INSTRUCTIONS FOR HOW TO BUILD A TABLE OF CONTENTS AND TABLE OF AUTHORITIES SO THE PAGE NUMBERS AUTOMATICALLY UPDATE IN COREL® WORDPERFECT®[1]

Table of Contents

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INTRODUCTION

The Fifth DCA now requires that all document pages "be consecutively numbered beginning from the cover page of the document and using only the Arabic numbering system, as in 1, 2, 3." (Fifth Dist., Local Rule, rule 8(b).) The cover page (including the cover page of a brief) should always show number 1. Additionally, briefs may no longer have different numbering systems (so no more numbering the table of contents and the table of authorities with roman numerals (i, ii, iii, iv)).

These instructions show how to create a table of contents and table of authorities in Corel® WordPerfect® (WordPerfect) that can automatically be updated. This will allow counsel to properly paginate the brief with Arabic numerals beginning on the cover page and automatically update the page numbers in the tables after the tables are built so that they are correct.

These instructions were created using WordPerfect X7.

Important Note: **When you generate your tables, make sure that you begin with the FINAL, PROOFREAD copy of your brief. The process will go much quicker and more smoothly if you do not need to make any changes to the brief after generating the tables.**

STEP 1:   INSERT PAGE NUMBERS IN THE BRIEF

Before you begin creating the table of contents and table of authorities, insert page numbers in the brief, beginning with page 1 on the cover page. The "1" must be displayed on the cover page.

In the menu at the top of the page, go to **Format**.
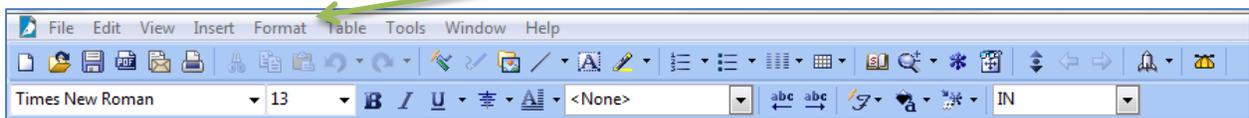
Go to **Page** in the dropdown menu and select **Numbering** in the menu that appears on the side.

You should see the **Select Page Numbering Format** window:
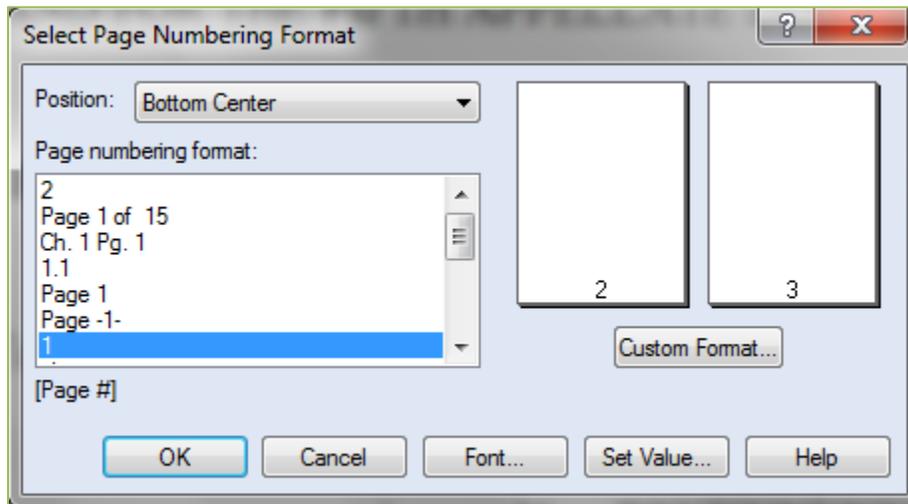
Select the page number style that you would like to insert. Click **OK**.

STEP 2:   MARK THE HEADINGS FOR THE TABLE OF CONTENTS

Begin by using the Headings feature in WordPerfect to mark every heading that should appear in the table of contents. This includes the headings for the table of contents, the table of authorities, all headings and subheadings in the substantive section of the brief, the word count certificate, and the proof of service. Instructions for completing this step in WordPerfect are available on CCAP's website here:
http://www.capcentral.org/procedures/truefiling/docs/wp_bookmark_instructions.pdf

STEP 3:   GENERATE THE TABLE OF CONTENTS

After you have marked each heading, go to the page in your brief that you set up for your table of contents. Place the curser where you want the table of contents to begin.
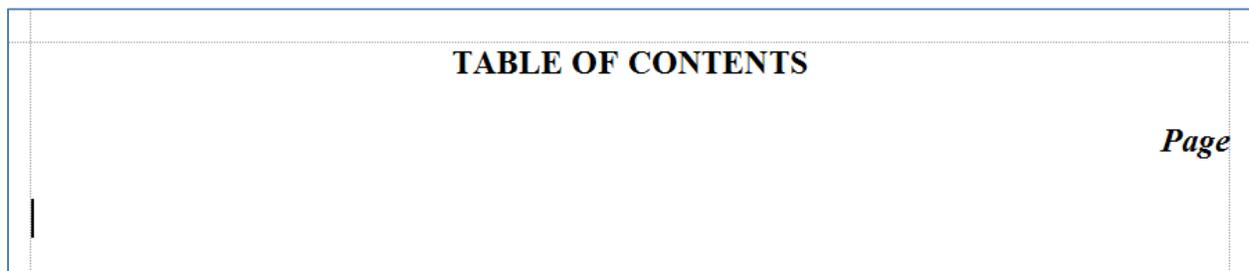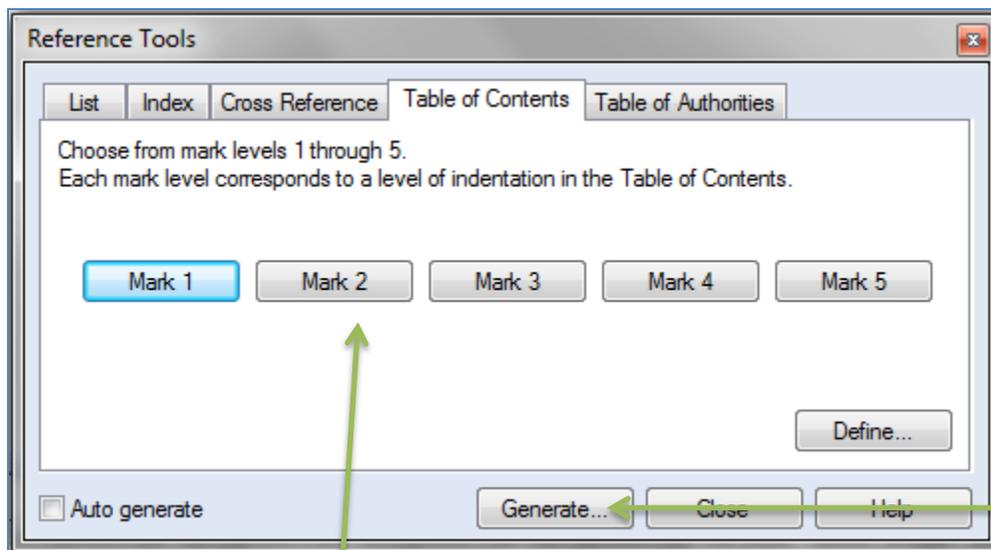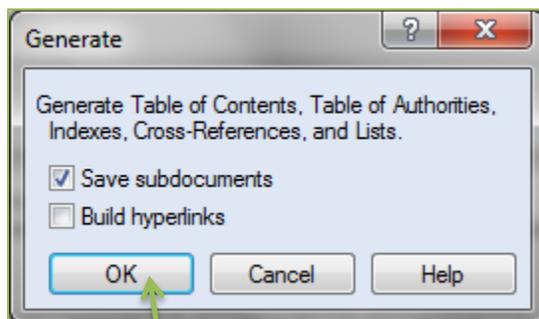
Go to **Tools** at the top of the page.

Select **Reference** from the dropdown menu, and then select **Table of Contents** from the menu that appears on the side.

You should see the following **Reference Tools** window:

Select how many levels you want marked for your table of contents. For example, if you marked your brief using Headings 1, 2, and 3, you will want to select Mark 3.

Once you have made your selection, click **Generate** at the bottom of the window. You should see the following window:
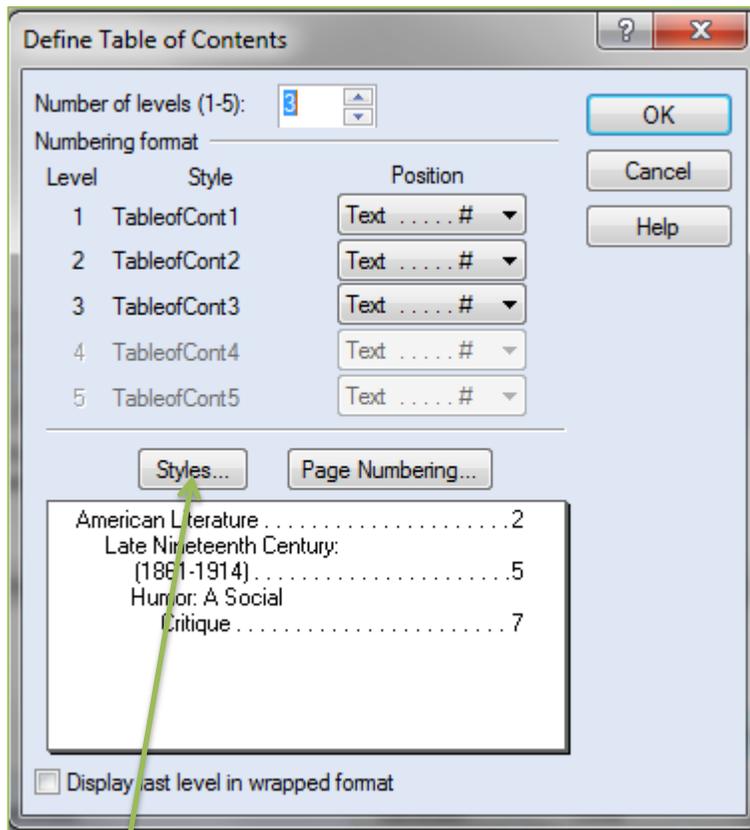

Click **OK**.

If you do not like the format of the table of contents, do the following:

- Undo the table you just generated by holding down the **Ctrl** and **Z** keys on your keyboard at the same time. Or go to **Edit** at the top of the page and select **Undo** from the dropdown menu.
- Follow the steps above to get to the **Reference Tools** window again.
- This time, click the **Define** button.
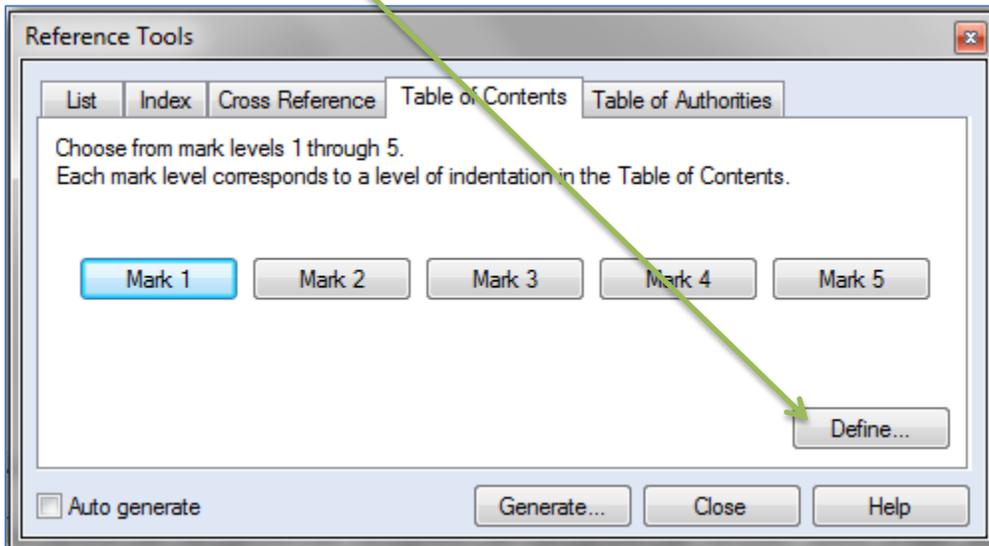
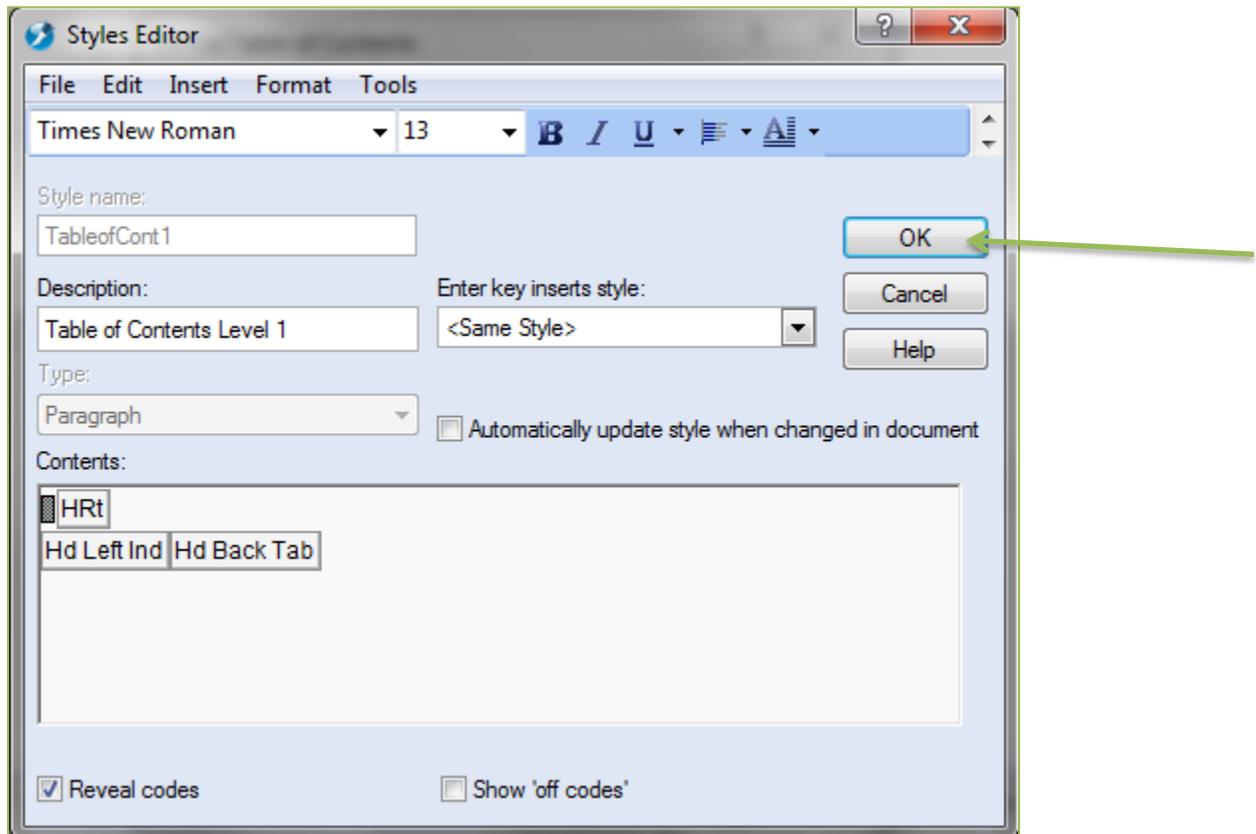- You should see the following **Define Table of Contents** window:

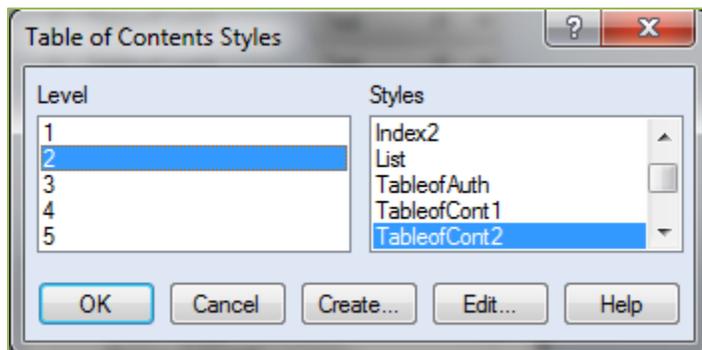Click on the **Styles** button. You should see the **Table of Contents Styles** window:
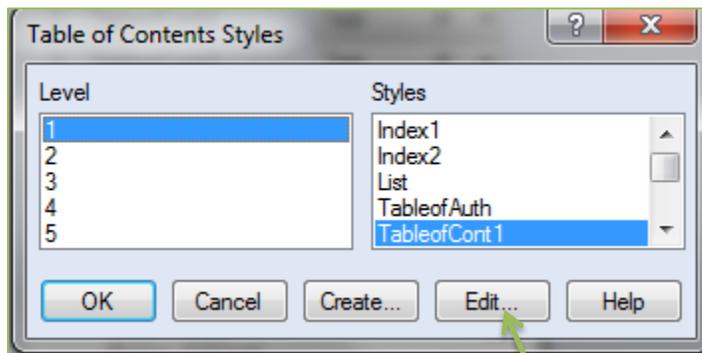
Level 1 should be selected. Click **Edit**.

You should see the **Styles Editor** window:

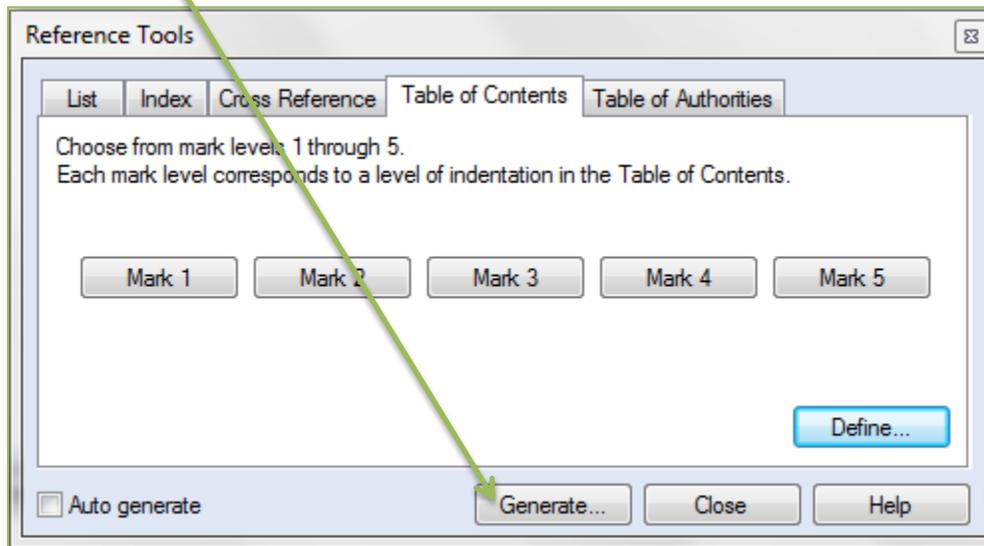Select the formatting (font, size, spacing, bold, italic, etc.) that you would like for Level 1 of your TOC. Click **OK**. You should return to the **Table of Contents Styles** window. Select Level 2 and repeat the steps.

When you are finished formatting all the TOC levels, click **OK** in the **Table of Contents Styles** window. You should return to the **Define Table of Contents** window. Click **OK**.

You will return to the **Reference Tools** window. Click **Generate**.

The table of contents will be generated:

TABLE OF CONTENTS

Page

Warning: There may be some formatting in the table of contents that you want to clean up. **DO NOT MAKE THESE CHANGES NOW. You are going to regenerate the table of contents later in the process (see Step 7 below) and you will lose the changes when the table is regenerated.**

If you plan to make any changes to the table of contents, you will want to determine whether any of the changes will alter how many pages the table of contents will be. If your table of contents will be longer after you make any necessary changes, insert any additional pages at this point before you move on to the table of authorities.

For more information on table of contents in WordPerfect, see The Table of Contents Feature in WordPerfect, Barry MacDonnell's Toolbox for WordPerfect, http://wptoolbox.com/tips/TOC.html.

STEP 4: **SETUP THE WORDPERFECT DOCUMENT FOR THE TABLE OF AUTHORITIES**

Next, you will setup the table of authorities page in your document. In our example brief, there are cases, statutes, and rules of court. Under the statutes section, there will be citations to the Government Code, Health and Safety Code, and Penal Code. You can setup the table of authorities by doing the following.
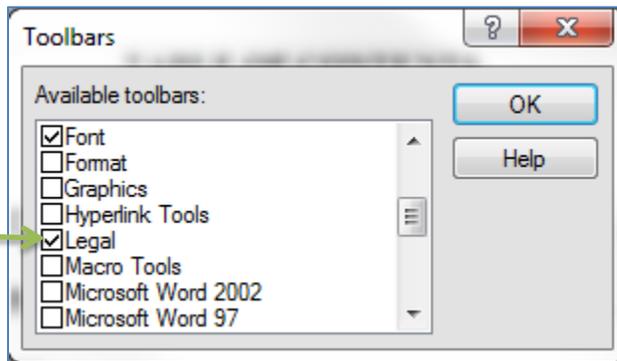
First, make sure the "Legal toolbar" is displayed at the top of the page. In WordPerfect X7, the Property toolbar looks like this:
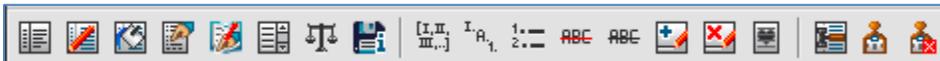
If you do not see this toolbar, click on **View** in the menu at the top of the page and select **Toolbars** from the dropdown menu.
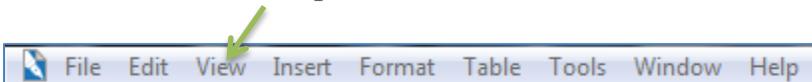
You should see the following window:

Check the box next to **Legal**. Then click **OK**.

You should now see the Legal toolbar displayed. You will use this toolbar later when you mark the citations to include in the table of authorities.

Second, go to the page that you set aside for your table of authorities:

TABLE OF AUTHORITIES	
	Page(s)

Type the different categories that you will have in your table of authorities. The brief for this example has categories for cases, statutes (with subcategories for the Government Code, Health and Safety Code, and Penal Code), and rules of court:

And Penal Code

TABLE OF AUTHORITIES

Page(s)

CASES

STATUTES

Government Code

Health and Safety Code

Penal Code

CALIFORNIA RULES OF COURT

Now you are ready to begin working with WordPerfect's Table of Authorities feature. Place your curser under CASES. Now go to **Tools** in the menu at the top of the page:
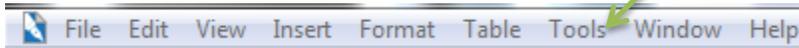
Go down to **Reference** in the dropdown menu and select **Table of Authorities** from the menu that appears on the right-hand side. You should see the following **Reference Tools** window, with the **Table of Authorities** tab selected:
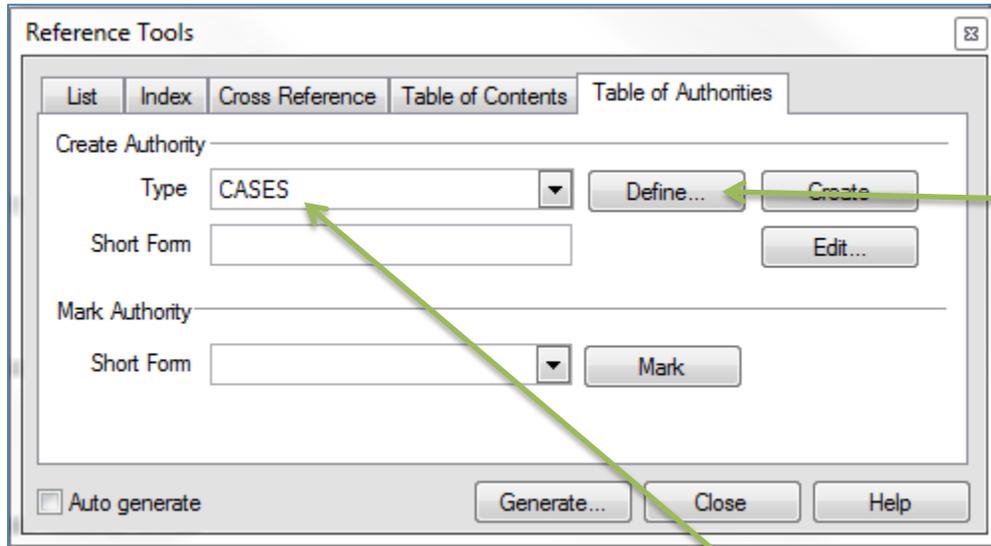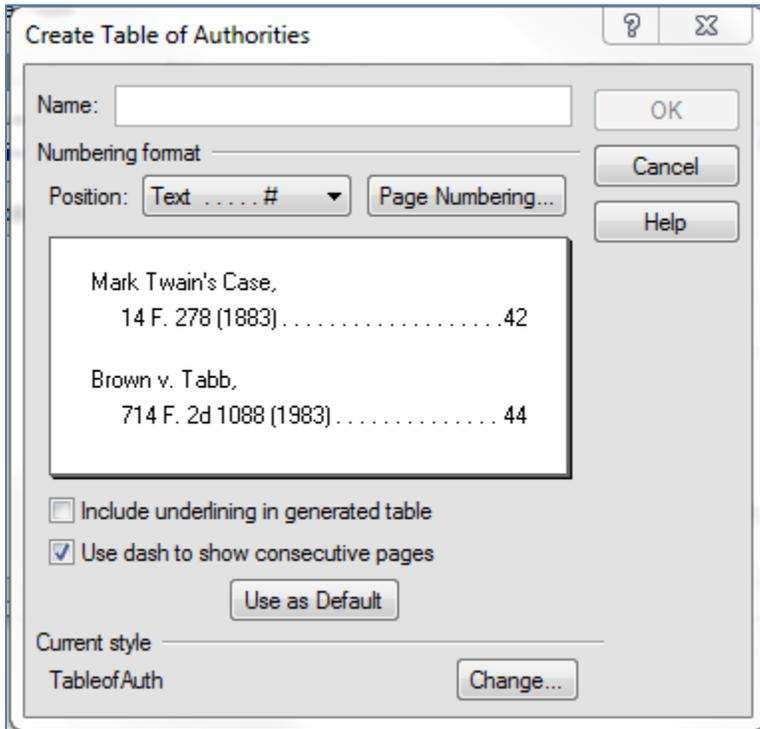

You should see that CASES is already entered in the **Type** box at the top of the page. Click **Define**. You should see the following **Define Table of Authorities** window:
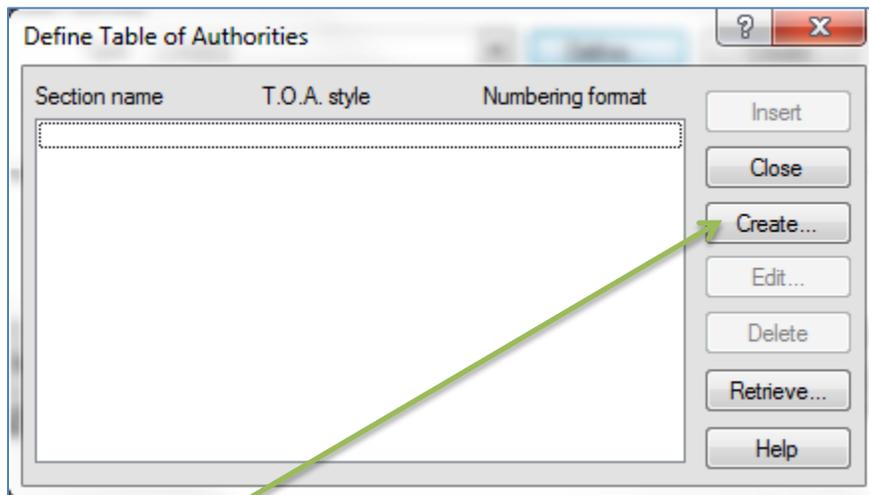
Click **Create**.

You should see the following **Create Table of Authorities** window:

In the **Name** box at the top, type CASES. Click **OK**.
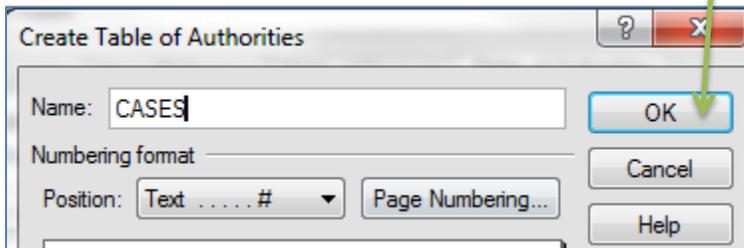
The window will close and you will see the **Define Tables of Authorities** window again. This time CASES will be listed in the window.
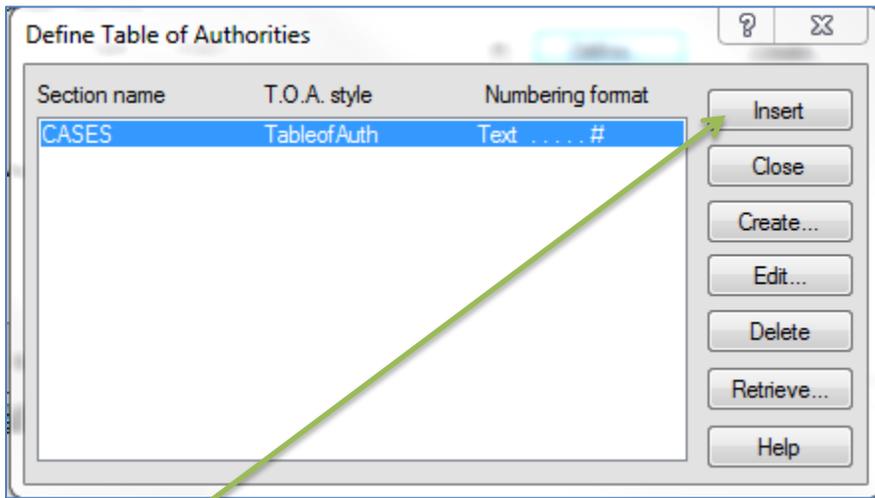
Click **Insert**. The window will close and you will see where the CASES section of the table of authorities will generate in your document.

The reveal codes section of the document will look something like this:

Place your curser under the next section of the table of authorities. In this example, it is the Government Code section under the Statutes section.

TABLE OF AUTHORITIES

Page(s)

CASES

<< Table of Authorities will generate here >>

STATUTES

Government Code

Health and Safety Code

Penal Code

Reference Tools

| List | Index | Cross Reference | Table of Contents | Table of Authorities |

Create Authority

Type   Government Code   ▼   Define...   Create

Short Form   _____   Edit...

Mark Authority

Short Form   _____ ▼   Mark

☐ Auto generate   Generate...   Close   Help

In the **Reference Tools** window, you will see that "Government Code" is not one of the choices from the dropdown menu. You can create a new entry called "Government Code." Begin by typing Government Code in the **Type** box at the top. Click **Define**.

You will see the **Define Table of Authorities** window again. Click **Create**.

Define Table of Authorities
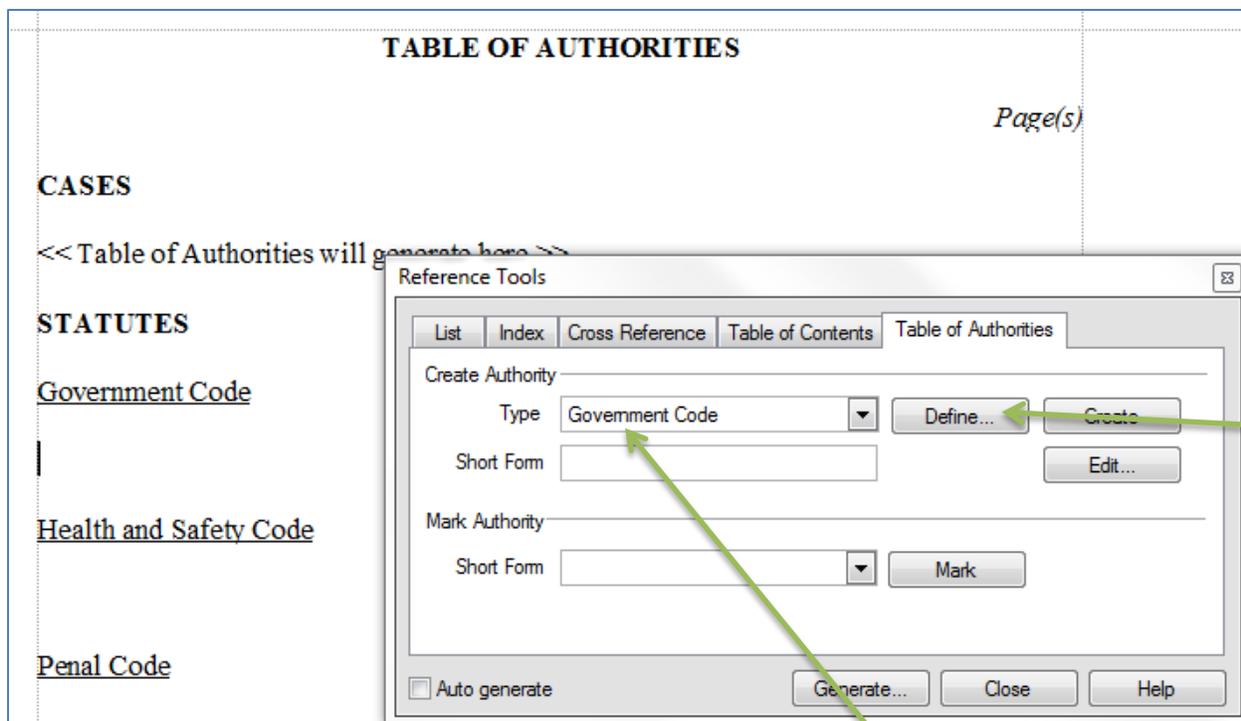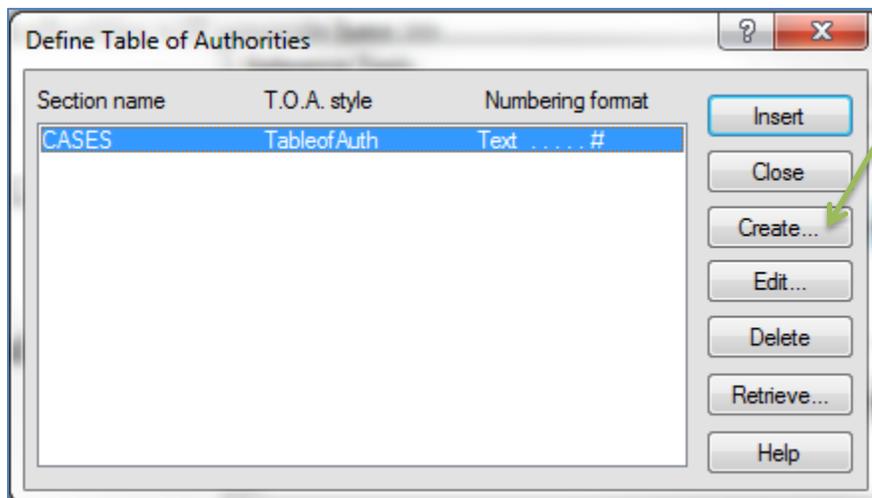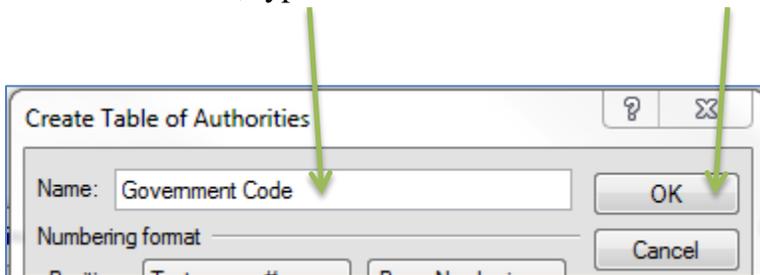
| Section name	T.O.A. style	Numbering format	
CASES	TableofAuth	Text .....#	Insert
			Close
			Create...
			Edit...
			Delete
			Retrieve...
			Help

You will see the **Create Table of Authorities** window again.

In the **Name** box, type Government Code. Click **OK**.

The window will close and you will return to the **Define Table of Authorities** window. You should see now see Government Code in the list. Make sure that it is highlighted and click **Insert**.
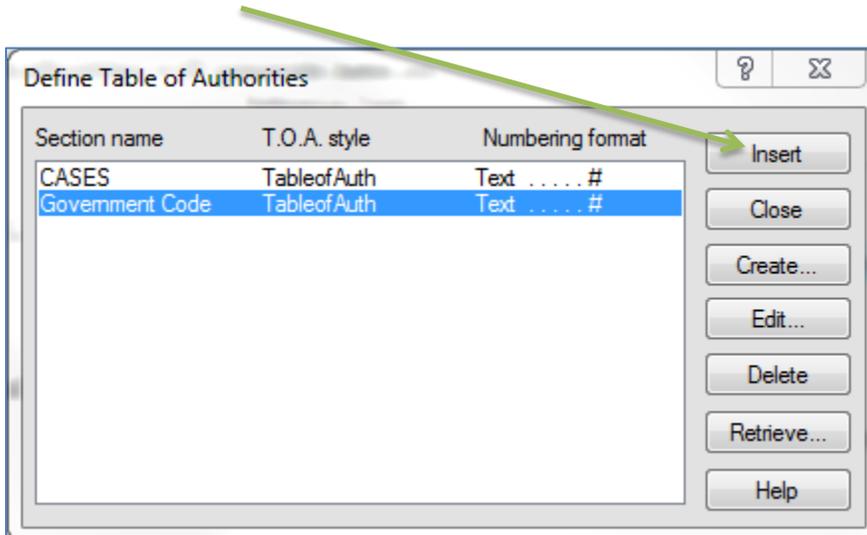
The window will close and you will see where the Government Code section of the table of authorities will generate in your document.
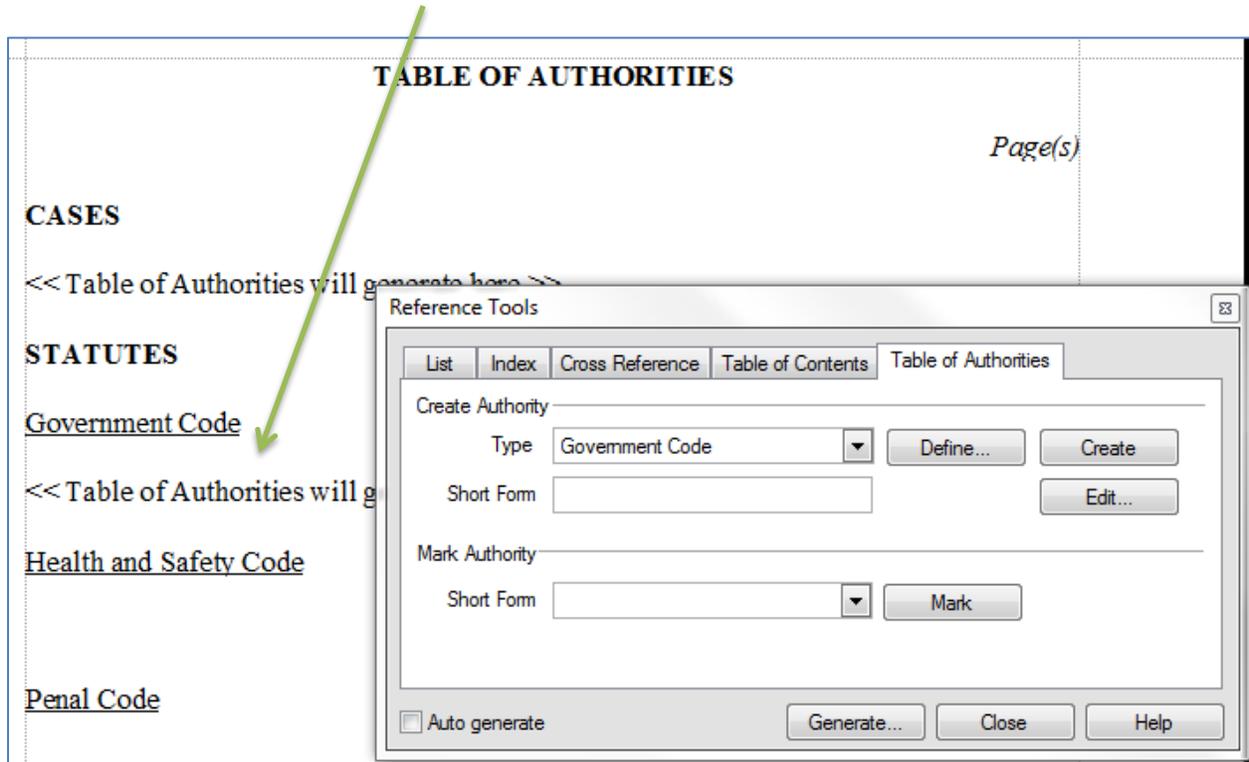
The reveal codes section of the document will look something like this:
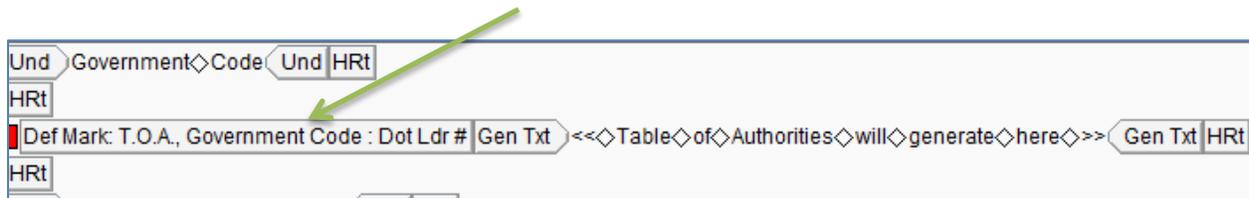
Repeat these steps with the remaining sections of you table of authorities, creating new categories when needed. Close the **Reference Tools** window when you are done.

Your document should look something like this:

```
                    TABLE OF AUTHORITIES

                                                                  Page(s)

CASES

<< Table of Authorities will generate here >>

STATUTES

Government Code

<< Table of Authorities will generate here >>

Health and Safety Code

<< Table of Authorities will generate here >>

Penal Code

<< Table of Authorities will generate here >>
```

STEP 5:   MARK YOUR CITATIONS FOR THE TABLE OF AUTHORITIES

After you setup your table of authorities page, begin marking the citations to include in the table of authorities (**remember, you want to do this step using the final, proof-read version of your brief**). If you do not know how to use the Table of Authorities feature in WordPerfect to mark your citations, the following resources have instructions for using this feature:

How to create a Table of Authorities in WordPerfect,
http://howto.corel.com/en/c/How_to_create_a_Table_of_Authorities_in_WordPerfect

Using WordPerfect's Legal Tools – Shortcut Steps, pp. 4- 6,
http://www.capcentral.org/procedures/brief_writing/docs/WP_Legal_Tools_Shortcuts.pdf

Unofficial WordPerfect Tutorial—Table of Contents & Authorities Pt. 3,
https://www.youtube.com/watch?v=JRH7ek5dzN8

When you have finished marking all the citations, save your document.

STEP 6:   GENERATE THE TABLE OF AUTHORITIES

After you finish marking all your citations, you will generate the table of authorities. Go to the **Table of Authorities** tab in the **Reference Tools** window. You can open this window by going to **Tools** in top menu, selecting **Reference** from the dropdown menu, and selecting **Table of Authorities** from the menu on the right-hand side.
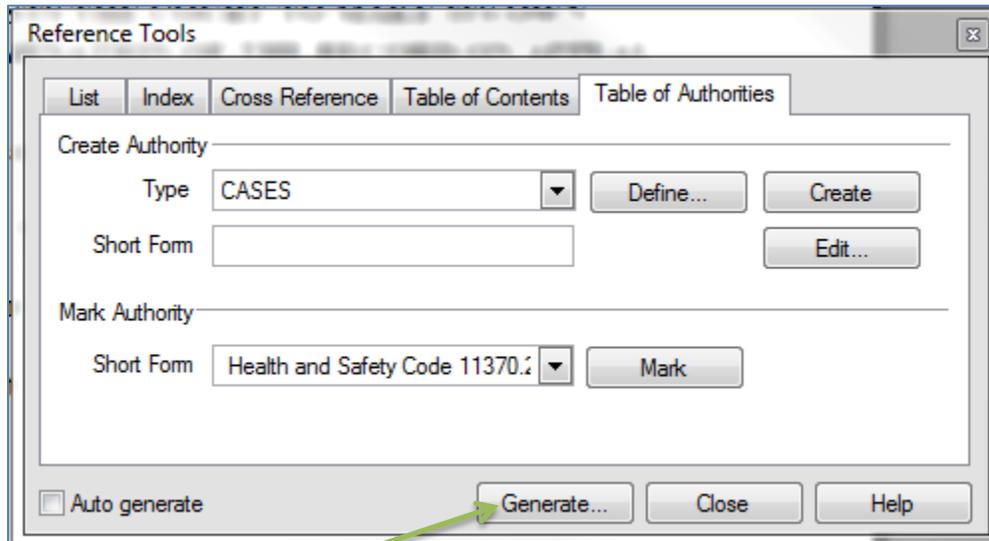
Click **Generate**. You should see the following window:
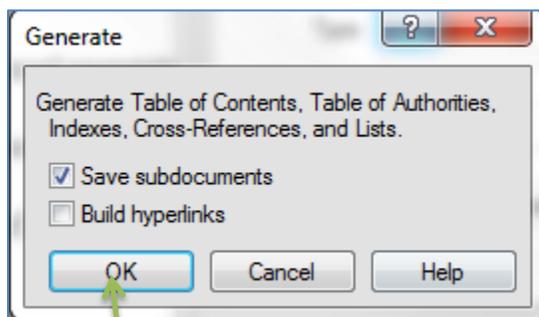
Click **OK**. The table of authorities will generate and should have the correct page numbers, despite the fact that the pages shifted when the table of authorities was generated.

Warning: There may be some formatting in the table of authorities that you want to clean up, or other changes that you want to make. DO NOT MAKE THESE CHANGES NOW. The table of authorities will be regenerated

in the next step when you update the table of contents page numbers and you will lose the changes when the table is regenerated.

STEP 7: UPDATE THE PAGE NUMBERS IN THE TABLE OF CONTENTS

Now that the table of authorities has been added to the brief, the page numbers in the table of contents are no longer correct. Once you have finalized the table of authorities, you must go back and regenerate the table of contents.

Go to your table of contents. Now go to **Tools** in the menu at the top of the page:

File   Edit   View   Insert   Format   Table   Tools   Window   Help
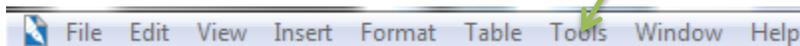
Go down to **Reference** in the dropdown menu and select **Table of Contents** from the menu that appears on the right-hand side. You should see the **Reference Tools** window:
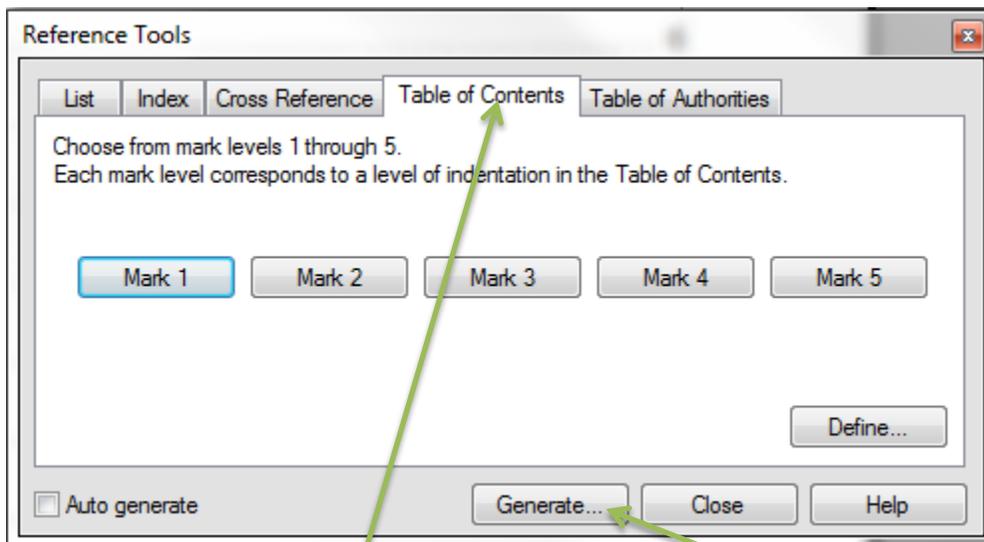
Make sure the **Table of Contents** tab is selected. Click **Generate**. Your table of contents will be generated again with the correct page numbers (this step will also regenerate the table of authorities). Now it is safe to make any necessary changes in the table of contents.

Also review the table of authorities and make any necessary changes.

Your brief should now be properly paginated and your tables should have the correct page numbers.