Microsoft Word Automatic Numbering

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Multilevel numbering in Word is easy to mess up. *It always has been.*

Automatic Paragraph Numbering all starts with the Define New List Style Dialog.

You use that to create and name a list style, within that dialog, when you format numbering you go to the Define New MultiLevel List Dialog. The key is to assign a separate existing paragraph style to each level of numbering. The styles can be built-in styles- or custom styles.

See also my free <u>MultiLevel Numbering Tutorial Document</u>. It is a document that goes step-by-step through setting up a List style with numerous screenshots.

If you use automatic paragraph numbering or bullets read Shauna Kelly's directions on numbering and bullets. Start with <u>How to create numbered headings or outline numbering</u> *and her parallel page <u>How to</u>* <u>control bullets</u>. For large documents you must follow these directions or you will lose your hair! (Mac version: <u>https://www.brandwares.com/bestpractices/2016/06/outline-numbering-in-word-for-os-x/</u>).

For styles attached to numbering or bullets this way, you also control the **left indents** through the Define New MultiLevel List dialog *not* the Ruler, the Format Paragraph nor the Modify Style dialogs. See: <u>Numbered Lists - Number Alignment</u> by Suzanne Barnhill, MVP.

Again, you first want the paragraph styles existing in your document without numbering.

These can be built-in styles or custom styles or a mix of the two. You can, if you want, modify their formatting later. Then you go to the **Define New List Style** (*Not Define New MultiLevel List! You will get to that dialog in the process, though.*) Shauna Kelly's page uses the built-in heading styles. This can be convenient but the process works with any existing paragraph styles including your custom styles.

This may seem a bit convoluted at first, but it really is not. Just follow the steps. Shauna Kelly's instructions use the built-in heading styles, but you can use any existing paragraph styles including your custom styles. There are, however advantages to using the built-in heading styles when you create a Table of Contents. Here are some more advantages: <u>Why Use Word's Built-In Heading Styles? by</u> <u>Shauna Kelly</u> Note, you can modify these built-in styles to look exactly the way you want.

Even if what you want is a single-level list, you want to do this if you want the **most control** over your list.

The basic idea is that the numbering is set using the Define MultiLevel List dialog with each numbering level being attached to an existing paragraph style. Once you have this set up, you should **not use the buttons for numbering in the Ribbon but rather apply the appropriate style for that level**.

You can save a document with this as a template for future documents if you want so you will not need to do this every time. However, once you've done this a few times it becomes second nature and not that difficult.

See also this thread: <u>Multi-Level Lists</u> – see the answers, especially those from Suzanne Barnhill, MVP.

If you are feeling adventurous, you could try vba code:

- Multi-Level List on the Fly vba code by Greg Maxey
- Paul Edstein's macros on Eileen's Lounge Post of December 15, 2024
- _____

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3 4 Se	ection 1.01 Heading	2	Lin <u>k</u> level to style:	
5	(a) Heading 3		Heading 1	\sim
-	 (i) Heading 4 1) Heading 5 	Each level in your numbering	Level to s <u>h</u> ow in gallery:	
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-	i) Heading 7 a. Heading 8 i. Heading 9	existing paragruph of	.istNum field lis <u>t</u> name:	
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Using the ListNum field

If you want to use a *field* to insert a number from your list, you can do that with the ListNum field once you have defined your list using the dialog.

If the numbering starts at the beginning of paragraphs, though, it is easier to simply use the style associated with the list level you are inserting. The ListNum field is generally used to insert a number from the list within a paragraph (and not as a cross-reference).

Note that fields do not update as dynamically as do the numbers associated with styles. Those associated with styles update virtually instantly (much more dynamically), while the ListNum field will update when fields update.

See also:

- ListNum field
- Dealing with Fields in Microsoft Word

• Some Fields are Updated While Others Are Not

[Quick] Style Sets and Numbering

Styles in a multilevel list, when properly set up, can be a part of a [Quick] Style Set or applied by a macr using the Organizer method.

- [Quick] Style Sets can include multilevel numbering attached to Microsoft Community
- [Quick] Style Sets with MultiLevel Numbering attached to paragraph styles
- [Quick] Style Sets and Word Themes in Microsoft Word
- [Quick] Style Sets
- <u>A Global StyleSheet in Microsoft Word?</u>
- If you are going to use the built-in list styles, start with the ones that say Heading 1, Heading 2, etc. like the ones shown in the screenshot of the Define New MulitLevel List dialog on the preceding page. Do any modification to Indents or the appearance of the numbering in the Define New MultiLevel List Dialog – not in the paragraph style definitions.



Sequence Fields

A legacy alternative which provides very stable numbering is to use Sequence Fields. That was Word's original automatic numbering scheme and is very flexible, but is far from simple.

- <u>SEQuence Field</u> in my page on Numbering
- <u>Seq (Sequence) field</u> (Microsoft documentation)

Videos on creating a multi-level list

- Saving custom paragraph numbering as List Styles Deborah Savadra <u>https://youtu.be/niD6VXPvAyU?t=487</u>
- Styles and Automatic Paragraph Numbering Affinity Group Consulting <u>https://www.youtube.com/watch?v=EICWOeIhsR4</u>
- Playlist of (excellent) short videos on MultiLevel Numbering by Jason Morell <u>https://www.youtube.com/watch?v=n70UutcLm6U&list=PLp6cX9mN-SNq-n28y-LXolJtqpySyuybc</u>
- How To Create Multilevel Numbering In Word (That Actually Works) Jason Morell <u>https://www.youtube.com/watch?v=He_ob8ydc9E</u>
- How to Fix All the Things That Can Go Wrong With Multilevel Numbering Jason Morell <u>https://www.youtube.com/watch?v=TM0w9bn8PaE</u>
- How to REALLY use Microsoft Word: Styles, Multilevel Lists, and Outline View Scott Hanselman <u>https://www.youtube.com/watch?v=vV8EwtytfEI</u>

To me, the following videos, although correct, are not as good. Your taste may differ. They all do demonstrate attaching the outline numbering levels to styles and approach from different directions.

- How to make chapters, sections and subsections in word Karina Adcock <u>https://www.youtube.com/watch?v=Yh7OgpwNgg0</u>
- Automatic Numbering For Thesis Chapters, Sections And Subsections (Step-By-Step MS Word Guide) – Academic English Now <u>https://www.youtube.com/watch?v=GE1IhLTkv2c</u>
- Hierarchical Outline numbering for Microsoft Word Documents Young Career Pros <u>https://www.youtube.com/watch?v=GevZOS-nCuw</u>
- How to Apply Multilevel Numbering In Microsoft Word | Numbering Headings and Subheadings – Chester Tugwell <u>https://www.youtube.com/watch?v=cpW6FqRgRrc</u>
- Multilevel Numbering in Word 20 FAQ's Answered Jason Morrell (35 min) <u>https://www.youtube.com/watch?v=TM0w9bn8PaE</u>

Web Pages

- <u>Numbering in Microsoft Word</u> my page
 - <u>Apply Outline Numbering</u>
 - <u>SEQ (Sequence Fields)</u>
- How to create numbered headings or outline numbering in Ribbon Versions of Word by Shauna Kelly
- Outline Numbering in Word for macOS by John Korchok
- <u>A Global StyleSheet in Microsoft Word?</u> (My page)
- [Quick] Style Sets can include multilevel numbering attached to styles

Numbering Downloads from my site

- <u>MultiLevel Numbering Tutorial Document</u>
- Outline Heading Styles Global Stylesheet Add-In
- [Quick] Style Sets with MultiLevel Numbering attached to paragraph styles

Additional free downloads (from my site)

 <u>Styles QAT Add-In (gives you access to many style features regardless</u> of which ribbon tab is displayed)

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Controls from left to right...

- 0 [Quick] Styles Gallery from Home Tab
- o Legacy Styles Dropdown
- Styles Pane (More control over more styles)
- Styles Organizer (copy styles from one document/template to another)
- Style Inspector (What is set / controlled by this style?)
- Style Separator (Allows two paragraph styles in one logical visible paragraph)
- [Quick] Style Sets (Change all of the [Quick] Styles at once with preview)

(This Add-In also has smaller versions with fewer controls)

- <u>Heading Style Keyboard Shortcuts Add-In for Headings 4-9</u> Headings 1-3 have built-in keyboard shortcuts. This macro-free Add-In adds shortcuts for built-in Headings 4-9.
- [Quick] Style Sets Sampler A document with all the regular [Quick] Styles. Use it with the Design tab to try different [Quick] Style Sets and Themes.
- <u>Themes Sampler</u> a document showing different elements of a Word Theme. Use it with the Themes on the Design tab to try different Themes.
- <u>Letterhead Textboxes and Styles Tutorial</u> document
- <u>Space Before Formatting at Top of New Page</u> uses Frame as part of style
- <u>StyleRef Field Tutorial</u> using style to mark text for repetition (especially in headers and footers)
- <u>Question and Answer Styles</u> multiple choice questions set up using Styles
- <u>IncludeText Field Tutorial</u> demonstrates effect of styles on pasted text
- Document Formatted Using Styles Compared to Direct Formatting
- <u>Basic Letterhead Template</u>