

**CHAPTER 6****INFOCUS**

# LISTS

A **list** in Microsoft Word is a series of items preceded by a bullet or number. You can apply bullets or numbers to a list, as well as modify the bullet type or numbering format to suit the requirements of the document.

**In this session you will:**

- ✓ gain an understanding of lists
- ✓ learn how to apply bullets to a list or selection
- ✓ learn how to modify a bullet definition
- ✓ learn how to modify a bullet
- ✓ learn how to apply numbering to a list
- ✓ learn how to define a number format
- ✓ learn how to renumber a list
- ✓ gain an understanding of multilevel lists
- ✓ learn how to apply a multilevel list
- ✓ learn how to promote and demote list items
- ✓ learn how to define a new multilevel list
- ✓ learn how to define a multilevel list style
- ✓ learn how to modify a multilevel list style.

# UNDERSTANDING LISTS

There are three types of lists that you can create in Microsoft Word: **bulleted**, **numbered** and **multilevel**. Items in a bulleted list are preceded by a bullet • or other symbol. Items in numbered

lists are preceded by a number or letter. Multilevel lists are hierarchical and items may be preceded by a symbol, number or letter. This page discusses the differences between them.

## Bulleted Lists

**Bulleted** lists are used for items that have no particular priority, such as a list of features or facts. They have only one level and each item is preceded by a bullet or other symbol. Examples include:

- A filled round circle, known as a bullet
- An open circle
- ⊕ A fancy icon
- ✓ Or any other symbol that takes your fancy

Ideally the bullet you choose will reflect the tone and purpose of the communication, and will conform to company standards and requirements.

## Numbered Lists

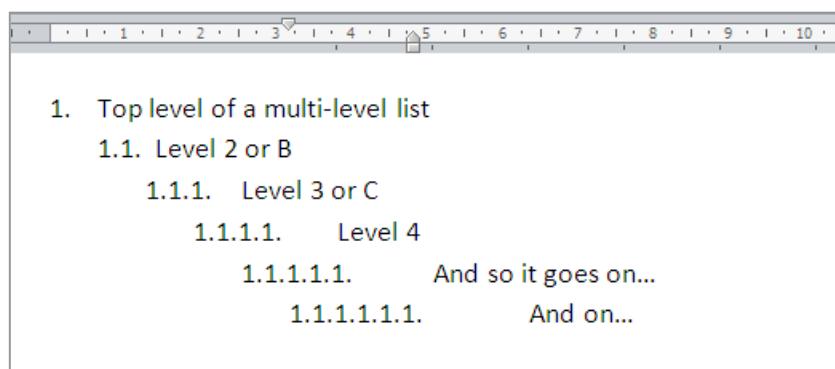
**Numbered** lists are used for items that have a sequence or priority, such as a series of instructions. They can also be used for identification, so that the item can be referred to easily. Examples of numbering systems used in numbered lists include:

- The Arabic numbering system 1, 2, 3...
- Roman numerals, either capitals I, II, III or lowercase i, ii, iii...
- Alphabetic, either capitals A, B, C or lowercase a, b, c...

Each of the numbers may or may not be accompanied by a symbol such as a period (.) or a bracket, and the numbering system you choose will affect the alignment of the numbers and text.

## Multilevel Lists

**Multilevel** lists are used where there is a sequence and when you want each paragraph numbered separately. This is especially useful for documents with a formal structure such as policies and exam papers. Multilevel lists can use all numbers, all bullets or a mixture of both. They have a hierarchy, so the symbol or number that is used for a particular paragraph will depend on how far in the paragraph is indented. The alignment of the number or bullet and the corresponding text will depend on the settings that are defined for the list style. The position of the **First Line Indent Marker** ↴ controls the position of the number or bullet, and the position of the **Hanging Indent Marker** ↪ controls the position of the text.



# APPLYING BULLETS

When you apply bullets to a list or selection, the default bullet that Word applies is a filled circle ●. Word also provides a library of other symbols—including picture fonts and images—that you can

also apply as bullets. Some of the more common symbols are displayed in the **Bullet Library**, and you click on a symbol to apply that bullet style to your selection.

## Try This Yourself:

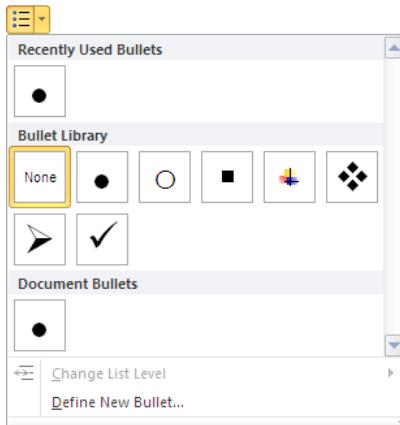
**Open** **File** Before starting this exercise you **MUST** open the file *W809 Lists\_1.docx*...

- 1 Select the list items as shown
- 2 Click on the drop arrow for **Bullets**  to display the **Bullet Library**  
*This shows you that None is currently selected and that there are seven standard bullets to choose from...*
- 3 Point to different bullets to see them applied temporarily to the list in **Live Preview**
- 4 Click on the **tick** symbol ✓ to apply it as a bullet  
*You will notice that the paragraph spacing between each point is also reduced...*
- 5 Click on the drop arrow for **Bullets**  again  
*This time it shows you which bullets you have applied recently and which bullets are used in the document...*
- 6 Click on the drop arrow for **Bullets**  to close the library
- 7 Click outside the text to deselect it and save the document

1



2



3



## For Your Reference...

To **apply bullets** using the **Bullet Library**:

1. Select the list
2. Click on the drop arrow for **Bullets** 
3. Click on the symbol of your choice

## Handy to Know...

- Make sure that the bullet style you choose is appropriate to the purpose and tone of your communication. If you select a bullet that is too fancy, casual or humorous, for example, you risk distracting the reader or sending the wrong message.

# DEFINING A BULLET

If you find that none of the bullets in the **Bullet Library** are suitable for your document, you can define a **new bullet**. The new bullet is then added to the **Bullet Library** and becomes

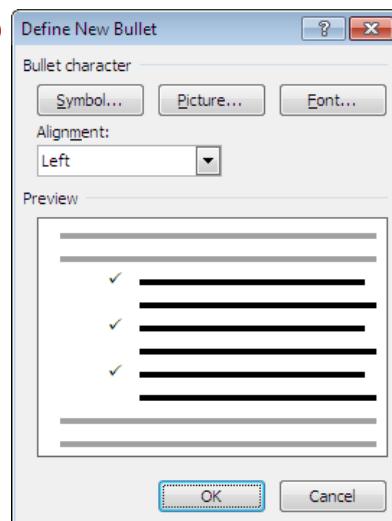
available to all documents. You can specify a symbol or a picture and change the font settings of the symbol you select.

## Try This Yourself:

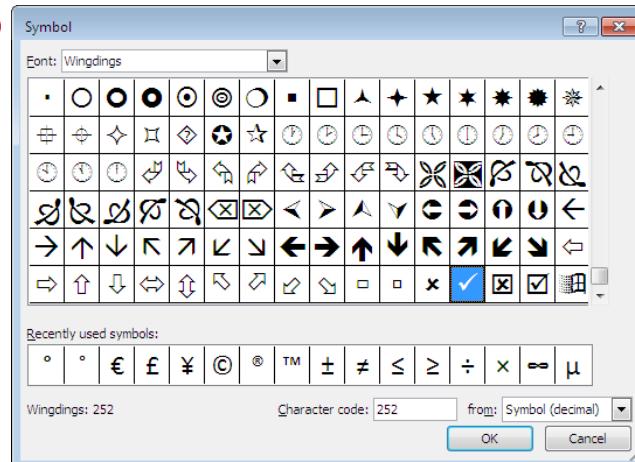
**Same File** Continue using the previous file with this exercise, or open the file W809 Lists\_2.docx...

- 1 Select the bulleted list  
*Let's define a new bullet and apply it at the same time...*
- 2 Click on the drop arrow for **Bullets** and select **Define New Bullet** to display the **Define New Bullet** dialog box
- 3 Click on **[Symbol]** to display the **Symbol** dialog box  
*The current symbol, a tick ✓, is shown selected...*
- 4 Click on the five pointed star ★ in the top row  
*Notice that you are selecting a symbol from the Wingdings font, which is dedicated to special characters like these...*
- 5 Click on **[OK]** to accept the symbol and then click on **[OK]** to apply it to the bulleted list  
*The ticks will be replaced by stars – giving you a true five star rating...*
- 6 Click outside the list to deselect it
- 7 Save the document

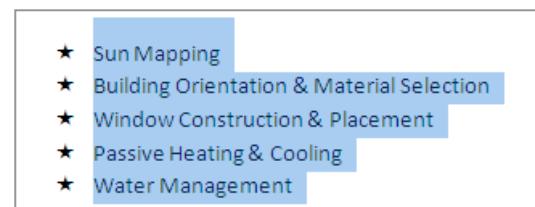
2



3



5



## For Your Reference...

To **define a bullet**:

1. Click on the drop arrow for **Bullets** and select **Define New Bullet**
2. Click on **[Symbol]**
3. Click on a new symbol
4. Click on **[OK]** and click on **[OK]**

## Handy to Know...

- If you click on **[Picture]** in the **Define New Bullet** dialog box, you can select from a range of image bullets.
- You can **add** a bullet to the **Bullet Library**. Click on the drop arrow for **Bullets** , right-click on the bullet under **Document Bullets** and select **Add to Library**.

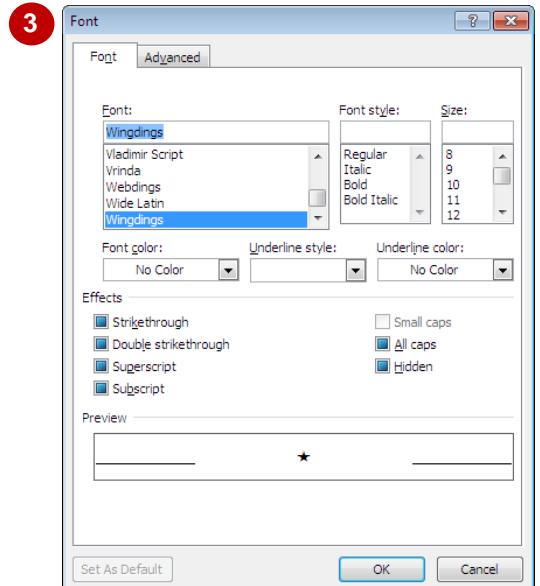
# MODIFYING A BULLET

Once you have defined a bullet, you can change it to suit your document design. If your bullet is a character selected from a specific font, you can modify the size, style and colour of the bullet.

When you modify a bullet, the updated version is added to the **Bullet Library** along with the original bullet.

## Try This Yourself:

- Same File** Continue using the previous file with this exercise, or open the file W809 Lists\_3.docx...
- 1 Click in the bulleted list  
*This indicates which bullet you want to modify...*
  - 2 Click on the drop arrow for **Bullets** and select **Define New Bullet** to display the **Define New Bullet** dialog box
  - 3 Click on **[Font]** to display the **Font** dialog box
  - 4 Click on the drop arrow for **Font colour** and click on **Orange, Accent 6** under **Theme Colours**
  - 5 Click on **[OK]** and then **[OK]** to apply the changes  
*Let's see how the change has affected our Bullet Library...*
  - 6 Click on the drop arrow for **Bullets** to display the **Bullet Library**  
*Rather than the black star being modified, the orange star has been added to the library...*
  - 7 Click on the drop arrow for **Bullets** to close the menu and then click away from the text to deselect it
  - 8 Save and close the document



- 5
- ★ Sun Mapping
  - ★ Building Orientation & Material Selection
  - ★ Window Construction & Placement
  - ★ Passive Heating & Cooling
  - ★ Water Management



## For Your Reference...

To **modify a bullet**:

1. Click in the bulleted list
2. Click on the drop arrow for **Bullets** and select **Define New Bullet**
3. Modify the font or alignment
4. Click on **[OK]**

## Handy to Know...

- You can change the alignment of bullets, specifying whether they are left, centre or right-aligned by using the **First Line Indent** marker .
- You can **remove** a bullet from the **Bullet Library** by right-clicking on it in the library and selecting **Remove**.

# APPLYING NUMBERING

When you first apply numbers to a list from the **Numbering Library**, the default numbering format is Arabic numerals followed by a period, i.e. 1. 2., and so on. Word provides a range of

other numbering formats that you can apply to your lists or headings. A range of standard formats are displayed in the **Numbering Library**.

## Try This Yourself:

**Open**  
**File**

Before starting this exercise you **MUST** open the file *W809 Lists\_4.docx*...

- 1 Select the four lines of text as shown
- 2 Click on the drop arrow for **Numbering**  to display the **Numbering Library**
- 3 Point to the options in the **Numbering Library** to test drive different options in Live Preview  
*The list will change as you point to different formats and the spacing between the lines will reduce...*
- 4 Click on 1) 2) 3) to apply this format
- 5 Click away from the text to deselect it  
*With numbering it is clearly a sequential process*
- 6 Save the document

The process is:

Heat from air is capture in a heat exchanger.

Cooled air is passed back into the exhaust system.

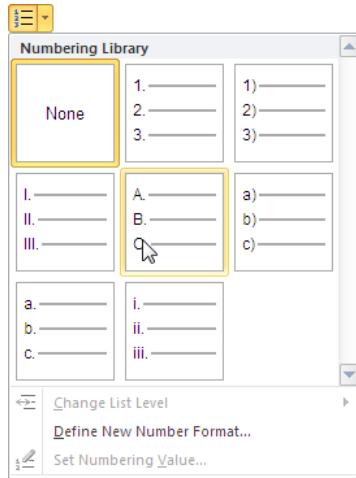
Fresh air is heated to between 20°C and 50°C in the heat exchanger.

Heated air is humidified and used for heating or cooling.

AGE intend to extend this program across their other manufacturing sites, with complete implementation expected by 2010.

1

2



The process is:

1) Heat from air is capture in a heat exchanger.

2) Cooled air is passed back into the exhaust system.

3) Fresh air is heated to between 20°C and 50°C in the heat exchanger.

4) Heated air is humidified and used for heating or cooling.

AGE intend to extend this program across their other manufacturing sites, with complete implementation expected by 2010.

5

## For Your Reference...

### To apply numbering:

1. Select the text
2. Click on the drop arrow for **Numbering** 
3. Click on the numbering format of your choice

## Handy to Know...

- If you have several numbered lists in a longer document, make sure that you use the same format consistently unless there is a good reason to change it. If different lists in the same document use different formats, it may confuse your reader.

# DEFINING A NUMBER FORMAT

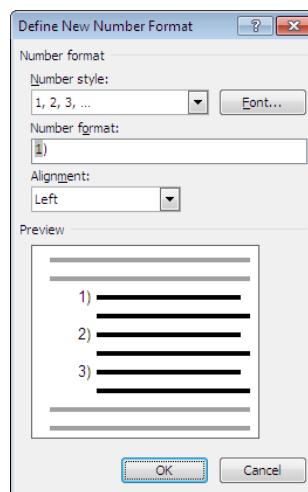
If none of the standard numbering systems in the **Numbering Library** suit your document, or you want to create your own numbering format, you can define a **number format**. The new number

format will be added to the **Numbering Library** and becomes available to all documents. You can specify the numbering style, format and alignment, as well as the font attributes.

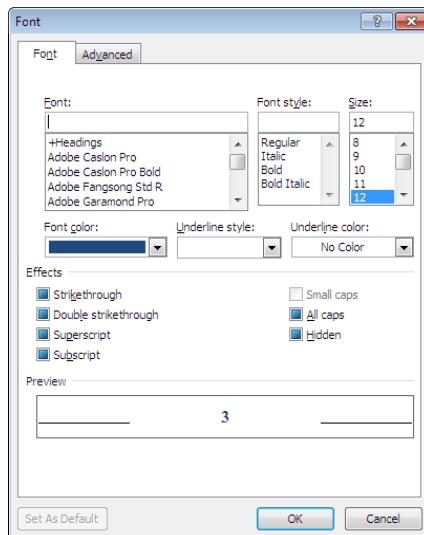
## Try This Yourself:

- Same File** Continue using the previous file with this exercise, or open the file W809 Lists\_5.docx...
- Select the numbered list  
*You can apply the new number format at the same time as defining it...*
  - Click on the drop arrow for **Numbering** and select **Define New Number Format** to display the **Define New Number Format** dialog box
  - Click just after the parentheses for **Number format** and press **Back Space** to delete the parentheses
  - Click on the drop arrow for **Alignment** and select **Right**  
*This pushes the numbers out to the left of the first line indent marker, as shown in the Preview...*
  - Click on **[Font]** to display the **Font** dialog box
  - Select **Bold** for **Font Style** and select **12** for **Size**, then click on the drop arrow for **Font Colour** and select **Dark Blue, Text 2**
  - Click on **[OK]** to return to the **Define New Number Format** dialog box and then click on **[OK]** to apply the formatting
  - Click away from the text to deselect it and save the document

2



6



8

The process is:

- Heat from air is capture in a heat exchanger.
- Cooled air is passed back into the exhaust system.
- Fresh air is heated to between 20°C and 50°C in the heat exchanger.
- Heated air is humidified and used for heating or cooling.

## For Your Reference...

To **define a number format**:

- Click on the drop arrow for **Numbering**
- Select **Define New Number Format**
- Change the number style, format, font attributes and alignment as required
- Click on **[OK]**

## Handy to Know...

- To modify a number format, click in the text that contains the number format you want to change, click on the drop arrow for **Numbering** and select **Define New Number Format**. Make changes as required and then click on **[OK]**.

# RENUMBERING A LIST

There may be times when you want to renumber values in a list, such as when you want the numbering to begin at 3, for example, or you want to continue the numbering sequence from a

previous list in the document. This might come in handy if you split a list and want both lists to start at 1, for example.

## Try This Yourself:

**Same File** Continue using the previous file with this exercise, or open the file W809 Lists\_7.docx...

1 Click after the colon immediately before the list and press **Enter**

2 Type **Used Air**

3 Click at the end of the second point and press **Enter** twice

When you press **Enter** once, Word assumes you want to continue the numbered list; pressing **Enter** again tells Word to discontinue the list and return to normal text...

4 Type **Fresh Air**

Now let's reset the numbering of the second list...

5 Click at the start of the third point then click on the drop arrow for **Numbering**  and select **Set Numbering Value** to display the **Set Numbering Value** dialog box

6 Click on the down arrow  for **Set value to** until it reads **1**

7 Click on **[OK]**

The numbering of the second list is now reset...

8 Save and close the document

The process is:

Used Air

- 1 Heat from air is capture in a heat exchanger.
- 2 Cooled air is passed back into the exhaust system.
- 3 Fresh air is heated to between 20°C and 50°C in the heat exchanger.
- 4 Heated air is humidified and used for heating or cooling.

2

The process is:

Used Air

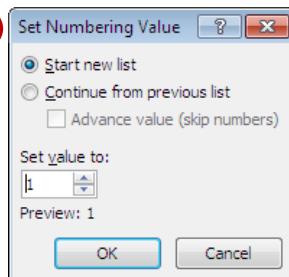
- 1 Heat from air is capture in a heat exchanger.
- 2 Cooled air is passed back into the exhaust system.

Fresh Air

- 3 Fresh air is heated to between 20°C and 50°C in the heat exchanger.
- 4 Heated air is humidified and used for heating or cooling.

5

6



Fresh Air

- 1 Fresh air is heated to between 20°C and 50°C in the heat exchanger.
- 2 Heated air is humidified and used for heating or cooling.

7

## For Your Reference...

To **renumber** a list:

1. Click in the text
2. Click on the drop arrow for **Numbering** 
3. Select **Set Numbering Value**
4. Adjust the **Set value to** figure
5. Click on **[OK]**

## Handy to Know...

- If you select **Continue from previous list** Word will examine the numbering of the previous list in the document, and then start the numbering in the current list using the next number or letter in the sequence.

# UNDERSTANDING MULTILEVEL LISTS

**Multilevel lists** contain several levels of numbering or bullets, or both. Multilevel lists are used where there is a need for a hierarchy of lists—headings, subheading and points within the

subheadings, for example. Multilevel lists in Word contain nine levels. This page examines a few types of multilevel lists and how they work in Word.

## Numbered Multilevel Lists

Some documents must be numbered so that individual paragraphs or sentences can be identified quickly and easily, such as contracts and laws. In this case, numbering can be applied using multilevel lists. Examples of multilevel lists created using numbers and letters are:

1. Heading
  - 1.1. Subheading
    - 1.1.1. Paragraph
      - 1.1.1.1. Subparagraph
    - 1.1.2. Paragraph
  - 1.2. Subheading
2. Heading

## Bulleted and Combination Multilevel Lists

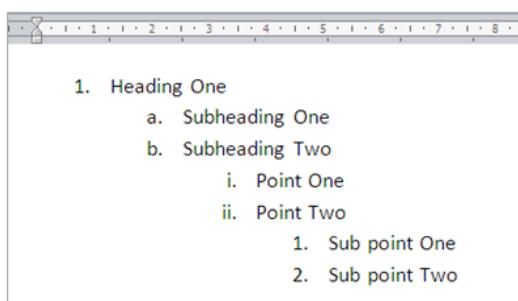
You can also create a hierarchy of bullets in a multilevel list, or use a combination of numbers and bullets. This enables you to use numbers where they are needed but use bullets if a priority or sequence does not apply. For example:

- ❖ Heading
- Subheading
  - Paragraph
  - Subparagraph

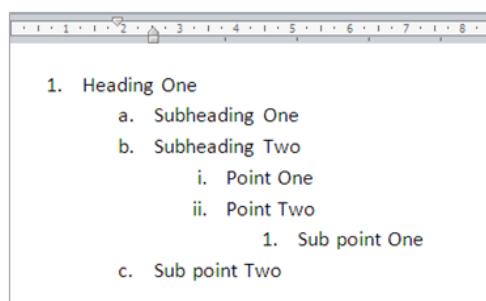
## Controlling Levels in a Multilevel List

To start a multilevel list, like any other numbered list, type the number in the required format and press **Tab** or **Increase Indent** . When you press **Tab**, this tells Word that you want to start a numbered list. To demote the next list item (that is, take it down one level in the hierarchy), press **Enter** to continue the numbering on the next line, then press **Tab** to indent and apply the next-level number format. To continue the list in that number format, press **Enter** and type the list item. To promote the next list item (that is, take it up one level in the hierarchy), press **Shift** + **Tab**.

To move a list item up in the hierarchy, you need to click at the beginning of the line and press **Shift** + **Tab** or **Decrease Indent** .



Press **Enter** to continue the list in the same style, or press **Tab** or **Increase Indent**  to demote the list item; each list item will be indented at the default tab stops



In the example above, **Sub point Two** has been promoted by pressing **Shift** + **Tab** or **Decrease Indent** 

# APPLYING A MULTILEVEL LIST

Word provides a number of multilevel numbering and bullet list styles to choose from. These styles are available in the **Multilevel List Library**. To apply a multilevel list, select the text to be

included in the list and select a style from the **Multilevel List Library**. Word will assign the style to the list, and then you can promote and demote list items as required.

## Try This Yourself:

**Open**  
**File**

Before starting this exercise you MUST open the file W809 Lists\_8.docx...

- 1 Select all of the text from **Before you go** to the end of the document
- 2 Click on **Multilevel List**  to display the **Multilevel List Library**
- 3 Point to each of the **Multilevel List Library** options to see a magnified version of them
- 4 Click on the first option to the right of **None**  
*The format will be applied to the text. Because there are no levels in the text, they are numbered consecutively...*
- 5 Select the items numbered 2 to 5 then click on **Increase Indent**  in the **Paragraph** group  
*This makes them part of question 1 and numbers them accordingly...*
- 6 Repeat step 5 for the other three questions  
*You now have a multilevel list*
- 7 Save the document

Put a circle around the best answer to the following questions.

- 1) Before you go to the beach and swim in the waves you should:
  - 2) Learn how to swim
  - 3) Buy bathers
  - 4) Check the weather forecast
  - 5) Pack a large lunch
- 6) Before you get into the sun at a surf beach you should:
  - 7) Put oil on your skin to make it browner
  - 8) Put on a little sunscreen
  - 9) Apply a strong sunscreen and reapply every few hours
  - 10) Only apply sunscreen if the sun feels hot
- 11) When you swim at a surf beach you should:
  - 12) Jump in wherever it is less crowded
  - 13) Swim between the flags and lifesavers
  - 14) Swim near the best waves
  - 15) Follow the surfers out to the breaks
- 16) If you get into trouble while you are swimming you should:
  - 17) Call and wave for help
  - 18) Swim in to the shore
  - 19) Dive under the water
  - 20) Hold your breath

4

- 1) Before you go to the beach and swim in the waves you should:
  - a) Learn how to swim
  - b) Buy bathers
  - c) Check the weather forecast
  - d) Pack a large lunch

5

## For Your Reference...

To **apply a multilevel list**:

1. Select the text
2. Click on **Multilevel List** 
3. Click on an option in the **Library**
4. Adjust the levels of the list as required

## Handy to Know...

- You must use **Increase Indent**  or **Decrease Indent**  when promoting or demoting multiple list items. If you press **Tab** with multiple list items selected, the selection will be deleted.

# PROMOTING AND DEMOTING LIST ITEMS

You can promote or demote list items in the hierarchy. When you promote or demote a paragraph, heading or list item, the numbers or bullets will adjust accordingly to reflect the

current list level position. There are several ways to adjust the level of an item or paragraph in a multilevel list, which you will be shown here.

## Try This Yourself:

**Same File**

Continue using the previous file with this exercise, or open the file W809 Lists\_9.docx...

- 1 Select the four list items below question 1 and then click on **Decrease Indent** 

The list items are promoted...

- 2 Press **Ctrl + Z** to undo and then click in the first question

We'll change the level of this line to start with...

- 3 Click on **Multilevel List**  and point to **Change List Level** to display the available levels

- 4 Click on **a)** to renumber the list

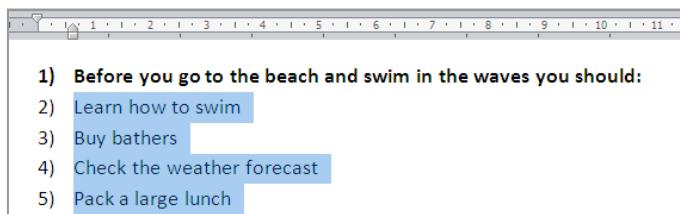
- 5 Click to the left of the second question, then press **Tab** to demote the list item

- 6 Click to the left of the third question, then click on **Increase Indent**  to demote the list item

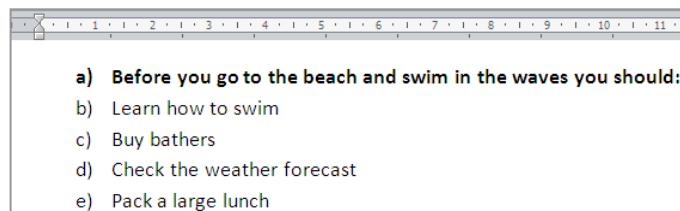
- 7 Repeat step 5 for the fourth question

- 8 Select list items **b)** to **e)**, click on **Multilevel List**  and select **Change List Level** then click on **i)**

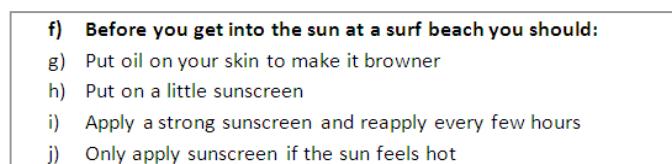
- 9 Repeat step 7 for the remaining answers and save the document



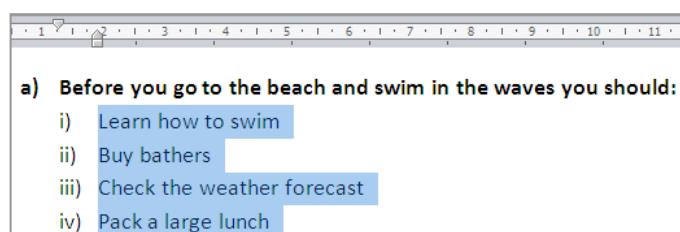
1



4



5



8

## For Your Reference...

To **promote** and **demote list items**:

1. Click in or select the list item/s and then:
  - Click on **Increase Indent**  to demote or **Decrease Indent**  to promote, or
  - Press **Tab** to demote or **Shift + Tab** to promote

## Handy to Know...

- You cannot use **Tab** or **Increase Indent**  to demote the first item in a list, as the entire list will be indented to the next default tab stop. To demote the first item in a list, you must select **Change List Level** in the **Multilevel List Library**.

# DEFINING A MULTILEVEL LIST

While the **Multilevel List Library** has a good selection of list styles to choose from, you may find the need to customise a list style to suit your purpose. This is called **defining** a multilevel list.

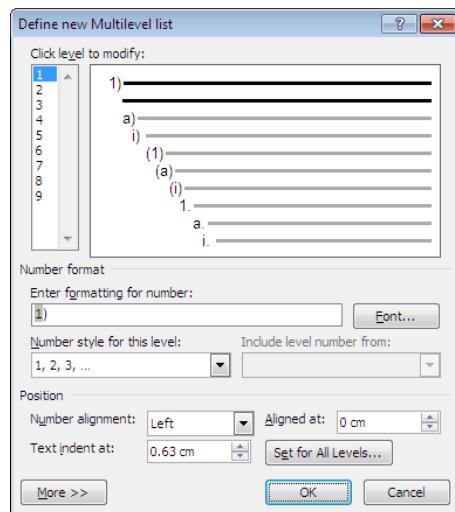
When defining a multilevel list, you can select the number style, format, as well as alignment and indent settings. When you update a list style, the list items using that style will also be updated.

## Try This Yourself:

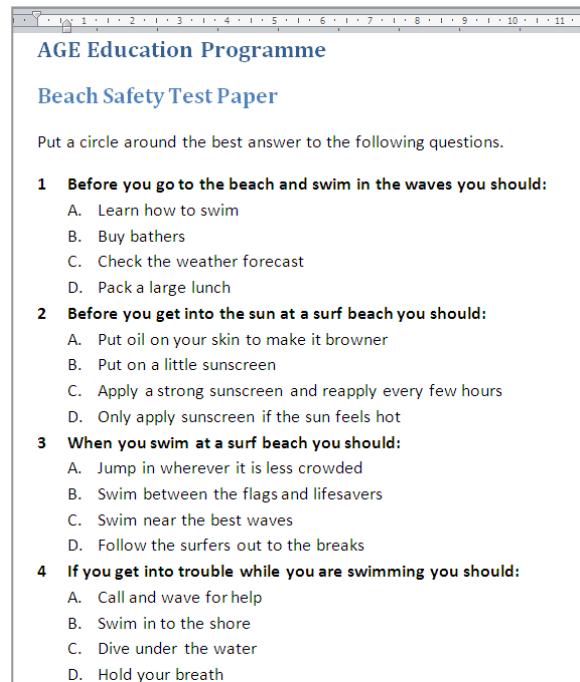
**Same File**

- 1 Continue using the previous file with this exercise, or open the file W809 Lists\_10.docx...
- 2 Click in the list and then click on **Multilevel List**  and select **Define New Multilevel List** to display the **Define new Multilevel list** dialog box
- 3 Ensure that 1 is selected under **Click level to modify**, then click after 1) in **Enter formatting for number**, press **Del** to remove the bracket then press **.**
- 4 Click on 2 under **Click level to modify** to display its settings
- 5 Click on the drop arrow  for **Number style for this level** and click on **A, B, C, ...**
- 6 Click after **A**) in **Enter formatting for number**, press **Del** to remove the bracket then press **.**
- 7 Click on **[OK]** then click outside the list to deselect it and display the new format
- 8 Save the document

1



2



## For Your Reference...

To **define** a **multilevel list**:

1. Click on **Multilevel List** 
2. Select **Define New Multilevel List**
3. Select a level then make the required changes
4. Click on **[OK]**

## Handy to Know...

- New multilevel list definitions are not added to the **Multilevel List Library** automatically. To add one to the library, click on **Multilevel List**  and right-click on the list under **Lists in Current Documents**, then select **Add to List Library**.

# CREATING A MULTILEVEL LIST STYLE

You can create your own multilevel list styles. List styles are saved and added to the **Multilevel List Library**, however they can also be restricted to a single document or template. You can also

modify a list style once created, and all list items with that list style applied will also be updated to reflect the changes.

## Try This Yourself:

**Same File** Continue using the previous file with this exercise, or open the file W809 Lists\_11.docx...

1 Click in the first list item under **Section 1**

We will use this format as the basis for the new list style...

2 Click on **Multilevel List**  and select **Define New List Style** to open the **Define New List Style** dialog box

We will name the new style...

3 Type **Questions**

4 Click on **[OK]**

The format of the list style will remain unchanged as no formatting changes were made...

5 Click in the list under **Section 2**

6 Click on **Multilevel List** 

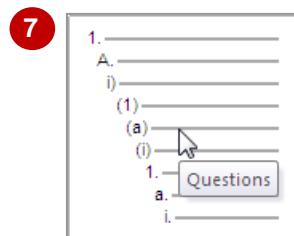
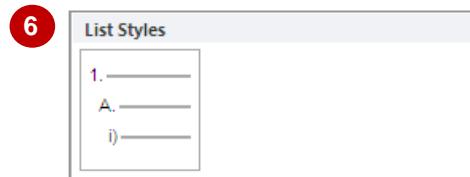
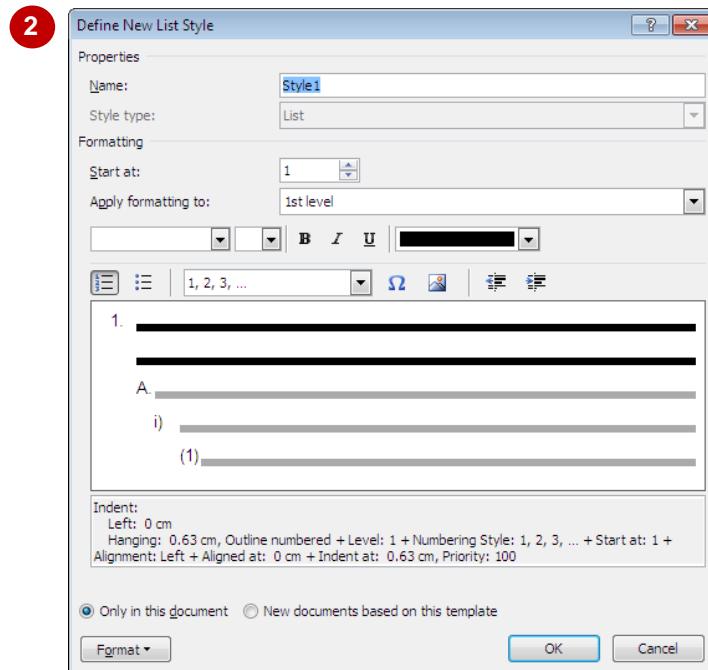
Notice that a new section called **List Styles** has been created...

7 Point to the new style

The name **Questions** will be displayed...

8 Click on **Questions** to apply the style to the second list

9 Save the document



## For Your Reference...

To **define a new list style**:

1. Click in an existing style
2. Click on **Multilevel List** 
3. Select **Define New List Style**
4. Type a **Name** and click on **[OK]**

## Handy to Know...

- You can also define a new list style from scratch. Click on **[Format]** in the **Define New List Style** dialog box and select **Numbering** to open the **Modify Multilevel List** dialog box. Make the required changes and then click on **[OK]**.

# MODIFYING A MULTILEVEL LIST STYLE

The advantage of using list styles, especially in long documents, is that if you make changes to the list style, all lists with that list style applied will be updated to reflect the changes. When you

modify a style, you can make formatting changes to the list levels, as well as select in which documents or templates the list style will be made available.

## Try This Yourself:

**Open File** Before starting this exercise you MUST open the file W809 Lists\_12.docx...

**1** Click in the first list

You can make changes to lists formatted with a style without having to select them all...

**2** Click on **Multilevel List**  to display the gallery, then right-click on the list style **Questions** and select **Modify** to open the **Modify Style** dialog box

**3** Click on the drop arrow  for **Apply formatting to** and select **2<sup>nd</sup> level**, then click on the drop arrow  for the format (shows **1, 2, 3,**) and select **a, b, c,**

**4** Click on **New documents based on this template**

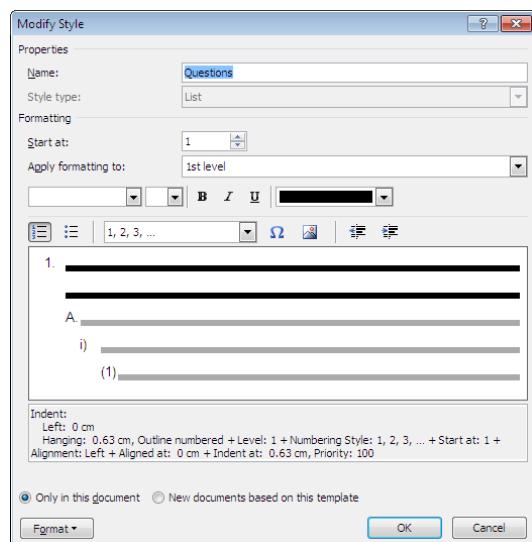
Any new documents based on the **Normal.dot** template will have this list style available to use...

**5** Click on **[OK]** to apply the changes

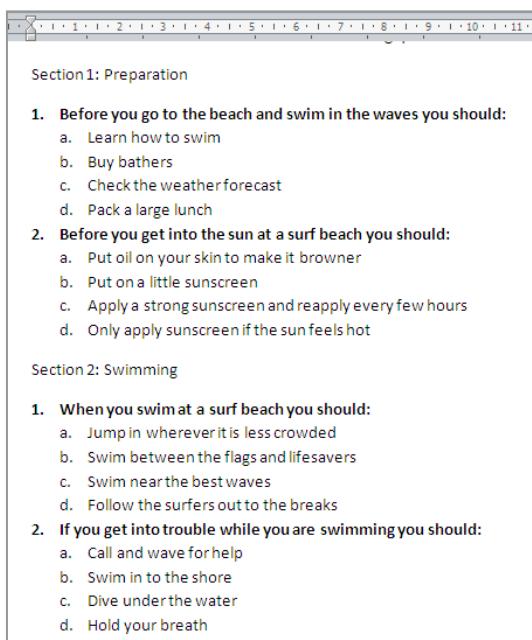
You will notice that both lists have been updated to reflect the changes to the list style...

**6** Save and close the document

**2**



**5**



## For Your Reference...

To **modify a multilevel list style**:

1. Click on **Multilevel List** 
2. Right-click on the style in **List Styles** and select **Modify**
3. Make the required formatting changes
4. Click on **[OK]**

## Handy to Know...

- You can assign a shortcut key combination to a list style, such as **Alt + Q** for the style **Questions**. This makes it quicker to apply a multilevel style. Click on **[Format]** in the **Modify Style** dialog box and select **Shortcut key**. Press the key combination and then click on **[Assign]**.