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### 04.05: Lists

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## Bulleted and Numbered Lists

David McMurrey

### Chapter Objectives

Upon completion of this chapter, readers will be able to:

1. Distinguish between different types of lists in technical documents and explain appropriate situations for using each.
2. Explain and apply general guidelines for formatting different types of lists.
3. Use Microsoft Word to style lists appropriately.

## Bulleted and Numbered Lists

Lists are useful because they emphasize selected information in regular text. When you see a list of three or four items strung out vertically on the page rather than in normal paragraph format, you are likely to pay more attention to it. Certain types of lists also make for easier reading. For example, in instructions, it is a big help for each step to be numbered and separate from the preceding and following steps. Lists also create more white space and spread out the text so that pages don't seem like solid walls of words.

Like headings, the various types of lists are an important feature of professional technical writing: they help readers understand, remember, and review key points; they help readers follow a sequence of actions or events; and they break up long stretches of straight text.

Your task for this chapter is to learn about the different types and uses of lists and to learn their specific format and style.

"Lists emphasize important points and help readers follow a sequence."

## Lists: General Guidelines

In technical-writing contexts, you must use a specific style of lists, like the one presented here.

- Use lists to highlight or emphasize text or to enumerate sequential items.
- Use exactly the spacing, indentation, punctuation, and caps style shown in the following discussion and illustrations.
- Make list items parallel in phrasing. See this tutorial from commnet.edu's Guide to Grammar and Writing on Parallel Structures.
- Make sure that each item in the list reads grammatically with the lead-in.
- Use a lead-in to introduce the list items and to indicate the meaning or purpose of the list (and punctuate it with a colon).
- When two items are alternatives, use a bulleted list (with or between). Do not use numbered lists for OR-ed items. For three or more alternatives, indicate that in the list lead-in.
- When a separate notice or explanatory paragraph follows a item, indent that separate material to the text of the parent list item.

5. Select the **Save preview picture** check box.
6. Click **OK** to close the dialogue box.

Notice that this note is indented to the text of the parent list item.

**Note:** Keep the properties window open for the next exercise.

- Avoid using headings as lead-ins for lists.
- Avoid overusing lists; using too many lists destroys their effectiveness.
- Use similar types of lists consistently in similar text in the same document.
- Use the "styles" function in your software to create vertical lists rather than constructing them manually.

Note: In-sentence lists could be called "horizontal" lists. All the other lists types presented here are "vertical" lists in that they format the items vertically rather than in paragraph format.

## Guidelines for Specific Types of Lists

It's difficult to state guidelines on choosing between the various kinds of lists, but here's a stab at it:

- Most importantly, use numbered lists for items that are in a required order (such as step-by-step instructions) or for items that must be referred to by item number. Use bulleted lists for items that are in no required order.
- With in-sentence lists, there are no conventions when to use letters (a), (b), and so on, as opposed to numbers (1), (2), and so on. If you are in a numbered list and need a sublist, use lowercase letters, to contrast with the numbers. Otherwise, there seem to be no widely agreed-upon guidelines—just be consistent!
- Use vertical lists as opposed to in-sentence lists when you want the emphasis provided by the vertical presentation. In-sentence lists provide only minimal emphasis; vertical lists provide much more.
- Within an individual report, use in-sentence lists and vertical lists consistently for similar situations. For example, if you have topic overviews for each section of a report, use in-sentence or vertical lists for the overview—but don't mix them for that particular use.

## Common Problems with Lists

Problems with lists usually include the following:

- Mix-up between numbered and bulleted lists
- Lack of parallel phrasing in the list items
- Use of single parentheses on the list-item number or letter
- Run-over lines not aligned with the text of list items
- Lack of a strong lead-in sentence introducing list items, and lack of a colon to punctuate lead-ins
- Inconsistent caps style in list items
- Unnecessary punctuation of list items
- Inconsistent use of lists in similar text
- Lists that have too many items and need to be subdivided or consolidated

## Format for Lists

Use the following for specific details on the capitalization, typography (bold, underlining, different fonts, different types sizes), and spacing for each type of list.

### In-sentence lists

Use these guidelines for in-sentence lists:

1. Use a colon to introduce the list items *only* if a complete sentence precedes the list. In this problem version, the colon breaks right into the middle of a sentence (how dare it!):

Example

<b>Problem:</b>	For this project, you need: tape, scissors, and white-out.
<b>Revision:</b>	For this project, you need tape, scissors, and white-out.

- Use both opening and closing parentheses on the list item numbers or letters: (a) item, (b) item, etc.
- Use either regular Arabic numbers or lowercase letters within the parentheses, but use them consistently. (Do not punctuate either with periods.) Use lowercase for the text of in-sentence lists items, except when regular capitalization rules require caps.
- Punctuate the in-sentence list items with commas if they are not complete sentences; punctuate with semicolons if they are complete sentences.
- Use the same spacing for in-sentence lists as in regular non-list text.
- Make the in-sentence list occur at the *end* of the sentence. *Never* place an in-sentence list introduced by a colon anywhere but at the end of the sentence, as in this example:

Example

<b>Problem:</b>	The following items: tape, scissors, and white-out are needed for this project.
<b>Revision:</b>	The following items are needed for this project: tape, scissors, and white-out.

The purpose of the *How to Collect Minerals Guide* is to get you started without overwhelming you with too much information. You can begin mineral collecting after you have learned (1) how to identify the difference between minerals and rocks, (2) how to select mineral collecting tools, (3) how to identify different types of minerals, (4) how to identify a good mineral-collecting location, and (5) how to collect minerals.

*No colon after "learned"—the sentence is completed by the list items.*

*Both sides of the parenthesis are used.*

*List items are parallel in phrasing. (They could have been "identifying...", "selecting...", and so on.)*

## Simple vertical lists

Use these guidelines for simple vertical lists:

1. Introduce the list with a lead-in phrase or clause (the lead-in need not be a complete sentence; the list items can complete the grammar started by the lead-in). Punctuate the lead-in with a colon.
2. Use simple vertical lists when the list items do not need to be emphasized and are listed vertically merely for ease of reading.
3. Use sentence-style capitalization on list items.
4. Begin run-over lines under the text of the list item, not the regular left margin. This format is called the *hanging-indent* style.
5. Use the equivalent of a blank line above and below vertical lists.
6. Either start list items flush left or indent them no more than half an inch.
7. Use "compact" list format if you have just a few list items only a single line each. In the compact format, there is no vertical space between list items. Use a "loose" format—vertical space between list items—if the list items are multiple lines long.
8. Punctuate list items only if they are complete sentences or verb phrases that complete the sentence begun by the lead-in (and use periods in these two cases).
9. Watch out for lists with more than 6 or 8 list items; for long lists, look for ways to subdivide or consolidate.
10. When possible, omit articles (*a, an, the*) from the beginning of non-sentence list items.

Now that you know the three types of rocks to look for, it's time to gather or purchase the necessary tools:

Collecting bag  
Gloves  
Handheld rock pick  
Hand trowel  
Hard hat  
Safety goggles  
Rock chisel

*Lead-in to the list punctuated with a colon*

*No bullets—Items require no emphasis*

## Bulleted lists

Use these guidelines for bulleted lists:

1. Introduce the list with a lead-in phrase or clause (the lead-in need not be a complete sentence; the list items can complete the grammar started by the lead-in). Punctuate the lead-in with a colon.
2. Use bulleted lists when the list items are in no necessary order but you want to emphasize the items in the list.
3. Use asterisks or hyphens if you have no access to an actual bullet. Use your software's list styles for these vertical lists.
4. Use sentence-style capitalization on list items.
5. Begin run-over lines under the text of the list item, not the bullet. This format is called the *hanging-indent* style.
6. Use 0.25 inches for the hanging-indent (between the bullet and the text of the list item).
7. Use the equivalent of a blank line above and below vertical lists.
8. Either start list items flush left or indent them no more than half an inch.
9. Use "compact" list format if you have just a few list items only a single line each. In the compact format, there is no vertical space between list items. Use a "loose" format—vertical space between list items—if the list items are multiple lines long.
10. If you have sublist items in a bulleted list, use a less prominent symbol for a bullet (such as a dash or clear disc), and indent the sublist items to the *text* of the higher-level list items. (It is certainly possible to have subnumbered items within a bulleted list, in which case indent them the same as subbulleted items.)
11. Punctuate bulleted list items only if they are complete sentences or verb phrases that complete the sentence begun by the lead-in (and use periods in these two cases).
12. Watch out for bulleted lists with more than 6 or 8 list items; for long bulleted lists, look for ways to subdivide or consolidate.
13. Avoid single-item lists. It's just like traditional outlines: if you have a 1 or an a, you need a 2 or a b.
14. When possible, omit articles (*a, an, the*) from the beginning of list items.

Two of the utility-scale wind turbines sponsored by DOE are commercially available:

- Advanced Wind Turbines AWT-26
- Zoned Systems Z-40.
- New World Power Technology Company
- New World Grid Power
- Flowind Corporation

*Lead-in to the list punctuated with a colon*

*Vertical space between regular text and the list*

*No punctuation on list items unless they are complete sentences*

## Numbered lists

Use these guidelines for numbered lists:

1. Introduce the list with a lead-in phrase or clause (the lead-in need not be a complete sentence; the list items can complete the grammar started by the lead-in). Punctuate the lead-in with a colon.
2. Use numbered lists when the list items are in a required order (for example, chronological) or must be referenced from somewhere else in the text.
3. Type the number followed by a period; do not use parentheses on the number. Use your software's list styles for these vertical lists.
4. Use sentence-style capitalization on list items.
5. Use "compact" list format if you have just a few list items only a single line each. In the compact format, there is no vertical space between list items. Use a "loose" format—vertical space between list items—if the list items are multiple lines long.
6. Begin run-over lines under the text of the list item, not the number. This format is called the *hanging-indent* style.
7. Use 0.25 inches for the hanging-indent (between the number and the text of the list item).
8. Use the equivalent of a blank line above and below vertical lists.
9. Either start list items flush left or indent them no more than half an inch.
10. If you have sublist items in a numbered list, use lowercase letters, and indent the sublist items to the *text* of the higher-level list items. (It is certainly possible to have subbullet items within a numbered list, in which case indent them the same as subnumbered items.)
11. If you have sublist items, use a less prominent symbol for a bullet (such as a dash or clear disc) or a lowercase letter for subnumbered items, and indent the sublist items to the *text* of the higher-level list items.
12. Punctuate numbered list items only if they are complete sentences or verb phrases that complete the sentence begun by the lead-in (and use periods in these two cases).
13. Watch out for numbered lists with more than 8 or 10 list items; for long numbered lists, look for ways to subdivide or consolidate.
14. Avoid single-item lists. If you have a 1 or an a, you need a 2 or a b.
15. When possible, omit articles (*a*, *an*, *the*) from the beginning of list items.

### Beginning a Basic Scan

Lead-in to the list punctuated with a colon

After accepting the default options for ScanDisk, begin your scan by doing the following:

1. Select the drive you want to check for errors by clicking once on the drive.
2. Select the type of test you want to run.
3. Click the **Start** button.

ScanDisk will begin checking your hard drive for errors and upon completion will display the results of your hard drive scan.

Vertical space above and below the list

List items end with periods; they are complete sentences

**ScanDisk Results - (C:)**

ScanDisk found errors on this drive and fixed them all.

6,237,052 KB total disk space  
0 bytes in bad sectors  
6,049,792 bytes in 1,299 folders  
9,560,064 bytes in 220 hidden files  
2,544,607,232 bytes in 23,120 user files  
3,826,524,160 bytes available on disk  
4,096 bytes in each allocation unit  
1,559,263 total allocation units on disk  
934,210 available allocation units

Close

## Two-column lists

Use these guidelines for two-column lists:

1. Use two-column lists when you have a series of paired items, for example, terms and definitions.
2. Introduce the list with a lead-in sentence that is a complete sentence. Punctuate the lead-in sentence with a colon.
3. Column headings are optional; if used, align them to the left margin of the text of the columns.
4. Either start list items flush left or indent them no more than half an inch.
5. Use "compact" list format if you have just a few list items only a single line each. In the compact format, there is no vertical space between list items. Use a "loose" format—vertical space between list items—if the list items are multiple lines long.
6. Use sentence-style capitalization for both columns.
7. Punctuate items in the columns only if they are complete sentences.
8. Left-align the items in both columns.
9. When possible, omit articles (*a*, *an*, *the*) from the beginning of list items.

Note: The best way to create a two-column list is to use a table and hide the grid lines. If you use tabs between the columns, you are in for a mess if the text changes at all.

**VTS components.** For professional-quality video teleconferencing systems (VTS), a number of equipment components, including the following, are usually required:

<b>Broadband modem</b>	Connects an office to a high-speed internet service. A standard modem is insufficient; a great deal of bandwidth is required for a VTC.
<b>Router</b>	Manages the connectivity and traffic that occurs when VTC participants in an office connect to a broadband modem.
<b>Webcam</b>	Records the video signal that is sent to participants during a live session. Incorporates autofocus capability.
<b>CODEC</b>	Translates video and audio signals for transmission.
<b>Monitors</b>	High-quality displays are necessary for conducting professional-level conferencing.
<b>Speakers and microphones</b>	Good quality speakers and microphones are necessary, both for room-based systems and personal computers.

*Lead-in to the list punctuated with a colon*

*Secretly, this two-column list is a table with the grid lines turned off.*

*The two-column items are a mix of predicates and complete sentences—all starting with an initial capital and punctuated with a period.*

## Lists with run-in headings

One last little variation on lists is the vertical list with run-in headings or labels at the beginning of the items. This format is used extensively in this book. It's like another way of doing a two-column list.

You can use bold or italics for the actual run-in heading (italics is used in the figure).

### **Stem Cell Development**

Stem cells are simply "primitive" cells occurring in an organism's early developmental stages that give rise to other types of cells. There are three primary stem cell types:

- *Totipotent* – cells with the potential to form a complete organism or differentiate into any of its tissues or cells
- *Pluripotent* – cells with the potential to form many types of cells but not all needed for fetal development
- *Multipotent* – cells with the potential to develop into specialized cell types

*Lead-in to the list punctuated with a colon*

*Labels for the list items can be bold; a period or semicolon can be used to punctuate the labels.*

## Nested lists

A *nested* list contains two or more level of list items. Nested lists can contain every combination of list type: numbered list items (123...) with lowercase-letter sublist items (abc...), filled-disc bulleted list items with clear-disc or hyphenated sublist items; and other combinations of these.



7. Optionally, click **Delivery Options** and select one of the following delivery options:

- Define the importance of a message
- Confirm delivery of a message
- Change the delivery priority of a mail message
- Prevent copying or forwarding of a mail message
- Spell check the message
- Prevent receipt of out-of-office messages from others
- Add a mood stamp to a mail message

8. Click **Send**.

Notice the the bullets align to the text of the parent item (the numbered items).

This is a *bulleted* sublist because the items are in no necessary order.

Now here's another example of a nested list:

**Basic manicure steps.** Once you have these items at your workstation, you are ready to begin the manicure by following these steps:

*Note:* Unlike professional nail salons, MMD specialists do not cut the client's cuticles during the manicure process. MMD abstains from this process for health and safety reasons, as it can cause the client pain as well as run the risk of infection or inflammation.

1. Remove old polish:

- a. Check to see if your client has any old polish on her nails; you need to remove this polish before you can begin the manicure process.
- b. Pour about 7 drops of acetone (from the acetone bottle) onto a cotton ball.
- c. Beginning at the base of the nail (the part that is farthest from you and closest to the client), press down with the cotton ball and pull it down to the tip of the nail. Repeat until you remove all polish from the nail

Now that you are an expert on the types of lists you can use in your documents, check out this tutorial video for using features in your word processing program to create lists that are attractive and formatted appropriately.

Lists in MS Word