

# Automatically Numbered Headings in WordPerfect® for Windows®

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*Need document headings that automatically number themselves? Here is a method that creates custom headings based on WordPerfect's **outline** feature. Three samples at the end of this paper demonstrate customized versions of legal-, standard-, and Roman-style outlines using this technique.*

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This method uses your own custom formatting—similar to the formatting found in WordPerfect's standard Heading styles—in an easily created *automatic numbering outline*.<sup>(1)</sup>

## The basis for the method

Open a blank document and click on

- **Insert, Outline/Bullets & Numbering;**
- click the "**Legal**" graphic icon (usually the second item, top row);
- click **OK**.

This will insert the first level of a Legal outline. Open the Reveal Codes window and take a quick look at the codes that were just inserted. (If you pass your cursor over the codes you'll see more about them.)

The **Legal** outline, like all WordPerfect outlines, is composed of *two linked components*:

- an [Outline] code at the beginning of the outline's list of items, which contains the *outline specifications*—that is, the outline's name, its type of "list" (single- or multi-level), and the specific number, character and/or bullet schemes that should be used at the beginning of each outline level; and

- a WordPerfect system [Style] code (internally named Legal 1, Legal 2, etc.) that contains each outline level's *number and initial formatting*—that is, the actual number displayed in the document (via a [Para Num:] code placed inside the [Style] code<sup>(2)</sup>), plus one or more indent codes to format the rest of the paragraph.

Let's take a moment to look a little closer. Click **Insert, Outline/Bullets & Numbering**, choose "**Legal**", then click **Edit**. You'll see various styles are linked to numbering schemes: Legal 1, Legal 2, and so forth.

For example, the generic numeric pattern, 1.1.1, is linked to the Legal 3 style. In fact, the information in the adjacent two fields ("Text before" and "Number/Bullet") is passed through to this style through the linkage. The Legal 3 style then tells WordPerfect to adjust and display the appropriate three-part number (e.g., 2.1.3) for that specific level of the outline, and then indent the text after the number so that the following text wraps under the number and not at the left margin.

Now, exit from all dialogs and return to the document. If you double-click the [Para Style: Legal 1] code in Reveal Codes, you'll see the Styles Editor dialog

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<sup>(1)</sup> This method was developed in WordPerfect X3, but the general procedure should work for other versions, at least back to version 9.

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<sup>(2)</sup> The [Para Num:] code also contains the type of number, character or bullet to be used at the beginning of that particular outline level, and any optional text that should precede the number. Both of these items are specified inside the Outline code—i.e., in the Bullets & Numbering module.

appear for the linked Legal 1 style. If you then use the Styles Editor's menu or toolbar buttons to add a Bold and Very Large format at the beginning of the string of codes in the Style Editor's 'Contents:' field, then click OK, all top-level (i.e., "Heading 1"-type style) paragraphs in the current document will be numbered 1, 2, 3, etc., *in bold, very large font*.

Similarly, if you have already inserted a second level to the sample outline (just press <Tab> at the beginning of the level) and double-click the [Para Style: Legal 2] code, you can add a Bold and Large format at the beginning of the string of codes in the Style Editor's Contents field. All second-level (i.e., Heading 2 style) paragraphs will then be numbered 1.1, 1.2, 1.3, etc., *in bold, large font*.

*In other words, you are adding the same text formatting that exists in the default system styles of Heading 1 and Heading 2, which are typically used to create standard headings. You could, of course, add other formatting, such as italics or underline, or replace hard left indents with tabs or spaces.*

Importantly, you can also add codes to tell WordPerfect to include any heading formatted with this custom outline style in a Table of Contents, if you use one. (See the second Tip in the next section, under Step 4.)

Bottom line: *You could easily make all of this a permanent feature on your system by adding formatting codes to newly created ("custom") level styles (e.g., Legal Head 1, Legal Head 2, etc.) that are based on existing system styles (Legal 1, Legal 2, etc.). You would then link them to a newly created outline scheme, in a similar manner to the existing Legal outline—all with a few mouse clicks.*

As the method describes, by creating *copies* of these standard WordPerfect system styles you won't impact the originals, and you can format the copies to your specific needs.

You can also make as many copies as you like, each for a different purpose, and copy them to a template.

## Custom headings: Legal style

1. The first thing to do is create new custom level styles based on the existing **system** Legal styles. But to do that, you first need to make WordPerfect display all its system styles, not just user styles: Click **Format, Styles, Options, Settings**, and click the **radio button**, "WordPerfect heading styles and all other system styles." (We'll set this button "off" after you are done; otherwise, you'll get a very long list of styles in future sessions in the Styles drop list on your property bar. This might be confusing.) Click **OK** to return to the Styles dialog.
2. Next, select (click on) on the "Legal 1" system style in the "Available styles:" pane of the Styles dialog, then click **Edit** to bring up the Styles Editor. In the "Contents:" pane of the Styles Editor, put the cursor at the beginning of all codes, then select all codes (**<Shift+Right Arrow>** might work better than using your mouse) and copy (**<Ctrl+C>**) them to the Windows clipboard. Then click **Cancel**, since you don't want to disturb the codes or other settings in this system style.
3. Back in the Styles dialog, click **Create** to bring up the Styles Editor again.

Give the new style a *name* (e.g., Legal Head 1), and a *description* (e.g., Legal Heading Level 1).

Set the "Enter key..." field to `<None>` if you don't want to "chain" these headings together one after the next, but rather be able to quickly insert body text after typing each heading; otherwise, set the field to `<Same Style>`.

The "Type:" field should be set to *Paragraph*.

Leave the box, "Automatically update style...", *unchecked* if you want to be able to change an *individual* heading's format in the document without impacting all headings at that level. Otherwise, check the box, which will let you make global changes to that heading level in the current document, such as adding a color, changing the heading font type, and so on.

4. Now, put the cursor in the "Contents:" pane and paste (`<Ctrl+V>`) the codes into this pane that you just copied to the clipboard. Typically, these are a [Para Num:] code and one or more [Hd Left Ind] codes. Then go to the beginning of those codes and add Center justification, Bold, and Very Large format codes (if those are what you want) with the buttons on the Styles editor's toolbar or with the Styles Editor's menu. You can add other formatting, if desired, such as redline or a color, or even a different font type.

## Tips:

- ❑ You can also delete or change the left indent adjacent to the [Para Num:] code <sup>(3)</sup>, perhaps replacing it with a tab (you'll need to use the Styles Editor's menu to **Insert, Tab**), a space (press the `<Spacebar>`), or even a hard return (press `<Enter>` after the [Para Num:] code). A space will tighten up the distance between the number and the heading's text. A hard return will put the heading on the next line under the number, as demonstrated in **Sample 1** at the end of this paper.
- ❑ If you want to have these headings show up in a **Table of Contents** – probably a good idea in most circumstances – check the box at the bottom, "Show off codes"; then place your cursor just *before* the long code, [Codes to the left are ON, codes to the right are OFF], select this code (*only!*) with `<Shift+Right Arrow>`; then click **Tools, Reference, Table of Contents**. A TOC property bar or dialog will appear on your screen. Click the appropriate **Mark** button for that level of the Table of Contents. (Generally speaking you will "Mark 1" for top level headings, "Mark 2" for second level headings, etc., but the positioning of a given heading level in the TOC is up to you, since you can mark any level with any TOC button.) Then click **Close** to return to the Styles Editor. You should see a *pair* of [Mrk Txt T.O.C.] codes surrounding the long [Codes to the left...] code. These paired codes tell WordPerfect to include any text you use with this heading in a TOC, if any, but to exclude any other formatting because other format codes in the Contents pane are outside this pair of codes.

Click **OK** in the Styles Editor dialog when you have finished formatting the style.

5. **Repeat Steps 2-4 for the remaining style levels** (Level 2, Level 3, etc.). You probably need to do this for at least five levels, and you'll probably want to use a different format for each

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<sup>(3)</sup> If you applied center justification, you'll probably see a [Ignore Left Ind] code. You can delete it to make things neater in the Contents pane.

level (e.g., Bold/VeryLarge, Bold/Large, Bold/Normal, etc.).

6. **When you have finished creating the new styles for the various outline levels**, and while the Styles Editor is onscreen (if it's not, click **Format, Styles**), click **Options, Settings**. Set the radio button back to the top choice, "WordPerfect heading styles." This hides most of the large number of styles that display in the Styles list. Click **OK**, then **Close**, to return to the main document screen.

7. **Next, create the new Legal-number outline.** Click **Insert, Outline/Bullets & Numbering**. Under the Numbers tab at the top, select the Legal numbering outline scheme (1, 1.1, 1.1.1). Click **Options, Copy, Current document, OK**, and give the copy a name (e.g., Legal Head), then click **OK** to return to the Bullets & Numbering dialog.

(You used the "Current document" option in this step rather than "Default template" so that you can test the results before sending the outline to a template or another computer. Later, you can copy the outline to the default template – or other locations – to save it, following Step 10 below, once you are sure it works properly.)

8. **Choose (i.e., click on) the new outline icon** in the Bullets & Numbering dialog and click **Edit**. The Create Format dialog opens. In the "Style:" drop list, select the newly created Legal Head 1 for the first numbering level, Legal Head 2 for the second level, and so forth. (Note that the Preview pane might not be an accurate representation.) Click **OK**.

If you click **OK** again, a new heading appears in the document,

which can be used immediately or deleted.

Otherwise, click **Cancel** to return to the main document window.

9. ***It is a good idea at this point to test the outline and all its levels*** with some sample text. See the "How to use the new Outline styles" section below. Do this before saving the outline, especially to a template. While this is not critical, it will make things easier for you in the long run.

10. **Save the outline.** You have two basic choices where to store the new outline and its linked styles (which at this point are "attached" to the outline; they will be saved along with the outline itself).

- a. *If you want to save the outline in your default template<sup>(4)</sup>* —the template on which all new, blank documents are based—bring up the Bullets & Numbering dialog if it is not already displayed, select (click on) the new icon from the list, then click **Options, Copy, Default template, OK**.
- b. *If you want to have the outline available in other documents, or in a different [custom] template, or on another system, or even in a different [but relatively recent] version of WordPerfect, you can*
  - edit the other document or template and create the outline and its linked styles in it, following the steps above;

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<sup>(4)</sup> The current location of the default template on a computer is shown in Tools, Settings, Files, Template.

or—if you want all your custom (“user”) outlines copied to any of these other places—**do this instead**:

- in the document that has the new custom outlines, click **Insert, Outline/Bullets & Numbering, Options, Save As**.

In the Filename field of the “Save Outline Definitions to...” dialog enter a filename (*without* a filename extension; e.g., “MyWP12outlines”).

Enable the **radio button**, “**User styles**.” Before leaving this dialog, click the **drop list browse button** next to the filename to note where the file will be stored; this will help you retrieve it later, or copy it to removable media to transport it to another location. Click **OK** to save the custom outlines. Click **OK** or **Cancel** to exit from the Bullets & Numbering dialog.

*Now, go to the other document, template, WordPerfect version, or computer system. (For the latter, you will need to have the Outline Definitions file handy.)*

Open the **Outline/Bullets & Numbering** dialog there, and click **Options, Retrieve**.

Enable the “**User styles**” **radio button**, then use the **drop list browse button** to locate and select the saved outline file. Click **OK**.

The new custom (user) outlines should appear at the bottom of the Outline/List icons.

## Custom headings: Standard style and Roman style

The basic technique—demonstrated in Sample 2 and Sample 3 at the end of this paper—is the same as the one described above, with these exceptions:

- These two sample outlines are *single-level*, not multi-level, so there was only one numbering style created and linked with each of the outlines: *NumberHead 1* for the standard outline, and *RomanHead 1* for the Roman outline. The outlines themselves were created by copying the “Numbers 2” and “Roman” outlines, respectively, then modifying them to link to the new styles and naming them Numbers Head and Roman Head.
- The new styles linked to these outlines, *NumberHead 1* and *RomanHead 1*, were adapted from the *Level 1* style, not the *Legal 1* style. They were then formatted with Bold and marked for inclusion in a Table of Contents. The *NumberHead 1* style uses a hard-center-on-margin code (**Format, Line, Center**); the *RomanHead 1* uses a flush-right-with-dot-leaders code (**Format, Line, Flush right with dot leaders**). You might want to modify your own version of these styles to use a different justification, relative size, different font, etc.



## How to use the new Outline styles

1. Choose the new outline you wish to use with **Insert, Outline/Bullets & Numbering, OK**. Note that the Outline property bar displays. For *multi-level* numbers, this lets you Promote, Demote, Move, Show, Hide, etc., the current level—a distinct advantage over manually numbering headings.

### Tips:

- ❑ Pressing **<Tab>** or **<Shift+Tab>** before typing text also demotes and promotes the level, respectively. For *single-level* outlines, the item is simply tabbed or back-tabbed.
  - ❑ If you immediately press **<Backspace>** you will delete that numbered item.
  - ❑ A useful button on the property bar is the "Set Paragraph Number" button ([I,II,III,...]). This lets you set a new number for the current and subsequent headings.
2. Type some text for your heading after the number appears, then press **<Enter>**.
  3. Note that in most *standard* outlines, the **<Enter>** key normally starts a new numbered outline item at the cursor location.<sup>(5)</sup> However, if you have set the Styles Editor's "Enter key inserts..." field to **<None>**, the **<Enter>** key will take you back to normal body text, where you can insert as much text as you want before the next outline number is needed.

So, for your *customized* outlines, to insert a new outline level, press **<Ctrl+H>** (or **<Ctrl+T>** if you use the

DOS keyboard)<sup>(6)</sup> to insert the next outline item. These keys act as an On/Off toggle switch for the current outline level.

If you put the cursor on an existing phrase, or select the phrase first, the outline style will apply to the phrase/selection.

## Enabling a custom Outline in a document with a mouse click or keystroke

To start an Outline with a macro, simply open a new blank document and record the steps with **Tools, Macro, Record**.

During recording, choose the outline from the Bullets & Numbering dialog, and press **OK**.

For quick access, assign the macro to a toolbar or keystroke combination. For more information see *Three easy ways to play macros, load programs, type (insert) keystrokes, use special features* at <http://wptoolbox.com/tips/EasyPlay.html>.

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<sup>(5)</sup> Using a standard outline with "chained" paragraphs, you can press **<Ctrl+Shift+L>** to separate subsequent unnumbered paragraphs with line breaks.

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<sup>(6)</sup> These keys have the feature, "Outline Body Text," assigned to them in the Windows and DOS keyboard definitions.

## Sample 1

### Legal-style paragraph numbering with centered two-line headings

# 1

## New Rules of the Road

Foremost is the safety of bikers who must share the roads with automobiles. Just as disconcerting is the high incidence of accidents on paths restricted to use by pedestrians, skateboarders, and other bikers. Teaching cycling etiquette and designating roads as multi-vehicle highways are inexpensive and practical and can alleviate the majority of hazards bikers face.

### 1.1

#### A Touch of Irony

You want irony? Try this bit of information: according to *The Daily Microcosm's* Anna Fornos, a city which sponsors three annual cycling events and supports the county's alternative transportation program, there is not a single bike lane. We need to think about doing something to reverse the current situation. And now that we have the name of a giant corporation backing us, there's no reason to remain silent regarding the lack of bicycle and pedestrian facilities in our community.

### 1.2

#### The Future of Bicycle Transportation

Right now the city is drafting a transportation plan, and not of moment too soon. Katherine Fornos claims that if a growing city does not accommodate cyclists who ride to work, people who have ridden to work for years will no longer be riding to work. Ms. Fornos goes on to say the following: "There isn't one provision to accommodate bikers. Perhaps it's an oversight. Or perhaps it's the lack of bikers in the city council. We can safely assume that the director of the Losantiville Planning Organization doesn't bike (at least, not outdoors)."

##### 1.2.1 What We Can Do [ ←THIS LEVEL WAS DESIGNED TO BE FLUSH LEFT]

So if it's someone with legislative pull we need, we can go straight to the governor's office and find a state bicycle coordinator. With some pressure she will work with local governments to apportion some road money to non-highway programs. But unless we speak up, we'll go unnoticed. □

## Sample 2

### Standard-style paragraph numbering with centered headings

#### 1. **New Rules of the Road**

Foremost is the safety of bikers who must share the roads with automobiles. Just as disconcerting is the high incidence of accidents on paths restricted to use by pedestrians, skateboarders, and other bikers. Teaching cycling etiquette and designating roads as multi-vehicle highways are inexpensive and practical and can alleviate the majority of hazards bikers face.

#### 2. **A Touch of Irony**

You want irony? Try this bit of information: according to *The Daily Microcosm's* Anna Fornos, a city which sponsors three annual cycling events and supports the county's alternative transportation program, there is not a single bike lane. We need to think about doing something to reverse the current situation. And now that we have the name of a giant corporation backing us, there's no reason to remain silent regarding the lack of bicycle and pedestrian facilities in our community.

#### 3. **The Future of Bicycle Transportation**

Right now the city is drafting a transportation plan, and not of moment too soon. Katherine Fornos claims that if a growing city does not accommodate cyclists who ride to work, people who have ridden to work for years will no longer be riding to work. Ms. Fornos goes on to say the following: "There isn't one provision to accommodate bikers. Perhaps it's an oversight. Or perhaps it's the lack of bikers in the city council. We can safely assume that the director of the Losantiville Planning Organization doesn't bike (at least, not outdoors)."

#### 4. **What We Can Do**

So if it's someone with legislative pull we need, we can go straight to the governor's office and find a state bicycle coordinator. With some pressure she will work with local governments to apportion some road money to non-highway programs. But unless we speak up, we'll go unnoticed. □



## Sample 3

### Roman-style paragraph numbering with flush-right headings

#### I..... **New Rules of the Road**

Foremost is the safety of bikers who must share the roads with automobiles. Just as disconcerting is the high incidence of accidents on paths restricted to use by pedestrians, skateboarders, and other bikers. Teaching cycling etiquette and designating roads as multi-vehicle highways are inexpensive and practical and can alleviate the majority of hazards bikers face.

#### II..... **A Touch of Irony**

You want irony? Try this bit of information: according to *The Daily Microcosm's* Anna Fornos, a city which sponsors three annual cycling events and supports the county's alternative transportation program, there is not a single bike lane. We need to think about doing something to reverse the current situation. And now that we have the name of a giant corporation backing us, there's no reason to remain silent regarding the lack of bicycle and pedestrian facilities in our community.

#### III..... **The Future of Bicycle Transportation**

Right now the city is drafting a transportation plan, and not of moment too soon. Katherine Fornos claims that if a growing city does not accommodate cyclists who ride to work, people who have ridden to work for years will no longer be riding to work. Ms. Fornos goes on to say the following: "There isn't one provision to accommodate bikers. Perhaps it's an oversight. Or perhaps it's the lack of bikers in the city council. We can safely assume that the director of the Losantiville Planning Organization doesn't bike (at least, not outdoors)."

#### IV..... **What We Can Do**

So if it's someone with legislative pull we need, we can go straight to the governor's office and find a state bicycle coordinator. With some pressure she will work with local governments to apportion some road money to non-highway programs. But unless we speak up, we'll go unnoticed. □