

How to Make a Formal Outline in Microsoft Word

Microsoft Word provides an option to create an outline. While this is helpful, and what I would recommend for you, there is one problem. Word has many default settings that you may not wish to use in your outline (i.e., fonts, sizes, etc.). One of the difficulties students have with composing a formal outline is a limited understanding of how to either override Microsoft Word's often helpful automatic features or how to customize these features. A formal outline has a very prescribed format, so you will need to go into the Outlining tool in Word to tell the program exactly how you wish it to create your outline.

Each major section of your paper should be labeled with a Roman numeral (I, II, III, IV, etc.). Each subsection should be labeled with a capital letter (A, B, C, D, etc.). Each sub-subsection should be labeled with an Arabic numeral (1, 2, 3, 4, etc.). Often papers will be divided even further: Arabic numeral sections can be divided into a, b, c, d, etc. and those can be further divided into i, ii, iii, iv, etc. If you are dividing further than that, your outline is too specific for the purposes of this paper.

Remember... you cannot have a I without a II. You cannot have an A without a B. You cannot have a 1 without a 2. And so on...

Here is a sample of a formal outline, properly formatted. Notice how the line spacing looks and how the sections are aligned:

- I. Major Section
 - A. Subsection
 - 1. Sub-subsection
 - a. One more level to go!
 - i. The end of the line!
 - ii. Remember you have to have at least two divisions to justify a division.
 - b. One more level b
 - 2. Sub-subsection 2
 - B. Subsection B
- II. Major Section II

So how do you get Microsoft Word to create an outline that looks like the one above—that is, how do you keep the program from changing your font to Arial size 18 for no reason, bolding or italicizing certain levels for no reason, or making odd alignments for no reason? Here is what you need to do before typing any text:

1. Begin a new document in Word.
2. Go to Format. Click on "Bullets and Numbering."
3. Click on the tab that says "Outline Numbered."
4. Choose the outline option that is closest to the one described above (it should be the first "square" to the right of the one that says, "None"). Click on that so there is a blue outline around the "square." Now look down above the "OK" and "Cancel" buttons. See the one that says "Customize"? Click it.
5. The first thing you will see is a screen that says "Customized Outline Numbered List." Level 1 should be highlighted.

6. In the blank where it says “Number format,” clear the current content (it should just be a “1”). Simply select it all and press “Backspace” or right-click and “Cut.”
7. Now click on the drop-down menu that says “Number style.” You should be presented with several choices for Level 1. Choose this one: I, II, III, etc. You should now see “I” in the “Number format” blank. Put a period after that “I” so your outline will automatically insert periods after each number or letter in the outline. It should look like this “I.”
8. Next click the “Font” button and choose the font that you will use consistently for the text of your entire outline.
9. Now do the same thing for each level. Click on Level 2 in the “Level” area. Follow the same process for customizing, this time selecting “A, B, C, etc.” Make sure you have a period after each number or letter. Make sure you change the font each time.
10. For Level 3, select “1, 2, 3, etc.”
11. For Level 4, select “a, b, c, etc.”
12. For Level 5, select “i, ii, iii, etc.”
13. Click “Ok” to get away from the Outline screen.

When you return to your document, you should notice that there is a “I.” waiting for you. You should begin typing your opening paragraph. Every time you hit enter, Word will advance you through your outline. For example, after you finish the first paragraph next to “I.”, you will hit enter, and Word will provide, “II.” for your first major heading. If you would like to move to “A.” to provide your subhead, you will need to hit the Tab key. Every time you wish to move in a level (i.e., from I to A, from A to 1, from 1 to a, from a to i), you will hit tab. Every time you want to move out a level (i.e., from i to a, from a to 1, from 1 to A, from A to I), you will need to hold shift and then hit tab.

It is fine for your outline to be single spaced. Remember that you are using topics/phrases with the exception of your first and last paragraphs. Use your packet as a guide.