

INTEGRATING TRIALDIRECTOR WITH OTHER PROGRAMS



Table of Contents

The following topics have been exported from the TrialDirector 6 Help System to enable easy printing. To access the most current information from the full Help system, open the Help menu in TrialDirector.

- Application Integration..... 1
- Concordance 2
 - Displaying Concordance Document Images With TrialDirector..... 2
 - Establishing Link..... 2
 - Exporting Concordance Coding Database into TrialDirector 3
 - Import Coding Data From Concordance..... 7
- iConect 9
 - iCONNECT and TrialDirector Integration Features 9
 - Establishing Link..... 9
 - Using iCONNECT with TrialDirector..... 9
- LiveNote..... 15
 - Establishing Link..... 15
 - Using LiveNote with Presentation Mode 16
 - Using LiveNote with Transcript Manager..... 19
- CT Summation Enterprise/iBlaze..... 21
 - Step One: Integration..... 22
 - Step Two: Exchanging Transcripts 23
 - Step Three: Linking Documents..... 25
 - Sharing Images with Enterprise/iBlaze 28
 - Sharing Transcripts in Enterprise/iBlaze 35
 - Printing from Enterprise/iBlaze using TrialDirector's Printing Tools 46
- Microsoft Access Integration 50
 - Establishing Link..... 50
 - Using Microsoft Access with TrialDirector 50
- CaseMap 51

Application Integration

TrialDirector integrates with a number of third-party applications, creating even more powerful tools to move case data from discovery to trial. Listed below are the third-party applications that TrialDirector integrates with. Included is a brief description of how TrialDirector integrates with each particular application.

CT Summation iBlaze	CT Summation iBlaze has a single, simple uniform user interface for searching and sorting disparate pieces of information. iBlaze combines transcript management, remote and local document retrieval, and an interactive deposition tool, into one integrated program.
West LiveNote	TrialDirector and LiveNote users can transfer LiveNote annotations into TrialDirector and perform all the editing features provided within Transcript Manager.
LexisNexis Concordance	Concordance users can integrate Document Manager as their default image viewer. Simply configure your Concordance case to call the TrialDirector CPL to create the link. Utilizing DDE technology, TrialDirector will display the associated image from the Concordance case. Also, Concordance users can export their coding database for import into TrialDirector's Coding Module.
iCONNECT	iCONNECT users can search several online coding fields to find specific documents. The query results can then be directly sent to TrialDirector. The image files associated with the iCONNECT documents are downloaded to your system and automatically added to the TrialDirector case. This provides an easy to use, stable integration between your document repository and trial presentation software.
Microsoft Access	TrialDirector and Microsoft Access use DDE technology to create a fully functional integration. Many organizations utilize Access databases to store case information, such as document IDs, descriptions, and notes. DDE commands can be added to Access database forms to send the current page ID to the Document Manager, which will display the corresponding image.
LexisNexis CaseMap	Using DDE technology, TrialDirector can be set as the default image viewer in CaseMap.

Concordance

TrialDirector has a tightly integrated connection with LexisNexis Concordance. Concordance users can integrate TrialDirector's Document Manager as their default image viewer. Concordance cases are configured to call the Document Manager CPL to create the link. Using DDE technology, Document Manager will display the associated image from the Concordance case. Also, Concordance users can export their coding database for import into TrialDirector's Coding Module.

Displaying Concordance Document Images With TrialDirector

To view the associated document image in TrialDirector, use one of the 3 methods listed below:

- Simply click on the either the Concordance table record, the associated image will appear in TrialDirector.
- Use the **[Next]** and **[Previous]** navigation buttons on the bottom toolbar in Concordance.
- Use the **[Ctrl] + [C]** keystroke to copy the Concordance PRODNO item to the clipboard. TrialDirector will intercept the clipboard text and display the associated image.



Note For additional information about DDE linking with Concordance look in your Concordance Users Manual under "Configuring Image Viewers."

Establishing Link

In order to establish the link between Concordance and TrialDirector, follow the instructions below:

1. Copy the `trialdirector5.cpl` file in the `support\dde\concordance` directory of the TrialDirector CD into either the TrialDirector or Concordance application directory.
2. Next, the Concordance database settings need to be updated in order to effectively link to TrialDirector. First, open the `.INI` file contained within the Concordance database folder. For example, the *Sample* Concordance case database is located at the `C:\Program Files\Concordance\Database` directory. Within the case database directory there should be an `.INI` file of the same name as the case. (ex. `sample.ini`)
3. Open the `.INI` file with Notepad and establish the following ViewerCPL line under the [Settings] section.

[Settings]

`ViewerCPL=C:\Program Files\Concordance\trialdirector5.cpl`



Note: "Program Files" and "Concordance" simply represent the true path to the `trialdirector5.cpl` file.



Note: Create the [Settings] section if it does not exist within the `*.ini` file.

4. Go to the **Tools** menu in Concordance and open the **Preferences** dialog. Select the Viewer tab and set the viewer executable and the location of the CPL file.
5. After this step has been completed, open the Concordance database that you are working with. Look for a field labeled "BEGNO". If the document bates number field within the Concordance database you are using is different than "BEGNO", simply open the trialdirector5.cpl file with Notepad and replace "BEGNO" with the appropriate setting. This field must reference your beginning document bates number (the image ID field in the browse list within TrialDirector).
6. Open your Concordance database, and click the "Camera" icon on the bottom toolbar of the Concordance screen, as shown below.



TrialDirector will launch and open the last opened case. Open the TrialDirector case that contains the same Document IDs as the Concordance database. Create a new TrialDirector case to add the Document IDs and images to match Concordance, if necessary.



Note: The Document ID contained in the Concordance BEGNO field must match the TrialDirector ID field in order for the associated image to display.



Note: For your convenience a sample Concordance database file (*.dcb) and corresponding database *.ini file are provided within the CPL download package. Use these files with the TrialDirector Suite Demo Case. Open the sample Concordance database file and the TrialDirector case above to test the connection. The ViewerCPL line, within the *.ini file, reflects the default TrialDirector application directory.

Exporting Concordance Coding Database into TrialDirector

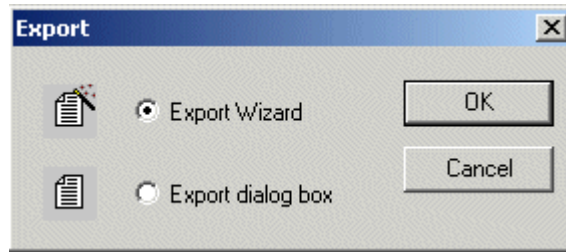
Topics

- [Export Coding Text from Concordance](#)
- [Import Coding Text into TrialDirector](#)

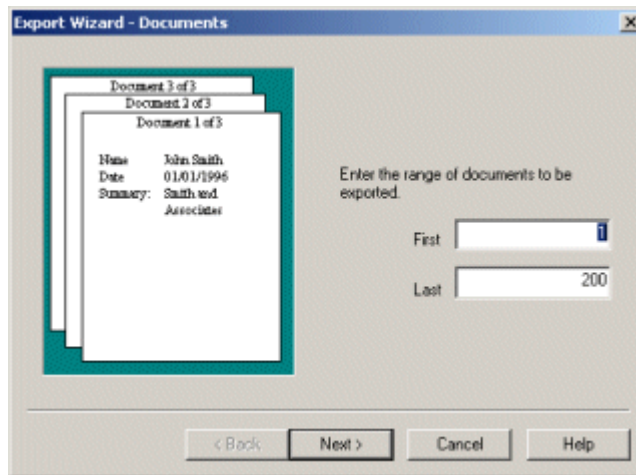
Export Coding Data From Concordance

Concordance can export coded documents as delimited ASCII text. Use Concordance's Document Export Wizard to properly export the coding information. Follow the directions below to export coding information from Concordance:

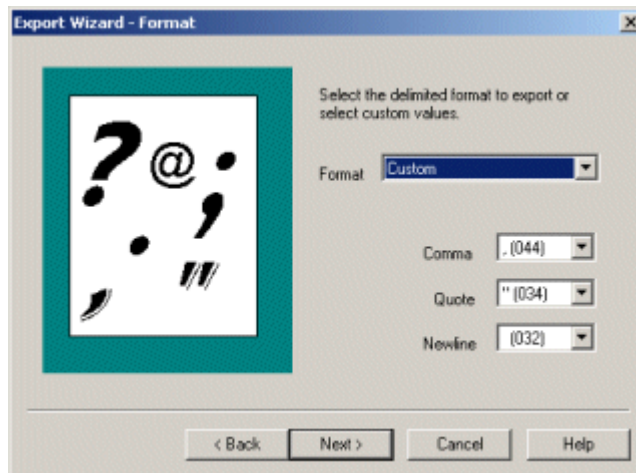
1. Click on the **Documents** menu in Concordance and select **Export**, then **Delimited Text**. The following screen will appear:



2. Select the **Export Wizard** option and click **[OK]** to continue. The following dialog will appear:



3. Select the range of documents you wish to export and click **[Next]** to continue. The following screen will appear:

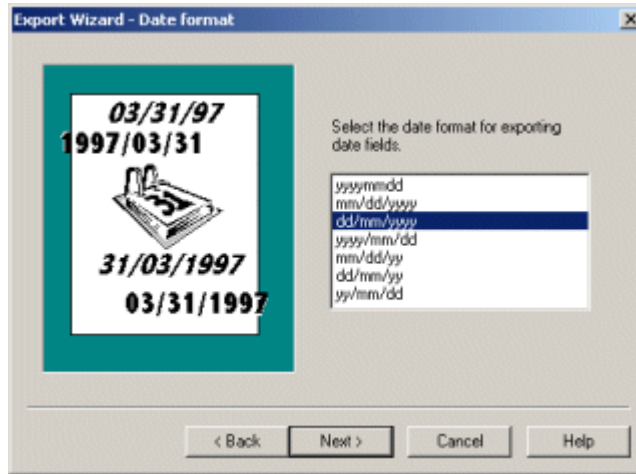


4. Select the **[Custom]** format from the drop-down list. Use the following ASCII characters to ensure proper formatting of the fields within the delimited file:
 - Comma = , (044)
 - Quote = " (034)
 - New line = \n (032)

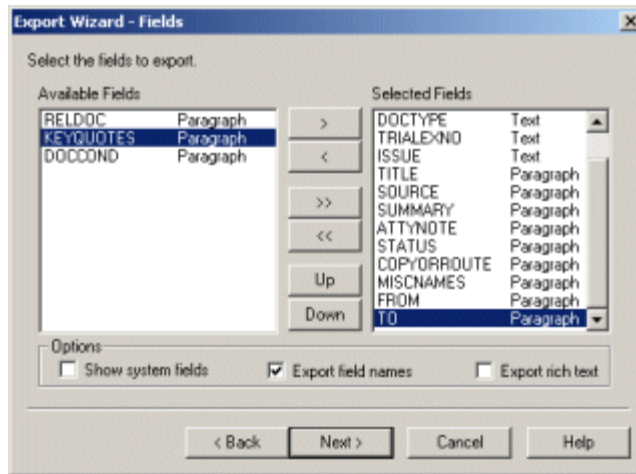


Note: Using the default ASCII character code of (013) will wrap text from long Attorneys Notes fields into the PRODNO field. This will cause note text to be misinterpreted as a Document ID during the TrialDirector coding import. Using ASCII character code (032), which is a space, will resolve the problem.

- Click **[Next]** to continue. The following screen will appear:

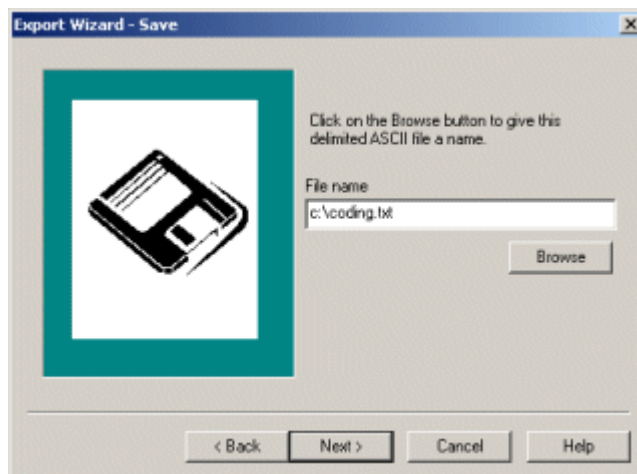


- Select the desired date field format and click **[Next]** to continue. The following screen will appear:



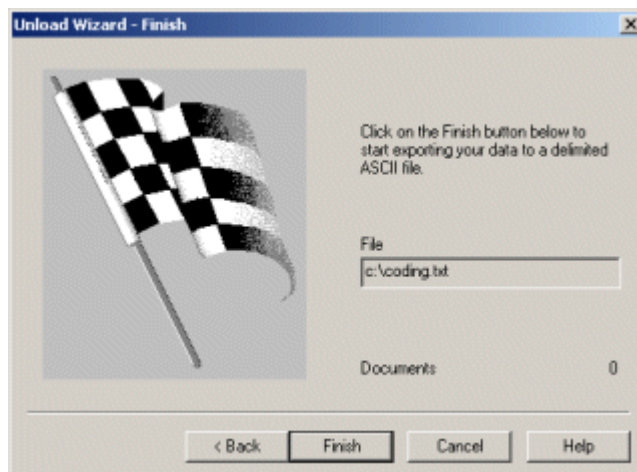
Note: The selected field names are read by the TrialDirector during the coding file import. The Concordance field names are mapped to the corresponding TrialDirector fields. See the link at the bottom of this page to learn more about importing a coding file.

- Move the fields you wish to export into the **Selected Fields** list. Make sure the **Export Field Names** option is checked within the Option section of this dialog. It is not necessary to select the other export options. Click **[Next]** to continue. The screen below will appear:



8. Type in a path and file name of the delimited ASCII file that will be exported from Concordance, as shown above. Click **[Next]** to continue.

The following screen will appear:

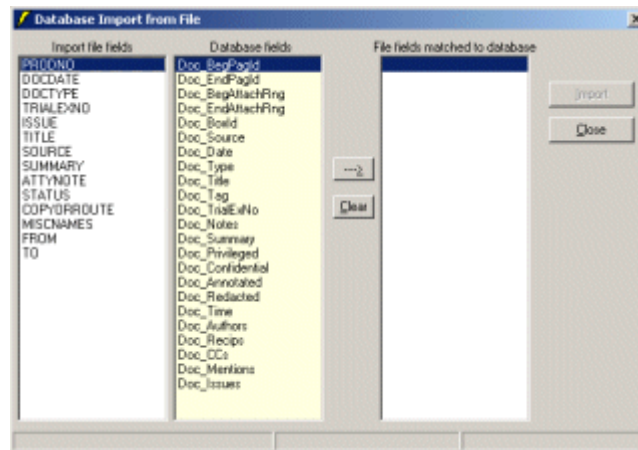


9. Click **[Finish]** to begin exporting the Concordance data to a delimited ASCII file. The coding file is now ready for [import into TrialDirector](#).

Import Coding Data From Concordance

Concordance has the ability to export coded documents as delimited ASCII text. Once coding data has been exported via Concordance's Export Wizard, it can be imported into TrialDirector. Follow the directions below to import coding information into TrialDirector:


1. Click on the **Coding** menu in TrialDirector and select **Import Coding Data**. TrialDirector will prompt you to browse to the comma delimited file to import. Select the file to import and click **[Open]** to proceed. The following screen will appear:



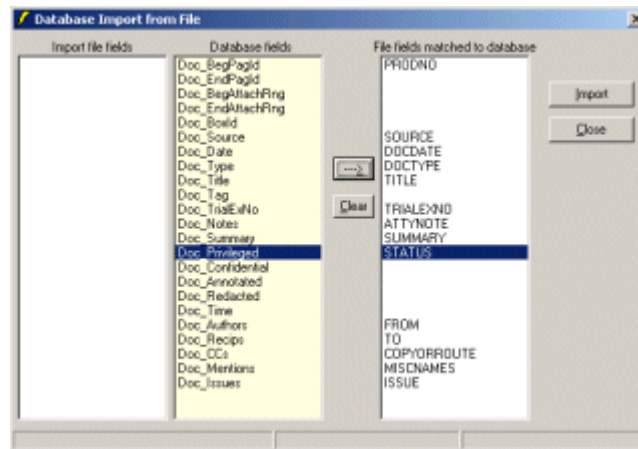
TrialDirector Coding Import Dialog: You do not have to import all of the file fields from the Concordance file.



Note: The Import File Fields displayed during import depend upon the fields exported from the Concordance database.

2. TrialDirector will read the first record of the Concordance input file to determine the **Import File Fields**. These fields are listed in the left side column in the screen above. The available **Database Fields** are listed in the center column. Finally, the **File Fields Matched to the Database** are listed on the right column. The user needs to match or map the file fields from the import file to the available fields. To perform this task, perform the steps below:
 - Select the first Import File Field.
 - Find the appropriate field within the listed Database fields that most closely matches the Import File Field.
 - Click the arrow  button to move that field to the File Fields Match to Database column.
 - This action will cause the moved item to disappear from the Import File Fields column.
 - Repeat these steps until all the fields in the Import File Fields have been mapped. Any fields remaining will not be imported.

- Once all of the fields have been mapped, the import dialog will look similar to the one below. Click **[Import]** to start the process. The import process time is determined by the amount of data included in the input file.



Note: You do not have to map all of the file fields from the import file.

During the import process, you will see a progress indicator. Any duplicate records will be indicated as well as the number of actual records processed.

- Once the coding file has been imported, click **[Close]** on the import dialog to update the coding database and return to TrialDirector. Clicking on the **Coding** Item Type tab will display the newly added records.

iConnect

iCONNECT is an Internet based document repository. iCONNECT users can search several online coding fields to find specific documents. The query results can then be directly sent to TrialDirector. The image files associated with the iCONNECT documents are downloaded to your system and automatically added to the TrialDirector case.

This entire process occurs with just a few mouse clicks. Now there is an easy to use, stable integration between your document repository and your trial presentation software.

iCONNECT and TrialDirector Integration Features

- Export iCONNECT case images directly to TrialDirector
- Export current or selected documents, document queries, or entire iCONNECT databases directly to TrialDirector
- Annotate images for trial presentation, after they are exported to TrialDirector.
- Export iCONNECT coding data directly to TrialDirector

Establishing Link

TrialDirector has provided a single executable file that will automatically establish the link for iCONNECT.

To establish the link between TrialDirector and iCONNECT, run the *inMime5.exe* file, which is located in the path listed below:

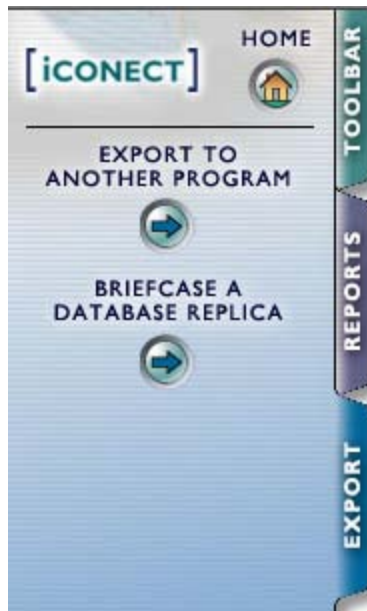
C:\Program Files\Common Files\inData Shared\inMime5.exe

Using iCONNECT with TrialDirector

iCONNECT users can add individual document images or a batch of images associated with a query to a TrialDirector case. Follow the steps below to add iCONNECT images to TrialDirector:

1. Make sure that the connection has been established. Click the link at the bottom of the page for more information about establishing the link with iCONNECT.
2. Log into iCONNECT, choose a database from the Case Manager screen and begin working.
3. Perform searches and categorize database evidence as necessary to determine the documents you wish to export to TrialDirector.
4. Click on the blue iCONNECT **Export** tab on the left side of the screen, under **Toolbar** and **Reports**.

5. On this blue tab, click the **[Export to Another Program]** button, as shown below.

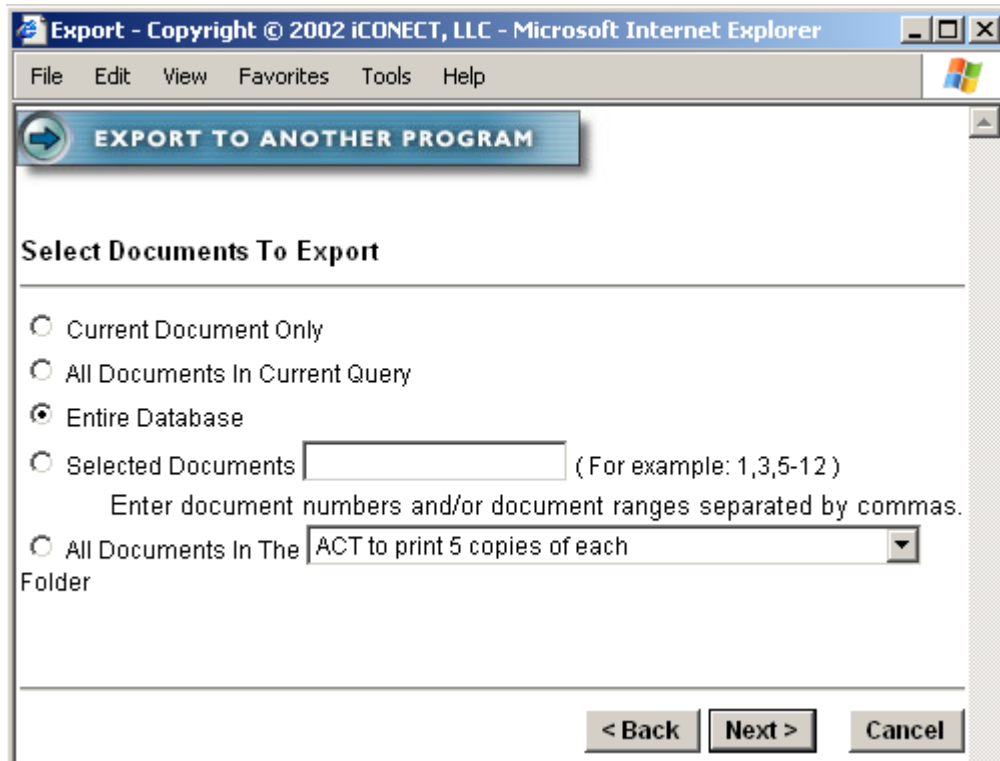


Note: These instructions cover iCONNECT version 3.5, which was released in November 2002.

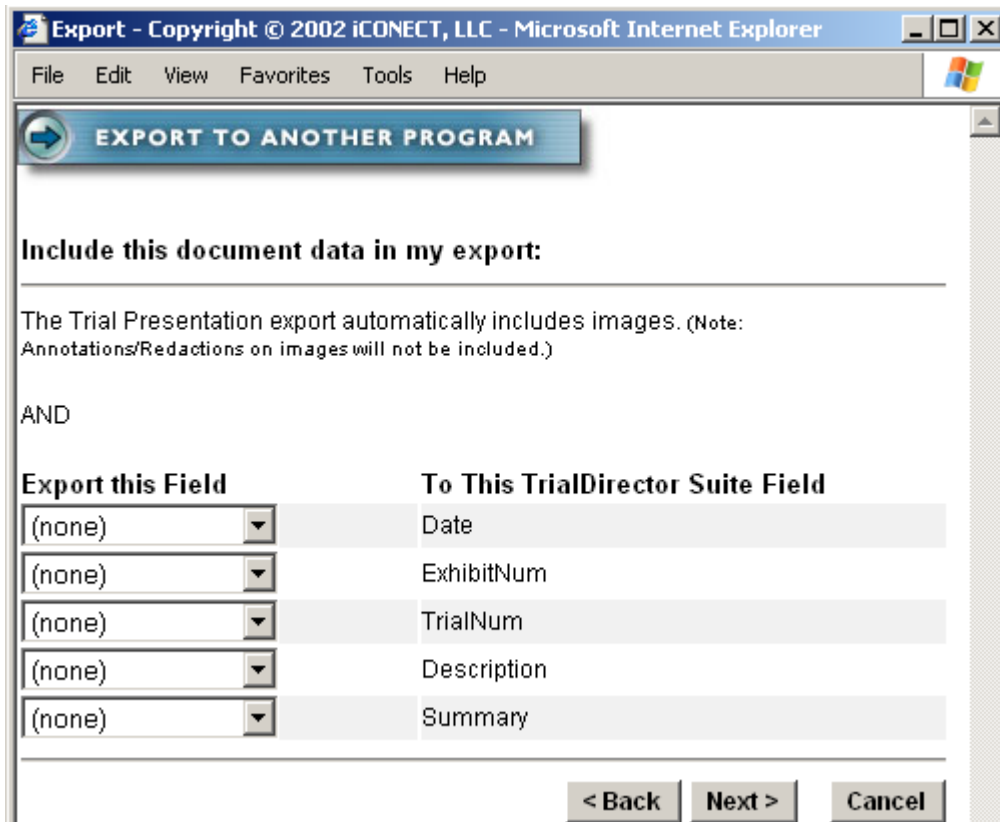
6. An Export screen will pop up, providing you with a list of programs that data can be exported to. Choose TrialDirector from the "Trial Presentation" category. Click **[Next]**. *If TrialDirector is not listed on this screen, please contact your iCONNECT administrator to have it added.*



7. The next screen will ask you to choose the documents you wish to export. You can export just the current document, all documents resulting from the current search, the entire database or a range of documents. You can also select all the documents that have been placed in a specific folder. After you have made your selection, click **[Next]**.



8. You will next be asked to choose how your coded data will appear in TrialDirector's Document Manager module. **THIS PORTION OF THE EXPORT IS NOT YET IMPLEMENTED AND IS RESERVED FOR FUTURE USE.** Simply click [Next] to continue.



9. If your administrator has requested "export tracking", you will be asked to enter a short comment explaining why you are downloading these files to TrialDirector. The tracking screen will also record your username, time of export and other information. This screen may not appear. If it does not, skip this step.



Note: The Write Production Information option may or may not appear, depending on your iCONNECT admin settings.

Export - Copyright © 2002 iCONNECT, LLC - Microsoft Internet Explorer

File Edit View Favorites Tools Help

EXPORT TO ANOTHER PROGRAM

Tracking

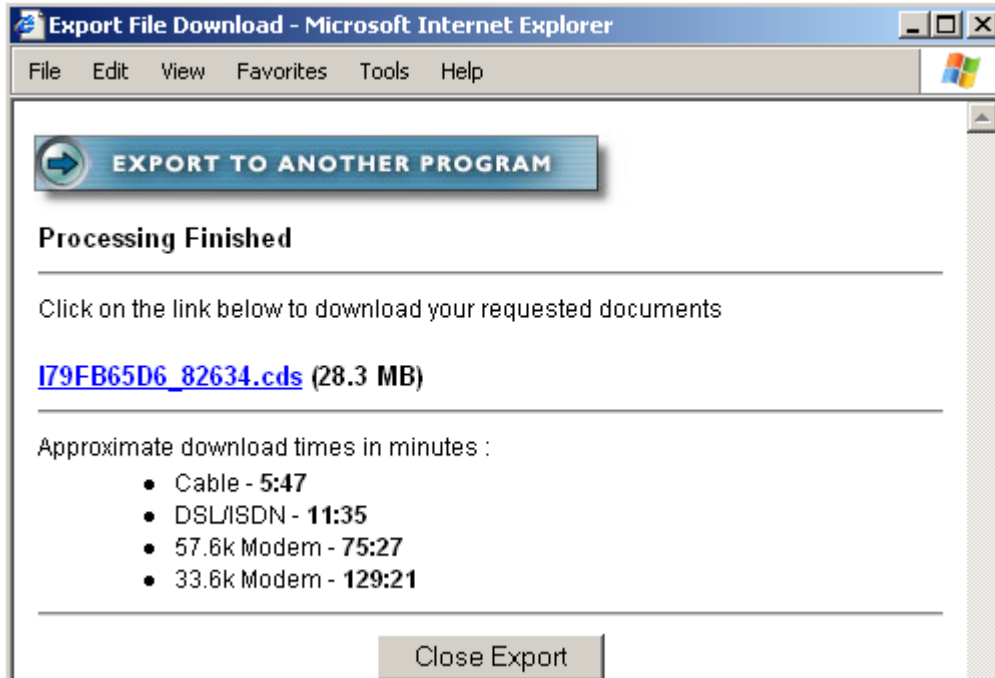
Write production information back to database

Include:	Date	Time
	User	Query

Comment: (300 Char Max.)

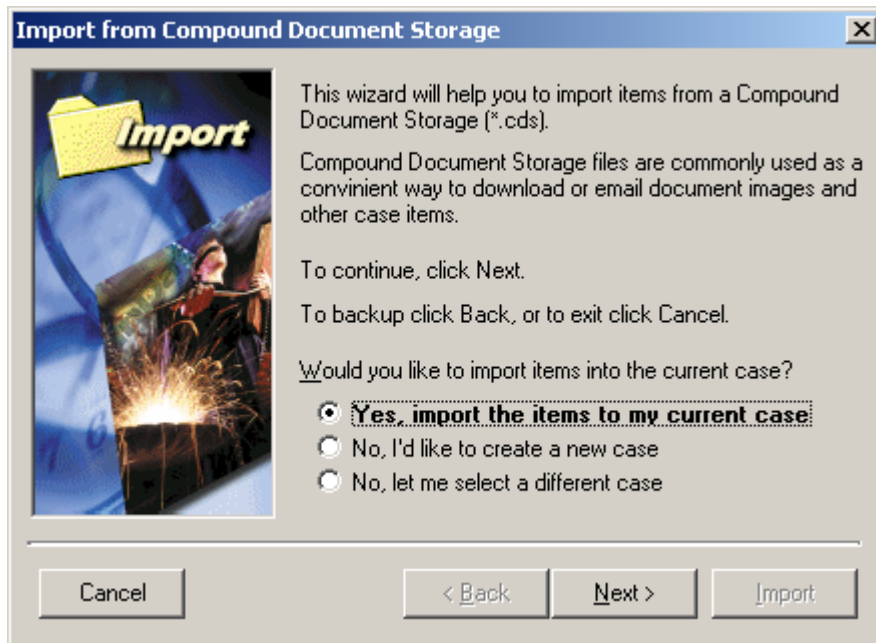
< Back Finish Cancel

10. iCONNECT will generate a TrialDirector "CDS" import file based on the criteria you have specified in the previous screens. Once your file has been generated, you will be presented with a blue hyperlink. iCONNECT will also determine the approximate download time based on your connection. Click on the hyperlink to download your TrialDirector file. When asked by Windows to **[Open]** or **[Save]** the file, select **[Open]**.



Note: The approximate download times are listed at the bottom of this dialog.

11. If the TrialDirector is not already running on your computer, it will automatically launch. The TrialDirector "Import Wizard" will also automatically launch and ask if you wish to import the images into the current case, a different case, or a new case. Select one of the options and click **[Next]**.
12. Then click **[Import]**.



Note: The iCONNECT images can be imported into any available TrialDirector case.

13. Once the images have been imported into TrialDirector, the process is complete! The images will appear in the Document Manager module. You can now begin working with this information using TrialDirector.



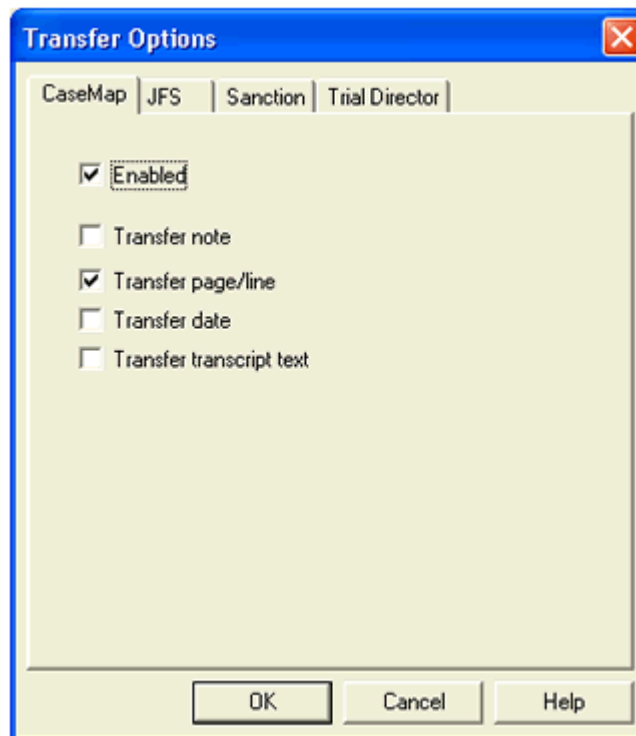
Note: The iCONNECT images are placed in a unique subdirectory under the CDS folder of the current case path. For example, images downloaded from iCONNECT may appear in a path similar to C:\Program Files\inData\Cases\Case0004\CDS\i431f534a_985

LiveNote

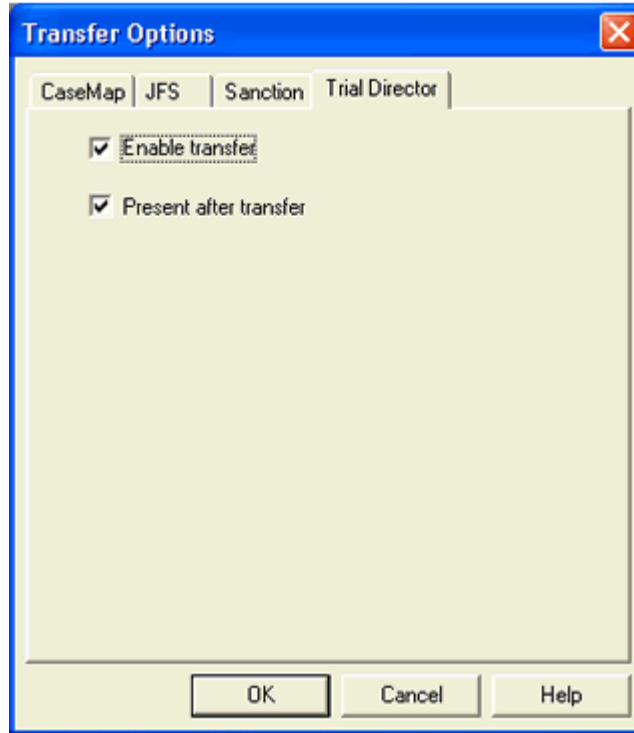
The West LiveNote transfer plug-in for TrialDirector is automatically established during the TrialDirector installation. The user only needs to set transfer preferences prior to taking advantage of the application integration. Below are the steps to establish LiveNote to TrialDirector transfer preferences.

Establishing Link

1. Select **Transfer** from the LiveNote Options Menu. The following dialog will appear:



2. Select the TrialDirector tab, then make sure that the Enable Transfer option is checked. Select the **Present after transfer** option if you would like to automatically playback the LiveNote annotation clip in TrialDirector

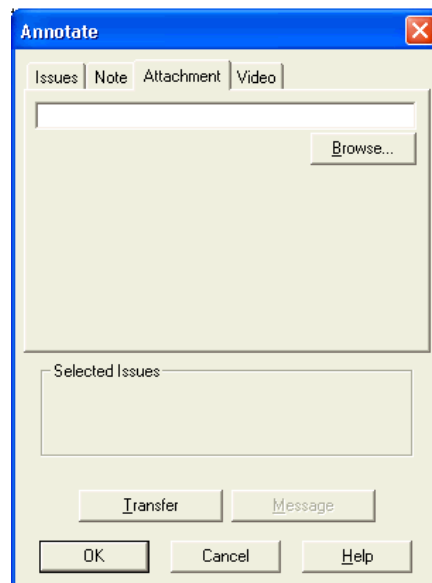


3. Click **OK** to accept changes.

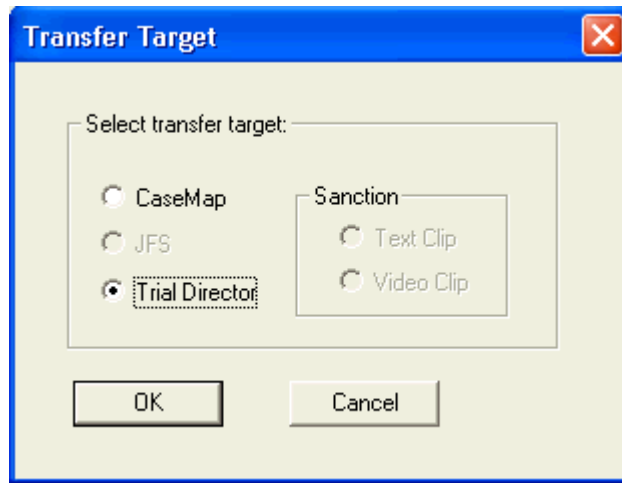
Using LiveNote with Presentation Mode

To send a LiveNote annotation to TrialDirector:

1. There are two ways that the annotation can be sent:
 - A. If you highlight part of a transcript and let go the mouse button the following dialog will appear



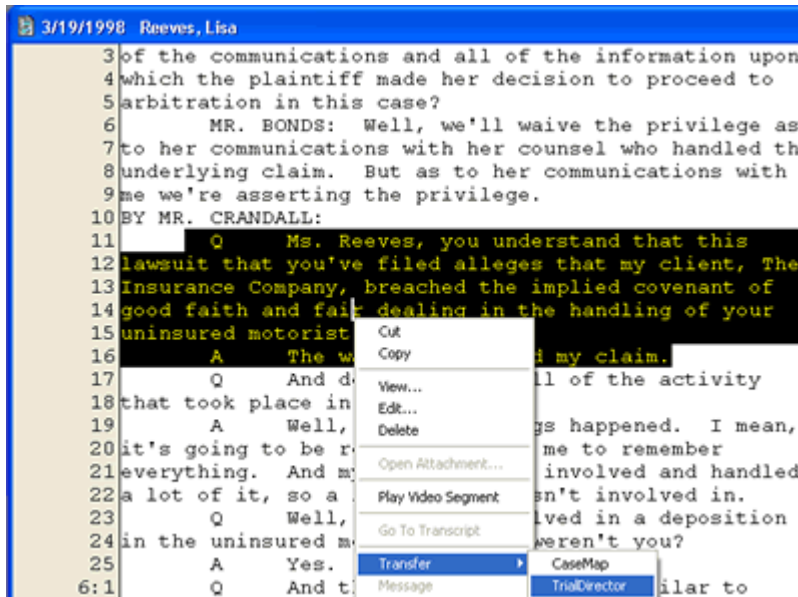
- Select Transfer



- Select TrialDirector and click **OK** to continue
- If this is the first time a transfer is performed, you will be requested to either select an existing TrialDirector Case or create a new case to associate with LiveNote. Either create a new case or select an existing TrialDirector Suite Case:



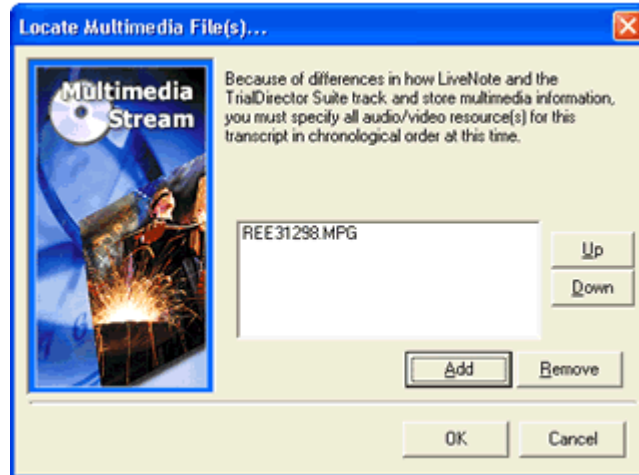
- B. Select the range of transcript text then right click to open the menu, then select **Transfer | TrialDirector**, as shown below.



- If this is the first time a transfer is performed, you will be requested to either select an existing TrialDirector Case or Create a new case to associate with LiveNote:

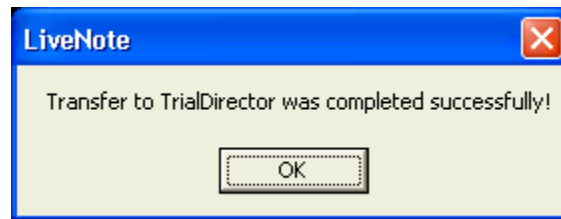


- Select either **Create a new TrialDirector Case** or **Select an existing TrialDirector Case** and proceed to follow the appropriate dialog box's until your selection is complete.
2. The first time a transfer is performed the user is prompted to associate the multimedia files associated with the LiveNote transcript. Click the **Add** button the browse out and add the multimedia files.
 3. Click **OK** when you have added the files



Note: The Case and Multimedia file associated only have to be performed once. Future LiveNote transfers will automatically send the information to the TrialDirector Suite with any user interaction.

- If the transfer to TrialDirector was completed successfully, the following dialog box will be displayed:

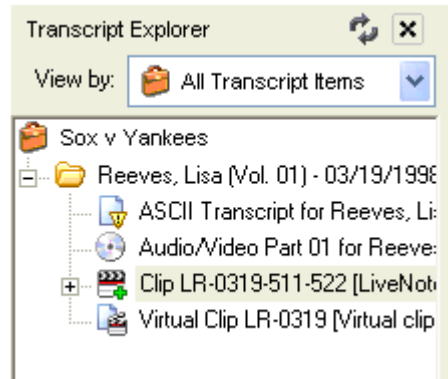


4. Click **OK** to Close
- If you selected the Enable Transfer and Present after Transfer options outlined in establishing, the LiveNote annotation clip will automatically play in TrialDirector.

Using LiveNote with Transcript Manager

If you have created a link, created or added the annotations to an existing Case, the annotations will also be available in Transcript Manager. You will be able to perform all of the editing features available in Transcript Manager.

For example, the Transcript Explorer below shows the annotation that was created in LiveNote and sent to TrialDirector.



Clips that were created, but have not been edited with Transcript Manager have a small green plus sign on their icons, as shown above.

CT Summation Enterprise/iBlaze

TrialDirector connects with CT Summation Enterprise/iBlaze so that you can access features from these leading litigation support programs together. When TrialDirector is integrated with Enterprise/iBlaze, you can work with key functions in TrialDirector directly from within Enterprise/iBlaze. For example, you can:

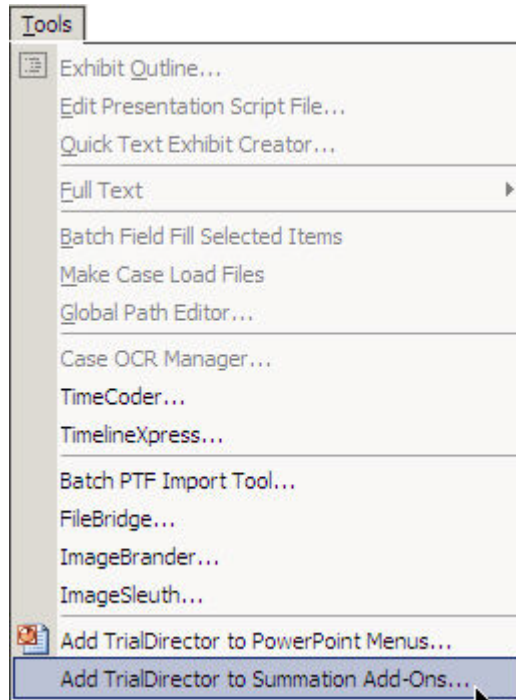
- View and mark-up images using TrialDirector's mark-up tools, or use Enterprise/iBlaze mark-up tools and incorporate these mark-ups with TrialDirector
- Create groups of documents using Enterprise's/iBlaze's Core Database and send them to TrialDirector workbooks
- Share transcripts between Enterprise/iBlaze and TrialDirector
- View video transcripts in Enterprise/iBlaze using TrialDirector's viewer
- Print condensed versions of Enterprise/iBlaze transcripts using TrialDirector's transcript printing options
- Create clips using Enterprise's/iBlaze's familiar tools and send the clips directly to TrialDirector for presentation in court

To connect TrialDirector and Enterprise/iBlaze so that they work together, you will have to take a few steps. First, you'll integrate the two programs. Next, you'll exchange the transcripts between each program. Finally, you'll share the document information in Enterprise/iBlaze with TrialDirector. After you've taken all three steps, the programs are ready to work together.

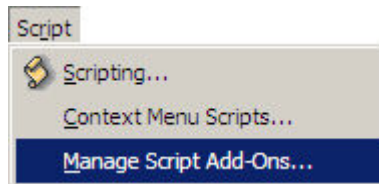
Step One: Integration

In order for you to use TrialDirector functions within Enterprise/iBlaze, you will need to make the programs aware of each other. This is referred to as "integration." Follow the instructions below to integrate the programs.

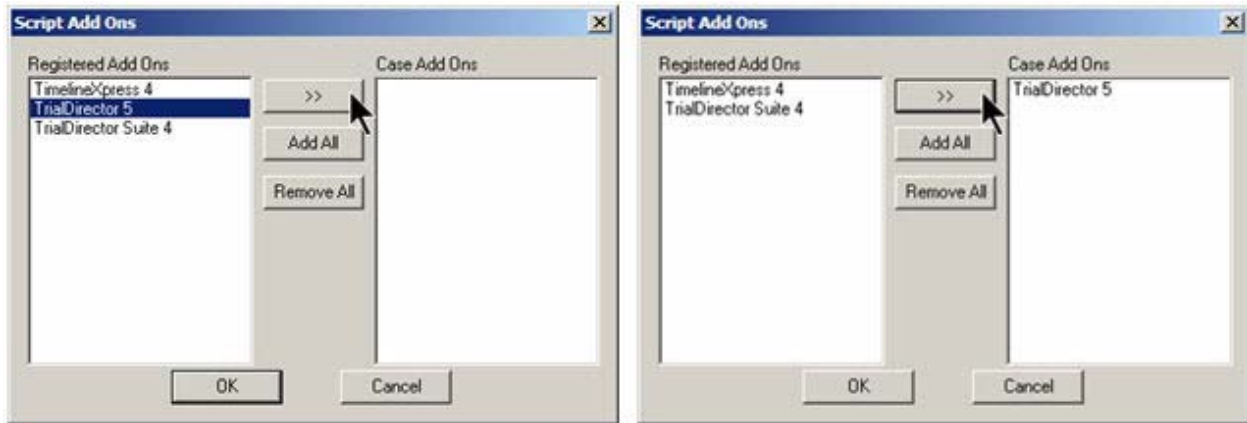
1. From the Transcripts Tab in TrialDirector, open the **Tools** menu and select **Add TrialDirector to Summation Add-Ons**.



2. Close TrialDirector and open Enterprise or iBlaze.
3. In Enterprise or iBlaze, click on the Script menu and select **Manage Script Add-Ons...**



The Script Add-Ons dialog opens.



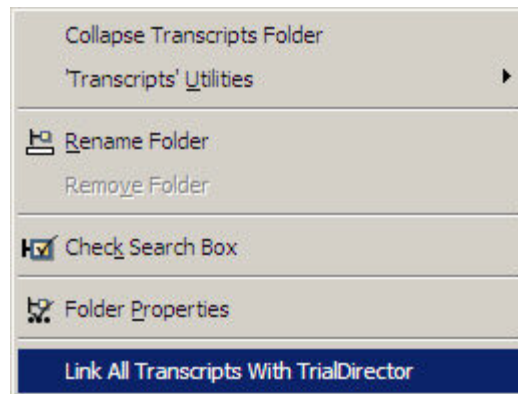
4. You should see TrialDirector 5 on the left side. (You may see other add-ons there, depending on how your system is configured.) Select TrialDirector 5 and click the >> button so that TrialDirector 5 now appears on the right side of the dialog box.
5. Click **OK**. TrialDirector is added to the Case Tools section of the Case Explorer tree in Enterprise/iBlaze.

Step Two: Exchanging Transcripts

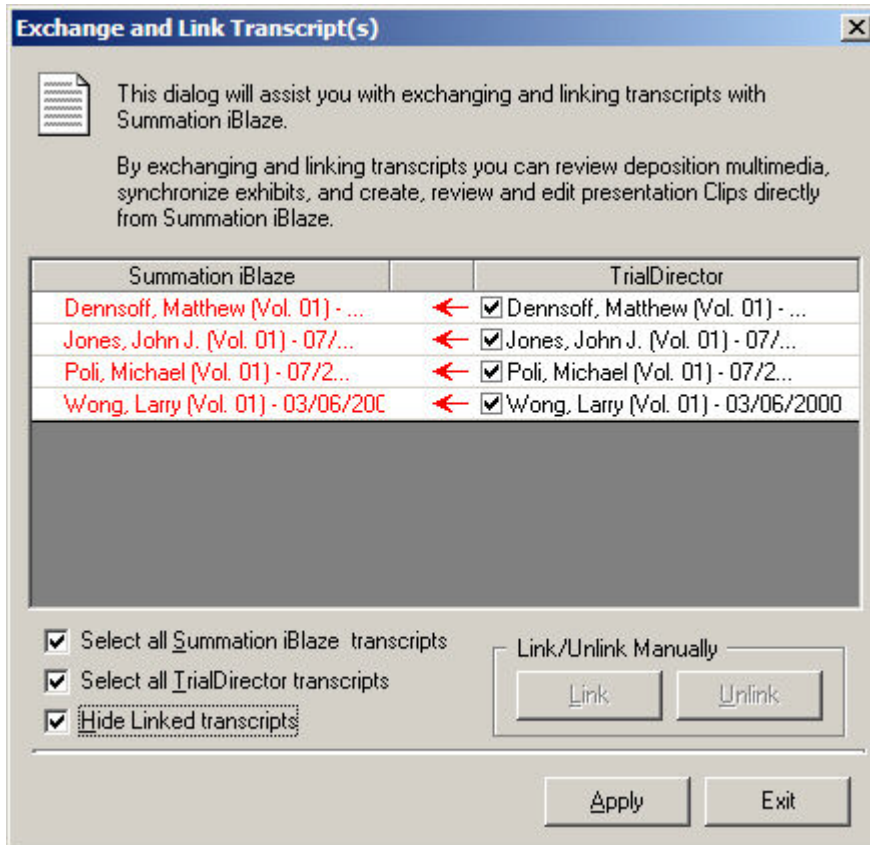
You can send transcripts that reside in Enterprise/iBlaze to TrialDirector , and you can send transcripts that reside in TrialDirector to Enterprise/iBlaze. At that point, the programs share the transcripts.

To Exchange Enterprise/iBlaze and TrialDirector Transcripts

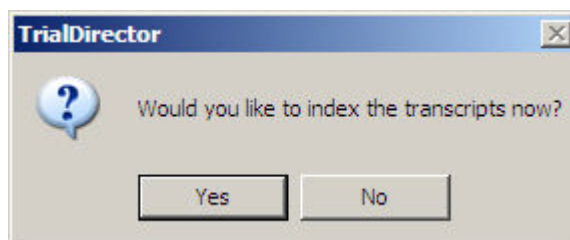
1. In Enterprise/iBlaze, right-click on **Transcripts** at the top of the Case Explorer tree. Select **Link All Transcripts with TrialDirector**.



2. When the TrialDirector dialog opens, select the transcripts in Enterprise/iBlaze and TrialDirector that you want to exchange and link. When a transcript is selected, a check mark appears in the check box adjacent to the transcript name.

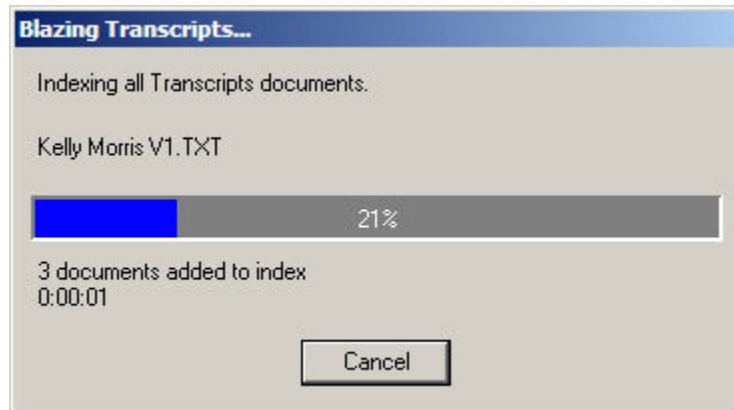
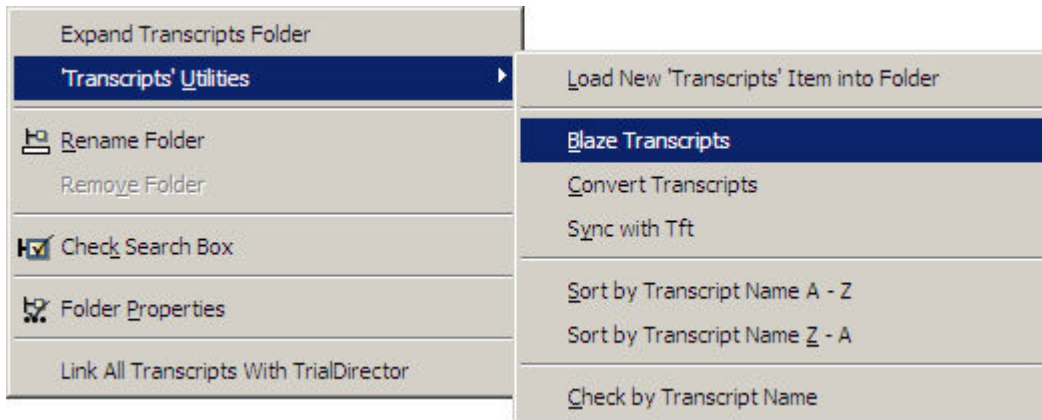


- You can select all Enterprise/iBlaze transcripts or all TrialDirector transcripts to be sent by checking the appropriate check box in the dialog. Note that the visible TrialDirector transcripts are the ones associated with the current TrialDirector case.
 - By default, TrialDirector is set to hide all transcripts that have already been sent and linked. If you want to see a displayed list of all transcripts, whether they have been sent or not, then clear the check box next to **Hide Linked transcripts**.
3. Click **Apply**. The programs will send and link each other's transcripts.
 4. Click **Exit** to close the dialog box.
 5. A prompt appears asking if you want to index the transcripts. Click **Yes** so that TrialDirector can create an index to all of the words in the transcripts.



If you want to index the transcripts later, click **No**. You should note, however, that until transcripts have been indexed in TrialDirector, you cannot search transcripts, view the Word Lists for the transcripts, or print the transcripts.

- If you sent transcripts from TrialDirector to Enterprise/iBlaze, you will need to Blaze (index) the transcripts in Enterprise/iBlaze. To do so, right click on Transcripts in the Case Explorer tree, select **Transcripts Utilities**, then select **Blaze Transcripts**.



When the Blazing process is complete, the dialog closes.

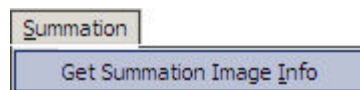
Step Three: Linking Documents

You can send Enterprise/iBlaze document images to TrialDirector using the following steps.

Note: You cannot send TrialDirector images back to Enterprise/iBlaze. TrialDirector's images will track with Enterprise/iBlaze as you move through the records in Enterprise/iBlaze.

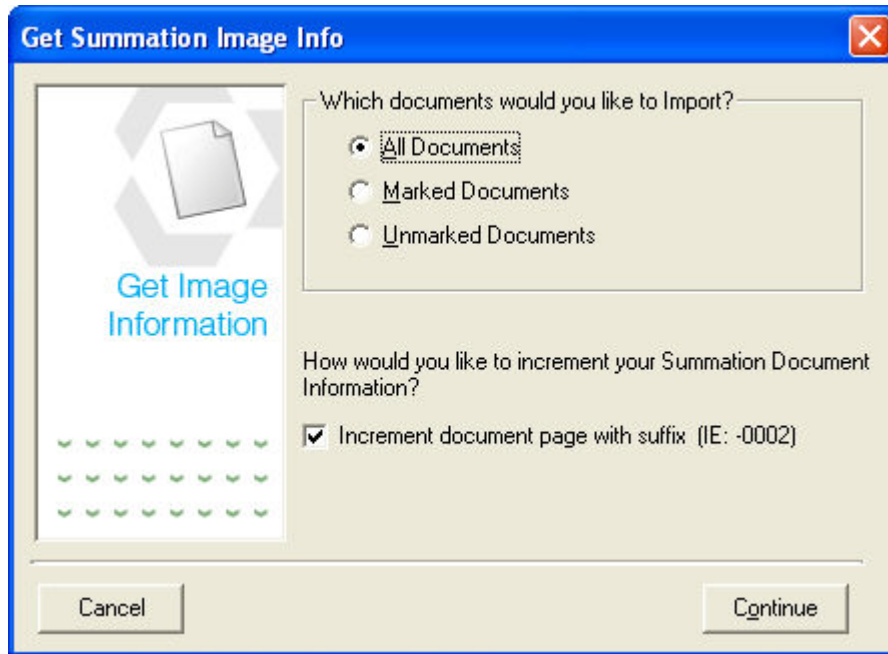
To Send Enterprise/iBlaze Imaged Documents to TrialDirector

- Make sure TrialDirector and Enterprise/iBlaze are open to the same case.
- From the TrialDirector Document Manager tab, click on the **Summation** menu and select **Get Summation Image Info**.



- If the Summation menu does not appear in TrialDirector, you may need to go through the integration process again.

3. In the next dialog, you can choose which set of documents you'd like to import. If you do not wish to send all documents to Enterprise/iBlaze, use Enterprise's/iBlaze's Marking feature to select the document summaries. You can also choose how to increment the numbering on the imported images. The two options are to number with or without a suffix.



Example of importing with a suffix:

BDJ0030
BDJ0030-001
BDJ0030-002
BDJ0030-003

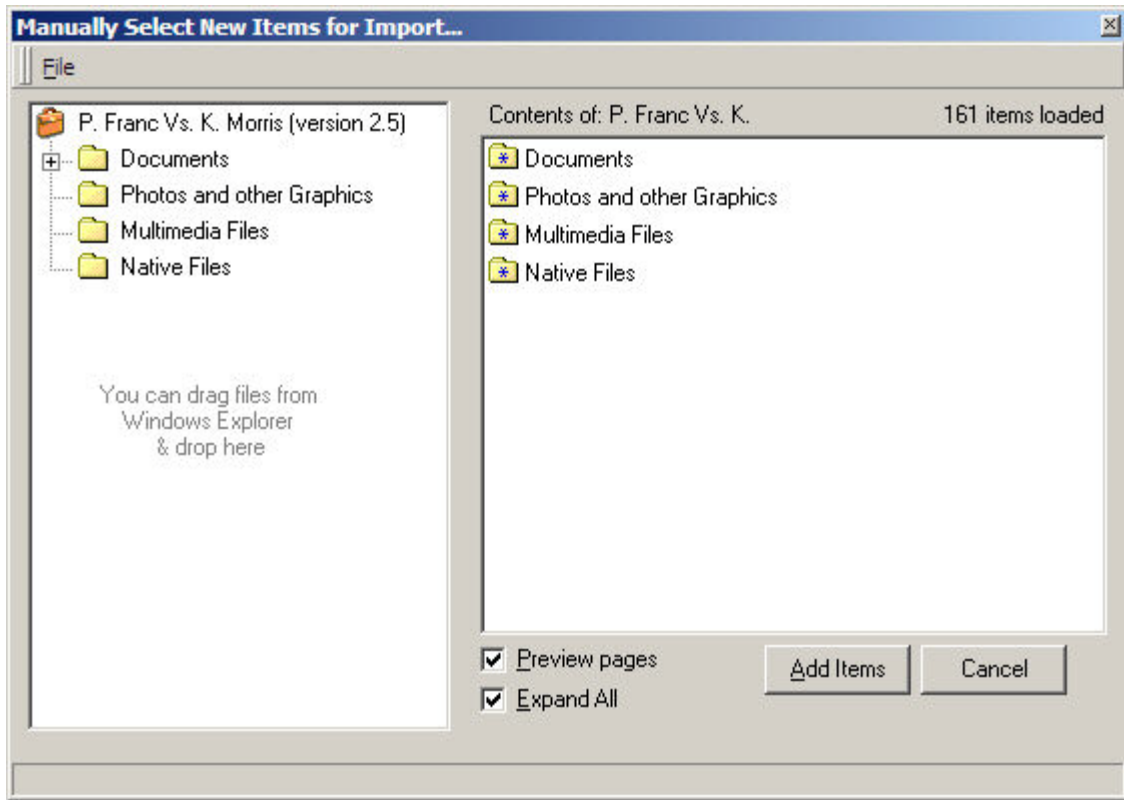
Example of importing without a suffix:

BDJ0030
BDJ0031
BDJ0032
BDJ0033

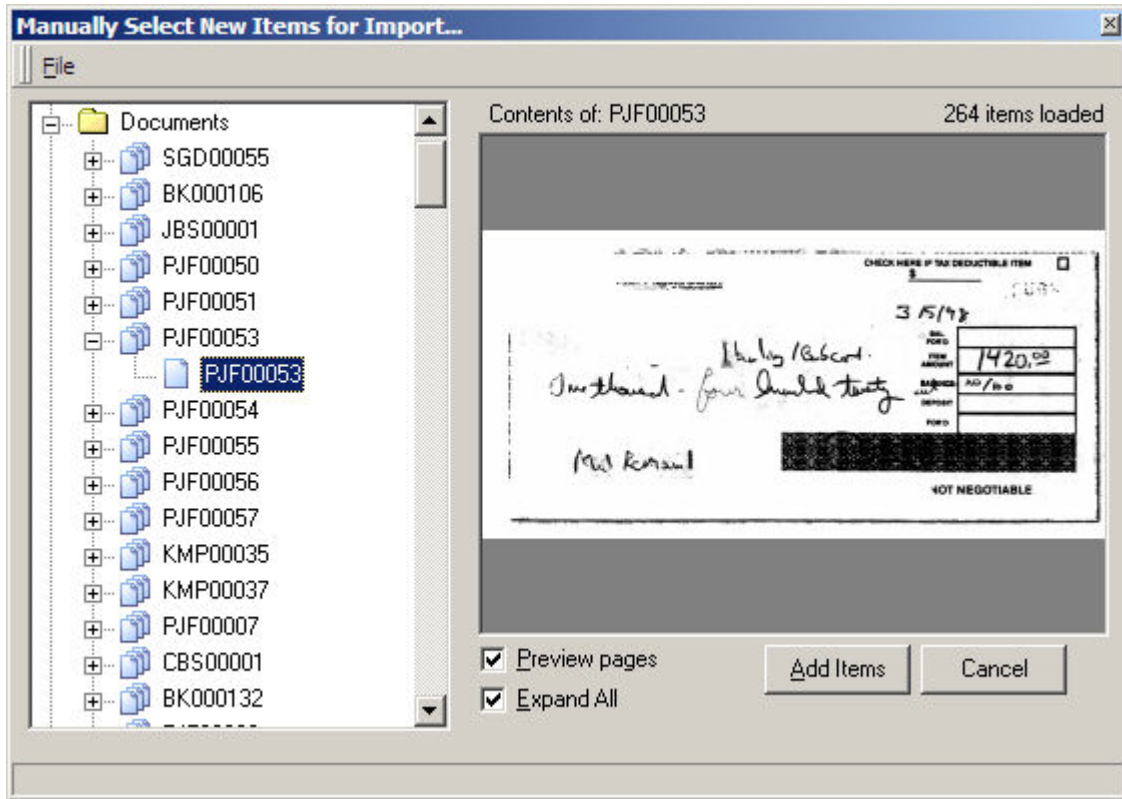
If you are sure that the document numbering in Enterprise/iBlaze is sequential – that is, there are no intermittent pages numbered with A's, B's, and so on – then you should import without a suffix. If, however, the pagination in Enterprise/iBlaze is not sequential or includes intermittent alphabetic suffixes, then you should import with a suffix.

After you have decided on a numbering option, click **Continue**.

4. TrialDirector begins processing the images based on the information contained in Summation's ImgInfo table. (For more information about the Enterprise/iBlaze ImgInfo table, refer to the Online Help.) The following dialog appears to give you the opportunity to review the images that are being exchanged with TrialDirector:



Click on the + next to Documents to expand the list of images. To view the image associated with the ID number, click the + next to the ID number. The image appears on the right side of the dialog.



5. When you are ready to exchange the images, click the **Add Items** button. The items are added to the Documents section of the Case Explorer in TrialDirector.

The contents of Enterprise's/iBlaze's Summary field is attached to each image as a memo. (To read more searching the contents of associated memos, see Search for Items.)

Sharing Images with Enterprise/iBlaze

When CT Summation programs and TrialDirector are integrated, you can exchange images in CT Summation programs so that they appear in TrialDirector. You can exchange all images by using the [Get Summation Info](#) option under the Summation menu in TrialDirector.

Or, you can send selected images from CT Summation programs to TrialDirector. This might be the case if you have used CT Summation iBlaze to identify the key documents in your case to be used, for example, as trial exhibits. In that case, you might not want to send everything in iBlaze to TrialDirector but rather send only those key documents.

Or, if you are using iBlaze to identify exhibits that will be covered with specific witnesses, you may want to take advantage of that work to send those documents to specific Workbooks.

In any of these instances, you are using CT Summation iBlaze as the main database and then using iBlaze's database search tools to retrieve those records and send them to TrialDirector.

Sending Images from CT Summation Products to TrialDirector

You may choose to send selected images from CT Summation products to TrialDirector. You can do this by sending the results of a search in Enterprise or iBlaze to TrialDirector, or you can do this by marking summaries in Enterprise or iBlaze and then choosing whether to send marked or unmarked summaries to TrialDirector.



Note: It is always a good idea to back up your case databases before performing file imports. See Backup a Case for additional details.

Sending Images to TrialDirector as a Result of a Search in Enterprise/iBlaze

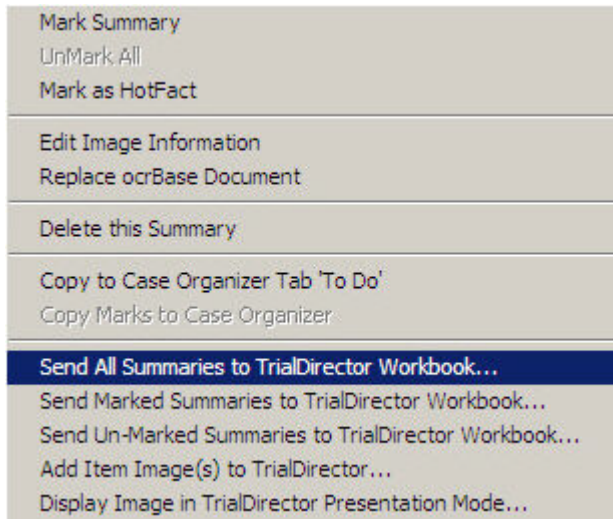
1. Run a search in Enterprise/iBlaze Column View for the documents you wish to send to TrialDirector. In the following example, the search is for every document identified as a trial exhibit in the **TRIALX#** field.
 - The search phrase is **TRIALX# EXISTS**, meaning there is at least one character in the TRIALX# field of the document's record/summary.

TRIALX# EXISTS

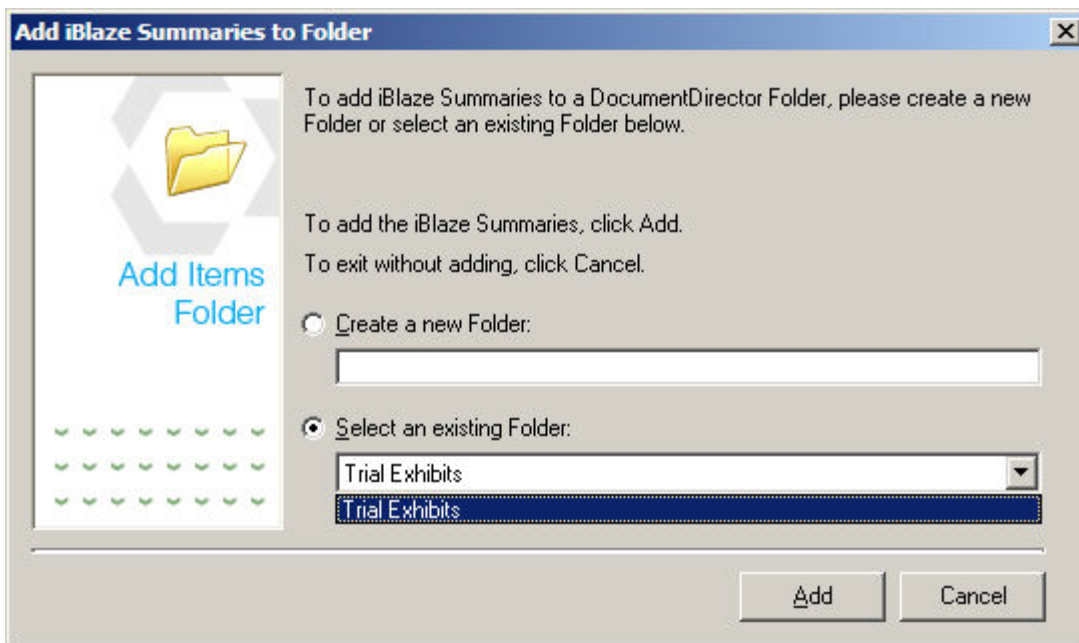
The screenshot shows a search interface with a search bar containing 'trialx# exists'. Below the search bar is a table titled 'Column E-table Edit: Summary 82 of 88 [of 88]'. The table has columns for Fields, Docid, Date, Trialx#, and Summary. To the right of the table is a preview window titled 'Image - BK000027 Page: 1 of 7' showing a document page with text and a signature line.

Fields	Docid	Date	Trialx#	Summary
60	NTE00003	03/15/1999	104	Handwritten drawing Deposition
61	KMP00040	00/00/1998	104	Photo of slide repair and slope
62	NTP00001	02/03/1998	105	Photo of slide debris channel
63	BK000106	09/20/1996	106	Supplemental soils report for
64	BK000111	01/25/1999	107	Landslide Repair Observations
65	SGD00055	10/01/1997	108	Summary of In-Place Moisture
66	SGD00057	02/19/1999	109	Handwritten drawing by defense
67	BK000119	06/09/1997	110	Supplemental soils report
68	SGD00001	09/00/1995	111	Original Soils Report

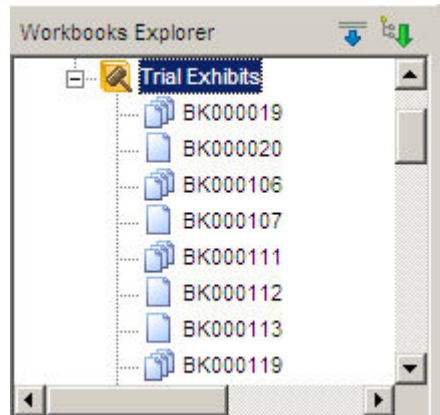
2. Right-click on the row number for any of the summaries that were returned as a result of your search. Select **Send All Summaries to TrialDirector Workbook**.



3. Switch to TrialDirector either by clicking on the TrialDirector button in the status bar at the bottom of your screen or by holding the ALT key down as you tap the TAB key to switch between open programs. The following dialog appears:



4. You can create a new Workbook by entering a name in under **Create a new Workbook** or you can select from existing Workbooks by clicking on the drop-down arrow under **Select an existing Workbook**.
- TrialDirector automatically creates a Trial Exhibits Workbook when a new case is created in TrialDirector, so in this example, we selected that Workbook.
5. Click **Add** to add the images to the Workbook. (To stop the process and begin again, click **Cancel**.) The images from iBlaze now appear in the Trial Exhibits folder in TrialDirector.

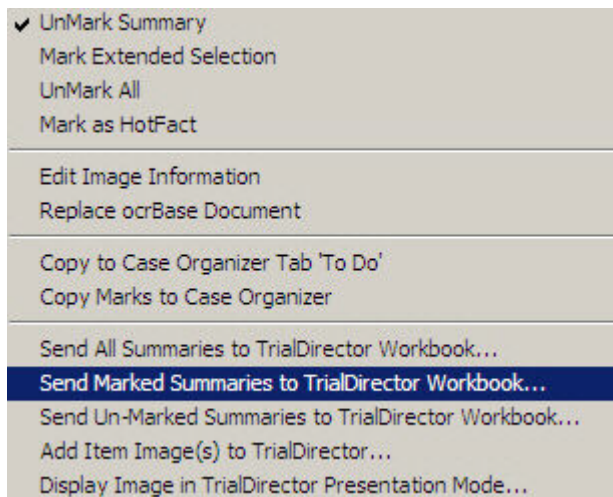


Sending Marked (or Unmarked) Summaries to TrialDirector

1. Mark the summaries in iBlaze using one of the following techniques:
 - Right-click on the row number for a single summary and select **Mark Summary**
 - OR
 - Select the summary by clicking on it and hit the keys **CTRL+M** on your keyboard
 - OR
 - Double-click on the row number for the summary and close any dialog boxes that may open in iBlaze.
 - To mark multiple adjacent summaries by marking the first summary (as described in a. or b. above) then right-clicking on the row number for the last summary in the group and selecting **Mark Extended Selection**. You may also hold down the **SHIFT** key as you click on the last row to mark all of the summaries in the group.

Fields	Docid	Date	Trialx#	Summary
60	NTE00003	03/15/1999	104	Handwritten drawing Deposition
61	KMP00040	00/00/1998	104	Photo of slide repair and slope
62	NTP00001	02/03/1998	105	Photo of slide debris channel
63	BK000106	09/20/1996	106	Supplemental soils report for
64	BK000111	01/25/1999	107	Landslide Repair Observations
65	SGD00055	10/01/1997	108	Summary of In-Place Moisture
66	SGD00057	02/19/1999	109	Handwritten drawing by defense
67	BK000119	06/09/1997	110	Supplemental soils report
68	SGD00001	09/00/1995	111	Original Soils Report
69	BK000105	09/19/1997	112	Letter from town engineer to
70	BK000091	09/11/1996	113	Staff Report to the Planning
71	BK000130	10/02/1997	114	Report on status of grading and
72	SGD00100	08/10/1995	115	Proposal Letter
73	BK000001	08/14/1998	116	Landslide Repair Plan Review
74	BDJ00100	01/04/1996	117	Drawing of plan for energy
75	BDJ00102	05/00/1998	118	Remediation plan
76	NTP00003	02/03/1998	119	Photo of scarp taken day after
77	NTP00005	07/00/1997	120	Photo of compaction of fill
78	NTE00001	09/30/1996	121	Town approved copy of Grading
79	BK000004	08/10/1998	122	Declaration by Morris that King
80	BK000014	03/18/1996	123	Letter to town planner from Civil
81	BDJ00101	09/00/1996	124	Marked-up original drainage and
82	BK000027	09/15/1995	125	Summary report of field notes by
83	CLM00006	10/07/1996	126	Notarized Site Development
84	BDJ0008	09/25/1996	127	Original grading and drainage
85	CBS00001	05/20/1997	128	Drawing of slope grade after
86	BK000127	01/25/1996	129	Review of project site plans
87	BK000012	02/28/1998	130	Letter from Thomas to Morris'
88	BDJ0006	09/25/1996	131	Original grading and drainage

- When the documents that you want to send to TrialDirector are marked, right-click on any row number and select either **Send Marked Summaries to TrialDirector Workbook** or **Send Unmarked Summaries to TrialDirector Workbook**, as appropriate.



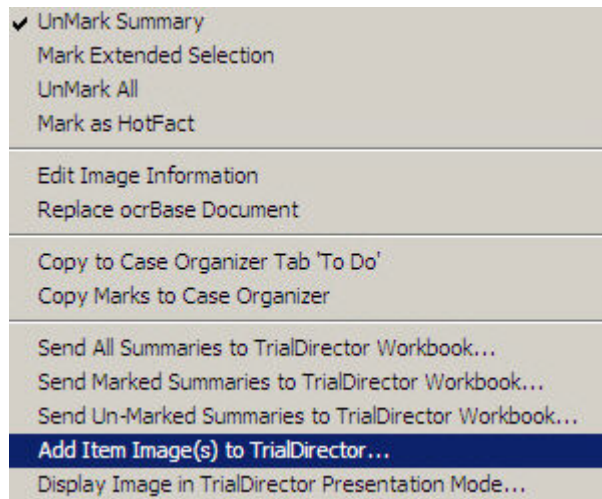
- Switch to TrialDirector by clicking on the TrialDirector button in the status bar.



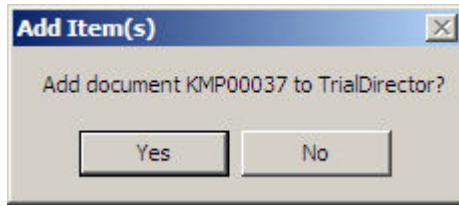
- Either add a new Workbook by entering a name in the **Create a new Workbook** dialog box or click on the drop-down arrow to **Select an Existing Workbook**. Click **Add**. The items you selected are now added to the Workbook.

Adding a Single Enterprise/iBlaze Document to TrialDirector

- Select the document summary in iBlaze that you wish to send to TrialDirector.
- Right-click on the row number for that summary, and select **Add Item Image(s) to TrialDirector...**



- Click **Yes** in the Add Item(s) dialog to add the document to TrialDirector. Click **No** to cancel the process.

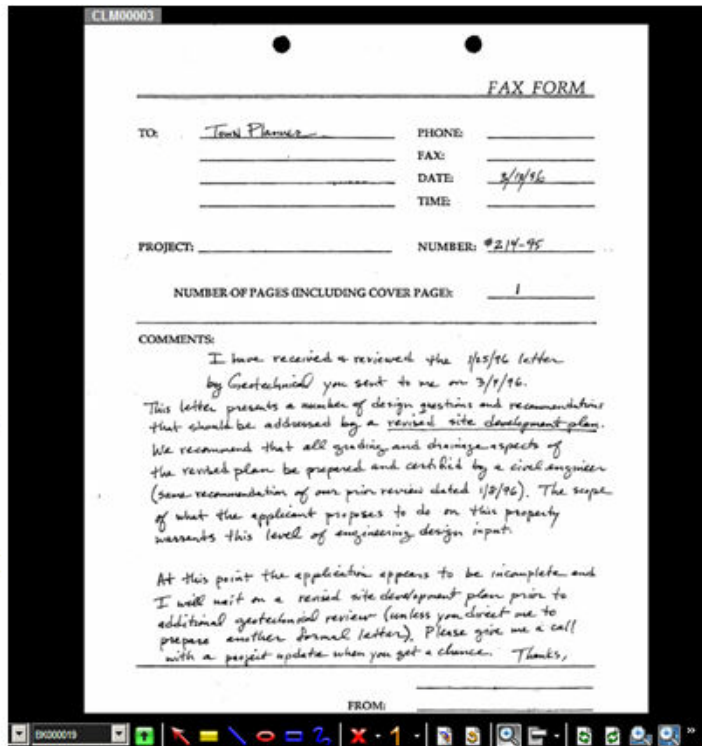
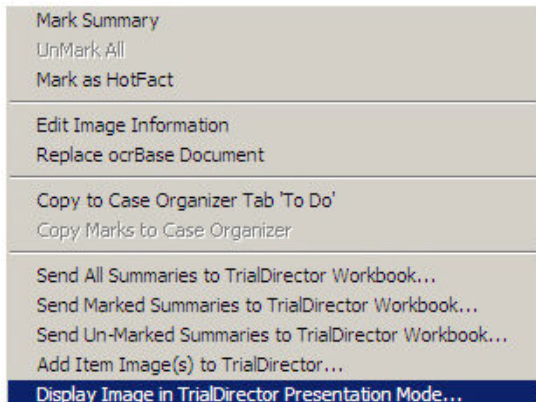


If you selected **Yes**, the document is added to TrialDirector.

Presenting a Document Directly from CT Summation Enterprise/iBlaze

Typically, you would run TrialDirector separately from a CT Summation program in the courtroom. But you may find, on occasion, that you would like to present a document directly from Enterprise or iBlaze.

1. Select the document you wish to present in the CT Summation program you are using.
2. Right-click on the row number for the document and select **Display Image in TrialDirector Presentation Mode** from the menu. TrialDirector's Presentation screen opens on your desktop displaying the selected document.



Sharing Transcripts in Enterprise/iBlaze

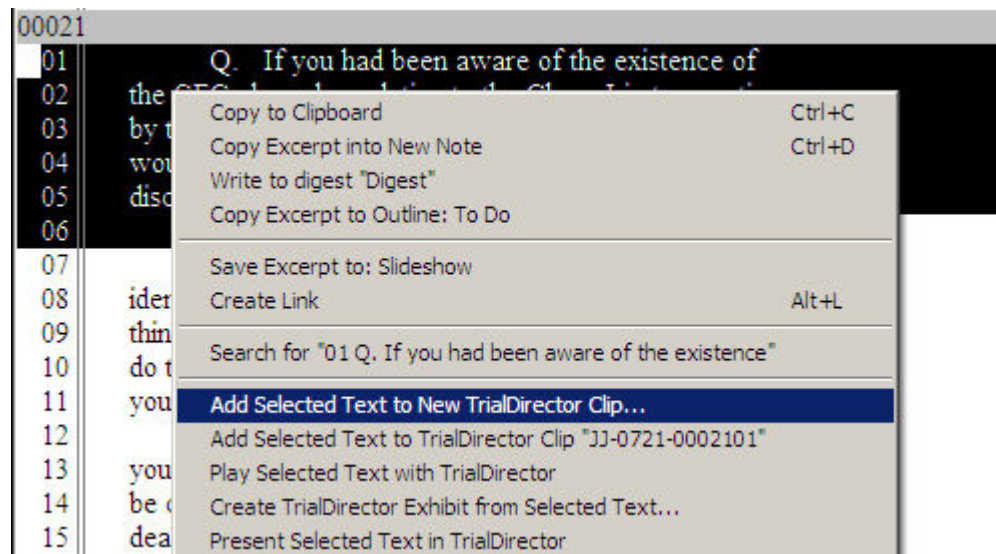
When your cases are shared by TrialDirector and CT Summation Enterprise/iBlaze, you have easy access to several of TrialDirector's advanced transcript handling functions. From within Enterprise or iBlaze, you can create transcript clips which will present in TrialDirector (clips will present with video if TrialDirector has the DVT), create quick text exhibits from transcript text to display in Presentation mode, or even present clips directly from Enterprise/iBlaze to TrialDirector's Presentation Mode.

Creating Video Clips

If depositions shared between TrialDirector and Enterprise/iBlaze are associated with video, you can create video clips directly in Enterprise/iBlaze. You can use two techniques: one is to highlight the text and create the clip based on the highlighting. The second is to create Transcript Notes for your video clips and send all of the notes over to TrialDirector. The second technique sends *all* notes to TrialDirector, whether or not they are ones you specifically designated as video clips. If you use the second technique, you may wish to limit your Enterprise/iBlaze Transcript Notes strictly to create video clips.

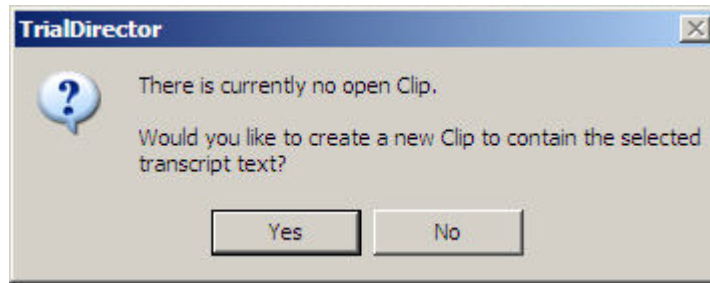
Creating Clips based on Highlighting

1. Double-click on the transcript name in the Enterprise/iBlaze Case Explorer to open the transcript you want to work with.
2. With the transcript open and in the active window, conduct a search for the text in the transcript you want to identify as a clip, or scroll through the transcript until you find the first selection.
3. Highlight the lines of text for the video clip. You can highlight the lines by holding down the left mouse button and dragging the highlight or, if you have to cross over a page break, you may find it easier to highlight lines using a combination of the SHIFT key and the keyboard's arrows.



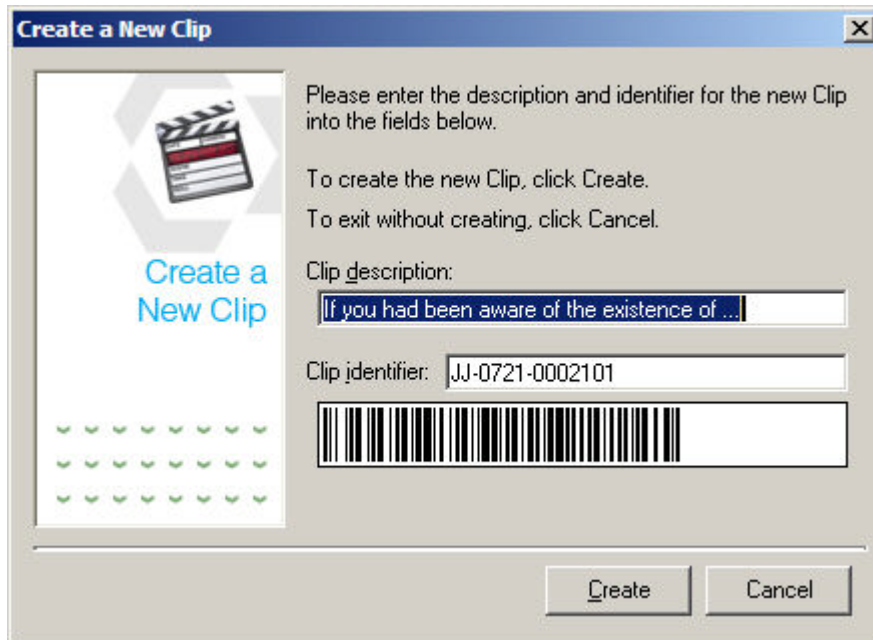
4. Right-click on the highlighted text and select **Add Selected Text to New TrialDirector Clip** to create a new clip **OR** select **Add Selected Text to TrialDirector Clip "[item id number]"** if you are

adding a new segment to an existing clip. If there is no currently open clip, you will see the following dialog. Click **Yes** to create a new clip.

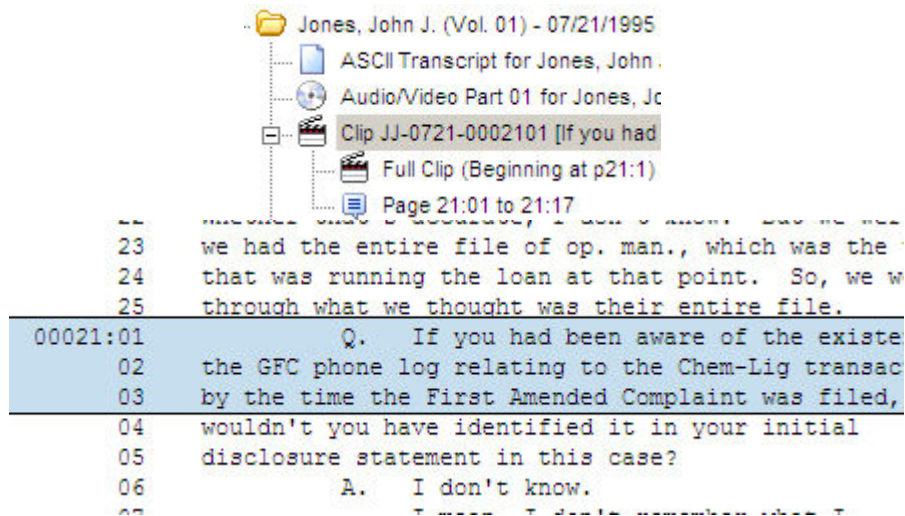


(See Help topic Create a Clip for more information.)

5. In the following dialog, enter a description for the clip. You may use the existing description (the first few words of the clip) or you may enter your own description. You may also modify the clip identifier, if you wish. When the description and identifier are set up the way you wish, click **Create**.



6. The clip now appears in TrialDirector's Transcript Manager window, where you can play the clip, edit it, delete it or rename it.



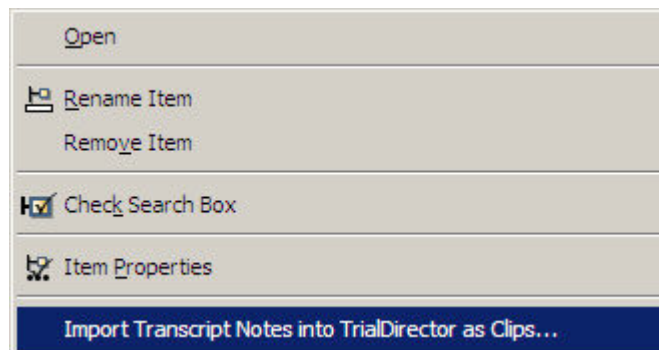
(See Help topic Clips for more information.)

Creating Clips from Transcript Notes

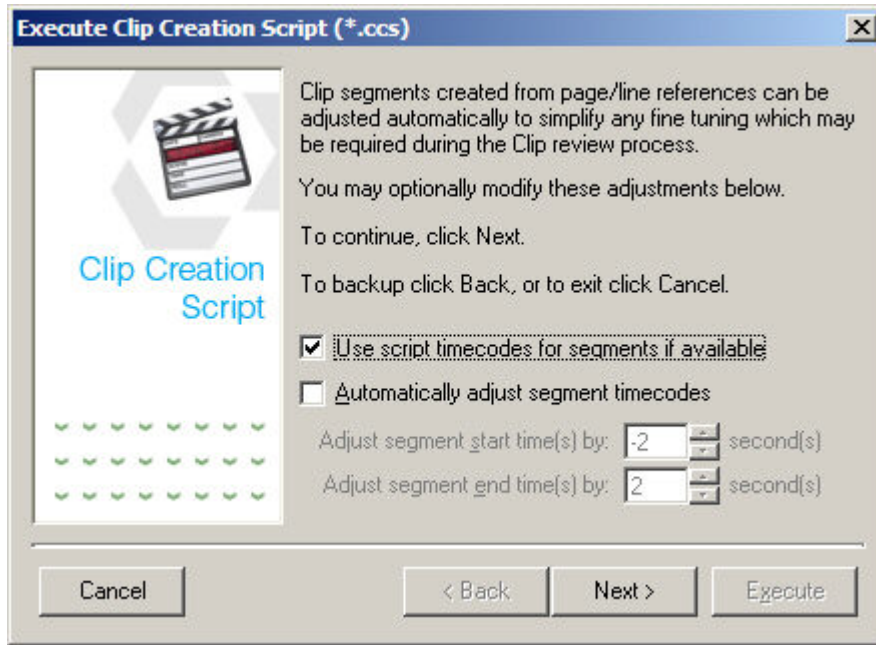


Note: This function creates a clip for every Transcript Note in Enterprise/iBlaze, not for selected notes.

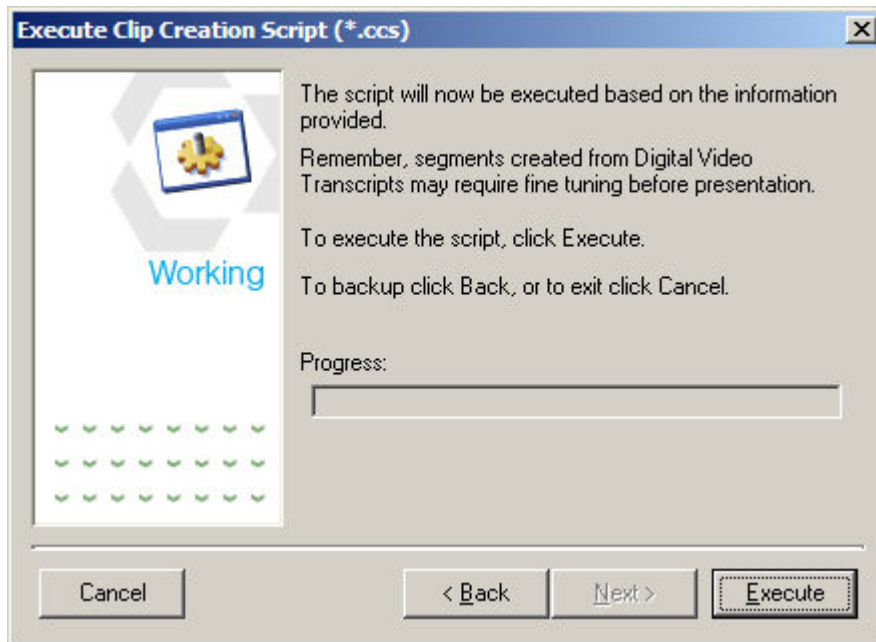
1. In the Enterprise/iBlaze Case Explorer window, right-click on Transcript Notes and select **Import Transcript Notes into TrialDirector as Clips...**



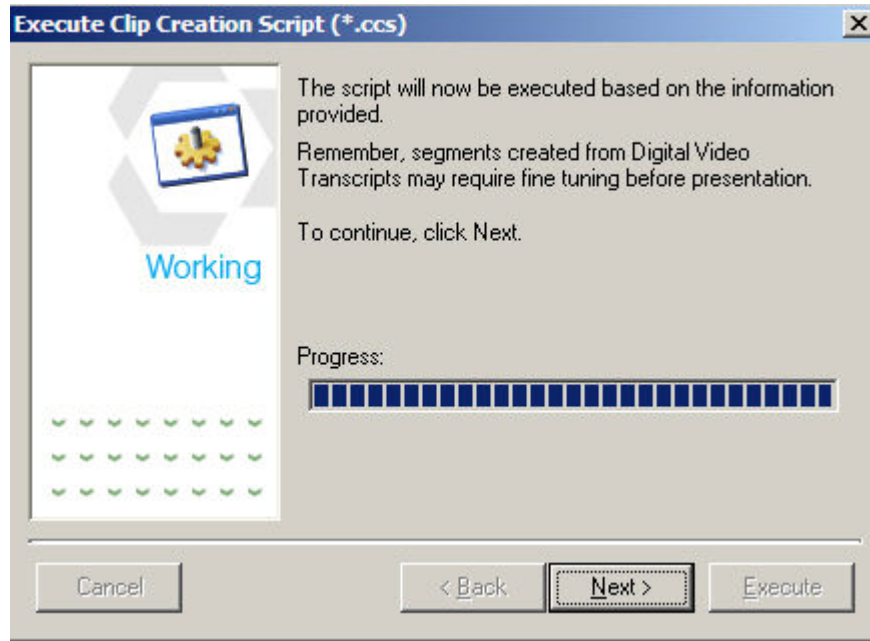
2. The following dialog opens giving you the opportunity to determine automatic adjustments for fine tuning scripts. Select the adjustment(s) you wish to use, if any, and click **Next**. To cancel the process, click **Cancel**.



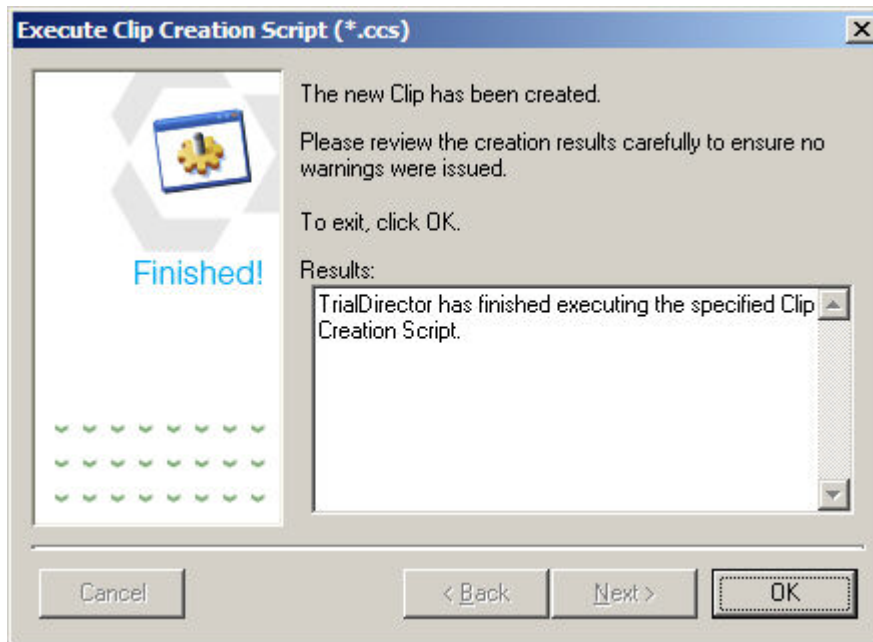
3. To proceed with sending the clips to TrialDirector, click **Execute**.



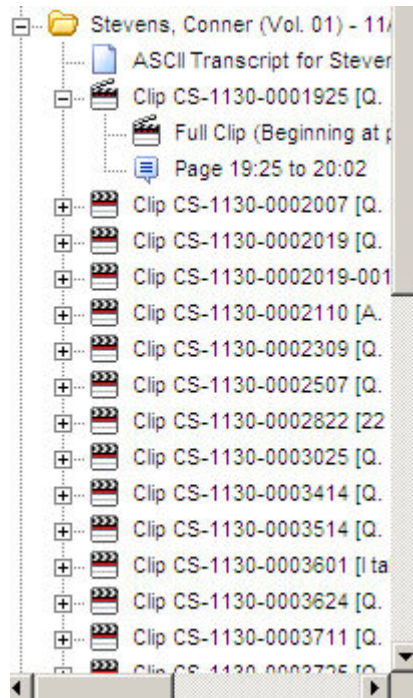
A progress bar advises you as the clips are transferred to TrialDirector. Click **Next**.



4. TrialDirector confirms that the clips have been created. Click **OK** to close the dialog.



5. The clips now appear in TrialDirector's Transcript Manager.

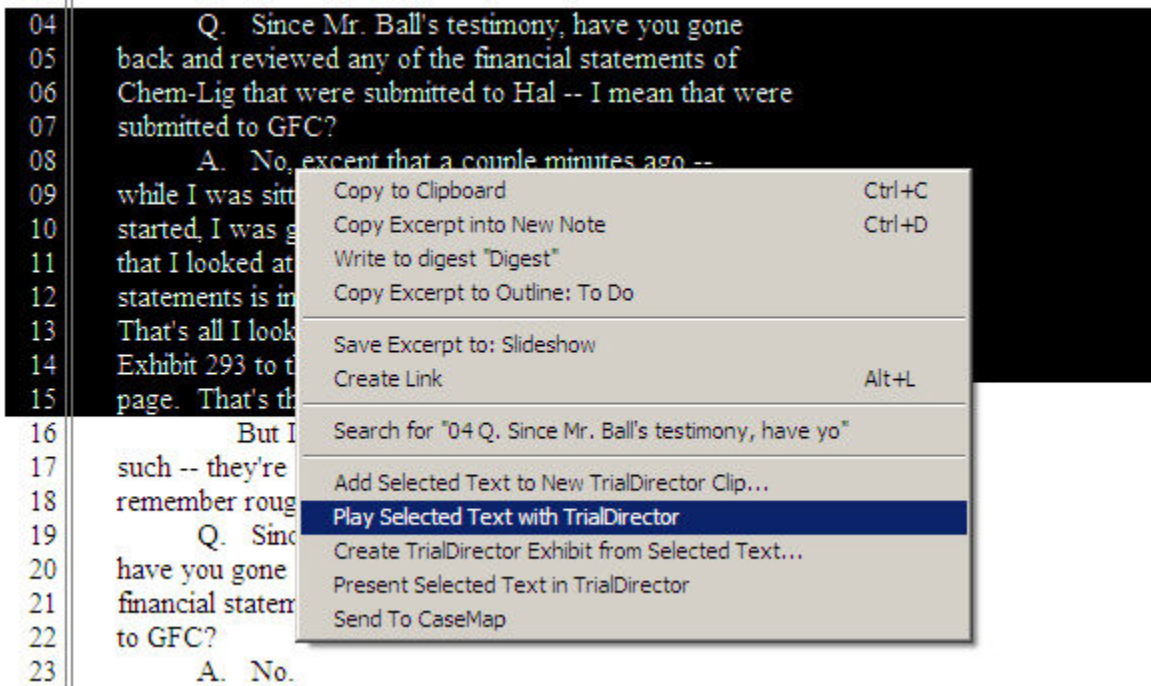


Playing Enterprise/iBlaze Transcript Text in TrialDirector

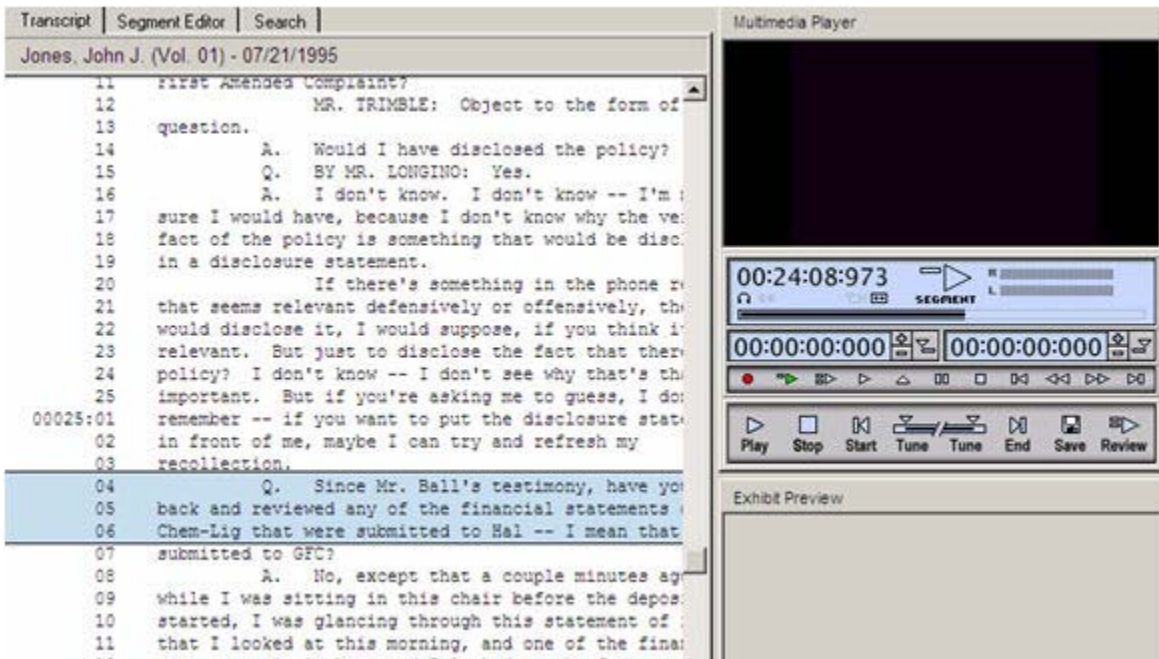
You can play video clips directly from within Enterprise/iBlaze, if a video is associated with the transcript and linked to TrialDirector.

1. Highlight the lines of text in the Enterprise/iBlaze transcript, either by holding down the left mouse button and dragging the highlighting or by using a combination of SHIFT and the arrows on your keyboard to create the highlighted section.
2. Right-click on the highlighted section and select **Play Selected Text with TrialDirector**. The segment plays in TrialDirector's Transcript Manager window.

iBlaze Transcript Window



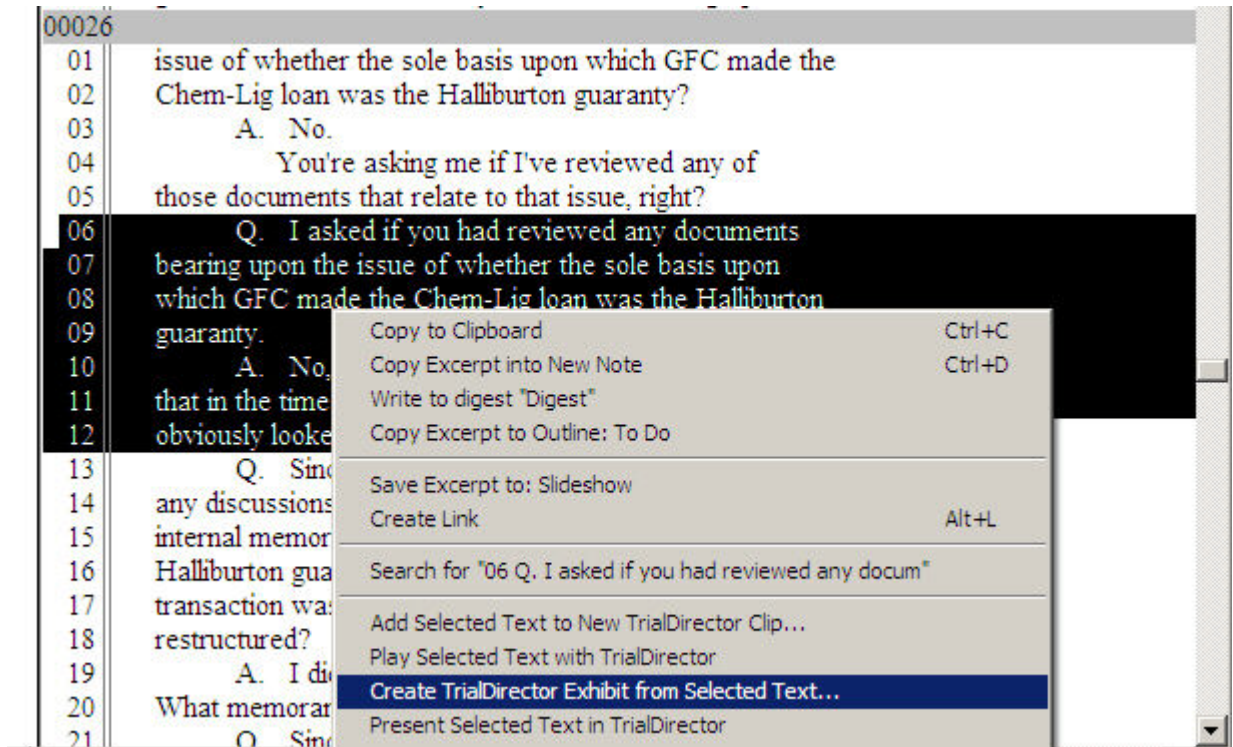
TrialDirector's Transcript Manager



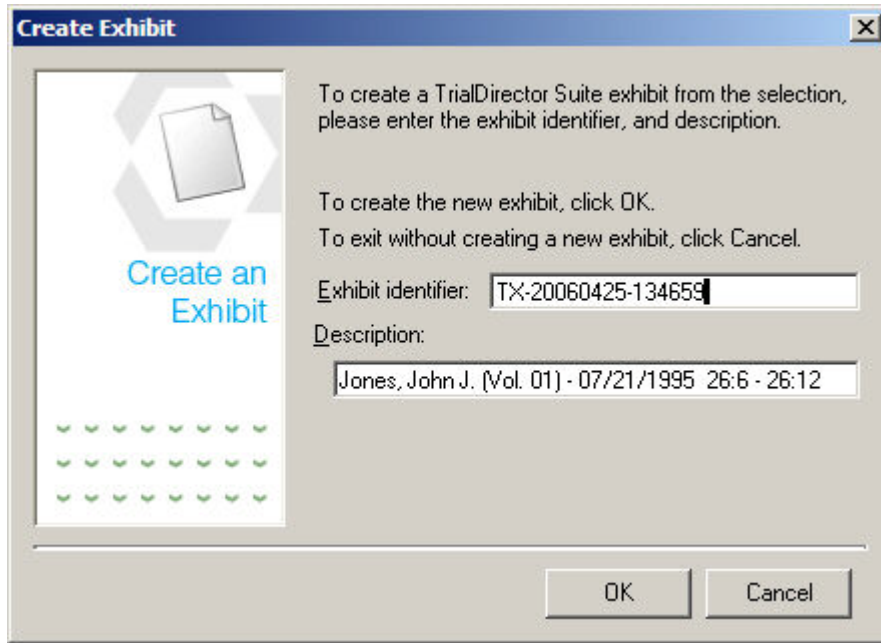
Creating Quick Exhibits from Enterprise/iBlaze Transcript Excerpts

Using the integration between Enterprise/iBlaze and TrialDirector, you can quickly create an excerpt of transcript text to be displayed as an exhibit in the courtroom. No more having to scan the pages of transcripts in order to be able to show transcript text as an image.

1. Highlight the lines of text in the Enterprise/iBlaze transcript that you want to display in TrialDirector.

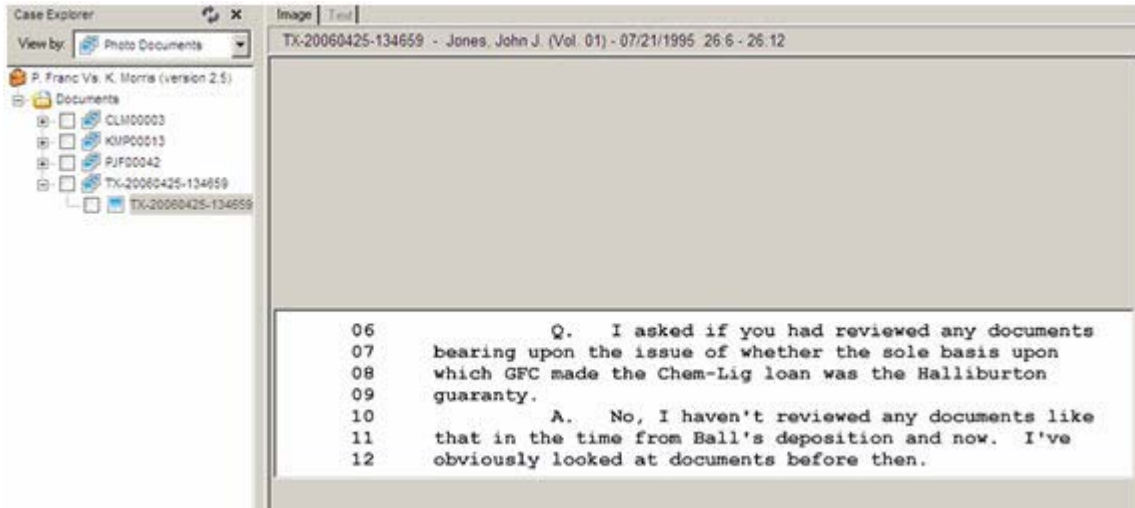


2. Right-click on the highlighted lines of text and select **Create TrialDirector Exhibit from Selected Text**.
3. If you wish, you may change the description of the newly created exhibit or you may leave it as described. Click **OK**.

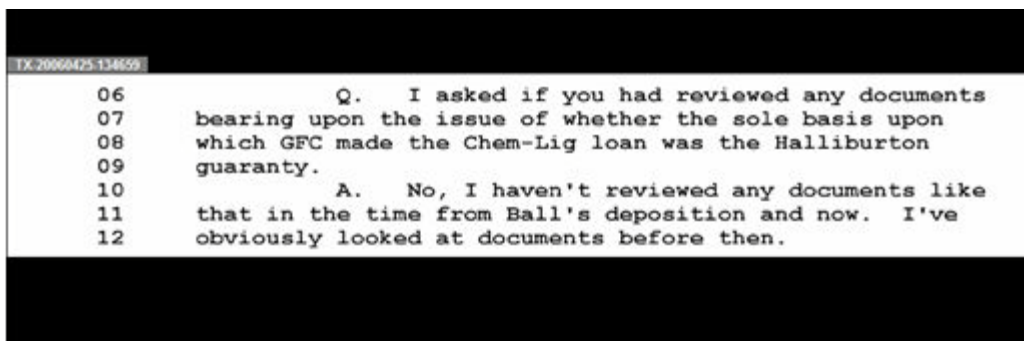


4. The excerpt now appears in TrialDirector's Case Explorer as a bitmap image.

Tip: You can quickly locate these excerpts by selecting Photo Documents from the View By: drop-down list at the top of TrialDirector's Case Explorer.



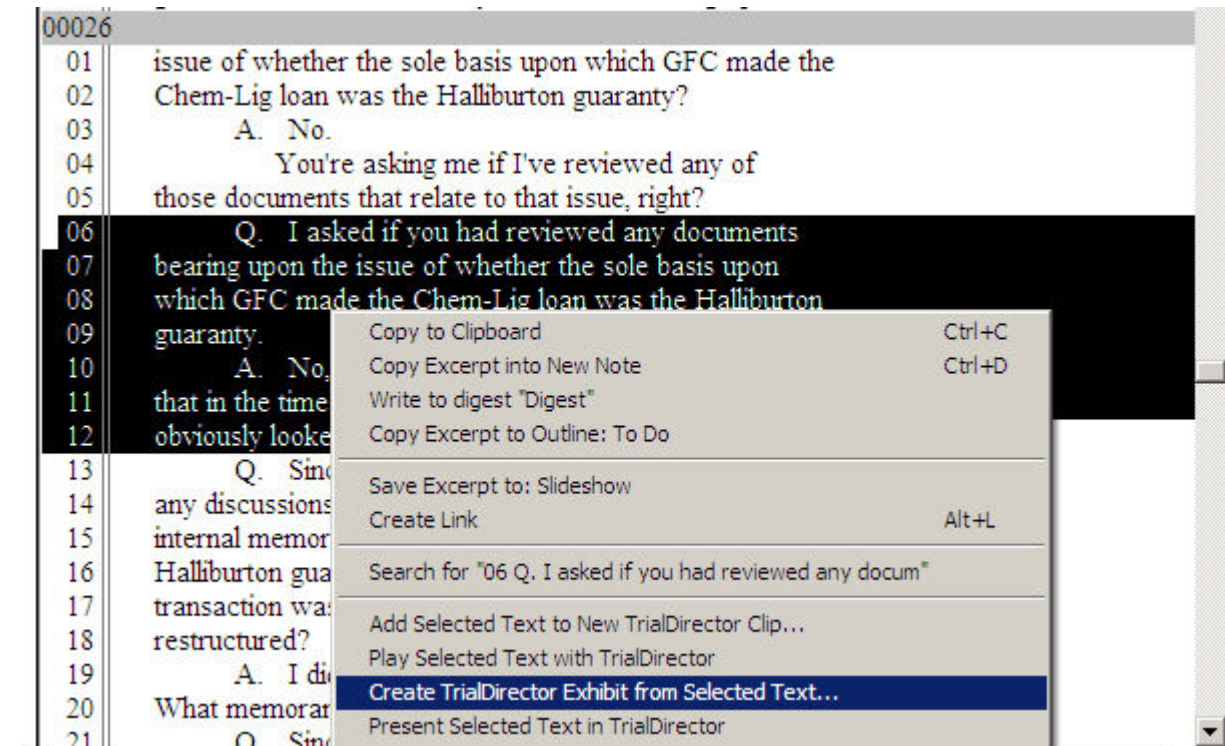
In Presentation Mode, the excerpt appears as follows:



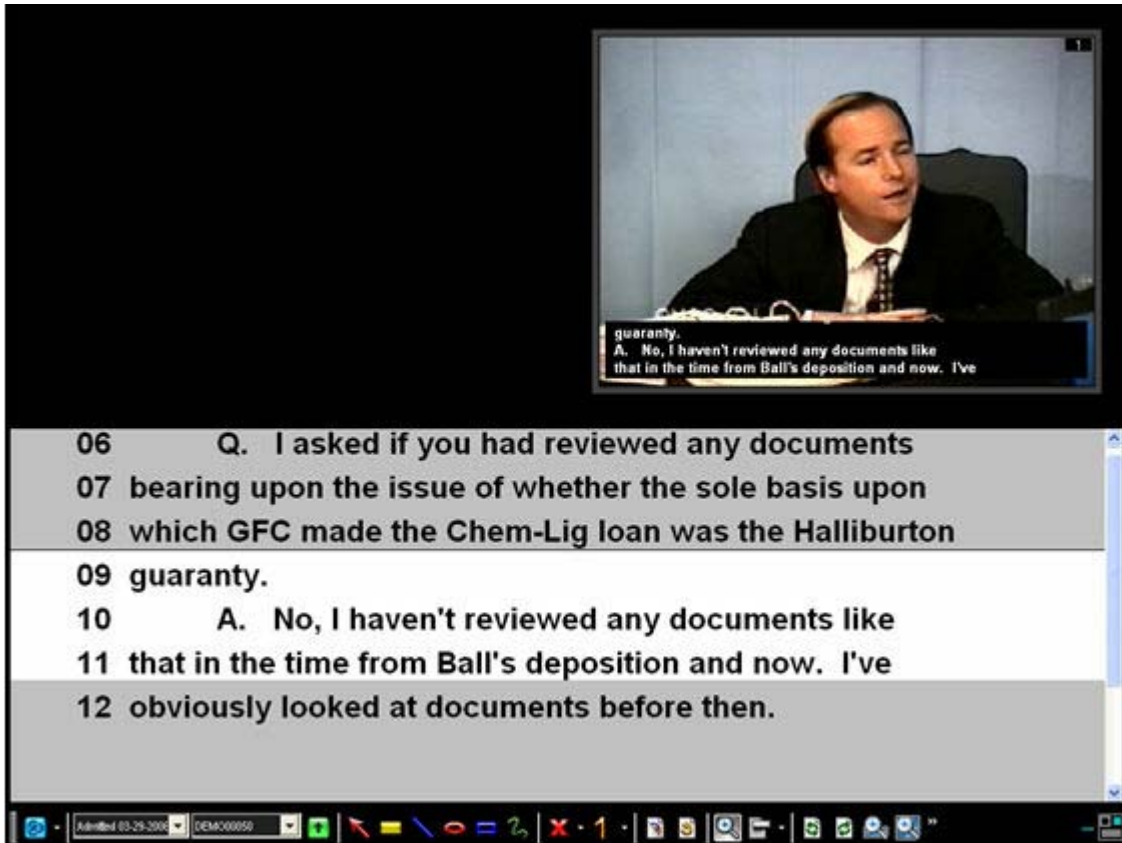
Presenting Testimony Directly from Enterprise/iBlaze

Typically, you would run TrialDirector separately from Enterprise/iBlaze in the courtroom. But you may find, on occasion, that you need to quickly present testimony directly from Enterprise or iBlaze.

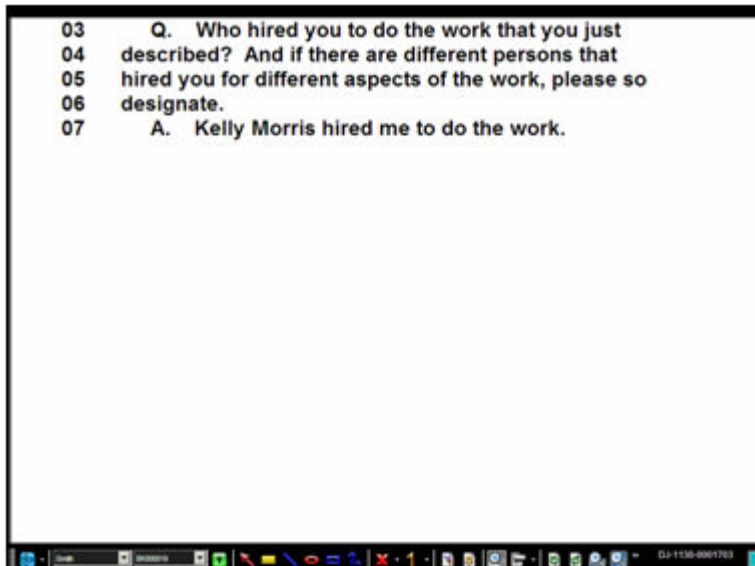
1. Open the transcript you wish to work with, and highlight the lines of testimony you want to present.
2. Right-click on the highlighted lines and select **Present Selected Text in TrialDirector** from the menu. TrialDirector's Presentation screen opens on your desktop displaying the selected testimony.



If video is associated with the transcript, then the video plus scrolling text will be displayed. (These settings may be adjusted in TrialDirector's Presentation Options. See Help Topic Presentation Options for more information.)



If no video is associated with the transcript, then the text appears in TrialDirector's Presentation mode as shown here:

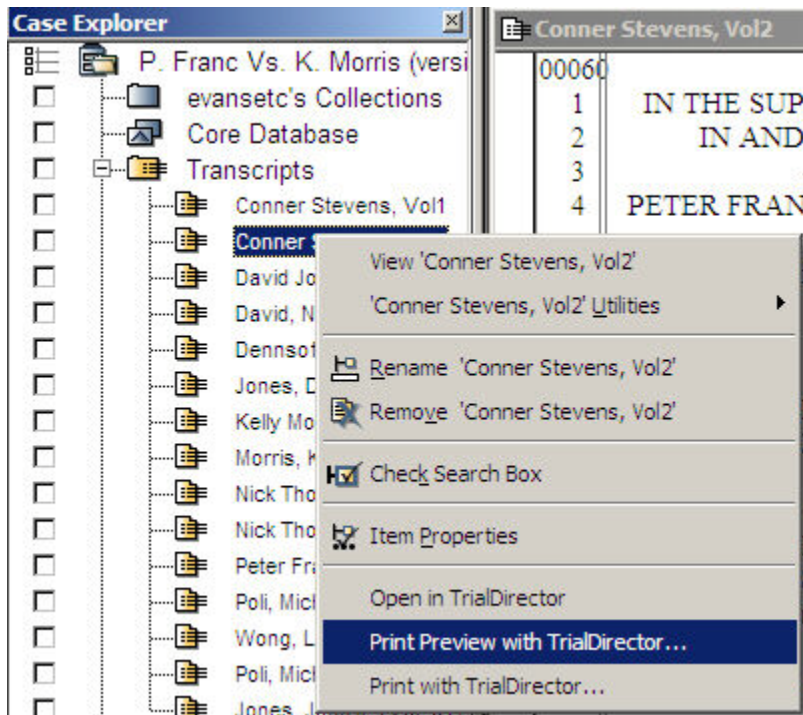


Printing from Enterprise/iBlaze using TrialDirector's Printing Tools

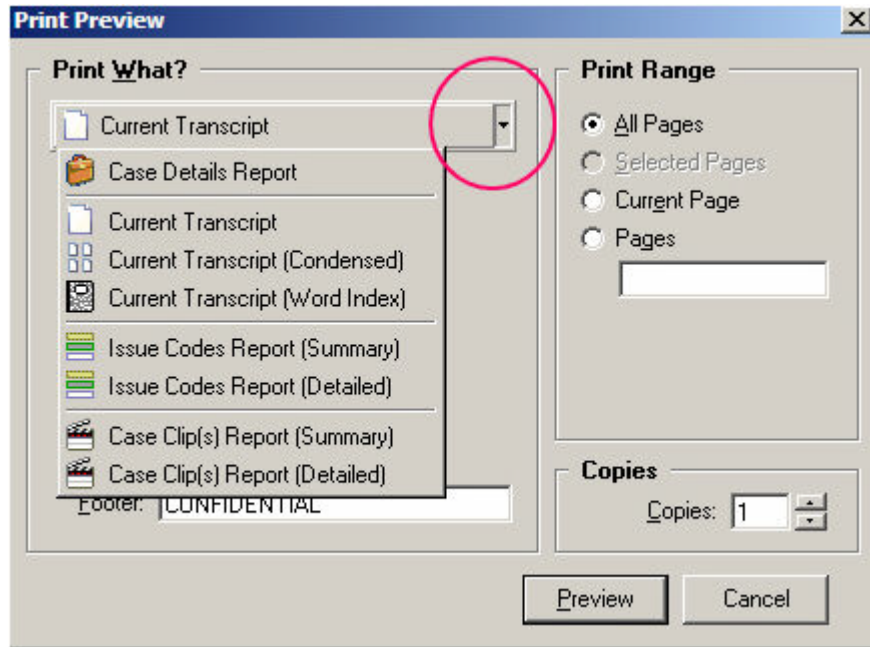
Although you can print transcripts using the printing tools in Enterprise/iBlaze, you may find that TrialDirector's Printing features offer you more options. For example, you may wish to print a transcript in "condensed format," that is, multiple pages per single printed sheet. TrialDirector lets you do that. You can also print the Word Index for those words associated with a transcript. Although you can print a transcript's vocabulary in Enterprise/iBlaze, TrialDirector will let you include the page:line references.

To Print an Enterprise/iBlaze Transcript in TrialDirector

1. Right-click on the transcript name in the Enterprise/iBlaze Case Explorer window.
2. Select either **Print Preview with TrialDirector** or **Print with TrialDirector** from the menu.



3. TrialDirector's printing options dialog opens. Click on the drop-down arrow to view the printing choices.



An example of TrialDirector's Condensed Transcript Format

Condensed Transcript of Jones, John J. (Vol. 01) - 07211966
Tuesday, April 26, 2006, 2:18:57 PM

P. Franc Vs. K. Morris (version 2.5)

<p>Page 1</p> <p>1 A. I don't really know. 2 Q. How often does that 3 A. Definitely. 4 Q. How often do you 5 A. Yes. 6 Q. How often do you 7 A. Probably. 8 Q. How often do you 9 A. I'm not really sure. 10 Q. Something between 10 and 100? 11 A. I told you I'm not sure. 12 Q. Are you ever represented by counsel 13 today? 14 A. No. 15 Q. You're not represented by someone today 16 in this deposition, are you? 17 A. No, I'm not. 18 Q. And the question to be sure without 19 counsel was your own question? 20 A. When you ask that question, it 21 presupposes that there was a question, unasked. 22 I'm not sure I really gave it any thought. 23 Q. Was the first time that you learned that 24 EFC was asserting a defense of reliance on counsel to 25 Halliburton's own counsel the day that I asked you</p>	<p>Page 1</p> <p>1 that is essentially an "if-then" or "but-for." I may ask 2 you either "yes" or "no," or just point to Larry, and 3 that's just simply a request to make whatever your 4 answer is verbally so he can write it down. 5 Do you understand that? 6 A. I understand that. 7 Q. Now, you at one point were counsel for 8 Raytheon Financial Corporation in this case, is that 9 correct? 10 A. Yes. 11 Q. And you are no longer counsel for them in 12 this case, is that correct? 13 A. Yes. 14 Q. Are you any longer counsel for Raytheon 15 in any respect? 16 A. You mean this case or any other case? 17 Q. Yes, sir. 18 A. I don't think we have any active cases in 19 a litigation-type context for Raytheon. 20 Q. When would the attorney-client 21 relationship between you and EFC with respect to this 22 case have ended? 23 A. When would it have ended -- 24 Q. Would it have ended when there was a 25 substitution of counsel?</p>
<p>Page 2</p> <p>1 about trying to schedule depositions and to tell you I 2 would be sending a subpoena? 3 A. Well, that's true. You were the first 4 one that told me that they had waived the privilege on 5 the idea that advice of counsel as a defense, which I 6 looked at in the office copy, and it's not even a defense. 7 Q. Now you were that your deposition taken 8 without? 9 A. Yes, now, I must have. I've taken a lot 10 of depositions, obviously. I think maybe I had my 11 deposition taken once or twice a long time ago. 12 Q. You've been in a lot of depositions 13 before and I know you know all the rules. The only 14 one thing that I'm going to mention is that from time 15 to time, just as that we get a case raised, if you 16 start to answer a question, as you normally would, 17 counsel intervention, before I have finished, you may see 18 me hold up my hand, and that's just a request that you 19 wait until I have finished so the court reporter can get 20 the question. 21 Is that acceptable to you? 22 A. I will do my best to follow that rule. 23 Q. And also, if at one point I notice that, 24 as people normally do in conversation, you answer a 25 question with a statement of your hand or with an answer</p>	<p>Page 2</p> <p>1 ME. THUNDER: Object to the form of the 2 question. 3 A. I don't really know. That's a legal 4 question. I haven't really given it any thought. I 5 mean -- I'm not sure. I don't know how to answer your 6 question. If it ended when we were out of the case, 7 then maybe that's the result. Whether that's true or 8 not under the law, I don't know. 9 Q. Mr. THUNDER: Are you under the 10 impression that today there still exists an 11 attorney-client relationship between you and EFC/REDFORD? 12 A. I don't know. Definitely there still exists 13 I was in the case. Whether -- whether there -- whether 14 that relationship and any privileged communication 15 extends after I'm out of the case, I don't know. I 16 haven't looked at it. 17 The place starts to the little place. 18 Every about that. You guys need some more questions here, 19 Frantz. Maybe you can encourage your own law firm to 20 do that. 21 Q. Now, would you describe to me what 22 you've done to prepare for the deposition today? 23 A. Well, let's see. I -- the Hall and I 24 had a short meeting with James Tardiff, "Shark" DeLong, I 25 don't know how long it was, it was like an hour.</p>

page 2

An example of TrialDirector's printed Word Index

Transcript Word Index for Jones, John J. (Vol. 01) - 07/21/1995
 Tuesday, April 25, 2006, 2:19:50 PM

P. Franc Vs. K. Morris (version 2.5)

counterclaim 5:25; 21:11, 13, 14; 22:2	differently 37:7; 39:24	evidence 21:20; 34:6, 10; 37:4	30:3; 32:17, 23; 33:5; 35:1, 14; 36:18	32:11; 33:15, 19, 25; 35:8, 17; 36:21; 38:23, 39:2, 24
county 1:2; 3:5; 41:2, 6	direct 39:11	exactly 18:24; 20:9	firm's 30:10	gfc's 26:14, 22; 39:8
couple 13:9; 19:25; 25:8	direction 41:11	examination 2:2; 4:5	firms 33:3	gfc/finova 8:11
course 16:18; 38:11	disagree 40:9	examined 4:3	first 1:22; 4:2; 5:23; 6:3; 17:9, 13, 18; 18:22; 19:1, 8, 17, 18, 19; 20:13, 17; 21:3; 22:16; 24:5, 11; 28:9, 25; 29:24; 30:11, 20; 32:14; 33:11, 20; 35:14, 16; 36:19, 20	gist 15:25
court 1:1, 22; 6:19; 37:14	disclose 24:22, 23 18	except 25:8	fit 23:18; 34:9; 37:24	give 12:18; 15:19, 20; 23:20, 21; 29:17; 40:8, 11
covered 16:4, 9	disclosed 24:8, 14, 18	excess 30:14	five 5:2; 20:2; 37:20	given 8:4; 14:6; 22:22; 28:4; 35:3; 39:8
craig 3:9; 5:15	disclosure 21:5, 8, 10, 18; 22:4; 24:9, 19; 25:1	excuse 17:20; 19:5	floor 3:4	giving 23:22
cummings 3:12	discount 18:11; 32:5	exhibit 18:8; 20:11; 25:14; 27:21; 29:9, 11, 22; 30:9	flow 33:22	glanced 20:16
cut 32:8, 24	discovery 9:9; 16:19; 36:8	exhibits 2:10; 27:13, 16, 19, 24	focus 11:11, 24	glancing 25:10
D	discuss 15:10	existed 17:10	focused 11:7	glass 8:17
damages 34:13, 15	discussed 10:19, 20; 15:13	existence 21:1; 22:8	focusing 11:12; 16:16	goes 34:20, 21
dated 41:20	discussion 10:16	exists 8:10		gone 16:22; 25:4, 20, 25; 27:12; 28:3
deb 5:25, 33; 10:9	discussions 16:3, 7, 18	expect 36:12		good 21:17, 20; 22:16
		expiration 26:15, 23		

Microsoft Access Integration

The ability to link to a Microsoft Access database via a DDE (Dynamic Data Exchange) is one of the many tools that you can take advantage of as a user of TrialDirector.

Establishing Link

Locate the **DDE.mdb** file, located in the **\support\dde\access** folder on the TrialDirector CD. Open the *Table1* form in Access, which will demonstrate a basic DDE link with Access. The case items contained within this database pertain to the TrialDirector Demo Case. Clicking on the navigation buttons on the bottom of the form will display the associated item in the Document Manager.

Displaying the *Table1* form in Design Mode will reveal the DDE commands used to establish the link between Access and TrialDirector. The DDE commands are listed below:

```
=DDESend("TrialDirector","DDImage","TxtDde",[Document ID])
```

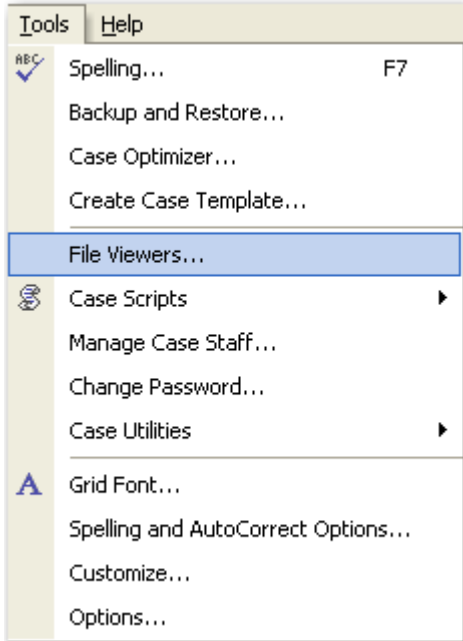
Using Microsoft Access with TrialDirector

Microsoft Access users can maintain their case information using a custom, in-house database while able to still use the features of TrialDirector. The Document IDs used in the MS Access database and the TrialDirector Case Explorer must match in order for the DDE commands to properly function. Running both applications will allow users to navigate through document information via an Access form and display the corresponding image in TrialDirector.

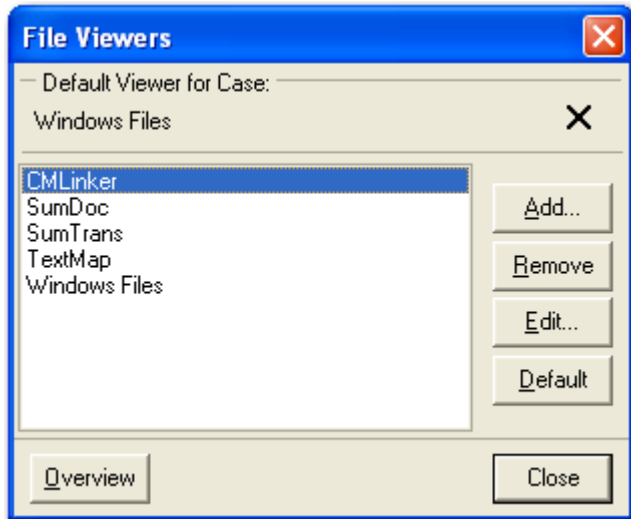
CaseMap

To set TrialDirector as the default file viewer in LexisNexis CaseMap, follow the instructions below.

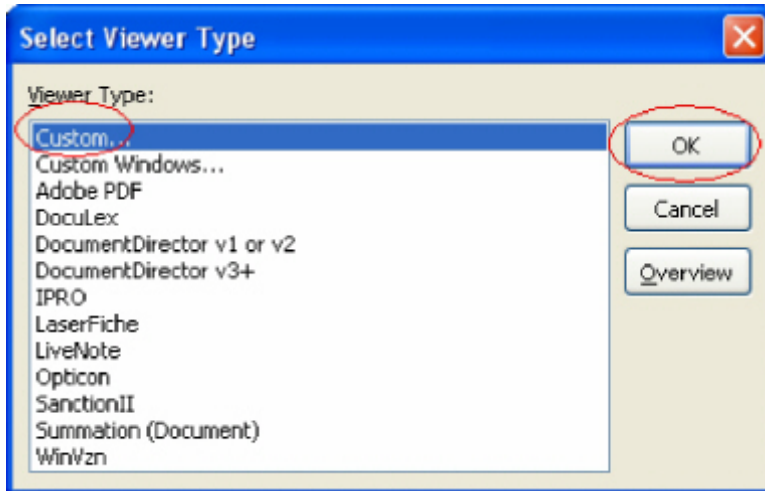
1. In CaseMap, click the **Tools** menu and select **File Viewers**.



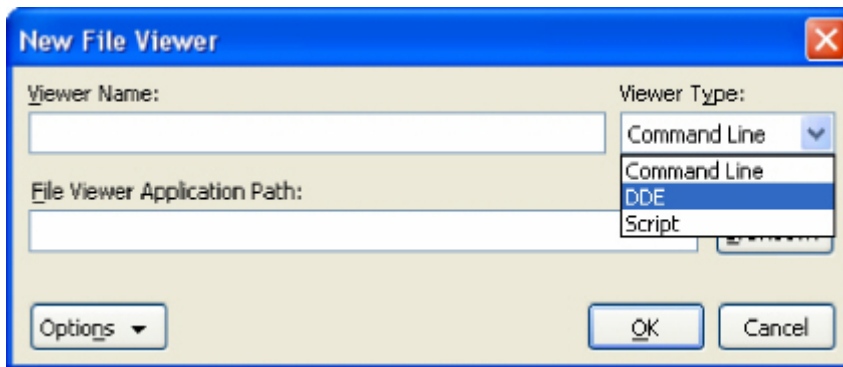
2. In the **File Viewers** dialog box, click the **Add** button.



3. In the **Select Viewer Type** dialog box, select **Custom** and click **OK**.

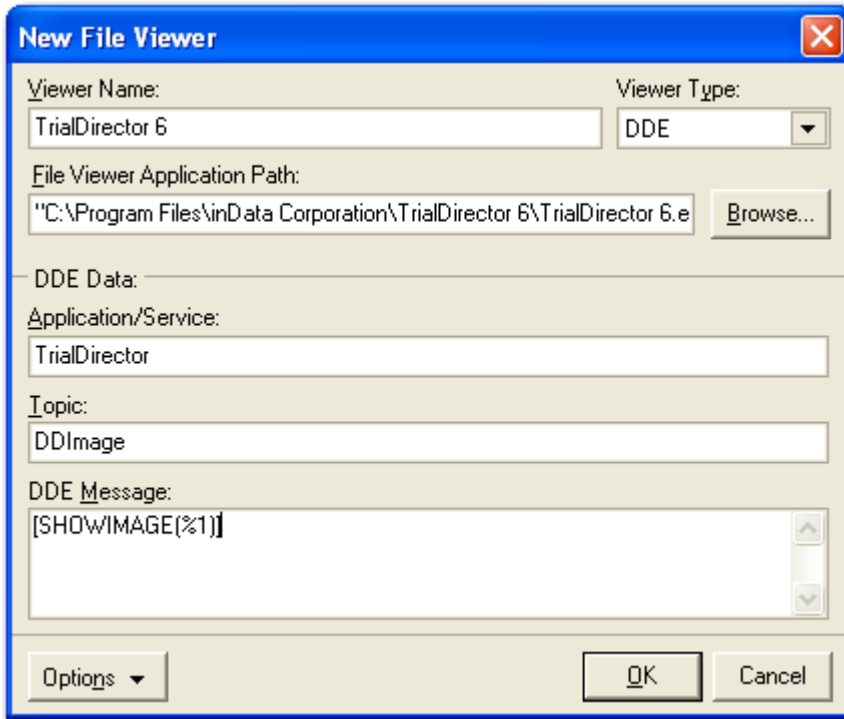


4. In the **New File Viewer** dialog box, under **Viewer Type**, select DDE.

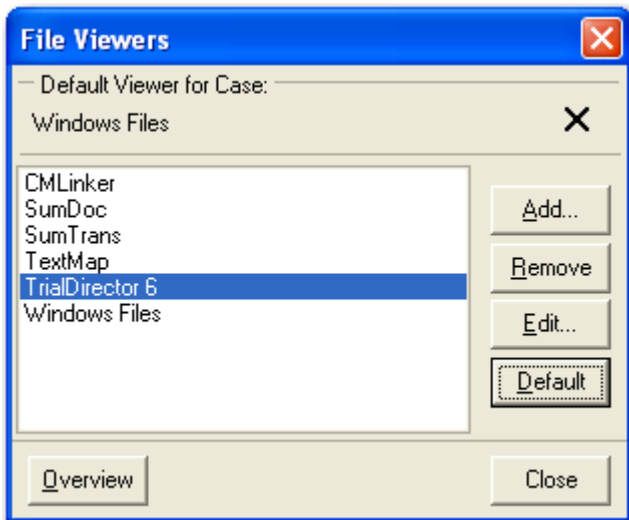


Once DDE is selected as the Viewer Type, additional fields appear.

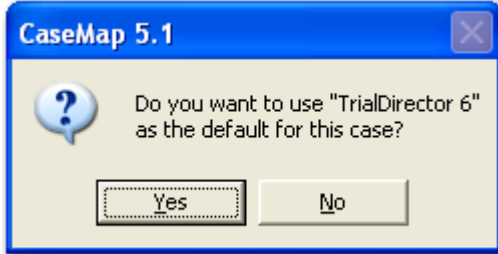
5. Complete the **New File Viewer** dialog box as shown below. Browse to the location where TrialDirector is currently installed.




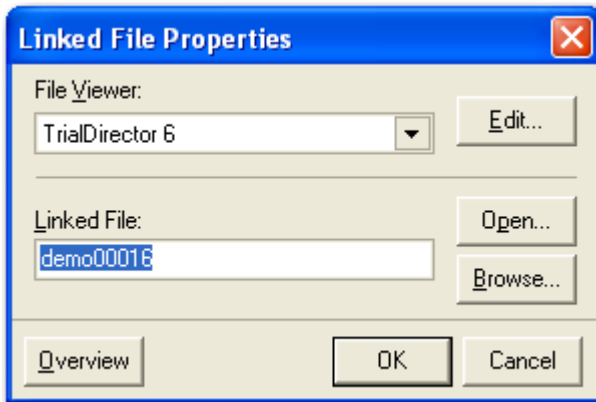
6. Once the file viewer has been configured, click **OK** to save the changes and return to the **File Viewers** dialog box.
7. Now that the File Viewer has been created, it must be set as the default viewer for the current case. Select **TrialDirector 6** from the list of viewers and click the **Default** button.



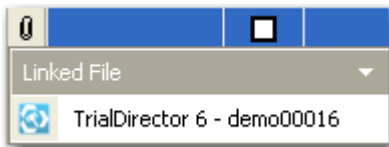
- Click **Yes** to confirm TrialDirector 6 as the default viewer.



- Click **Close** to return to CaseMap.
- This TrialDirector icon is now associated with the CaseMap items:  You must set the CaseMap **Linked File** field to reflect the **Item ID** of the TrialDirector record and NOT the actual path to the file. When using DDE to show an image in TrialDirector, the Item ID is used to display the image. TrialDirector takes care of locating the image, so you don't need to worry about the file path location.



- Once this step is complete, select the CaseMap record you want to view and use the **F9** key to display the image in TrialDirector or click on the paper clip icon in CaseMap and select the linked file in TrialDirector.



Note: This method provides a one-way link so that CaseMap will use TrialDirector to display images. You cannot send records from TrialDirector to CaseMap.