

How to Make a Formal Outline in Microsoft Word

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 (see attached example).

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. Plus you look anal-retentive.

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 listen to you while you're composing this outline—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? Well, it isn't elementary, my dear Watson, but it's not rocket science either. Here is what you do:

1. Go to Format. Click on "Bullets and Numbering."
2. Click on the tab that says "Outline Numbered."
3. The outline that looks closest to the one above is the one in 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.
4. The first thing you will see is a screen that says "Customized Outline Numbered List." Level 1 should be highlighted.
5. 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." However you usually delete text should be fine. The point is to get rid of it.

6. 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.
7. 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.
8. For Level 3, select “1, 2, 3, etc.”
9. For Level 4, select “a, b, c, etc.”
10. For Level 5, select “i, ii, iii, etc.”
11. Complain loudly that the format for all this MLA research paper stuff is too picky and is a pain in the behind to do. I hear ya, pal. That’s just the breaks.

You may notice if you look at my outline that I put extra spaces before and after a major section (I, II, III). I do this to make that pop out. You don’t have to do that.

Now what? Is that what I heard you say? You need to take all those note cards and organize them by topic. For instance, in my paper, I found I had a lot of cards centered around the section in the story when Louisa Ellis rearranges the books. I simply put all those cards in a pile. I sorted all my note cards into piles based on their various subject. During the course of doing this, I realized I had a whole group of cards that were off-topic and unusable—some notes on how OCD-like behavior has been noticed in animals. I think I copied them down initially thinking they would be more useful than they were. For example, canaries are known to engage in the same nest-building behaviors whether in the wild or domesticated. I thought that was interesting since there was a canary in the story; however, the information, while interesting, really wasn’t on topic. After you sort your cards according to topic, shuffle the arrangement of the cards in each pile to reflect what you think is a good order of presentation. You can see how I did this by looking at my outline. Then, arrange the piles in the order in which you plan to discuss the topics they represent.

In order to compose your outline, simply copy the information from your note cards into an outline format. Decide which cards are “general headings” and which cards are “subsections.” Put the card letter and number designation so you can find the card later. See my outline for example. You will notice almost every section has something like A22 after the note. That is because almost everything a person writes in a research paper is an idea someone else had. It isn’t plagiarism, because I’m going to show you how to document, or cite, each quote, idea, or bit of evidence you use.

After you rearrange your cards and write your outline, your whole paper is basically written. Don’t believe me? Look at my outline. All I have to do is flesh out the paper, inserting transitions and voilà!