

# Using WordPerfect's Legal Tools - Shortcut Steps

## Part 1: Creating the Table of Contents

### 1. Set up the Document First

Create 2 blank pages between the Title Page and the first page of brief:

Steps

- Put the cursor at the bottom of the title page;
- Hold the Control key down;
- Tap the Enter key twice.

Result> There should now be 2 blank pages created in the document.  
One will be for the Table of Contents, the other for Table of Authorities

### 2. Set up WordPerfect Tool Bar to Help You

Turn on the Legal toolbar

Steps

- Right-click on the top toolbar (where the little icons are located);
- Choose "Legal" from the list.

Result> A secondary toolbar should now be open.

### 3. Turn on Reveal Codes

Steps

- Hold down the Alt key;
- Tap the F3 key

Result> A codes window should now be open at the bottom of the document screen so you can see what text to select (don't grab codes when you select text).

### 3. Mark Text to go Into a Table of Contents

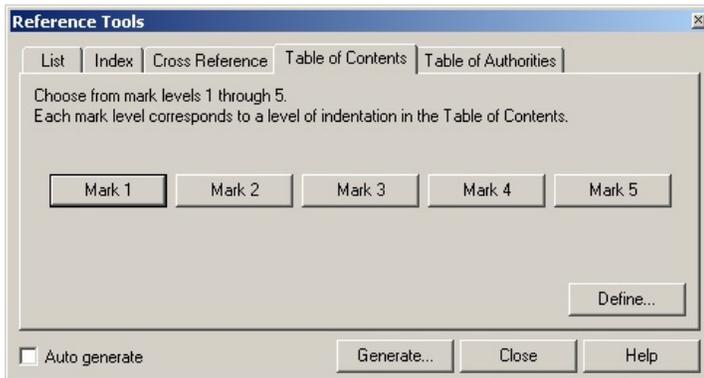
Mark the entries (text headings) for the table

Steps

- Select the text heading with your cursor & mouse;
- Click the little open-book-with-hand icon



- on the Legal toolbar to open this reference box:



- Choose the appropriate level of indentation for the table;
  - Choose 1 thru 5, 1 being the first level and 5 being the last;

Level examples:

- I. This is Level 1
  - A. This is Level 2
    - 1. This is Level 3
      - a. This is Level 4
        - (1) This is Level 5

- Continue selecting all the headings/text + select appropriate level for each;
- When done, choose Close at bottom of box

Result> The document is now marked for the Table. Even if subsequent changes are made to the pages with additional new pages or subtracted pages, the table will generate correctly with pages numbers automatically updating. Cool, huh?

#### 4. Create the Table

Steps to create Table title page

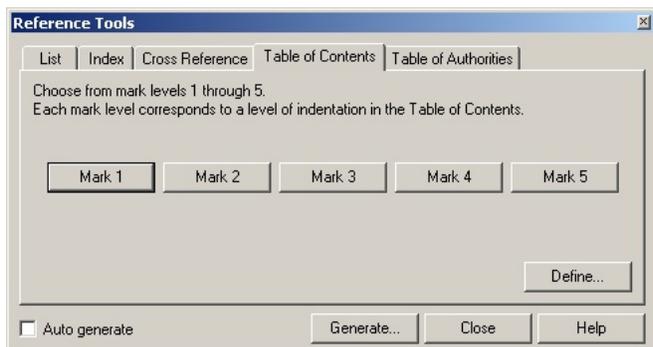
- Go to the first created blank page (if you forgot this step, create one now)
- Type “Table of Contents” at the top
- Select “Table of Contents” wording with the cursor
- Hold down the Shift key
- Tap the F7 key

Result> The words should now be perfectly centered at the top of page.

Steps to create the word “Page” to appear at the far-right column

- Put your cursor in the first line where you want this to go and tab over to the placement you want
  - Type the word “Page”
  - Click the Enter button
- Result> The page is now ready for the contents to drop in.

### Steps to create the Table outline



- Click the little open-book-with-hand icon on the Legal toolbar again;
- Click on the “DEFINE” button in the box (located lower right side of box);
- In the “Define” box, Type the highest number of levels you used in the document and enter it on the first line;

- Choose “OK”;
- Choose “Generate”

Result> All of the selected text entries should be automatically put in with corresponding page numbers and dot leaders. All you should need to do is a little bit of clean up on the table if there’s anything that looks strange.

## 5. Uh-oh the Page Numbers are Wrong!

You want the Table of Contents and the Table of Authorities to have different page numbering, and you want the brief to start on page number 1.

### Steps

- At the very top of the Table of Contents page, put the cursor before the words “Table of Contents”
- From the top Menu Bar click on Format > select Page > select Numbering
- Choose the numbering style for the Table pages (usually this is = i)
- Click OK
- Go back to toolbox and click the “Generate” button again.

Result > All pages from the Table of Contents page onward will now bear the numbering you just chose. If any pages are added or subtracted in the future, the page numbers will only re-set in the Table if you re-do the “Generate” button.

Fix the brief pages back to normal numbers next.

#### Steps

- At the very top of the briefing-page 1, put the cursor before any words;
- From the top Menu Bar click on Format > select Page > select Numbering
- This time choose the numeric numbers style for the brief (usually this is = 1)
- AND while still in this box “Set Value” = 1
- AND while still in this box, select “Let number change as pages are added or deleted”

Result > Go back and check that the Table pages are still numbered “i” “ii” “iii” etc.  
Check that the Brief pages are now numbered starting with 1, 2, 3, etc.  
If anything is wrong, drag the numbering >>Pg Num Pos<< code out of the reveal codes box and start over.

Now you are ready to create the Table of Authorities.

## Part 2: Creating the Table of Authorities

### 1. Mark All Citations First

The first step in creating this Table is to mark every single authority cited in the document.

### 2. Set up WordPerfect Tool Bar to Help You

Turn on the Legal toolbar (unless it is already open from creating the TOC)

#### Steps

- Right-click on the top toolbar (where the little icons are located);
- Choose “Legal” from the list.

Result> A secondary toolbar should now be open.

### 3. Turn on Reveal Codes

#### Steps

- Hold down the Alt key;
- Tap the F3 key

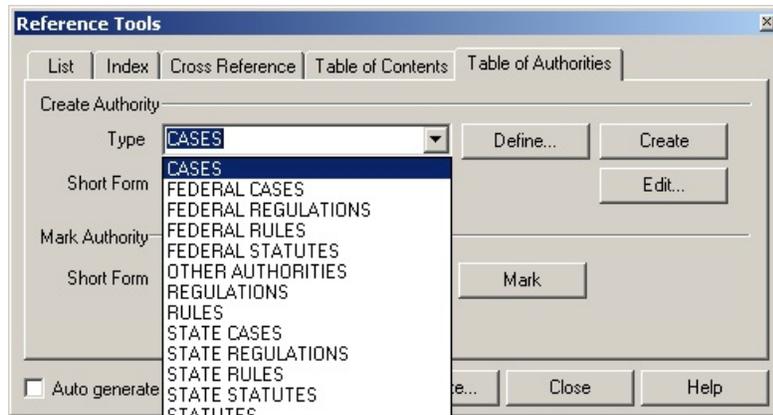
Result> A codes window should now be open at the bottom of the document screen so you can see what text to select (don’t grab codes when you mark text).

#### 4. Mark Authorities to go Into a Table of Authorities

Mark the first citation/authority for the table.

Steps

- Select the citation with your cursor & mouse;
- Click the little Balance Scales icon on the Legal toolbar to open this reference box:



Example: *People v. Wende* (1979) 25 Cal.3d 436 [selected citation]

- Select “Type” from the pull-down list or create your own such as: “MISC.”;
- Click your cursor in the “Short Form” box under “Type”;
- Edit the citation to make it short  
Example: **Wende**
- Choose “Create” button – DON’T freak out!! The document is okay.

>Result: the citation you’ve marked will pop up in a second WP window.  
Here you can edit the citation for font style, add returns, etc.  
The new window will look like this:

- When you are done, click the “Close” button.
- In the Reveal Codes window at the bottom, notice that a set of codes **ToA: Full Form** has been inserted around the citation that was marked.

#### 5. Continue Marking All The Others

Now it is just a matter of going through the document and marking every citation cited. Look at the Basic Citation Formats laminate for examples of “Types” you might see.

**Steps if this is a NEW authority to add to the table:**

- Select the next citation;
- Click on the Balance icon

closed.;

if your Legal Tool bar has been 

- Select “Type” for this next entry;
- Click in the “Short Form” box;
- Edit to make it shortened;
- Edit the entry in the new window;
- Continue marking to end of document;
- Click “Close” to close the window.

**Steps if this is a REPEAT authority to add to the table:**

- Select the next citation;
- Click on the Balance icon

closed.;

if your Legal Tool bar has been 

- Select “Type” for this entry;
- NEW STEP: Click in the “Short Form” box next to “Mark” button;
- Select the shorten name from the pull-down list;
- Click on the “Mark” button;
- Continue marking to end of document.
- Click “Close” to close the window.

Done marking?

6. Generating the Table of Authorities

Steps to create Table title page

- Go to the second created blank page (if you forgot this step, create one now)
- Type “Table of Authorities” at the top
- Select “Table of Authorities” wording with the cursor
- Hold down the Shift key
- Tap the F7 key

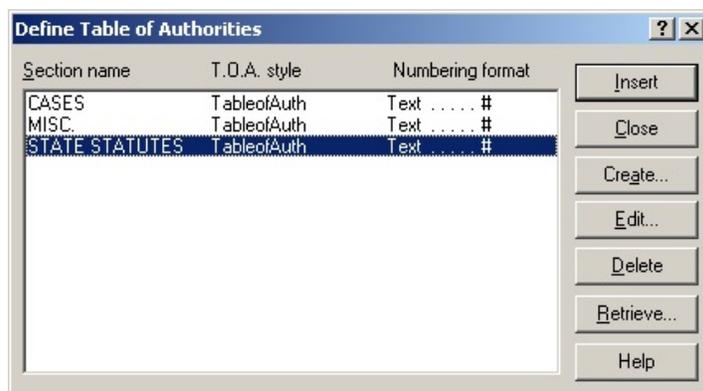
Result> The words should now be perfectly centered at the top of page.

Steps to create the word “Page” to appear at the far-right column

- Put your cursor in the first line where you want this to go and tab over to the placement you want
  - Type the word “Page”
  - Click the Enter button
  - Along the left-hand side, list as many categories as you can think of (don’t worry you can edit to add more later) Example: FEDERAL CASES, etc.
- Result> The page is now ready for the contents to drop in.

Steps to create the Table outline:

- Click the little Balance-scales icon on the Legal toolbar again;
- Go to the document/Table of Authorities page you created and put your cursor under CASES category.
- Go to the toolbox and select the “Type” category you want (each one drops in individually).
- Now click on the “DEFINE” button in the toolbox (located in the middle of box);
- Under the category in the Table the following text will appear:  
<< Table of Authorities will generate here >>
- Go back to the toolbox;
- Choose “Generate”



Result> All of the citations marked for that category should automatically dump in with corresponding page numbers and dot leaders. All you should need to do is a little bit of clean up on the table if there’s anything that looks strange.

Q: Did the citations generated go under the wrong heading? You have two choices, either delete them and go back to your toolbox and make sure the right category is chosen, OR change your heading and create another elsewhere on the page.

- Continue dropping in each category until you have listed them all in the Table.
- Scan the Table for more edits.