

ezBriefs Quick Reference Guide

A Step-by-Step Guide to Creating a Table of Authorities

1. Select Style Manual

On the top left of the ezBriefs ribbon, there is a dropdown selector that contains the various style manuals you can choose from. Depending on the jurisdiction and court you are filing in, you will choose either a state for State Court, or Bluebook for Federal Court.

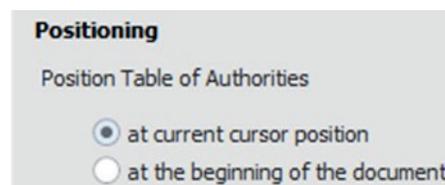


2. Settings & TOA Location

Here you can choose where the TOA is built, and options for the TOA's format.



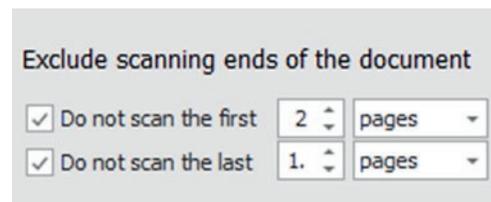
A. Click the Settings button, then select the Table of Authorities tab. To set the TOA build location, under Positioning, choose “at current cursor position.”



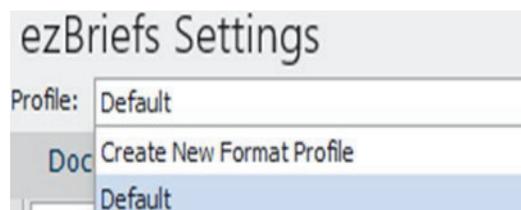
B. To include a Title heading, under Title, check the box for “Include Title”, and in the Title text box below, you can set the text you want. To not use a Title, just uncheck the box.



C. To exclude pages of the document from the Find scanning step, choose the Document Options tab, and check the boxes for Do Not Scan the First, and set the page value to 1 or greater. You can set similar values for the end of the document using the Do Not Scan the Last dropdown below it. Once you set the values, click the Apply Changes button, on the upper right of the dialog.

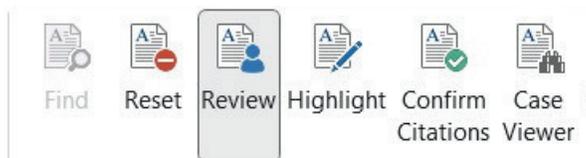


D. You can also save these settings as a Profile by clicking the dropdown menu next to Profile, and choosing Create New Format Profile. From there, give it a name and then use it on future TOAs by selecting it and then clicking Apply Changes.



3. Finding Authorities

When you click the Find button, the program scans the document for legal citations and inserts TA fields to mark them for future TOA generation.



4. Review (Found Authority Panel)

Once the find process is completed, the Found Authority panel will render on the right side of the page. This panel contains the list of all authorities and displays them based on their type (such as cases, statutes, rules) in the group or category they are assigned to. Clicking Review toggles the Found Authority panel open or closed.



5. Add/Modify Authority

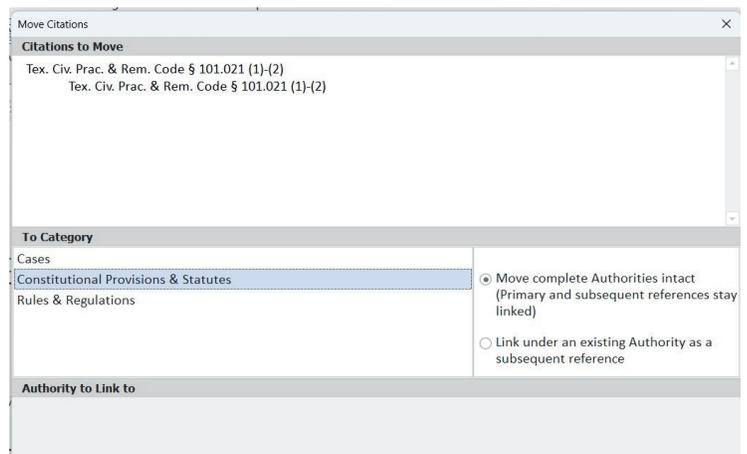
To add a citation to the TOA after the initial Find, you first highlight it in the text of the document, and then click the Add/Modify Authority button on the Found Authority Panel.

6. Edit TOA Entry

In the Found Authority panel, double click on any citation you want to change, and the Edit TOA Entry Text dialog will appear, allowing you to make changes to the final TOA citation. These edits will only appear in the TOA, not in the document itself.

7. Moving Authorities

In the Found Authority panel, check the box next to a citation you want to move to a different category or group. Next, click the Move button. In the middle of the dialog box that appears, choose the category you want to move the citation to. If the citation is an id or short cite you would like to link under a primary authority, select “Link under an existing Authority...” To move the authority, click the Apply button.

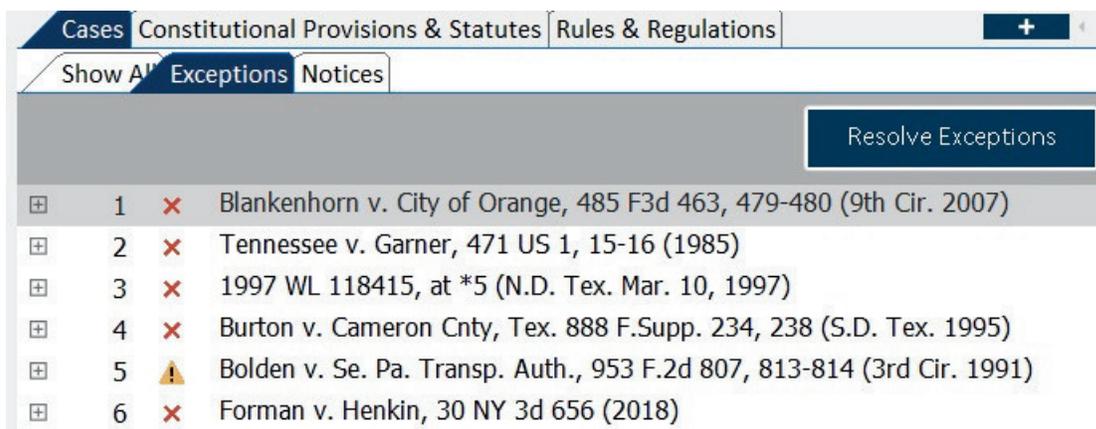


8. Delete

To remove a citation from the TOA, check the box next to it in the Found Authority panel, then click the Delete button. A second dialog will appear, and you will click the Yes button, to confirm the permanent deletion of the citation from the TOA.

9. Confirm Citations

You can click Confirm Citations on the ezBriefs ribbon and a Progress Report will display the number of authorities that were recognized, and display the number of exceptions (errors) as well as any citations that Benchly was unable to validate (notices). You can then click on Resolve Exceptions to see problems and decide to fix or ignore them. Fixing them updates the citation in the body and the TOA.

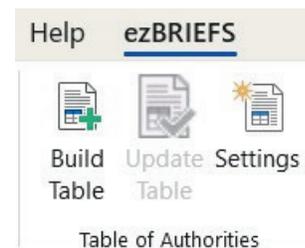


10. Build Table

This builds the final TOA. If “at the current cursor position” is selected in the Settings (step 2A), you should check that the cursor is at the correct starting point in the document for the Table of Authorities, prior to clicking Build Table.

11. Update Table

If your Table of Authorities needs to be updated due to newly added or removed authorities, simply click the Update Table button on the ribbon to rebuild it. Individual authorities can be added using the Add/Modify Authority button (step 5), however if your document has dozens of new authorities, it's best to Reset and run Find again for the most accurate results.



12. Reset

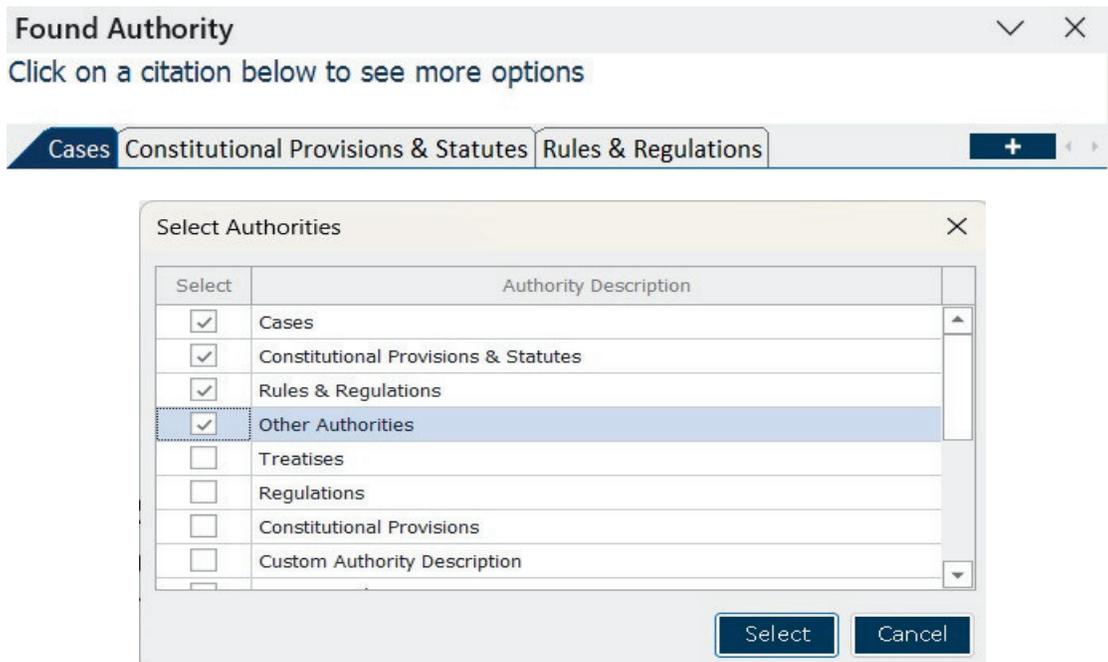
If you need to remove all previous TOA data, and the existing TOA itself, this button will put the document back to before ezBriefs was run. It can also be used on documents that are pasted together from multiple sources to clear existing native TA entries.



Frequently Asked Questions

1. How do I add a category or group to the TOA, such as Other Authorities?

A. In the Found Authority Panel, on the upper right side, there is a plus sign (+) button. Click on the + button and the Select Authorities dialog will appear. In the dialog, check the box next to any category you want to have appear in the TOA. Click the Select button to apply this to the TOA.



2. How do I change the name of a category or group in the TOA?

A. Click the + in the top-right of the Found Authorities panel to open the Select Authorities panel. Check the category box, double-click the name, edit the text, and click Select to save your changes.

3. How do I remove a category or group from the TOA?

A. In the list of Categories, uncheck any that you do not want to appear in the final TOA. Then click the Select button at the bottom of the dialog. Simply recheck the box with the category name to have the category and its authorities reappear.

4. How can I resize the Found Authority Panel so all buttons and categories will show?

A. To resize the panel, click Resize from the top-right menu and move your cursor left, or hover near the panel's edge until the two-way arrow appears and drag left. Hidden buttons and categories will appear as space allows.

5. Can I move the Found Authority Panel to another screen or area of my screen?

A. Yes, by placing your cursor on or near "Found Authority" at the top of the panel, a move cursor (4 arrows) will appear. Click and hold to drag the panel wherever you'd like, including outside of Word.