialogue – Report and Appendices. OSRIN Report No. TR-4. 258 pp. http://hdl.handle.net/10402/era.19092

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James, D.R. and T. Vold, 2010. Establishing a World Class Public Information and Reporting System for Ecosystems in the Oil Sands Region – Report. OSRIN Report No. TR-5A. 31 pp. http://hdl.handle.net/10402/era.19094

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Zhao, B., R. Currie and H. Mian, 2012. Catalogue of Analytical Methods for Naphthenic Acids Related to Oil Sands Operations. OSRIN Report No. TR-21. 65 pp. http://hdl.handle.net/10402/era.26792

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Valera, E. and C.B. Powter, 2012. Implications of Changing Environmental Requirements on Oil Sands Royalties. OSRIN Report No. TR-23. 21 pp. http://hdl.handle.net/10402/era.27344

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