

Outlining in Word

Microsoft Word® includes an outlining function which simplifies the creation and management of large documents, like research papers. While I have no particular love for Word, other word processors, like Open Office Writer, do not have this function, or don't implement it as cleanly. The well-paid engineers at Redmond did get this right.

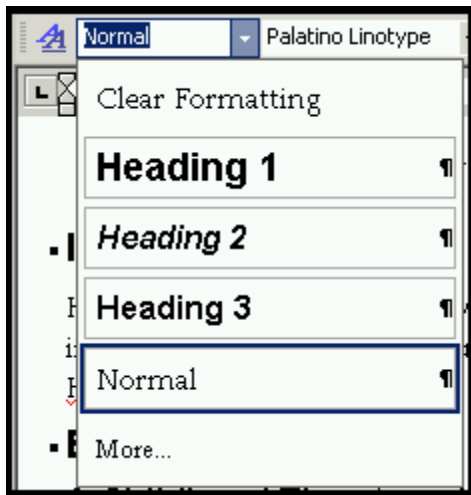
Set up – Applying the Right Styles

In order to use outlining, you must first do some set-up work. The standard Word document template includes three styles which are needed for outlining: Heading 1, 2, and 3.

Most of the text that you create will be in a body style, like Normal, or Body Text. You can see which style you are typing in by looking in the Formatting Toolbar:



Notice that to the right of the Style description is a drop-down menu arrow. When you click on this, you will see a selection of available *Styles*:



You will often see more styles than the ones shown at left, but the list will include these styles:

Heading 1, Heading 2, Heading 3 and Normal.

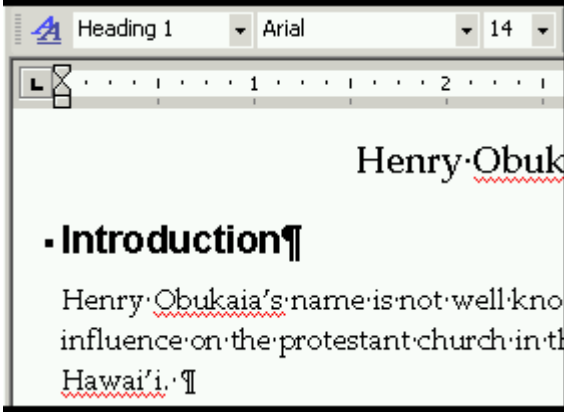
The Heading Styles are intended for use in outlining, and they are used with section titles in your document. Heading 1 is the highest level, Heading 2 the next, and so forth.

To create a section heading:

1. Press **Return** to make a new paragraph.
2. Type your section heading title.
3. Press **Return** again to make the title a separate paragraph
4. Click anywhere in the heading text to place the cursor in that paragraph.
5. Drop down the list of Styles as shown above.

6. Click on the name of the style you want, such as Heading 1.

You'll notice that the formatting of the title text you entered changes to match the formatting of the new style you chose.

 <p>The screenshot shows a Microsoft Word window. The title bar reads 'Heading 1', 'Arial', and '14'. The document content includes a heading 'Henry Obuk' followed by a paragraph starting with 'Introduction'. The heading is formatted with a larger font size and bold text. The paragraph text is 'Henry Obukaia's name is not well known influence on the protestant church in the Hawai'i.' The word 'Introduction' is highlighted in the paragraph.</p>	<p>In the sample at left, I typed in the word 'Introduction', made it a separate paragraph, clicked on it, and chose the Heading 1 style.</p> <p>Notice that this title text now takes the look of Heading 1 style. With the cursor still in the word 'Introduction', the drop-down list in the Formatting Toolbar shows it as Heading 1.</p>
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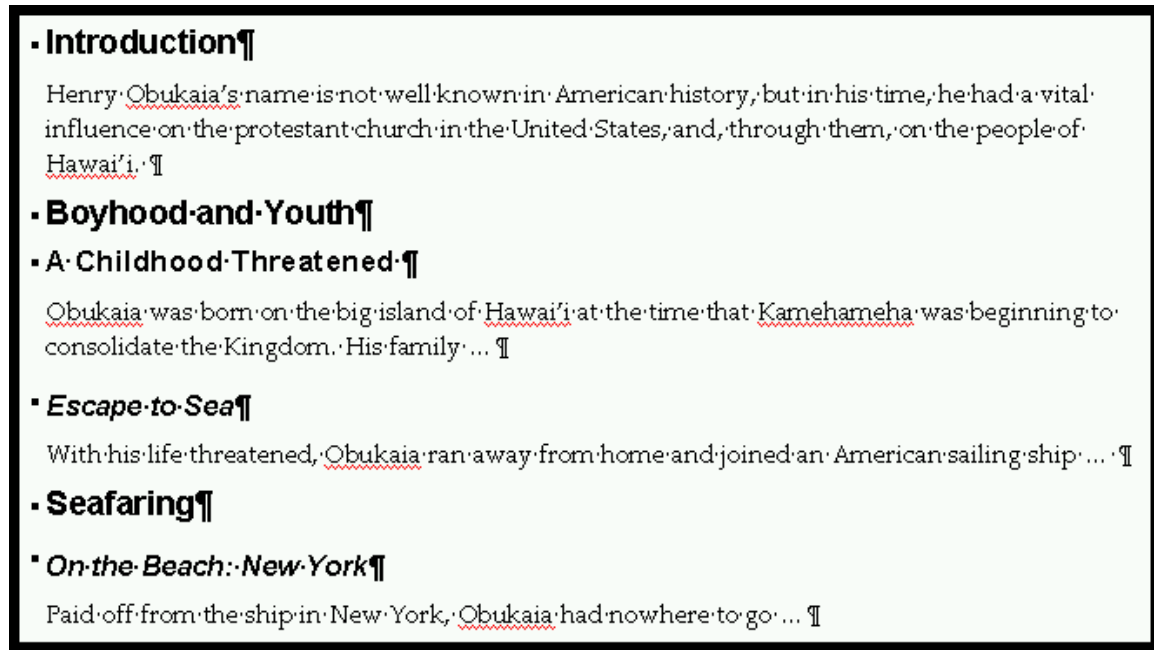
To complete your set-up work, you put titles in the appropriate places in your document, then assign Heading styles to your titles.

Some writers like to starting a project by typing in *just* the titles. (Sort of like building a house by putting up the frame first.) If you do this, you'll notice that what you have in your document is an *outline*. You have titles of your sections, even if you haven't yet written the contents of every section. You can work on your document in pieces, with a sense of the overall structure safely in place.

Using the Outline View Function

Once you have Heading styles assigned to the titles of your not-yet completed document, you are not locked in to the order of sections that you started with. This is because Word gives you a different view, **Outline View**, which lets you work with your document as an outline.

Here's a picture of a document I've been writing in Word, in **Normal View**.



The screenshot shows a document with the following content:

- **Introduction¶**
Henry Obukaia's name is not well known in American history, but in his time, he had a vital influence on the protestant church in the United States, and, through them, on the people of Hawai'i. ¶
- **Boyhood and Youth¶**
- **A Childhood Threatened¶**
Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
- **Escape to Sea¶**
With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶
- **Seafaring¶**
- **On the Beach: New York¶**
Paid off from the ship in New York, Obukaia had nowhere to go ... ¶

Notice that I have assigned Heading styles to section titles, and that I've begun writing some text under some of the titles. (The text that is not in Heading styles is in Normal style.)

To shift to Outline View, choose **Outline** from the **View** menu.

When you do this, a few things happen:

First, you see a new toolbar, the **Outlining** toolbar:



Second, your text looks different. The sample text shown above now looks like this:

- ⊕ **Introduction¶**
 - Henry Obukaia's name is not well known in American history, but in his time, he had a vital influence on the protestant church in the United States, and, through them, on the people of Hawai'i. ¶
- ⊕ **Boyhood and Youth¶**
 - ⊕ **A Childhood Threatened¶**
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family... ¶
 - ⊕ **Escape to Sea¶**
 - With his life threatened, Obukaia ran away from home and joined an American sailing ship... ¶
- ⊕ **Seafaring¶**
 - ⊕ **On the Beach: New York¶**
 - Paid off from the ship in New York, Obukaia had nowhere to go... ¶

What is different here is this: any Normal text under a Heading can be shown or hidden. You can move, expand or contract the text to show or hide sections, and generally arrange your document at will.

Here is the **Outline Formatting Toolbar**. Once you select a section, but clicking into it, you can do a number of things.



Starting on the right, there are buttons with arrows or a plus or minus sign.

Here's what they do:

Double left arrow	<i>Promotes</i> the section you select to the highest level, Heading 1.
Single left arrow	<i>Promotes</i> the section you select up one level (for example, a Heading 3 becomes a Heading 2, or Normal text becomes a Heading 3.)
Single right arrow	<i>Demotes</i> the section you select down one level (for example, a Heading 1 becomes a Heading 2, or Heading 3 becomes Normal text.)
Double right arrow	<i>Demotes</i> the section you select to the lowest level, Normal text.
Up arrow	<i>Moves</i> the entire section you select, and all the sections under it, <i>above</i> the next section in the outline.
Down arrow	<i>Moves</i> the entire section you select, and all the sections under

	it, <i>below</i> the next section in the outline.
Plus	<p><i>Expands</i>, or shows, all the sections under the section you have selected, including the Normal text.</p> <p>This lets you quickly see the subsections and contents of the section you have selected; that is, you see the details of a section.</p>
Minus	<p><i>Collapses</i>, or hides, all the sections under the section you have selected.</p> <p>This lets you see only the higher levels, which helps you understand the overall structure of your document, instead of the details.</p>

Using Collapse and Expand:

Let's look at an example of what the Minus, or Collapse button does. Suppose we place the cursor in the Heading 1 section, Introduction, as shown below:

- Henry Obukaia -- Hawai'ian Forerunner ¶
- ⊕ **Introduction** ¶
 - Henry Obukaia's name is not well known in American history, but in his time, he had a vital influence on the protestant church in the United States, and, through them, on the people of Hawai'i. ¶
- ⊕ **Boyhood and Youth** ¶
 - ⊕ **A Childhood Threatened** ¶
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
- ⊕ **Escape to Sea** ¶

If you press the **Minus** button, you will *collapse* the section 'Introduction', the underlying text will disappear and it will look like this:



▫ Henry Obukaia — Hawai'ian Forerunner ¶

- ⊕ Introduction ¶
- ⊕ Boyhood and Youth ¶
 - ⊕ A Childhood Threatened ¶
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
 - ⊕ Escape to Sea ¶
 - With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶

And if you press the **Plus**, or *expand* button, the underlying text will reappear.

Using Promote and Demote:

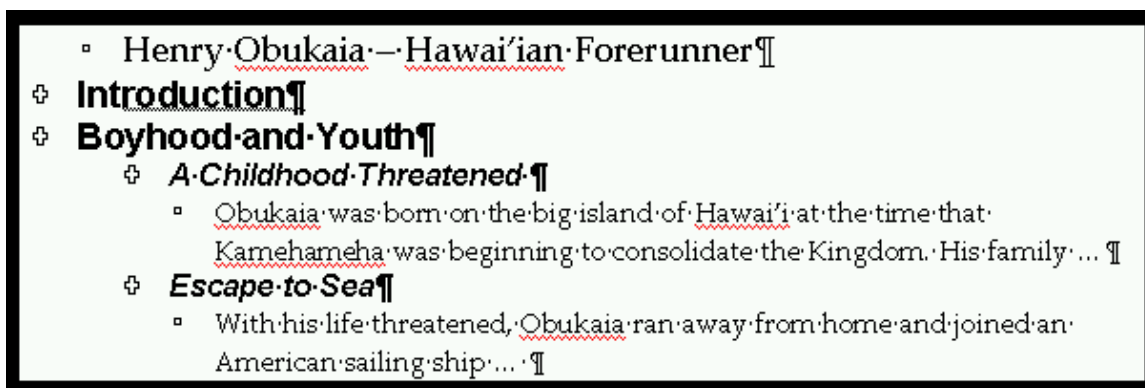
Suppose you place your cursor in the section marked 'A Childhood Threatened':



▫ Henry Obukaia — Hawai'ian Forerunner ¶

- ⊕ Introduction ¶
- ⊕ Boyhood and Youth ¶
 - ⊕ A Childhood Threatened ¶
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
 - ⊕ Escape to Sea ¶
 - With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶

If you press the **Single Left Arrow**, *Promote*, the section title (and the Normal text under it) will be moved up one level, and look like this:



▫ Henry Obukaia — Hawai'ian Forerunner ¶

- ⊕ Introduction ¶
- ⊕ Boyhood and Youth ¶
 - ⊕ A Childhood Threatened ¶
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
 - ⊕ Escape to Sea ¶
 - With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶

Using Move Up or Down:

Suppose you decide that a section is in the wrong place in your document. You can use the Up and Down arrows to move a section.

Notice the section titled 'Escape to Sea' below:



A screenshot of a document outline with a black border. The outline is as follows:

- Henry Obukaia — Hawai'ian Forerunner ¶
- ⊕ Introduction ¶
- ⊕ Boyhood and Youth ¶
 - ⊕ A Childhood Threatened ¶
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
 - ⊕ **Escape to Sea** ¶
 - With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶
- ⊕ Seafaring ¶
 - ⊕ On the Beach: New York ¶
 - Paid off from the ship in New York, Obukaia had nowhere to go ... ¶
 - ⊕ New Haven and a New Life ¶
 - With the friendship of the captain, ... ¶
 - Stranger in a Strange Land ¶

To move this section, first *select* it by clicking your mouse on the open plus sign to the left of the section title. When you do this, the section will appear in reverse video, as shown:



A screenshot of the same document outline as above, but with the 'Escape to Sea' section highlighted in reverse video. The outline is as follows:

- Henry Obukaia — Hawai'ian Forerunner ¶
- ⊕ Introduction ¶
- ⊕ Boyhood and Youth ¶
 - ⊕ A Childhood Threatened ¶
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
 - ⊕ **Escape to Sea** ¶
 - With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶
- ⊕ Seafaring ¶
 - ⊕ On the Beach: New York ¶
 - Paid off from the ship in New York, Obukaia had nowhere to go ... ¶
 - ⊕ New Haven and a New Life ¶
 - With the friendship of the captain, ... ¶
 - Stranger in a Strange Land ¶

If you clicked the **Down** arrow once, the section will move down one below the section just below it, in this case, the section named 'Seafaring'. After the move, it will look like this:



- Henry Obukaia – Hawai'ian Forerunner ¶
- ⊕ **Introduction** ¶
- ⊕ **Boyhood and Youth** ¶
 - ⊕ **A Childhood Threatened** ¶
 - Obukaia was born on the big island of Hawai'i at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶
- ⊕ **Seafaring** ¶
 - ⊕ **Escape to Sea** ¶
 - With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶
 - ⊕ **On the Beach: New York** ¶
 - Paid off from the ship in New York, Obukaia had nowhere to go ... ¶
 - ⊕ **New Haven and a New Life** ¶
 - With the friendship of the captain, ... ¶
 - **Stranger in a Strange Land** ¶

You can also just drag a section you have selected anywhere you want in your document.

This should give you an idea of how to use outlining.

Returning to Normal View

When you have made the outlining changes you want, open the **View** menu and choose **Normal**. Your screen will revert to Word's regular editing view, like this:

Henry Obukaia – Hawaiʻian Forerunner ¶

• Introduction ¶

Henry Obukaia's name is not well known in American history, but in his time, he had a vital influence on the protestant church in the United States, and, through them, on the people of Hawaiʻi. ¶

• Boyhood and Youth ¶

▪ *A Childhood Threatened* ¶

Obukaia was born on the big island of Hawaiʻi at the time that Kamehameha was beginning to consolidate the Kingdom. His family ... ¶

• Seafaring ¶

▪ *Escape to Sea* ¶

With his life threatened, Obukaia ran away from home and joined an American sailing ship ... ¶

▪ *On the Beach: New York* ¶

Paid off from the ship in New York, Obukaia had nowhere to go ... ¶

• New Haven and a New Life ¶

With the friendship of the captain, ... ¶

• Stranger in a Strange Land ¶