Working with List Styles in Microsoft Word

BY:

Richard V. Michaels, M.Ed.
Chief Product Architect, Great Circle Learning
Microsoft Office MVP
Tel: 239-389-2000
Email: info@greatcirclelearning.com
Learn more about us at: www.greatcirclelearning.com

Working with List Styles

A question was asked about how to create a style that would start with a numbered paragraph of text, followed by an indented and unnumbered paragraph of text. It would look like the following:

1. *This is the first item in my special list*

    And this is the next level in my list, notice it isn't numbered

    If a second paragraph was added they also wanted a blank line to appear between it and the first paragraph. (Note: Inserting blank empty lines is not the proper method to achieve the spacing; the format paragraph setting of Points Before and Points After should control it.)

To do this correctly you must create two special **Paragraph** styles and one **List** style. Here is the process to follow:

1) Open the New Style dialog

    a) PC users of Word 2007 or later, either use ALT-Ctrl-Shift-S to open the Styles task pane and then press the Manage Styles button to open the Manage Styles dialog and then press New Styles to open the New Styles dialog, OR… add the New Styles button to your Quick Access Toolbar. While you're there, add the Modify Styles button also.

    b) Mac users with Office 2011 and earlier or PC users with Word 2003 or earlier… from your menu bar choose Format > Style and select the New button.

2) First create the indented, non-numbered **Paragraph** style.

    a) Give it a name, or for example "**My Special 2**".

    b) I recommend that you base this new style on "None" so you can apply exactly what you want and not let it get influenced by any other style setting; of course you can choose to base it on most any other style you want.

    c) For the following style choose itself, "**My Special 2**".

    d) Use the Format menu to set the various attributes for Font and Paragraph formatting. Do not set anything regarding bullets and numbering.

    e) On the Paragraph dialog set the indentation to 0.5 (or whatever you desire); set Spacing Before to 6 pt. Spacing After to 18pt. (this will give the effect of a blank line added between paragraphs) and for Line Spacing choose Single with an "At Least" setting of 14 pts.
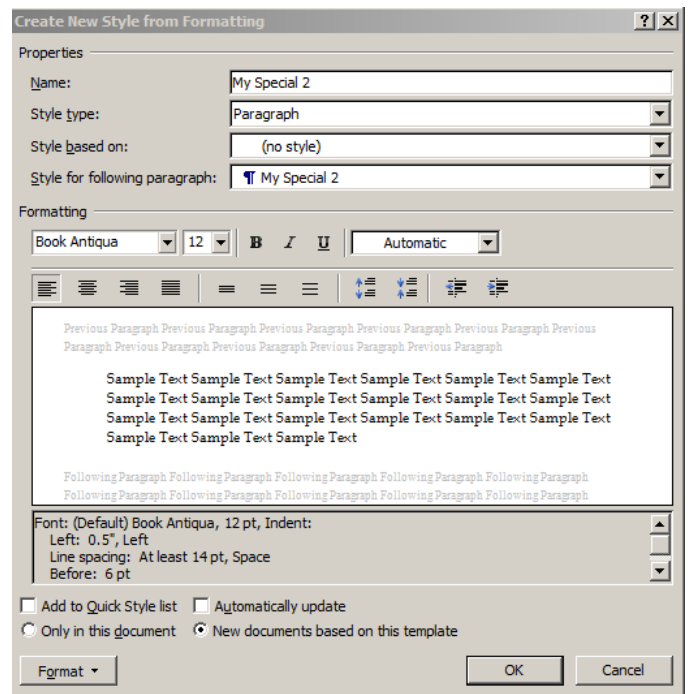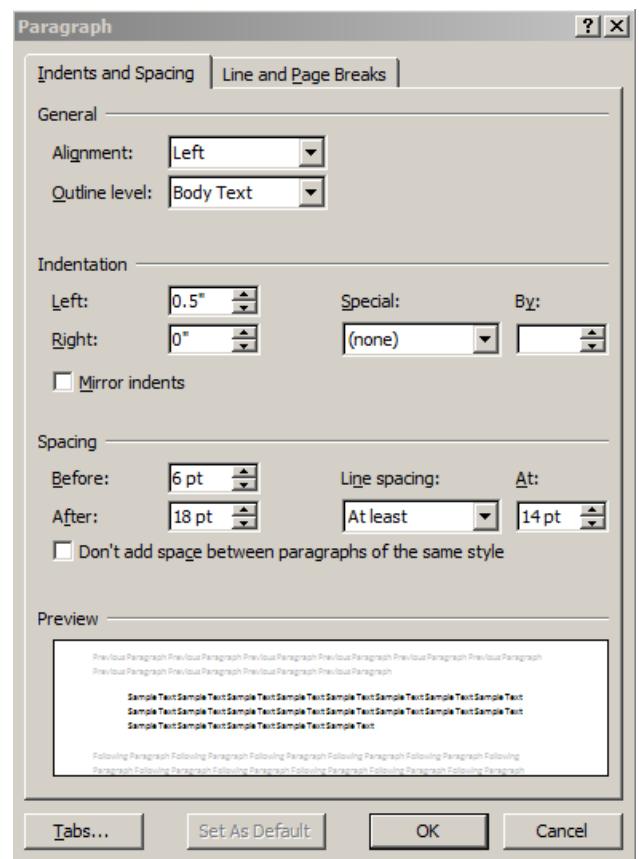

New Style Dialog (PC)

   f) When you are finished setting all of the formatting attributes and before you click Ok to this dialog, make sure you mark the box to "Add to Template"; PC users it's labeled "New documents based on this templates." DO NOT check the Automatic Update box.

3) Follow the same process as outlined in #2 above and create another new **<u>Paragraph</u>** style that you will call "**My Special 1**".

   a) Give it a following style of "**My Special 2**"

   b) As you did with the previous style you just setup, do not give this new style any bullet or numbering format attributes.
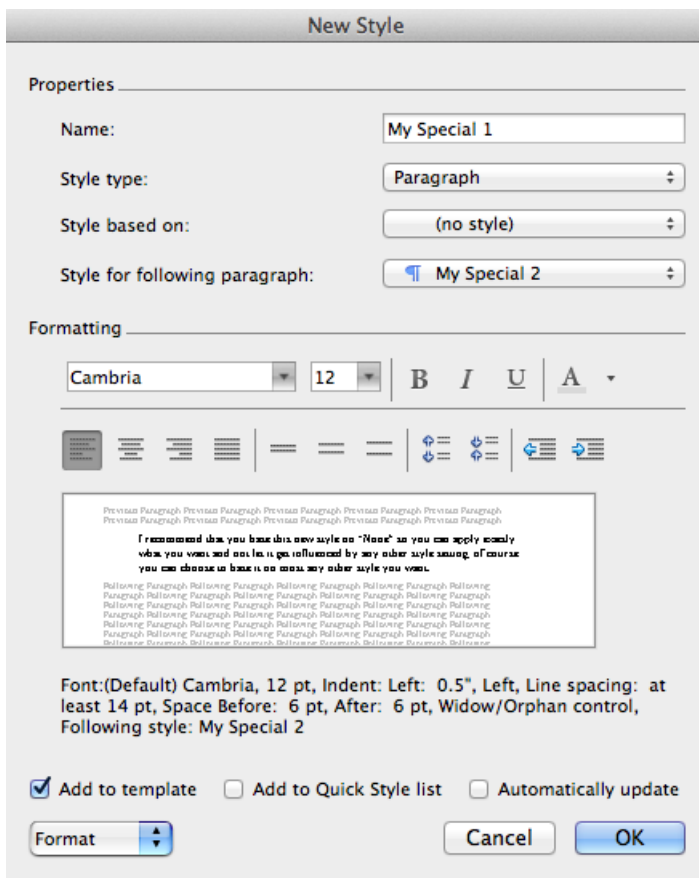
New Style Dialog (Mac)

Paragraph Formatting Dialog (PC)

4) Now you are ready to create a new **List** style.

   a) Give it a name like "**My Special List**".

   b) For "Style Type", make sure you designate "List" and as soon as you make that change you will see that the dialog adjusts.

   c) Do not mark anything on this "List" dialog accept the button to Add to Template (aka "New documents based on this template") and then choose from the Format menu on this dialog select Numbering... and then whether you are on a PC or a Mac, there is a slight divergence of what you see next.
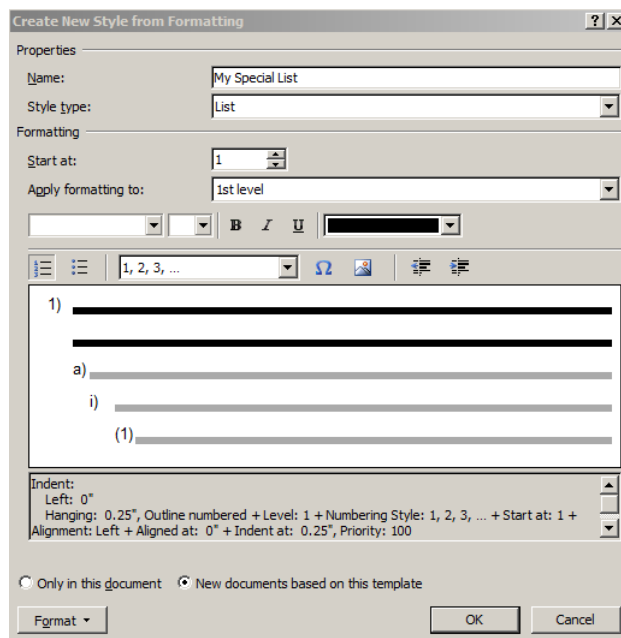
      i) PC users are immediately taken to the Modify Multilevel List dialog where you will choose your list level number formatting.

      ii) Mac users are shown a Bullets and Numbering dialog where you can choose your outline numbering format for the first level. You can choose it here and then press Customize or simply press Customize. Either way, on the next dialog you can set the formatting, so I prefer to just move on.

   d) The dialog you are now on is either labeled "Modify Multilevel List" (PC) or "Custom Outline Numbered List" (Mac); they look different but contain all the same functions.

      i) Make sure you expand the dialog. On a PC it is the "More>>" button and on a Mac it is the down arrow "∨" button. On both platforms the button is in the lower left corner of the dialog.

      ii) From the upper left area of the dialog make sure "1" is highlighted; this indicates that the settings are for Level 1 in the list. The large box shows you what your list will look like.

         (1) Locate the box labeled with something about formatting the number and it probably shows the format as "1)" but obviously without the quotes. If you want to format the number as "1." then just alter it in this text box.

         (2) As you see there are many choices you can make for the formatting but for now just leave them as is... you can experiment later.

         (3) Locate the box labeled something like, "Link level to style" and use the pull-down menu to find your newly created paragraph style "**My Special 1**" and assign it as the paragraph style assigned to level 1 in this list.

         (4) Do not press OK... you now have to set Level 2 formatting and assign it to a paragraph style.

Create a New List Style (PC)

Numbering
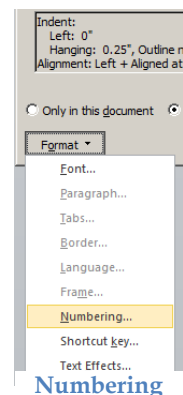
iii) Select 2 from the level list in the upper left of the dialog.

(1) For this level, clear the box about formatting the number; remember our specs call for a non-numbered paragraph to follow the numbered paragraph.
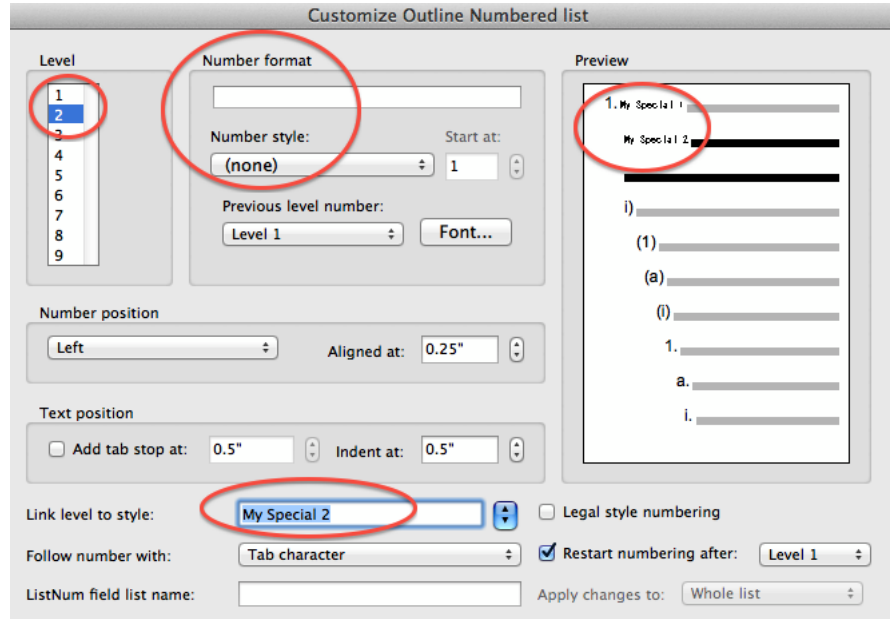
(2) Open the menu list labeled something like, "Number style for this level" and select "(none)".

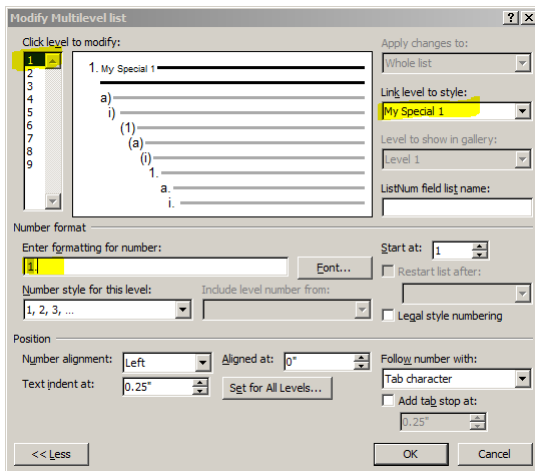(3) In the "Link level to style" menu select your "**My Special 2**" paragraph style.

iv) You can now click OK to this list dialog.

Customize Outline Numbered List (Mac)

v) On the New Style dialog, before you click OK, make sure the "Add to Template" (aka New documents based on this template") is marked.
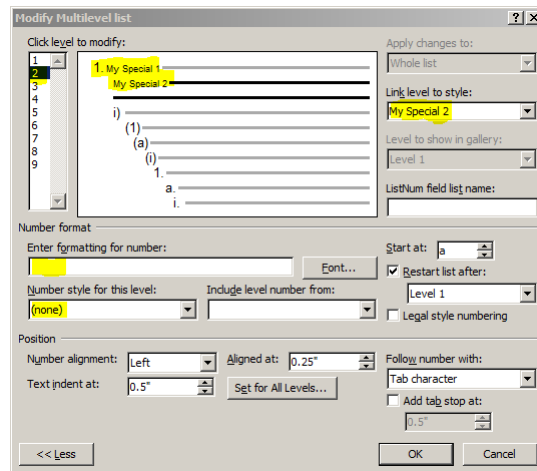
5) After backing out of all dialogs, you are now ready to use your new list style.

Modify Multilevel List (PC) – Level 1

Modify Multilevel List (PC) – Level 2

Documenting the process to properly make numbered lists is actually harder than performing the process itself. After you successfully create your first list, others will become very easy to do, which leads me to a final comment on list styles.

Under no circumstances should you ever randomly override a list style in a document. If you need to change formatting on a list paragraph, don't just select the paragraph and start clicking formatting button, you must change the style that is assigned to the paragraph. Done any other way you run the

risk of corrupting the documents list style entirely. And when that happens, don't be surprised when numbered lists start misbehaving elsewhere in your document.

If you need to alter the formatting of a paragraph, do it properly by assigning it to a **new Paragraph style** format.