

Apply Numbering to Word Headings and Captions

Microsoft Word is a powerful and versatile Word processing software first introduced in the 1980s. [1] Word contains functionality for authors to use in organizing large amounts of content by labeling information with headings and applying table and figure captions. You can use additional Word features to apply automated numbering schemes to further organize headings and captions.

The following instructions describe how to apply numbering to headings and captions of Word documents. To understand these instructions, you should have some experience using the Word application and be familiar with applying styles and lists to text.¹

Equipment and Supplies

You will need the following equipment and software to perform the instructions in this document:

- Personal computer or laptop - equipped with a keyboard and pointing device, such as a mouse or touchpad.
- Microsoft Word - either online through subscription or installed on the computer.

Create New Heading Styles and Define and Apply a New Multilevel List

Figure 1 is an illustration of a set of custom headings with automatic numbering:

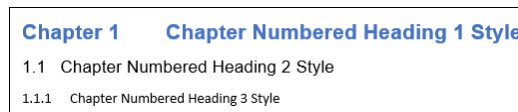


Figure 1. Example of custom heading styles containing a numbering scheme.

Applying numbering to headings in Word is a two-step process: (1) you must create a heading style for each level of numbering you want to include in your document, and (2) you must define a new multi-level list, then connect the list with the styles.

Create new heading styles. To create new styles for headings in Word:

1. Open a Word document and locate the Styles section on the Home tab of the ribbon as shown in Figure 2:

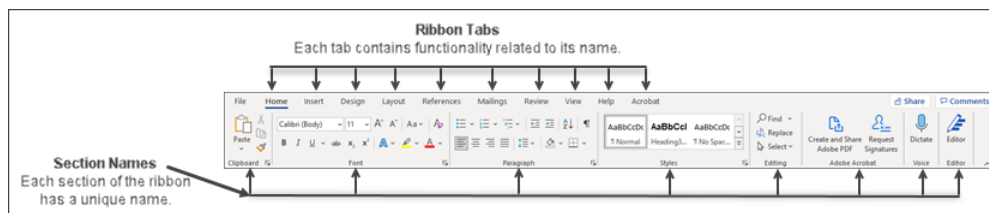


Figure 2 The ribbon is part of the Word interface that contains a selection of editing and formatting tools.

2. Click the **Arrow** icon located under the lower-right corner of the Styles gallery, as shown in Figure 3:



Figure 3. The Styles gallery contains a list of frequently used styles.

¹ *Note to Instructor:*

The intended audience for this document is mid- to advanced-level MS Word users who work in financial services, tech, government, and other industries. These users may hold non-technical or technical roles but require the ability to create and manage complex documents that need multiple levels of structure.

3. From the expanded Styles pane, click the **New Style** button as shown in Figure 4 to open a dialog box. Refer to Figure 5 to see an example of the dialog box.

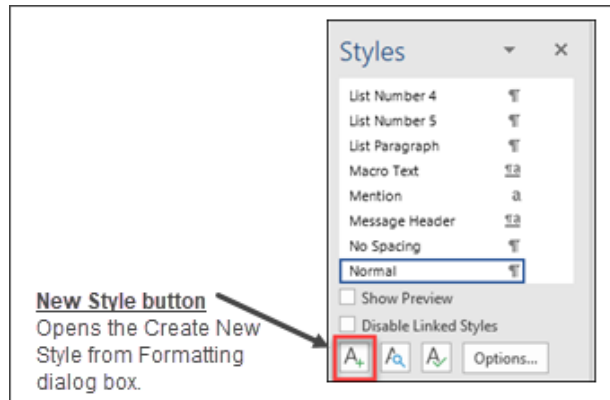


Figure 4. The styles pane contains a list of all available styles in the document.

4. Complete the fields in the properties section of the dialog box as shown in Figure 5:
- Type a unique name for the new style in the Name field (for example, Chapter Numbered Heading 1).
 - Click the Style type drop-down list, then select Linked (paragraph and character).
 - Click the Style based on drop-down list, then select Normal.
 - Click the Style for following paragraph drop-down list, then select Normal.

Note: You can apply optional formatting to the new style through the drop-down lists and buttons provided in the Formatting section of the dialog box. You can use even more formatting options by clicking the **Format** button in the lower-left corner of the dialog box and selecting options from its drop-down menu.

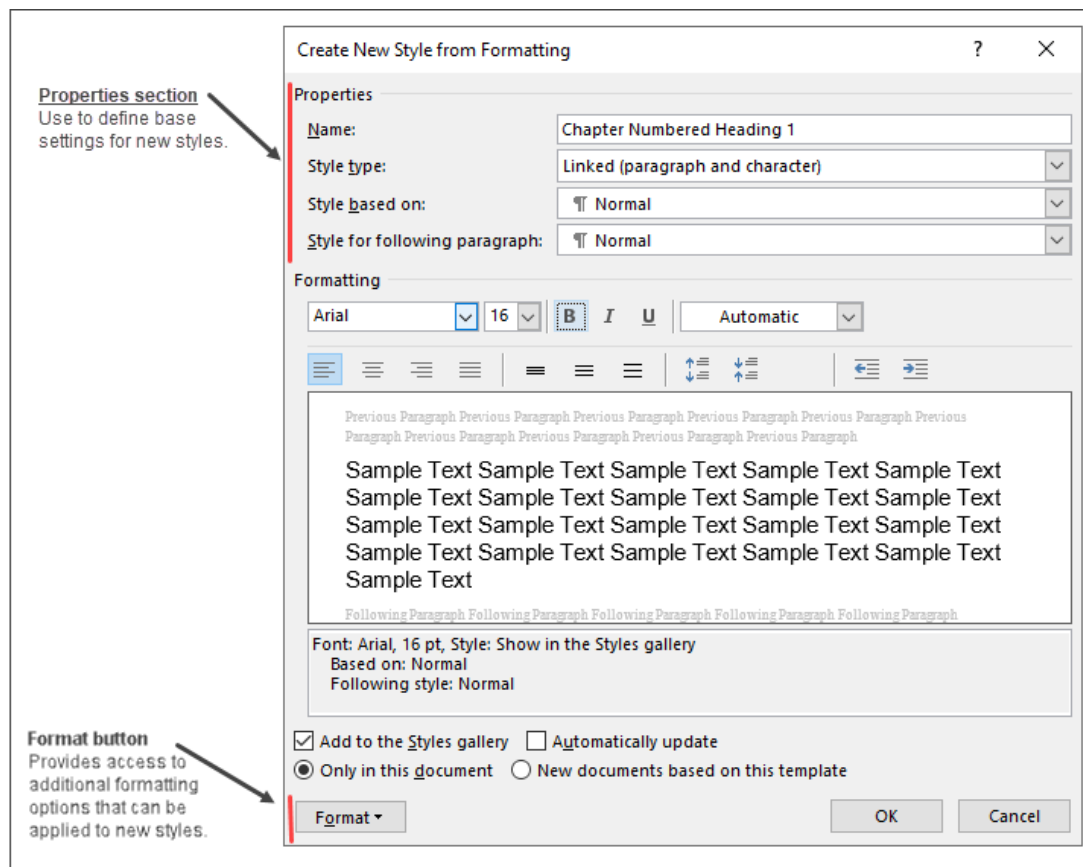


Figure 5. Use the dialog box to select properties and formatting for new styles.

5. Click **OK** to add the new style to the Styles pane. Refer to Figure 6.
6. Repeat step 3 through step 5 for each numbered heading you want to include in the document.

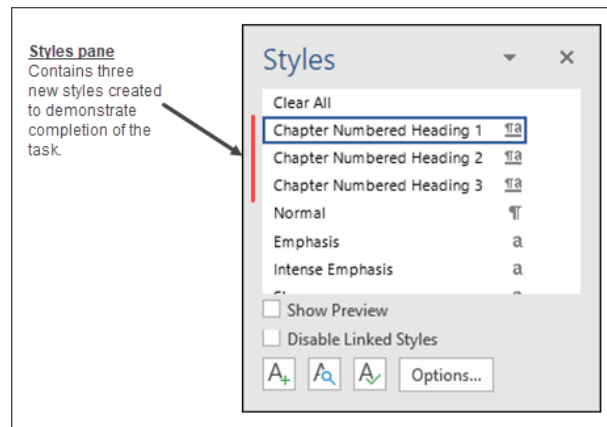


Figure 6. The Styles pane includes custom styles after task completion.

Define and apply a new multilevel list to styles. To add numbering to heading styles:

1. Click the **Multilevel List** icon located under the Home tab in the Paragraph section of the ribbon as shown in Figure 7:

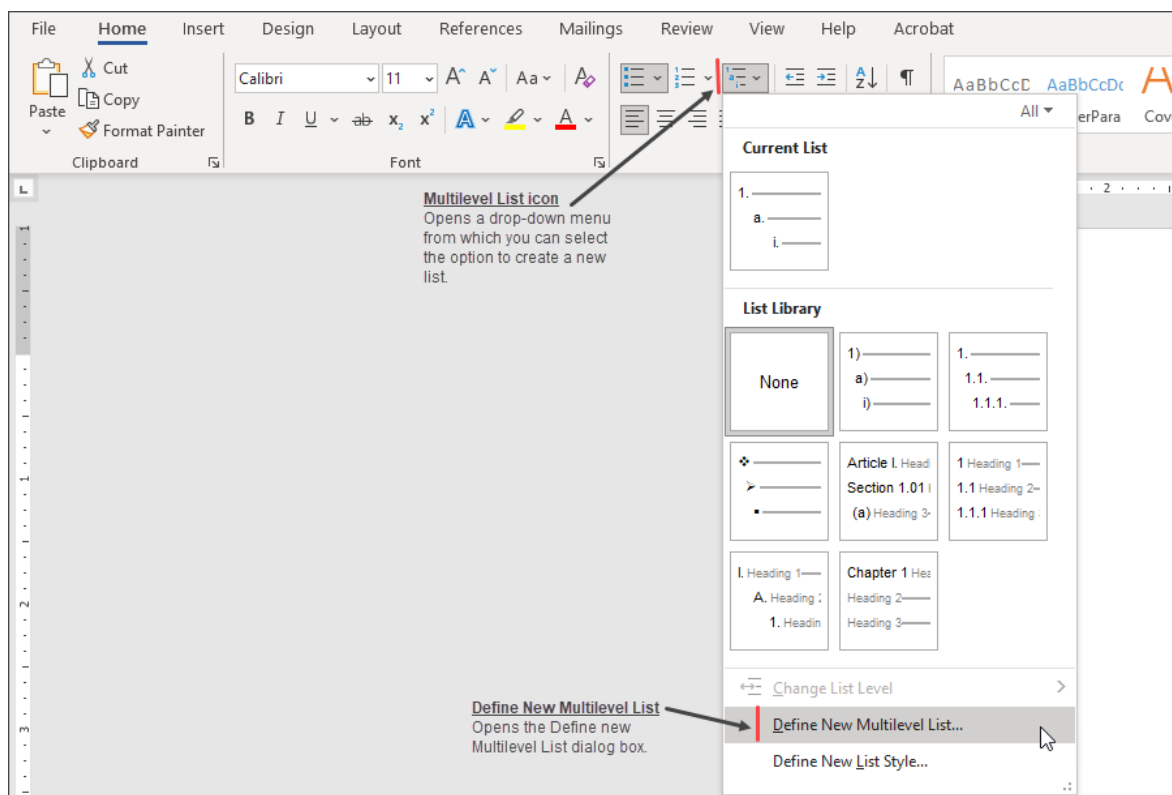


Figure 7. The Multilevel List icon displays a menu from which you can select the option to define a new multilevel list.

2. Select Define New Multilevel List from the drop-down menu to display a dialog box as shown in Figure 8.

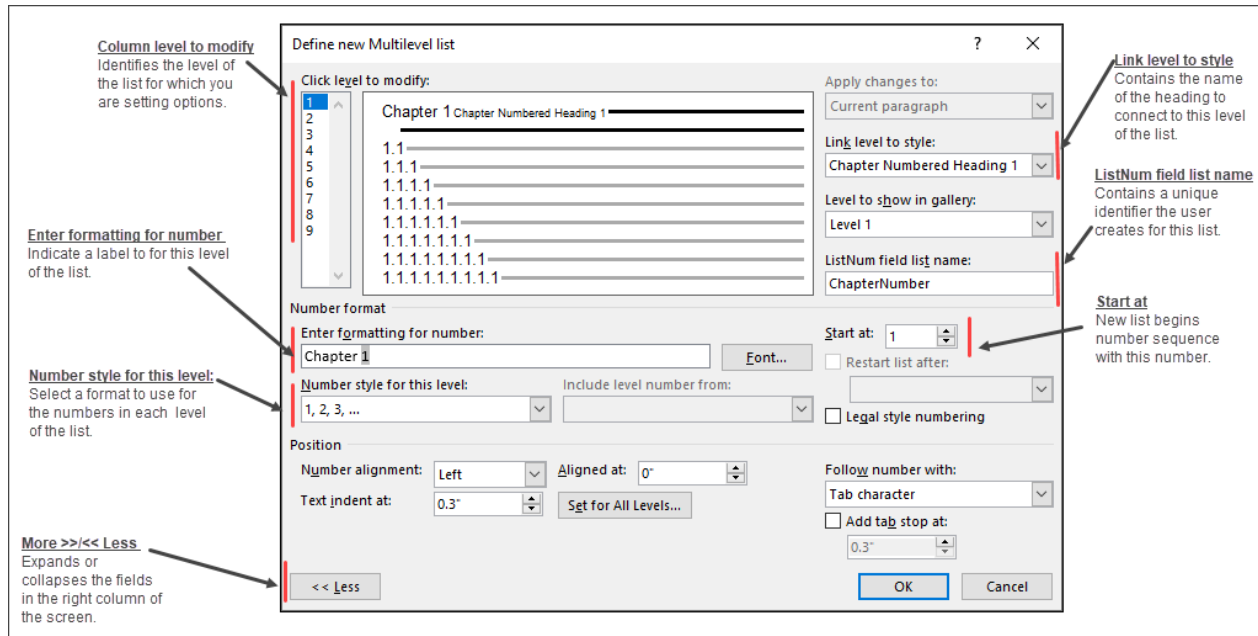


Figure 8. Create a new numbered list and assign this list to a style from the dialog box. Once connected, the style can be used throughout the document content to provide visual structure.

3. The Click level to modify column contains a set of numbers. Each number represents a level in the list. For example, the first number in the column is 1. It functions as the starting point in the list's hierarchy. Refer to Figure 6 to view an example. Modify the fields for the first level of the list (column 1) as follows:
 - Click the arrow for the Link level to style drop-down list, then select the name of the style that you will use as the first heading level.
 - Type a name for the list in the ListNum field list name.

Note: This name serves as a unique identifier and allows you to use multiple numbering schemes within the same document (for example, you could have a chapter numbering scheme and an appendix numbering scheme).
 - Adjust the number in the Start at field to match the number with which you want to start numbering (usually, this is set to 1, I, i, A, or a).
 - Type text to precede the list number for this level of the list in the Enter formatting for number field (for example, Chapter or Appendix).
 - Click the Number style for this level drop-down arrow and select the style for this level of the number (Arabic, uppercase or lowercase Roman, or uppercase or lowercase alphabetical).
4. Click 2 in the Click level to modify column field, then update the fields in the dialog box again as described in Step 3 to define the second level of the list and link it to the style created in the previous set of instructions. Continue defining each level of the list until you have one list level to connect to each heading style you want to include as a numbered heading in the document. For example, the original example shown in Figure 1 contains three heading styles and required the definition of three list levels.
5. Click **OK** to connect all levels of the numbered list and their associated formatting to the specified styles. To use a new, numbered heading style, place the cursor where you want to apply the style, click its name in the Styles pane, and begin typing. Figure 1 is an illustration of a set of numbered headings.

Apply Numbering to Captions

You can use Word to number figures and table captions in your documents. Captions are managed from the Captions section of the ribbon from the References tab as shown in Figure 9.

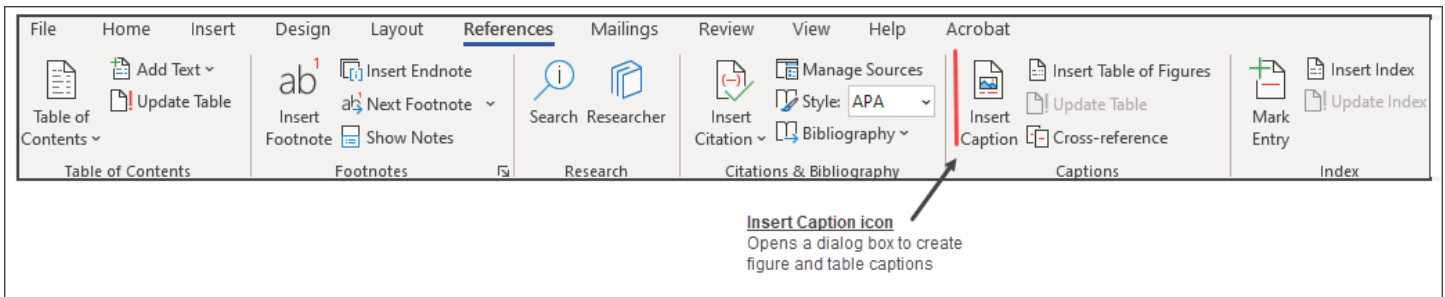


Figure 9. Captions section of the References tab.

Figure 10 is an illustration of a table followed by a numbered table caption:

Field	Description
User ID	Eight-character, alphanumeric sequence of characters to use in combination with the Password to access the WidgetBuilder.
Password	Eight-character, alphanumeric sequence of characters to use in combination with the User ID to access the WidgetBuilder.
Contact Name	Full name of the user.

Table 1. WidgetBuilder field descriptions.

Figure 10. This illustration depicts a numbered table caption.

To apply a caption to a figure or table:

1. Double-click the illustration or table that requires a caption to select the item.
2. Perform one of the following actions to open the Caption dialog box as shown in Figure 11:
 - Click the References tab, then the **Insert Caption** icon.
 - or*
 - Right-click in the selected illustration or image and click **Insert Caption** from the drop-down menu.

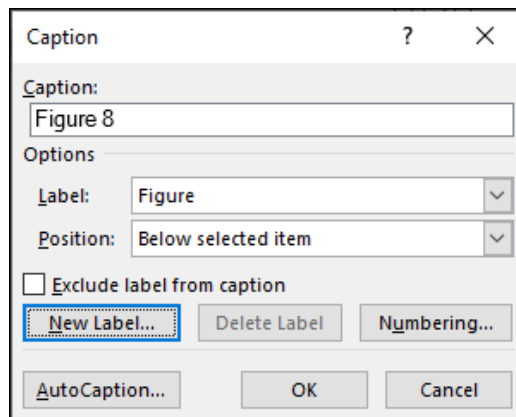


Figure 11. Define caption properties from the caption dialog box.

3. Perform the following actions:

- a. Type a description of the item in the Caption field.
- b. Click the Label field's drop-down arrow and select the label to apply to the caption from the list (for example, figure, table, or equation).
- c. Click the Position field's drop-down arrow and select the location for the caption, either above or below the selected item.

Note: There are several optional actions you can take to customize caption numbering:

- To remove the label from the caption, select the Exclude label from caption checkbox.
- To choose a label not readily available from the label drop-down list, click the **New Label** button and type the new label in the opened dialog box.
- To change numbering properties from the default Arabic numbering, click the **Numbering** button to open the Caption Numbering dialog box, as shown in Figure 12.

From this dialog box, you can choose to change the numbering format by selecting a new format from the format drop-down list. Options include Arabic, uppercase and lowercase Roman, and uppercase and lowercase alphabetical. If you are using numbered heading styles, you can include the chapter number in the caption by selecting the Include chapter number checkbox, then selecting the heading style name from the Chapter starts with style drop-down list. You can also change the separator to use when including the chapter number.

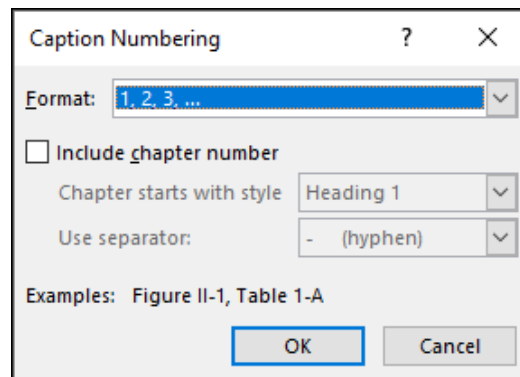


Figure 12. The Caption Numbering dialog box contains optional number formats that can be used with numbered captions.

4. Click **OK** to insert the caption.

Reference

- [1] The Editors of Encyclopaedia Britannica. "Microsoft Word Software" April 29, 2021 [accessed May 20, 2021]. <https://www.britannica.com/technology/Microsoft-Word>.