BENCHLY

ezBriefs 3.5 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.
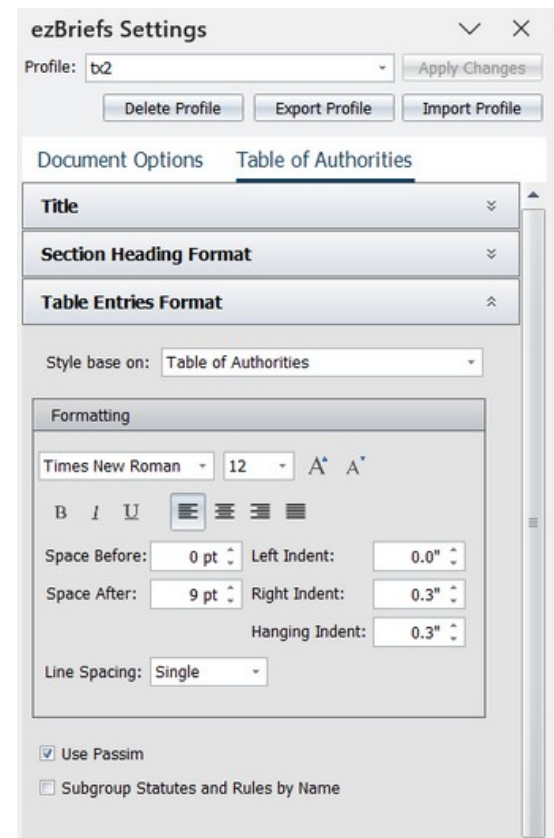
2. Settings

Here you can set the TOA formatting and set areas of the document to be excluded from the scan.

A. To set the font, size, and use of passim, choose the Table Entries Format under the Table of Authorities tab.

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 from scanning, go to the Document Options tab. Check Do Not Scan the First and enter a page value (1 or higher). To exclude pages at the end, use the Do Not Scan the Last dropdown. When finished, click Apply Changes in the upper right.

Save these settings as a Profile by clicking the dropdown next to Profile and selecting Create New Format Profile. Name the profile, then apply it to future TOAs by selecting it and clicking Apply Changes.
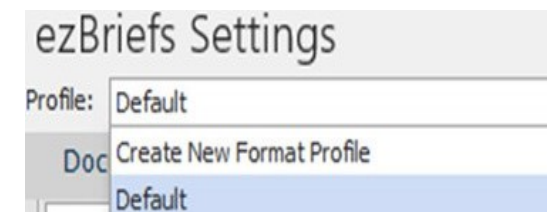
3. Finding Authorities

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, and the same workflow applies to the Settings and Case Viewer panes.


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 a citation you want to change, and the Edit TOA Entry Text dialog will appear. These edits will only appear in the TOA, not in the document itself. The Edit Authority dialog has two fields: the top field controls the case or statute title, and the bottom field controls the reporter text or statute section info.
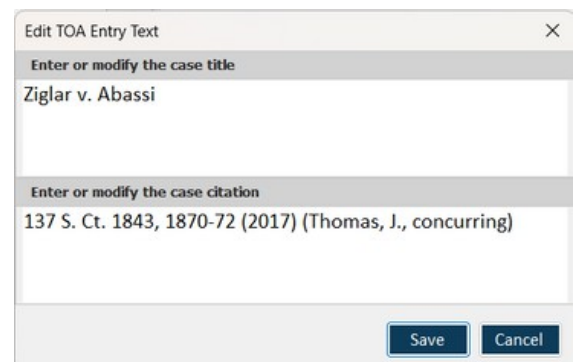
7. Moving Authorities

In the Found Authority panel, check the box next to a citation you want to move to a different category or group. Then click Move. In the dialog box that appears, select the category to which you want to move the citation. 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 Apply.
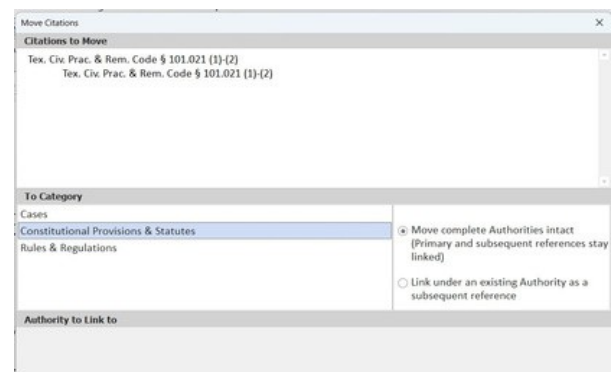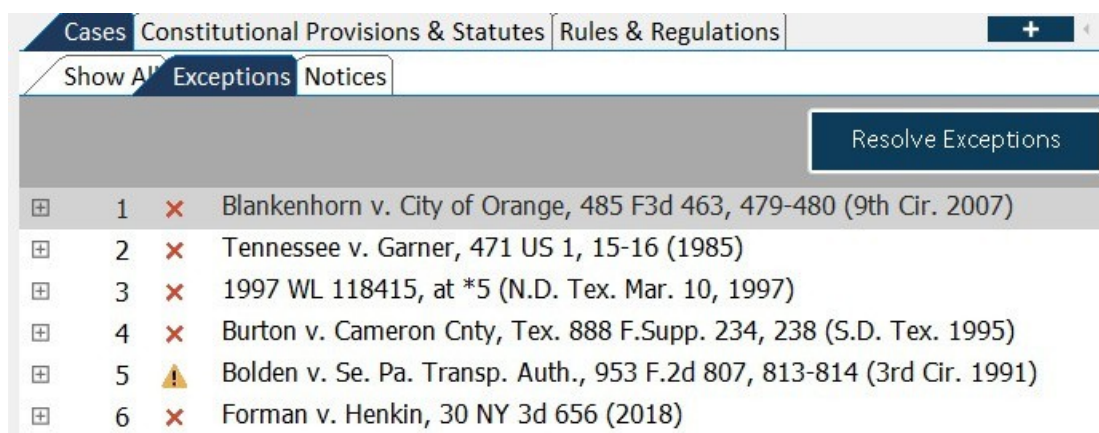
8. Delete

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.

Cases	Constitutional Provisions & Statutes	Rules & Regulations	+

Show All | Exceptions | Notices

Resolve Exceptions

⊞	1	✕	Blankenhorn v. City of Orange, 485 F3d 463, 479-480 (9th Cir. 2007)
⊞	2	✕	Tennessee v. Garner, 471 US 1, 15-16 (1985)
⊞	3	✕	1997 WL 118415, at *5 (N.D. Tex. Mar. 10, 1997)
⊞	4	✕	Burton v. Cameron Cnty, Tex. 888 F.Supp. 234, 238 (S.D. Tex. 1995)
⊞	5	⚠	Bolden v. Se. Pa. Transp. Auth., 953 F.2d 807, 813-814 (3rd Cir. 1991)
⊞	6	✕	Forman v. Henkin, 30 NY 3d 656 (2018)

10. Table of Authorities

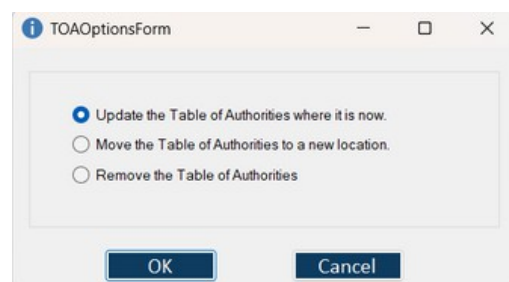Click Table of Authorities to build the final TOA.
The next dialog allows you to choose exactly where in the document to locate the TOA. The checkbox on the form allows you to turn on the paragraph markers when choosing the location.
Click the Set button to build the TOA.

Table Of Authorities   Settings

Table of Authorities

11. Update TOA

If you need to update the TOA, move it to another location in the document, or remove it from the document, those choices appear once a TOA is built, by clicking the Table of Authorities button again.

TOAOptionsForm — □ ✕

○ Update the Table of Authorities where it is now.
○ Move the Table of Authorities to a new location.
○ Remove the Table of Authorities

OK   Cancel

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.

Find   Reset   Review
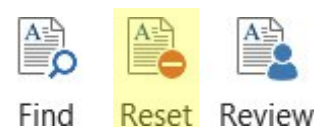
Frequently Asked Questions

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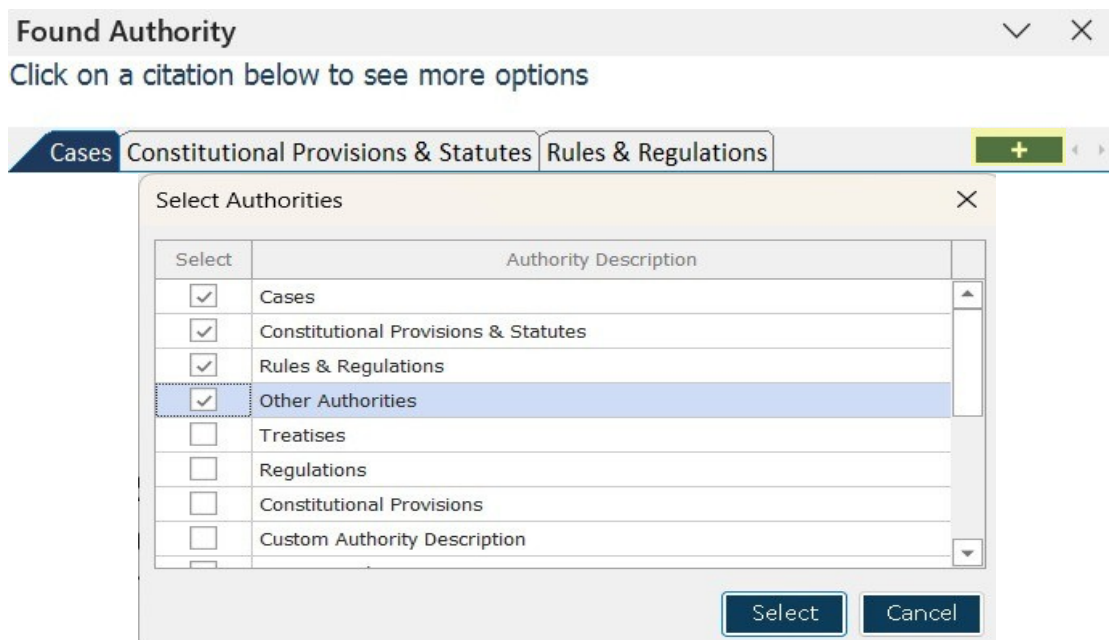
2. How do I change the name of a category or group in the TOA?

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.