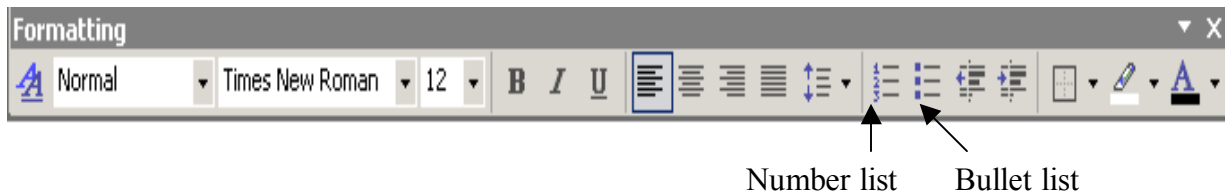


USING LISTS TO CREATE AN OUTLINE IN WORD

In this chapter, you will learn how to create a list in Word. With this list, you will learn how to indent (*promote*) and not indent (*demote*).

So, you have an outline you want to create in Word but you are having trouble with those darn automatic numbered and bulleted lists. You want to know how to change the type of numbers or bullets (*style*) you are using. Just follows these easy steps and you'll be on your way:

When you left click (*hit the left button on your mouse one time*) on the numbered or bulleted button (*icon*) on the Formatting toolbar, Word will automatically create the number or bullet list for you. No, this doesn't mean that Word will type what you want in your outline; this means that Word will automatically inset the numbers or bullets you'll need for your outline. That way you don't have to keep clicking on the button to add your numbers or bullets.



In order to be effective in this lesson, you must put all fears aside. Think of this lesson as if you are creating an outline for your class. First you must open Microsoft Word and follow every step. Let's begin:

Outlines in Word

When you have opened Microsoft Word on your computer left click (*hit the left button on your mouse one time*) the number list button (*icon*) 1 time on the **formatting** toolbar.



You should have the number 1 on your document. Whenever you click on the **number list** button or the **bullet list** button, Word will insert the numbers or bullets.

Now that you have that number 1 on your document, we are going to create an outline. From this point on re-type what you are reading:

1. When I click on the number button or bullet button on the formatting toolbar, Word will insert the number or bullet for me. Since I am creating an outline, I would like another sentence so I have to hit **enter** on my keyboard.
2. When I hit **enter**, Word inserts another number. I would like another sentence in my outline so I have to hit **enter** again.
3. If I accidentally hit the **backspace** key before I type a sentence, my number will disappear. That is okay. Don't panic! I just keep hitting the **backspace** key until I am at the end of the previous sentence. Then I hit **enter** on my keyboard again and Word inserts the number again for me. I would like another sentence in my outline. Hit **enter**.
4. This time, I would like to indent the next sentence in my outline. When I am done typing this sentence, I will hit **enter** so Word can insert the next number. After Word inserts the next number, I will hit the **tab** key one (1) time. Let's practice. Hit **enter** and then hit the **tab** key one (1) time.
 - a. This sentence will be indented (*demote*) in my outline. I would like another sentence with the same indent as this one. I hit the **enter** key and Word will indent the next sentence.
 - b. Notice how this sentence is indented (*demote*) the same as the previous? I would like another indented sentence. What do I need to do? Hit **enter!**
 - c. Okay. This isn't so bad. I will continue to type my outline but this time I would like the next sentence in my outline to be indented even more. Hit **enter**, and then hit the **tab** key one (1) time.
 - i. I now have another sentence in my outline which is indented (*demote*) more than the previous sentence. I want another sentence in my outline with the same indent as this sentence. What do I do? Correct! Hit **enter**.
 - ii. Remember, if I hit the **backspace** key and the number disappears, just keep hitting the **backspace** key until I am at the end of the previous sentence and hit **enter** again. Word will insert the number for me. Hit **enter**.
 - iii. Okay. This isn't so bad. But, I don't want the next sentence in my outline to be indented so far in. After I hit **enter**, I need to hold my **shift** key down and hit the **tab** key one (1) time. Word will move my sentence up one level. Hit **enter** then hold the **shift** key down and hit the **tab** key one time.
 - d. This sentence shouldn't be at the same indent as the previous sentence. I have just moved my sentence up one level (*promote*). I would like another sentence which is at the same indent as this sentence. Hit **enter**.

- e. Every time I hit **enter**, Word will insert the number or letter for me at the same position as the previous sentence. I want another sentence for my outline so I hit **enter**.
 - f. Now I understand! I am creating a **List** in Word and the sentences are called **listed items**. Okay. When I type the next sentence, I don't want it to be so far indented. I hit **enter** then I hold the **shift** key down and hit the **tab** key one time.
5. I have just moved this sentence up one level (*promote*). The next sentence I type will be at the same position as this sentence. On my own now.
 6. Now I am getting the hang of this! Now I will type an outline with easy directions for indenting (*demoting*) and not indenting (*promoting*) my list. Hit **enter**.
 7. What if I am done typing my outline and I have this number I don't need? What do I do? Hit **enter** two (2) times. The number will disappear.
-
-

You can stop re-typing! Let's recap what you have just learned. I am going to put this into an outline so you can re-type the next section.

Creating an outline in Word isn't so bad. Here is what I have learned:

When I want an outline in Word, I click on the number or bullet button on the formatting toolbar. Word will automatically insert a number or bullet for me. I can type my first sentence in my outline.

- This is my first sentence in my outline. When I want another sentence I hit **enter** and Word will insert the next number or bullet for me.
- This sentence will be at the same position as the first one. Every time I hit **enter**, Word will insert another number or bullet and I can type my next sentence in my outline.
- When I want my sentence to be indented, I hit **enter** and then I hit the **tab** key one time.
 - This sentence is indented. I have moved this sentence down a level which is called *demoting*. I hit **enter** again for another sentence.
 - Word will continue to insert numbers or bullets at the same position as the previous sentence. I hit **enter** again for another sentence then I hit the **tab** key to indent the next sentence.
 - When I want a new sentence, I hit **enter**.
 - When I want the next sentence to be indented, I hit **enter** then I hit the **tab** key one time.
 - I have another indented sentence in my outline. Now for my next sentence, I don't want it to be indented so far in. I hit the **enter** key then I hold the **shift** key down and hit the **tab** key one time.

- I have moved this sentence up one level, which is called *promoting*. I need another sentence at the same position as this one, I hit **enter**.
 - Word will insert another number or bullet and this sentence is at the same position as the previous sentence. Again, another sentence but I don't want it indented so far in. **Enter** then hold the **shift** key down and hit the **tab** key one time.
 - I have moved this sentence up one level again (*promote*). Every time I hit **enter** I get another number or bullet; I hold the **shift** key down and hit the **tab** key one time Word will *promote* the number or bullet for me. On my own now.
 - Great! I can now do this on my own! When I hit **enter** again, I get another bullet.
 - Now I am done with my outline. I will hit **enter** two (2) times.
-

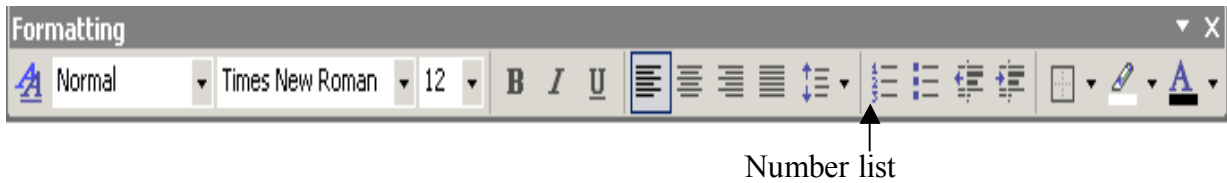
***Refer to *Outline. dot* and *Example. dot* templates on the CD. You can open these templates and modify them to your specific needs and save them on your computer. If you don't remember how to open them or save them, refer to the Introduction chapter.**

Now that you have mastered making a list in Word using the number button (*icon*) and the bullet button (*icon*), let's look at how to make changes to the types of numbers you are using. Why would we do this you ask? You might not always want the same numbers.

Remember: to be effective in this lesson, you must put all fears aside. Think of this next section as an outline you are going to give to your students and you want to add some creativity to your list. First you must open Microsoft Word and follow every step. Let's begin:

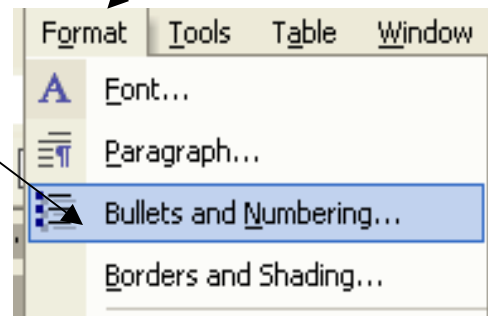
Follow every step from this point on.

Okay. You have an outline you want to create but before you can create the outline, you must first decide if this is going to be a number outline or a bullet outline. You have decided on the number outline. Do you remember what button (*icon*) you are supposed to click on first? YES! Click on the number button (*icon*) on the formatting toolbar first.



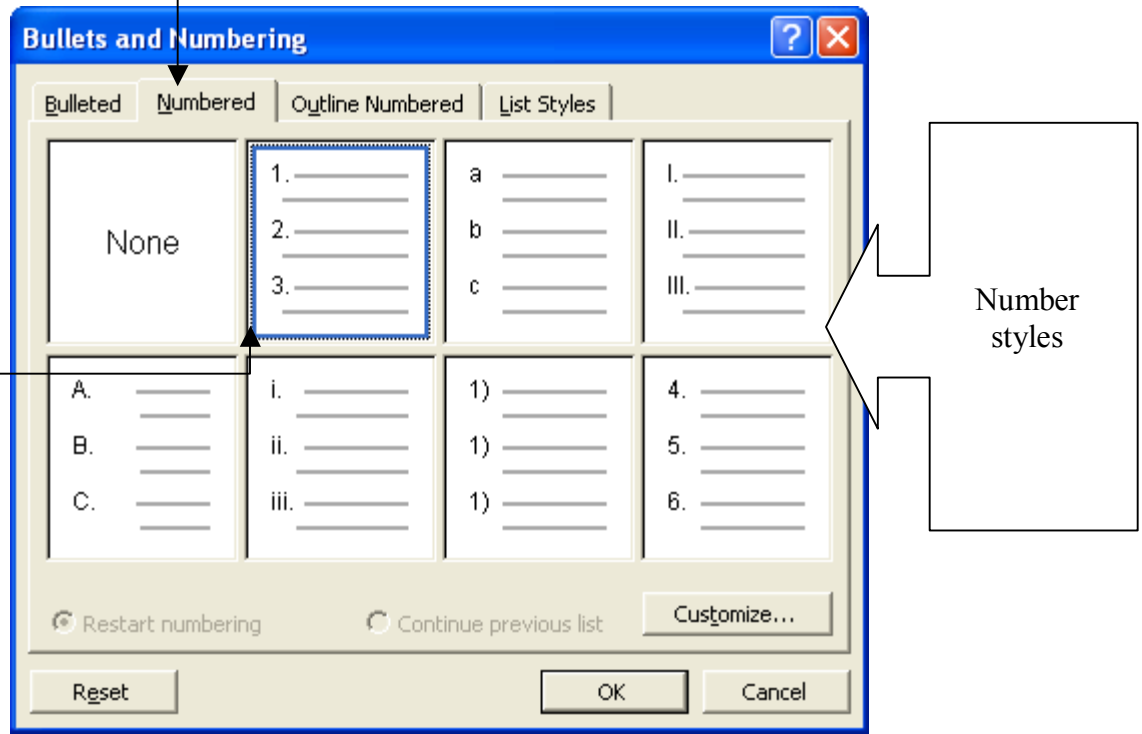
The number 1 will appear on your page (*document*). Now, you want to change the type of number style you are currently using. Why? You want something different, that's all.

First you will need to click (*hit the left button on your mouse one time*) on **Format** on the **menu bar** and then click on **Bullets and Numbering**.



You should now have the box (*dialog box*) below open:
You should be on the **Numbered** sheet (*tab*).

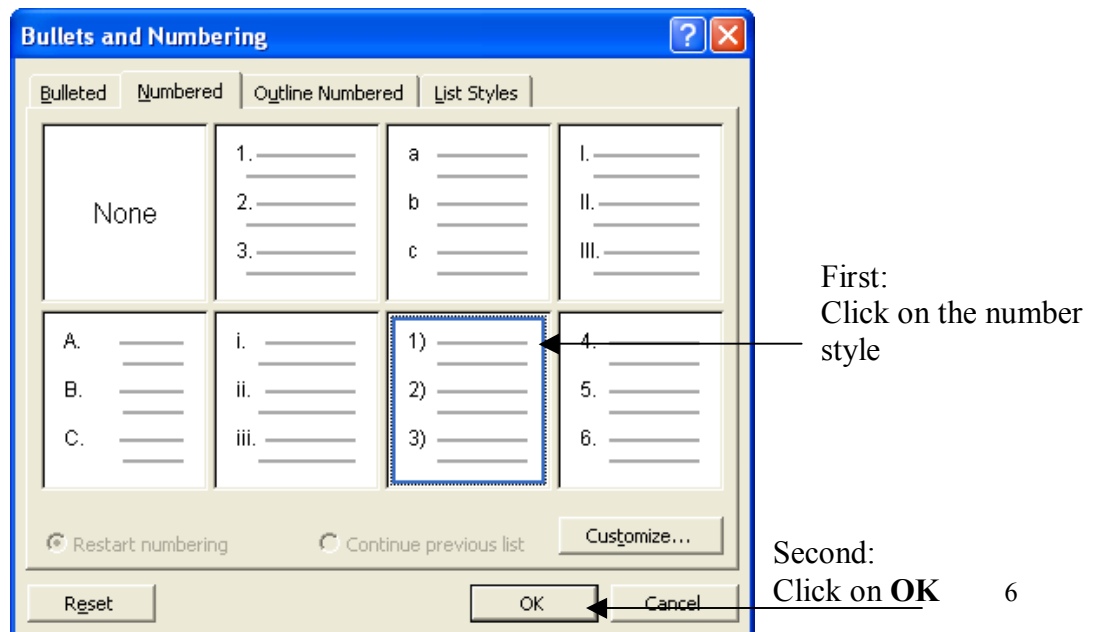
The number style you are currently using will have a **blue border** around it.



Since you have decided to use the number list, Word automatically shows you the different number styles you can use. One of the number style boxes should have a **blue border** around it. This is the number style you are currently using.

Okay. You want the numbers to look like this: 1) 2) 3)

So, click (*hit the left button on you mouse one time*) on the number style with parenthesis after the numbers. When you are done click on **OK**.



Now your list (which consists of one number right now) should look like this:

1)

Let's recap what you have just learned. I am going to put this into an outline so you can re-type the next section. You should have two Word documents open: one document to re-type the next section and another Word document to actually go through the steps of what you are re-typing.

I know how to create a list in Word using numbers. I have just learned how to change the style of numbers I am using. Now, I am going to create an outline for what I have just learned. So, I have to click on the number button (*icon*) on the **formatting toolbar**.

- 1) The last number style I used has parenthesis after the number, so Word gives me the last number style I used. I want another sentence. Hit **enter**.
 - 2) Word will give me another number with the same style as the previous one. I want another sentence. **Enter**.
 - 3) Okay. I want to change the number style I am using. I want a new sentence which will be indented. I hit **enter** and then I hit **tab**.
 - a. To make a change to the number style I am using, I will have to click on **Format** on the **menu bar** and then click on **Bullets and Numbering**. New sentence please! **Enter**.
 - b. Remember, Word will continue to indent my list. New sentence please! **Enter**.
 - c. Okay. I have now clicked on **Format** and then clicked on **Bullets and Numbering**. The box will show me other number styles I can use. The number style I am currently using has a blue border. New sentence please! **Enter**.
 - d. I will now click on the number style I want to use. After I have clicked on the number style I want to use, I will click on **OK**. New sentence please! **Enter**.
 - e. After I have clicked on **OK**, my number list should now be the number style I choose. New sentence please...but I do not want the next sentence indented. After I hit **enter**, I will hold the **shift** key down and hit the **tab** key one time.
 - 4) I have just moved my sentence up a level (*promoted*) and my number list should look like the number style I clicked on in the **Bullets and Numbering** box. Since I am done with my list, I will need to hit **enter** two times.
-

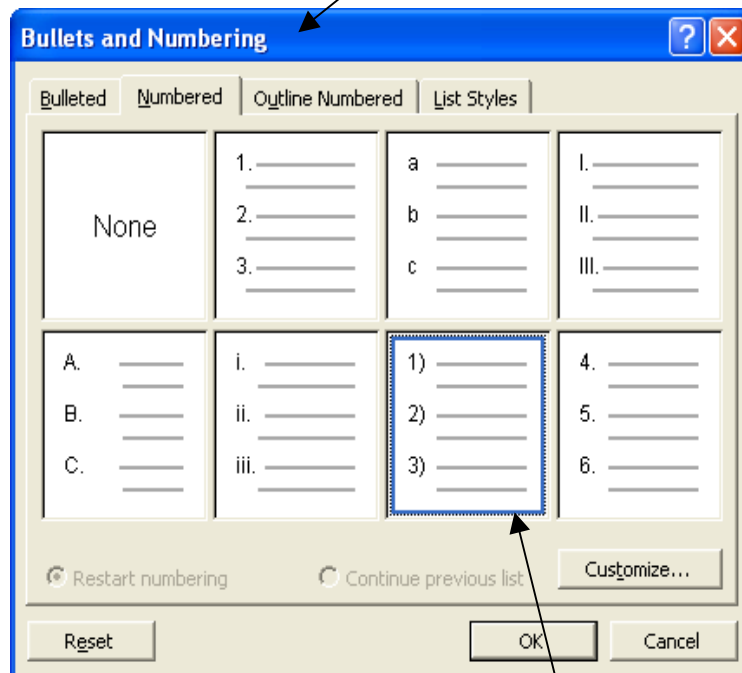
Stop typing. Good job! You have a question? "*What if I have already typed my outline and I want to change the number style I am using?*"

Good question. Let's look at an outline which has already been typed and now you want to change the number style you are using.

For example: you will change the number style of the outline in the above exercise. Remember, put all fears aside. You have already learned the hard part. Now it's just a piece of cake!

Just follow these easy steps to change the number style to an outline which has already been created:

1. The first thing you must do is, of course, open the Word document which has the outline you want to change.
2. After you have opened the Word document, you will need to highlight your outline.
 - a. Now, when you highlight your outline, Word will not highlight the numbers. Why?
 - b. When you created your outline, Word automatically inserted the numbers in the outline, which is called an **automatic list**. Since Word automatically inserts the numbers, the numbers themselves cannot be highlighted.
 - c. But, you can highlight the text in your list.
3. So, you should have the text in your list highlighted.
4. Once you have highlighted the text in your outline, you will proceed with the same process as before.
5. Click on **Format** on the **menu bar**.
 - a. Click on **Bullets and Numbering**
 - b. When you have click on **Bullets and Numbering**, a box (*dialog box*) will open.



6. The number style you are currently using will have a **blue border** around it.

7. Click on the number style you like.
8. Then click on **OK**.
9. Now your outline will have the number style you clicked on in the **Bullets and Numbering** box (*dialog box*).

Wow! You have learned how to create an outline in Word using the list feature. You have learned how to change the number style you are using for your outline. AND you have learned how to change the number style to an outline you have already created.

GOOD JOB! There's more....

You're probably thinking, "*How can there be more*"? Do you like how close the numbers are to the text? Do you like how far the text indents in after the number? Would you like to know how to change this?

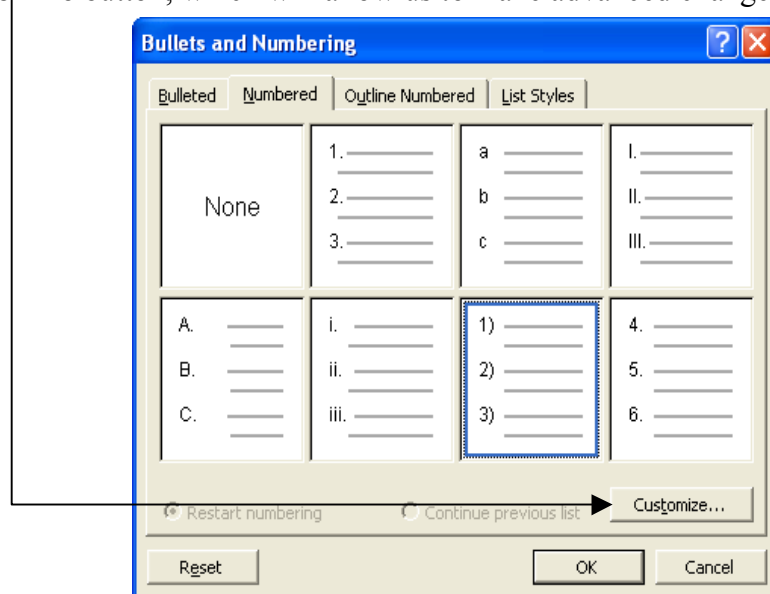
Of course you do! Why would you want to change this? So you can have more control over your outline in Word. You will be able to control how close the numbers are to the text. You will be able to control how far the text indents after the number. Better understanding means more control.

Remember: you have already learned the hard part. Everything from this point on is just icing on the cake. Breathe! Relax! No panicking!!

Let's begin...

You know that when you want to change the number style you are using, you go to **Format** on the menu bar to **Bullets and Numbering**. Now, when you want to make other changes, there is another button in the **Bullets and Numbering** we need to click on. Let us have a look:

Below we have the **Bullets and Numbering** box (*dialog box*) open. Inside this box (*dialog box*) there is a **customize** button, which will allow us to make advanced changes.



First, let us have a Look inside this **Customize Numbered List** button.

Number Format:

This is the number style you are currently using in your outline.

Number style:

This allows you to change the number style you are currently using.

Start at:

This will allow you to change the number you want to start with in your outline. You do not always have to start with 1.

Number position:

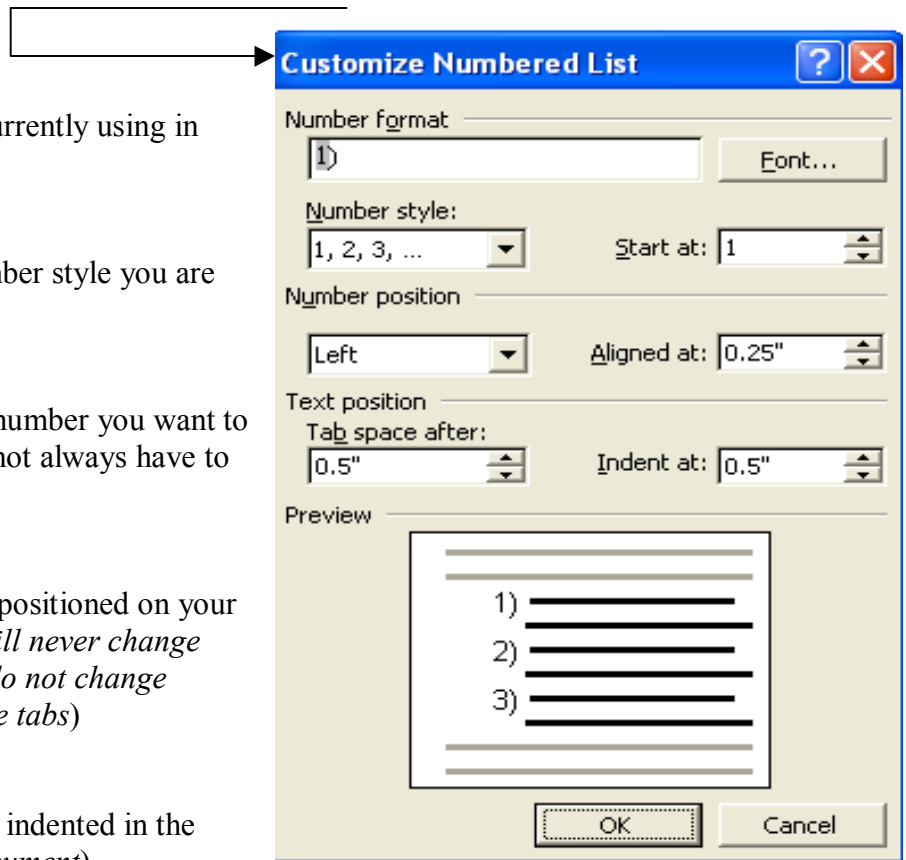
This is where the numbers will be positioned on your document (*honestly though, you will never change this! The position of the numbers do not change significantly enough unless you use tabs*)

Aligned at:

This allows you to change how far indented in the numbers will be on your page (*document*).

Text position (tab space after): This allows you to change how far the first line of your sentence in your outline will be indented.

Indent at: This allows you to change how far the second line of your sentence in your outline will be indented.



Stay calm! I know this is a lot of information. We will take what we have looked at and put this into practice.

Okay. You want to create an outline, but before you actually type the outline you want to change the number style you are using, you want to change what number will be first in your outline, and you want to control how close the numbers are to the text and how far the first line in your outline will be indented. Stay with me now.

You are probably asking “*Why in the world would I ever want to make so many changes? Can't we just keep this simple?*”

Yes we can keep it simple and it is! Remember: the more you know about what you are doing the more control you have over what you are creating! Let's begin:

From this point on you should retype everything you're reading. When you get to **STEP A**, you will not retype what you are reading; you should go through the steps for practice. You will need to have Microsoft Word open to complete this exercise. Let's begin:

I want to create an outline in Word using numbers and I want to control the numbers and the text. I am creating a new outline so I will make these changes before I type what I want in my outline.

First: I must click on the number button (*icon*), and Word will insert a number for me and the number style will be the last number style I used in my last outline.

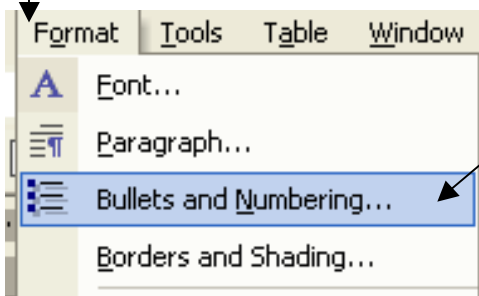
Now I should have a number on my page, since I clicked on the number button (*icon*) on the **Formatting** toolbar.

STEP A

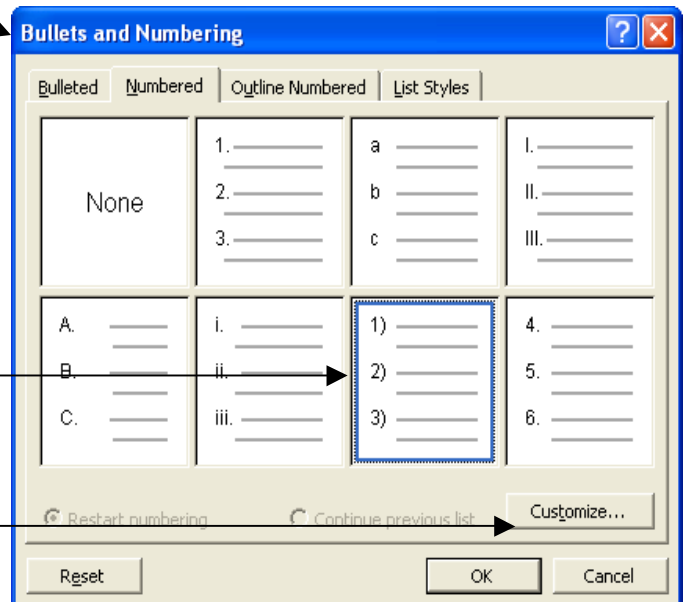
I want to make changes.

I click on:

Format on the menu bar and then click on **Bullets and Numbering**.



The **Bullets and Numbering** box (*dialog box*) will open.



The number style I used in my last outline will have a **blue border** around it.

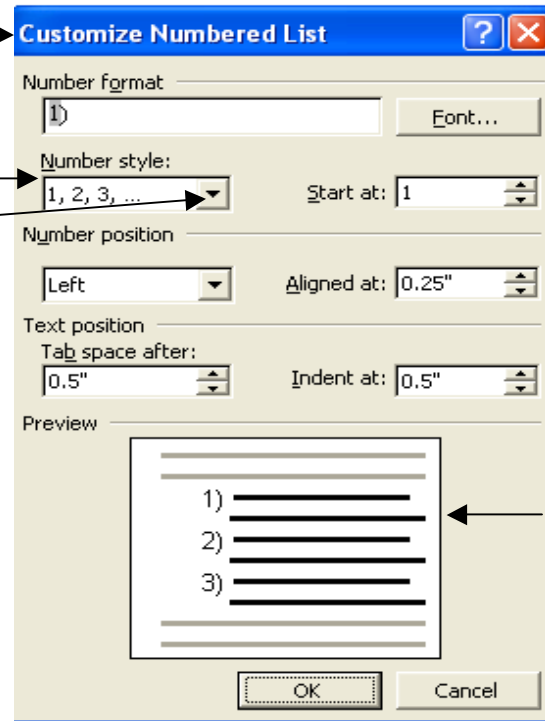
I want to make advanced changes, so I will click on **customize**.

The **blue title bar** should say **Customize Numbered List**.

Now, I want to change my **number style**. I will click on the arrow pointing down (*drop down arrow*) to see more options.

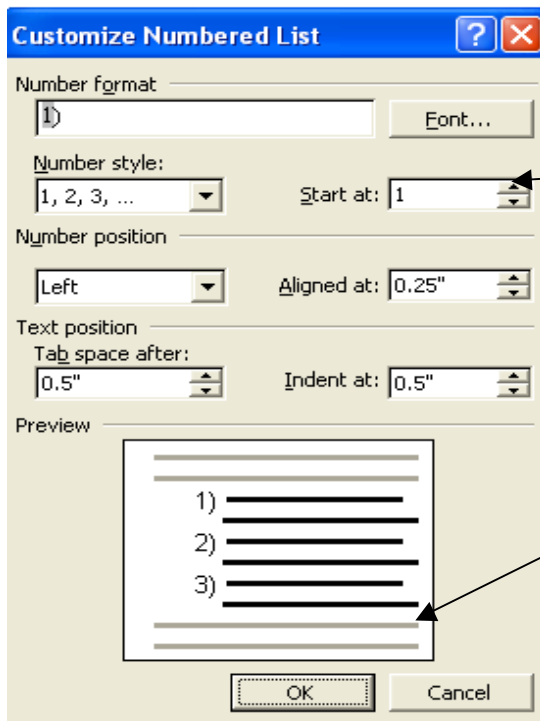
Wow! My outline doesn't have to be numbers; I can have the words **First, Second, Third**. I can have the numbers **1st, 2nd, 3rd**. I can have the words **One, Two, Three**. There are so many options!

Okay, calm down. I will choose.... **First, Second, Third**. So I will click on **First, Second, Third**. Now the **Number Format** will show **First, Second, Third**. Also, the preview will show the **Number Style** I chose.



When I make changes, the changes will show here.

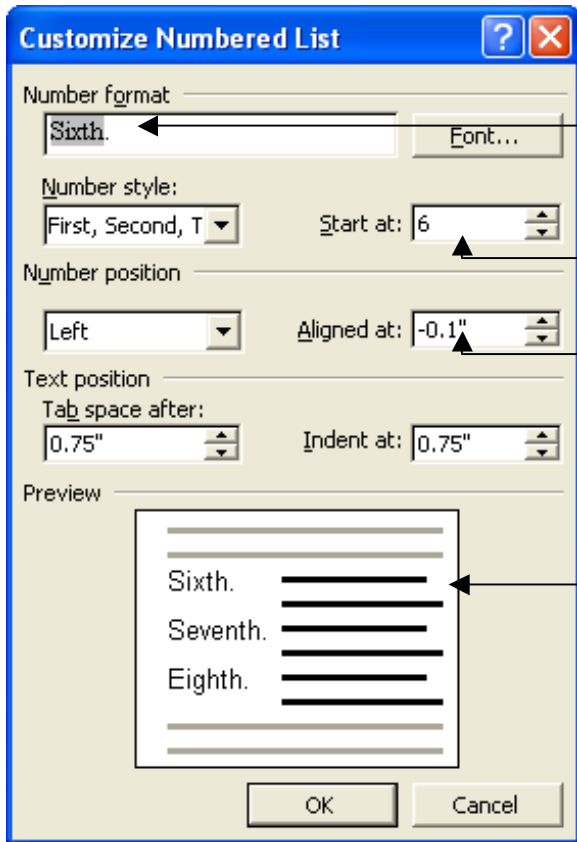
I am having so much fun with this! Now, I want to change the number my outline starts with. Why? The lesson plan I am creating will take be a take off from the previous lesson plan. So I don't want to start with **First** or the number 1 again. This lesson is a continuation of a previous lesson plan I created for my class.



In order to change the number I will start with, I will need to click on the up arrow of **Start at**.

I will choose to start my outline with the word **Sixth**.

Remember: the changes will show in the **Preview** at the bottom of the box (*dialog box*).



Let's breathe...

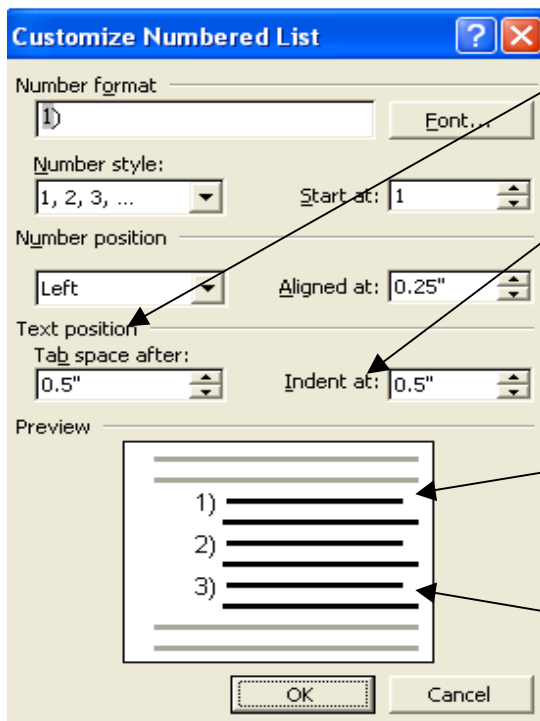
Number Format should display the **number style** I clicked on.

I changed the number I will start with in the **Start at**.

Now, I will change far the numbers are indented in the **Aligned at** (*yes, this number can be negative!*)

I will click on the up arrow to make the numbers indent, or I will click on the down arrow to make the numbers not indent so much.

Remember: look at the preview to see the changes I am making.

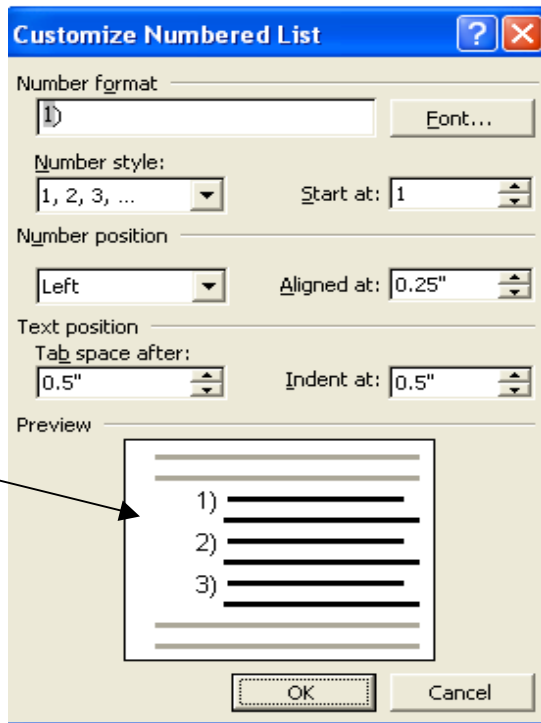


Text position: Tab Space after

Will allow me to change how far the first line of my sentence will be indented

Indent at will allow me to change how far the second line of my sentence will be indented.

Notice the lines in the preview after the numbers. Notice how the second line after the number is not even with the first line. I want to make the second line even with the first line.



Remember:
always look at
the preview to
see changes
being made.

To control how far the first line of my sentence will indent, I will click on the up arrow of **Tab Space after**. When I click on the up arrow, the first line of my sentence will move further away from the numbers. It will indent more. When I click on the down arrow, the first line of my sentence will move closer to the numbers.

To control how far the second line of my sentence will indent, I will click on the up arrow of **Indent at** to make the second line of my sentence indent more and more. Or, I will click on the down arrow to make the second line of my sentence move closer to the numbers in my outline.

I probably want the first line of my sentence and the second line of my sentence to be even. So, I will have to click on the arrows in **Tab Space after** and **Indent at** and look at the preview to see if my lines are even.

ALMOST DONE!

Before I click on **OK**, I will just look at the changes I have made.

Number Format: should display **Sixth**.

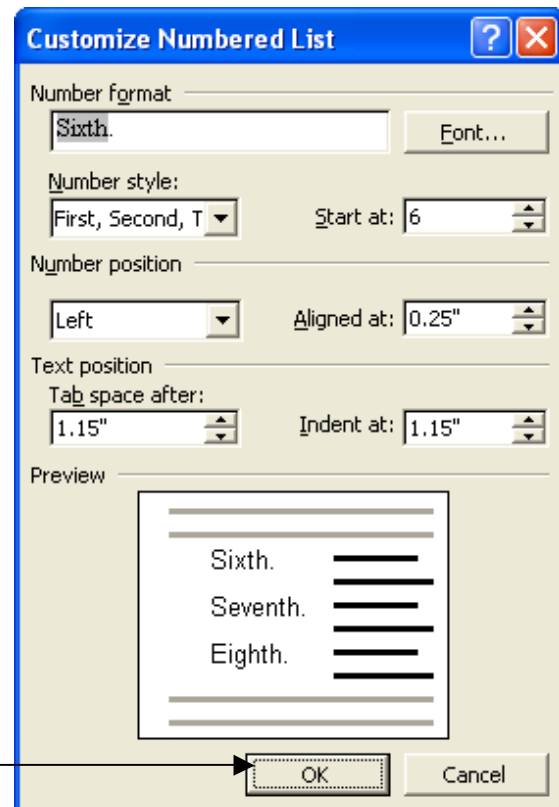
Number style: should display **First, Second, Third**

Start at: should display **Sixth** (remember, the lesson plan I am creating is a continuation of a previous lesson plan)

Tab space after: how close is the first line of my sentence to the numbers?

Indent at: how far in or out is the second line of my sentence indented? Do I want my first and second line to be even?

I cannot take this anymore. Let's click on **OK**



GOOD JOB! Even though you haven't typed anything in your outline, the word **Sixth** should appear as the first item in your outline, in the Word document you have been working in. So now let's type and recap what we have learned.

Re-type the next section in the open Word document you have been working in. Or, you can open another Word document if you like. First, click one (*hit the left button on your mouse*) time after the word **Sixth** so you can type your outline. Re-type everything you read for review:

-
- Sixth. Now that I have completed **STEP A**, Word will start inserting the number format I choose in the **Bullets and Numbering** box (*dialog box*). Since this outline I am creating right now is a continuation of an outline I created earlier, this outline will not start with the word *one*. It will start with the word *sixth*. This was so easy. Let's recap what I have learned in this section. New sentence please! **Enter**.
- Seventh. Would you look at that! Word has inserted the word *seventh* in my outline. Alright. When I want to create an outline using numbers, I must first click on the number button (*icon*) on the **Formatting** toolbar. Word will insert the number style I used last. New sentence please! **Enter**.
- Eighth. When I want to change the number style I am using, I must click on **Format** on the menu bar and then click on **Bullets and Numbering**. Word will then open the **Bullets and Numbering** box (*dialog box*). New sentence please! **Enter**.
- Ninth. There will be a blue border around the number style I used the last time I created an outline in Word. New indented sentence please! **Enter** and then **tab**.
- a. Yuck! This indented line looks awful. That's okay for now. I want my next sentence to be indented even more, so I will hit **enter** and the **tab** key one time.
- i. Much better. How do I fix the previous sentence? I want both sentences to be even. (*To make the previous sentence even with this one, click one time, hit the left button on your mouse, before the word "Yuck" and hit your tab key one time.*) Okay. In order to make the previous sentence even with this sentence, I will click one time at the beginning of my sentence, before the word "Yuck", and hit the **tab** key one time. Where was I? Oh yeah. I am in the **Bullets and Numbering** box and there is a blue border around the number style I am currently using, but I want to make other changes. New sentence please! **Enter**.
- ii. I will then click on the **customize** button in the **Bullets and Numbering** box (*dialog box*) to make more changes. New sentence please, but I don't want the next sentence to be indented so far in. I will hold the **shift** key down and hit the **tab** key two times.

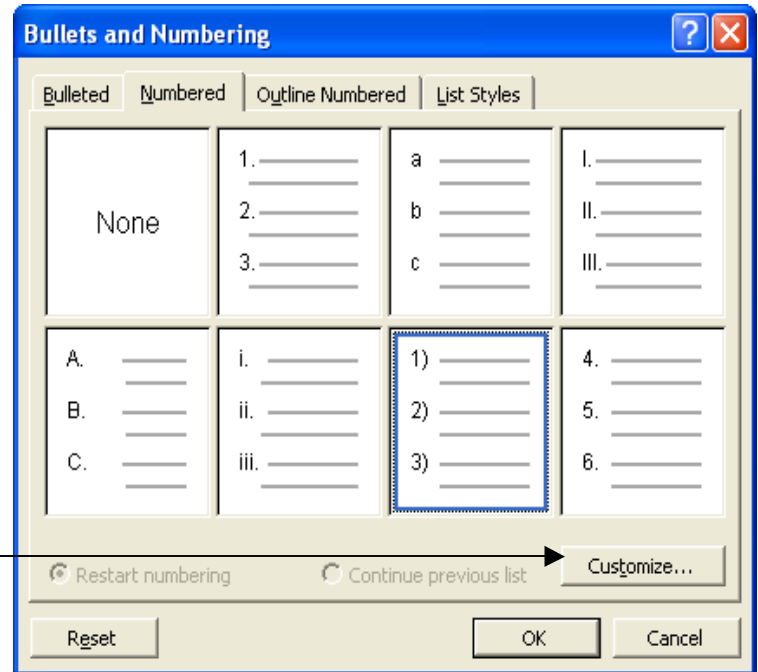
- Tenth. Cool! The **Number Format** will show the number style which is being used at the moment. I can change the number style I am using in the **Number Style** and I can change what number my outline will start with in **Start at**. New sentence please! **Enter**.
- Eleventh. When I want to make the first line of my sentence closer to the numbers, I can click on the down arrow of **Tab space after**. If I want to make the text further away from the numbers in my outline, I can click on the up arrow of **Tab space after**. New sentence please! **Enter**.
- Twelfth. When I want the second line of my sentence to be closer to the numbers, I can click on the down arrow of **Indent at**. If I want the second line of my sentence to be further away from the numbers, I can click on the up arrow of **Indent at**. New sentence please! **Enter**.
- Thirteenth. I most likely will want the first line and the second line of my sentence to be even. So I will have to keep clicking on the up or down arrows of **Tab space after** and **Indent at** and watch the preview to see the changes that are being made. New sentence please! I know I know!! **Enter**.
- Fourteenth. When I am all done making my changes, I will click on the **OK** button in the **Customize Numbered List** box (*dialog box*). New sentence please! Don't tell me!
- Fifteenth. I am all done now typing my outline, so I will hit **enter** two times.
-
-

You can stop typing now! You have another question? *“How do I make all of these changes that I have just learned to an outline I have already created?”* That is a very good question.

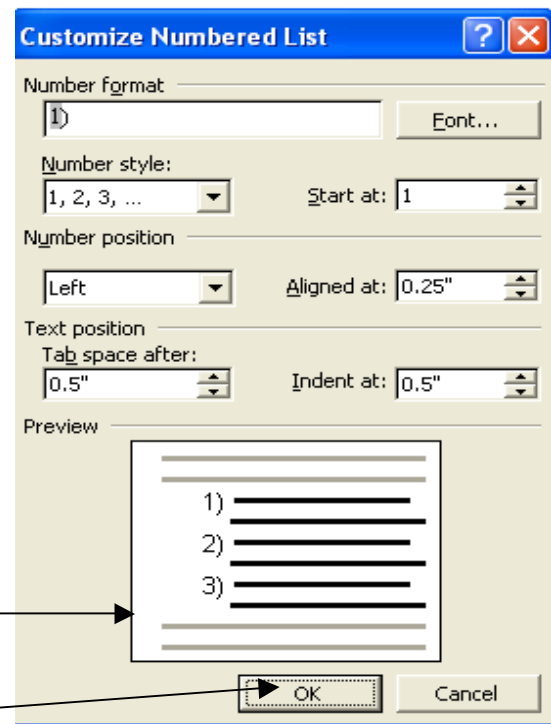
Just follow these easy steps to make all of the above changes to an outline you have already created. For review and practice, you will make changes to the outline you have typed above, which should already be open in Word:

1. The first thing you must do is, of course, open the Word document which has the outline you want to change.
2. After you have opened the Word document, you will need to highlight your outline.
3. Remember, when you highlight your outline, Word will not highlight the numbers. Why?
 - a. When you created your outline, Word automatically inserted the numbers in the outline, which is called an **automatic list**. Since Word automatically inserts the numbers, the numbers themselves cannot be highlighted.
 - b. But, you can highlight the text in your list.
4. So, you should have the text in your list highlighted.
5. Once you have highlighted the text in your outline, you will proceed with the same process as before.

6. Click on **Format** on the **menu bar**.
 - a. Click on **Bullets and Numbering**.
 - b. When the box (*dialog box*) opens, click on the **customize** button.



7. When you click on the **customize** button, another box (*dialog box*) will open.
8. The **Number Format** displays the number style you are currently using.
9. Use the **Number style** to make changes to the way the numbers look in your outline.
10. If you want the numbers to be indented on your page (*document*), click (*hit the left button on your mouse*) the up arrow in the **Aligned at**.
11. If you want the first line of your sentences to be further away from the numbers (*indented*), click on the up arrow of **Tab space after**.
12. If you want the second line of your sentences to be further away from the numbers, click on the up arrow of **Indent at**.
13. Remember: always look at the preview to see the changes you are making.
14. When you are done making changes, click on **OK**.



15. Now, your outline should reflect the changes you made in the **Customize Numbered List**.

Great job! Take a break, you deserve one. You deserve a pat on the back. So reach around and pat yourself on the back! NO! Actually, you deserve applause!!! Applaud yourself!

I would like you to take a break before proceeding to the next section. What! There's another section? Yes. The next section will use bullets in an outline instead of numbers. This will be easy. You have already learned the hardest part about outlines in Word. We are going to take what you have learned and just change it to bullets.

Save what you have created so far, walk away from the computer and rest your eyes, hands, fingers and brain and take a break. When you feel rested, come back and learn some more neat stuff about Word.