IT ESSENTIALS – Setting Up and Using Word 2013’s Multilevel Lists (IS166b)

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Table of Contents

INTRODUCTION ......................................................................................................................... 2
SETTING UP THE MULTILEVEL LIST FACILITY (1) ................................................................. 3
SETTING UP THE MULTILEVEL LIST FACILITY (2) ................................................................. 4
CHANGING THE APPEARANCE OF THE LIST’S HEADINGS ..................................................... 5
PREFIXING THE MAIN HEADING WITH CHAPTER ..................................................................... 6
USING THE MULTILEVEL LIST ................................................................................................. 7

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INTRODUCTION

The following instructions explain how to setup and use Word’s Multilevel List facility so that heading numbering is included automatically within a document’s headings, and so, for example, display as:

Chapter 1 An Introduction
1.1 An overview
1.1.1 Some details about the overview

When using this facility it is important to use the **1 Heading 1 — Multilevel List** option, as this is automatically linked to the Heading 1 to Heading 9 Styles. As a result, each heading level’s appearance can be modified easily by changing the relevant Style, and a Table of Contents can be created automatically.

If you are planning to produce a large multi-file document such as a thesis you are strongly recommended to first create and format a base document that all of your chapters are then based on. Doing this ensures that your chapters are all formatted in the same way, which should reduce problems when you get to the stage of pulling them together.

It should be noted that creating your chapters from a base document is even more important if you are intending to use Word’s Multilevel List facility.

For more details about creating a base document see page 29 of the Before You Start: Tips & Tricks for using Word 2013 to Produce your Thesis (IS166) session notes.
SETTING UP THE MULTILEVEL LIST FACILITY (1)

Word’s Multilevel List facility includes a number of options for creating lists, but the one to use when creating larger documents that are to include a Table of Contents is the **1 Heading 1** — option.

Follow these steps:

1. To begin setting up numbered headings using Word’s Multilevel List facility:
   - First enter an example heading into your base document for each heading level you are planning to use, e.g.
     - Main Heading
     - Sub-heading 1
     - Sub-heading 2
     - Sub-heading 3
   - **Note:** At this stage it is better to create more heading levels than you expect to use.

2. Now apply the correct Multilevel List style to the list of headings:
   - To begin, click and drag across the example headings to select them.

3. Click on the **Home** tab at the left of the **Ribbon**.

4. Click on the Multilevel List button in the **Paragraph** group at the centre of the **Ribbon** to display a menu of options.

5. Click on the **1 Heading 1** — option (probably 2nd row down on right).
   - **Note:** This option must be used for the headings to be picked up in the Table of Contents.

6. The headings will be prefixed with a number, and have the Heading 1 style applied to them.
**SETTING UP THE MULTILEVEL LIST FACILITY (2)**

Follow these steps:

1. Before progressing ensure you have completed the previous page.

   Now apply indents to all the headings except the first (main level) heading.

2. This will enable each heading level to display its number format (1.1, 1.1.1, 1.1.1.1) and Heading style (Heading 2, Heading 3 etc.).

3. To begin click within your second level heading text to obtain an insertion point.

   Ensure that the Home tab at the left of the Ribbon is selected.

4. Click on the Increase Indent button in the Paragraph group towards the centre of the Ribbon.

   The second level heading’s numbering will change to 1.1 and the Heading 2 style selected in the Styles panel towards the right of the Ribbon.

5. Now format the third level heading:

   Click within your third level heading text to obtain an insertion point.

   Click twice on the Increase Indent button in the Paragraph group towards the centre of the Ribbon.

6. The third level heading’s numbering will change to 1.1.1 and the Heading 3 style selected in the Styles panel towards the right of the Ribbon.

7. Repeat step 7 for each further heading level in your list, remembering to increase by one the number of times the Increase Indent button is clicked, i.e. the level four heading needs to be clicked three times etc.
**CHANGING THE APPEARANCE OF THE LIST’S HEADINGS**

Once the Multilevel List’s structure has been setup within the document you can then modify how each heading level appears by changing its Font, Font Size, Font Colour etc. This is achieved by modifying the relevant Heading 1 to Heading 9 Style (which the Multilevel List’s **1 Heading 1** — option is automatically based on).

It should be noted that changes made to these Heading Styles will affect ONLY the current document.

**Follow these steps:**

1. To modify the appearance of all of the Main Headings that you use in your document:
   - Ensure that the **Home** tab at the left of the **Ribbon** is selected.
   - Click and drag across the Main Heading text to select it.
   - Change the Font, Font Size, Font Colour etc. so that it appears as you require it.
2. To set these changes so that they are applied to all Main Headings in your document the Heading 1 Style needs to be updated:
   - Right-click on the **Heading 1 Style** in the **Styles** group towards the right of the **Ribbon**.
   - Click on **Update Heading 1 to Match Selection** to modify the Heading 1 Style.
3. To modify the appearance of all of the Second Level headings included in your document:
   - Click and drag across the Second Level Heading text to select it.
   - Then change the Font, Font Size, Font Colour etc. so that it appears as you require it.
4. Right-click on the **Heading 2 Style** in the **Styles** group towards the right of the **Ribbon**.
   - Click on **Update Heading 2 to Match Selection** to modify the Heading 2 Style.
5. Repeat steps 6 & 7 for each further heading level in your list whose appearance you wish to change, remembering that the Heading 3 Style needs to be updated for the Third Level heading and the Heading 4 Style needs to be updated for the Fourth Level heading etc.

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**Note:**

This is achieved by modifying the relevant Heading 1 to Heading 9 Style (which the Multilevel List’s **1 Heading 1** — option is automatically based on).

It should be noted that changes made to these Heading Styles will affect ONLY the current document.
PREFIXING THE MAIN HEADING WITH THE TEXT CHAPTER

Each heading level can have text included that displays automatically within the heading, for example to prefix the Main Heading number with the word Chapter.

The same facility can also add text that displays immediately after the heading number.

Follow these steps:

1. If the Main Heading level is to be used as the chapter heading it may be useful to add the prefix Chapter to the part of the heading that automatically displays. To do this:
2. To begin, right-click on the Main Heading’s number (1) so that it displays within a grey area.
3. Select Adjust List Indents from the menu that displays. The Define new Multilevel list dialogue box displays.
4. In this case it is the Main Heading level that is to be modified. Therefore, ensure that the 1 is selected in the top-left panel.
5. In the Enter formatting for number: panel, click to the left of the number to obtain an insertion point.
6. Then enter the text that is to prefix the heading’s number, e.g. Chapter (followed by a space).
   Note: If required, similar prefixes can be applied to other heading levels in the same way.
7. Click OK to close the Define new Multilevel list dialogue box.
8. You should notice that the Main Heading text has been automatically updated to include the prefix Chapter.
**Using the Multilevel List**

Once you have finished setting up the multilevel list ensure that the document has been saved. The list used for the setting up can then be deleted, as the changes to the list structure and Heading Styles will be embedded into the document ready for future use.

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**Follow these steps:**

1. To use the multilevel list to apply numbering to the document’s headings:
2. **To enter a new heading:**
   - Enter the text for the new heading.
3. Press [Enter] on the keyboard to move the cursor to the next line.
4. Click within the new heading to obtain an insertion point.
5. Click on the Heading 1 to Heading 9 Style as appropriate in the **Styles** panel towards the right of the **Ribbon**.
6. **To change an existing heading to another level e.g. from 1 to 1.1 or 1.1 to 1:**
   - Click within the heading to obtain an insertion point.
7. Click on the Heading 1 to Heading 9 Style as appropriate in the **Styles** panel towards the right of the **Ribbon**.