



Information Services

Creating lists and numbered headings in Word 2013

If you have ever wrestled with numbering in Microsoft Word, you are not alone! Numbering, particularly for headings, can generate more frustration than almost any other feature.

This note shows you how to customise numbered lists, and takes you through the easy way to create a numbering scheme for your headings.

Types of numbering

Word has three main types of numbering:

- | | |
|-------------------------|---|
| Fields | Fields include page numbering, captions and footnotes, and are relatively robust. |
| Simple lists | Simple lists include bulleted and numbered lists. |
| Multilevel lists | Multilevel lists are hierarchical lists which can be applied to paragraphs or headings. |

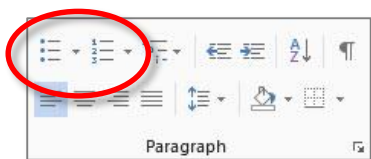
Heading numbering is most often seen in technical and academic documents, and will have several levels, for example:

- 1 Heading
 - 1.1 Heading
 - 1.2 Heading
 - 1.2.1 Heading
- 2 Heading
 - 2.1 Heading
 - 2.2 Heading
 - 2.2.1 Heading

Word can accommodate nine levels of numbering. Each level can be associated with a different style, can be a different number format (such as 1,2,3; a,b,c; i ii,iii.), and can restart multiple times – a recipe for disaster indeed.

Creating a simple list


If all you need is a simple bulleted or numbered list, the **Bullets** and **Numbering** commands in the **Paragraph** group on the **Home** tab are usually enough.



You can click on the down arrow at each command to choose a different bullet or number format from the library.

There is also an option to define a new number format or bullet. For bullets, you can choose a **Symbol** (change the font to Wingdings for a wide selection), use a **Picture**, or click on **Font** to change the colour and size.



Restarting a numbered list

If you are creating multiple lists in a document, you may need to force a list to restart the numbering sequence. For example, if you haven't entered any text or other content between the lists, Word assumes you are continuing with the same list and will number accordingly. To restart the list, right-click in what is to be the first item and select **Restart at 1**. You can also click on the **AutoCorrect Options** icon  (if it is visible) and select **Restart Numbering**.



Tip: If the numbering refuses to restart, try this. Right-click on the number and select **Set Numbering Value**. Choose **Start new list** and set the value to **1**. (You can also click on the down arrow at **Numbering** in the **Paragraph** group and select **Set Numbering Value**.)


Changing the indentation settings

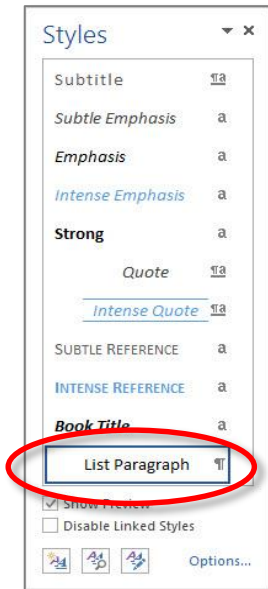
To quickly change the indentation setting for a *single* list, click in the list and on the **Decrease Indent**  or **Increase Indent**  options in the **Paragraph** group. This will *not* change the settings in other lists or for new lists.

To set indents precisely, right-click in the list and select **Adjust List Indents**. Enter the values for the number position and text indent. To adjust the hanging indent, make sure **Add tab stop at** is selected and enter the same value as in **Text indent**. Lists you have already created will not change. Any lists you create after the amended one, however, will have your new settings.

Changing the appearance of list text

If you want to change how the text in a numbered or bulleted list appears – to make it bold or italic, for example – you can save time by using Word's *styles* rather than by manually formatting each list. If you don't know how to use styles, see the note: *Formatting with styles in Word* in our Documents Catalogue at www.ed.ac.uk/is/skills/documents-catalogue.

When you create a list using the **Bullets** and **Numbering** commands, Word uses a style called **List Paragraph** to format the text. Click in the list, then, on the **Home** tab, click on the dialog box launcher in the **Styles** group  to open the **Styles** pane. Scroll through the pane until you see the style **List Paragraph** (you may need to scroll to the bottom).



Click on **Show Preview** to see how the formatting looks when applied. To change the formatting, move your cursor to the style name in the **Styles** pane, click the down arrow and select **Modify**.

From the **Modify Style** dialog box you can change the font face, size, and colour. The changes will be applied to all lists, new and existing.

You can also change the space between list items. In **Modify Style**, click **Format** and select **Paragraph**, deselect **Don't add space between paragraphs of the same style**, then adjust the **Spacing After** setting.

Do *not* use the **Indentation** settings in the **Paragraph** dialog box to try to change the positioning of the number or bullet – Word ignores these. Instead, right-click in the list and select **Adjust List Indents** as in *Changing the indentation settings* on page 2. This will not change the indent settings for existing lists, but will for new lists.



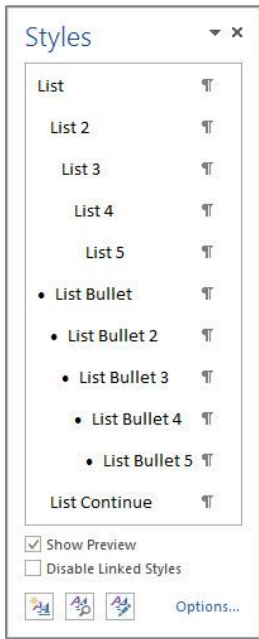
Note: The **Font** options in **Modify Style** will change the formatting of the text *and* the number; for example, choosing bold will make the number bold as well. If you don't want the number formatted in the same way as the text, click in a list, then, on the **Home** tab, click on the down arrow at the **Numbering** command in the **Paragraph** group and select **Define New Number Format**. Click on **Font** and set the **Font**, **Font style** or **Size**. Again, this will not change existing lists, but will apply to new ones.

Using list bullet and list number styles

Another way to create lists is to use Word's **List Bullet** and **List Number** paragraph styles. You can choose from a variety of predefined indentation settings, and like the **List Paragraph** style, you can modify the font formatting.

In the **Styles** group on the **Home** tab, click on the dialog box launcher to open the **Styles** pane. List styles do not display by default, so click on **Options**, and in **Select styles to show**, choose **All styles**.

Scroll down till you come to the styles for bullets and numbers. Each one has a different indent setting.



Click where your list is to start, then click on the style name and start typing.


Note that unlike the **Bullets** or **Numbering** options, pressing **[Enter]** twice does not end the list (although the number or bullet does disappear). To return to normal text, press **[Enter]** at the end of the last item in the list, then, from the **Styles** gallery or the **Styles** pane, apply the **Normal** style to the new paragraph (or select **Clear All**).

You can modify the style to change the **Font** formatting. As with the **List Paragraph** style, this will change the format of the number as well. Follow the instructions in the Note above to change the number.

To change the indentation settings, right-click in the list and select **Adjust List Indents**. Unlike the **List Paragraph** style, however, this will change the settings for *all* lists, new and existing.

Creating multilevel lists

Multilevel (or hierarchical) numbering allows you to create a more complex structure than a simple list. You can apply it to paragraphs or to headings.

Applying it to normal paragraph text is fairly straightforward. Click where the list is to begin and in the **Paragraph** group, click on the down arrow at **Multilevel List** , then choose a layout from the library. Press **[Tab]** or **[Shift Tab]** to change levels (or click the **Decrease Indent** and **Increase Indent** buttons).

Creating numbered headings is harder.

How to create numbered headings

Numbered headings have been known to cause more than a little grief. There are two secrets to achieving well-behaved numbering.

First, use Word's built-in Heading styles, and second, set up your numbering scheme before you begin so you don't have to make changes to it as you are working.

Step 1: Format your heading styles

Word has nine Heading styles – you will use a style for each level of your numbering. Before starting on the numbering, check the style formatting. Word's default settings are rarely how you want your text to look.


If you are making changes to the style from the **Modify Style** dialog box, do *not* use **Paragraph** on the **Format** menu to change tab or indentation settings; you will do this when you set up the

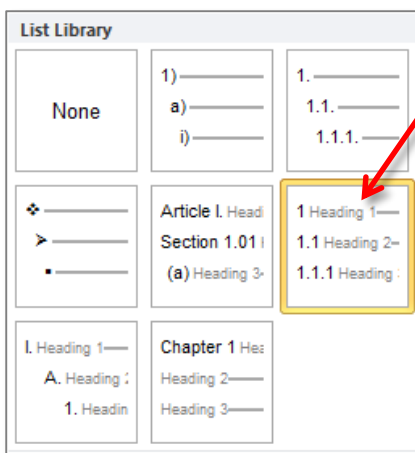
numbering. You can, however, change the **Spacing Before** and **After** settings. Similarly, do *not* use the **Numbering** option to format the number.

If you don't know how to modify a style, see the note: *Formatting with styles in Word* in our Documents Catalogue.

Step 2: Choose your numbering scheme

First, type your top level heading, and then with the cursor in the heading, click on the style **Heading 1** in the **Styles** pane to apply it.

On the **Home** tab, click on **Multilevel List**  in the **Paragraph** group to display the **List Library**.



Choose a layout that includes the Heading style names in the thumbnail (like the one indicated). If the numbering format is not quite how you want it, you can modify it later.

Word automatically applies numbering to all nine Heading styles.



To number your headings, all you need to do is apply the style to the text.

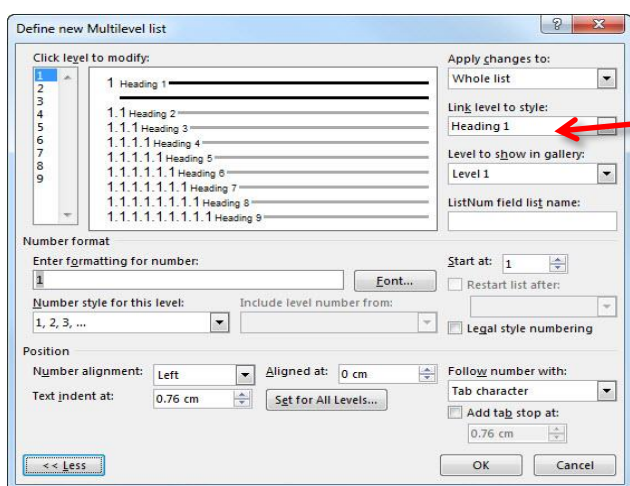
Note that you can only start a new numbering level in a list that is linked to styles by applying the style. Unlike unlinked multilevel lists, you can't use the **[Tab]** key or **Decrease Indent** and **Increase Indent** buttons. Once a style has been applied, however, you can use these options to change the level of a heading.

Step 3: Modify your numbering scheme

You can change the appearance of the numbering scheme. For example, you might want to include text as part of the number formatting (such as 'Chapter' or 'Section'), change the indentation of the number or the text, or even remove the numbering from a level.

To modify the scheme, click in a paragraph formatted as **Heading 1**. Click on the down arrow at the **Multilevel List** button, and then select **Define New Multilevel List** from the menu at the bottom.

In the **Define new Multilevel List** dialog box, click on the **More** button to see all the options.



You can have up to nine levels of numbering – more than you are ever likely to need.

Each level is linked to a Heading style through the **Link level to style** option on the right. This is what tells Word how to format the text at each level.

Note that you can make changes to all levels of your list in one operation without exiting this dialog box; simply select the level to edit in the box on the left.



Tip: Always start with your cursor in a Heading 1 paragraph regardless of the level you want to edit – this ensures the change is applied immediately. If you didn't, and your headings haven't changed, reapply the style. A quick way to do this is click on the down arrow at the style name in the **Styles** pane, click **Select All Instances** and then click on the style name.

Changing the number format

In the **Number format** section, the **Enter formatting for number** box shows you how the numbering will look for the level selected. To use a different format – A, B, C, for example – click on the down arrow at **Number style for this level** and choose from the list.

You can make other changes to the number format; for example, you can click in the **Enter formatting for number** box and put a full stop after the number field, or type in additional text. Make sure you don't delete the number field (highlighted in grey).



Tip: If you do delete the number field by mistake, click on **Number style for this level** and choose the style. The field will be reinserted.

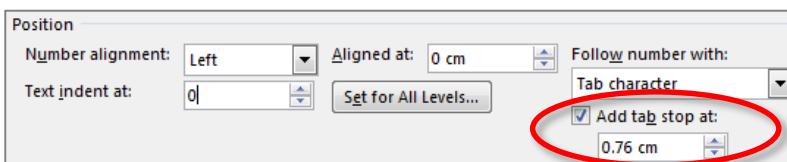
Changing the number and text position

In the **Position** section, you can change where the number and the heading text appear. **Aligned at** is the position for the number; **Text indent at** is where the heading text will begin. If you want to change the indentation settings, always do it here rather than using the **Paragraph** dialog box or the **Format** options in the **Modify Style** dialog box. Word will only use the settings shown in the **Define new Multilevel list** dialog box.

If you have added content to the number format in **Enter formatting for number**, you may need to change the tab settings to control where the heading text appears, since it will start beyond the value shown in **Text indent at**. The second line of a long heading will also appear indented from the margin.

First, decide where you want the tab to be (displaying the ruler will help – click on the **View** tab and select **Ruler**). Then, in the **Define New Multilevel List** dialog box, click on the level to be edited, and enter the new tab setting in **Text indent at**. Long headings will also wrap at this point.

If you don't want long headings to wrap at this setting, you can remove the hanging indent. To do this, in the **Define New Multilevel List** dialog box, type **0 cm** in **Text indent at**. Tick the **Add tab stop at** checkbox to retain the tab setting in the first line.



Removing numbering from a level

You might not want numbering to appear at all levels in your numbering scheme; for example, you could have Heading 1, 2 and 3 numbered, but not Heading 4.

To achieve this, in the **Define new Multilevel list** dialog box, click on the level where you want numbering removed, and in **Link level to style**, select **(no style)**. The Heading style will still be applied to the text, but will no longer be numbered.

Completing the changes

When you have finished your modifications, click **OK**. Your list appears in the **Current List** section of the List Library.

If you want to make further changes to your formatting, click in a Heading 1 paragraph and on the **Multilevel List** button. Select **Define New Multilevel List** again. This does not, as you might imagine, create yet another list layout – it updates the existing one.

Removing numbering from all headings


You can remove numbering from your headings if you change your mind. With your cursor in a Heading 1 paragraph, click **Multilevel List** and select **Define New Multilevel List**. Click on **More**. Click in **Link level to style** and select **(no style)**. Repeat for each heading level. If the Heading you are in is still numbered, reapply the style.

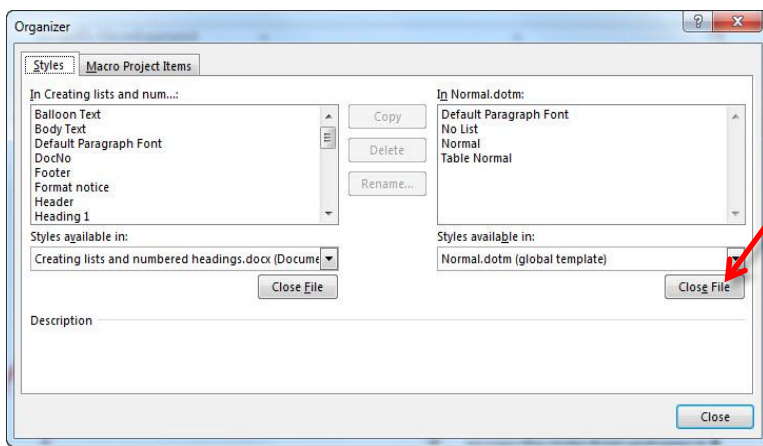
Using your numbered list in other documents

Setting up numbered headings can take time and effort, so... what if you want to use the formatting in other documents? There are several options.

Copy the styles with the Organizer

If you have already applied the Heading styles in a new document, but now want to modify them to match the text or numbering format in an existing document, you can use the **Organizer** to copy the styles.

Make sure the document you want to copy the styles *from* is not open. In the document you want to copy the styles *to*, open the **Styles** pane; then click on **Manage Styles**  and on **Import/Export** to display the **Organizer**.




The styles in the current document appear in the panel on the left.

In the panel on the right, click on **Close File**, then on **Open File**. Click on **All Word Templates** at the bottom right of the dialog box and select **All Word Documents**, then navigate to the document you want to copy the styles from and open it.

In the panel on the right, select all the Heading styles and click **Copy**. Word will ask if you want to overwrite Heading 1 – click **Yes to All**. Click **Close** to finish. The Heading styles will be copied over, overwriting the formatting of the styles in the current document.

Use copy and paste

If you haven't yet applied the Heading styles to a new document, a quick method is to use copy and paste to copy the formatting from an existing document.

Open the document containing the Heading styles and number formats you want. On the **Home** tab, click on the **Show/Hide** button  to display formatting marks. At a Heading 1 paragraph, copy the paragraph mark at the end – this is where Word stores the formatting for the paragraph, and is actually all you need to copy.

Open your new document and click **Paste**. The text and numbering formatting will be applied to all the Heading styles, not just the level you copied. You can now delete the pasted paragraph mark.

Create a master document

You can create a blank 'master' document by deleting all the text in an existing document and clicking on **File** and selecting **Save As**. All your style and number formatting is saved with the

document ready for you to use again, as are any page layout settings such as margins. (Remember to use **Save As** again as soon as you open the blank document so that you don't overwrite your master by mistake.)

Create a template

To create a template, delete all the text, then click on the **File** tab and select **Save As**. Click on **Browse** to display the **Save As** dialog box. Type in a file name, and at **Save as type**, choose **Word Template (*.dotx)**.

Word automatically saves the file in a folder called **Custom Office Templates** under **My Documents**. To use the template, click **File, New** and **Personal**.

If you want to share your template with others, you can save it in any location – on a shared drive, for example. To use it, open Windows Explorer, navigate to the file and double-click to open it. It will open as a Word document.

Resources

For more information on Word features and functions, see the **Working with Text** section on our **Documents Catalogue** at www.ed.ac.uk/is/skills/documents-catalogue.

For information on our training courses, see www.ed.ac.uk/is/skills.