

MANAGING CASE PATHS, DATABASES, SECURITY, AND USERS



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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.

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Manage Case Paths

The locations used to store cases on your computer or network are recorded by TrialDirector so that you can easily find and share cases. When you create, open, or remove a case, you have the option to choose a different case location than the one presented. You can select an alternate path from a list of previous case locations, add a new case location, or remove case locations from the list.

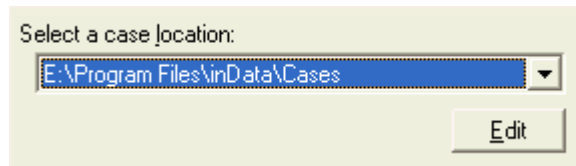


Note: If your case exhibits have moved to a new location, use the [Global Path Editor](#) to update the path(s). Use the [Reconnect Missing File Links](#) tool to locate exhibits that are missing correct path information.

You can [easily navigate to the established case path](#) from either the Case Explorer or the Transcript Manager.

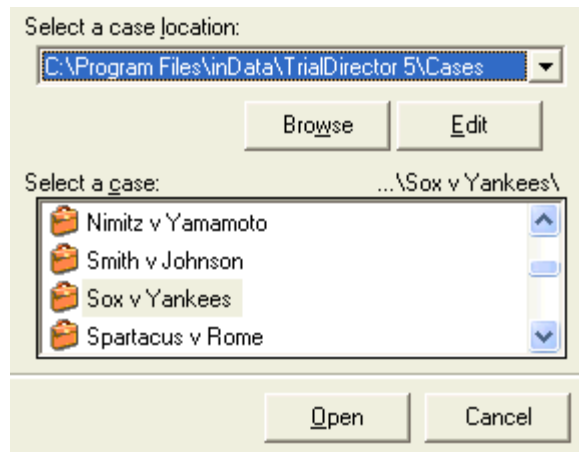
To Select a Case Path

1. Select **Create a New Case**, **Open a Case** or **Remove Case(s)** from the File menu. Each of the three dialogs displays the current case path, as shown below.



Note: TrialDirector case locations can be on local hard disks, shared network drives or even UNC paths.

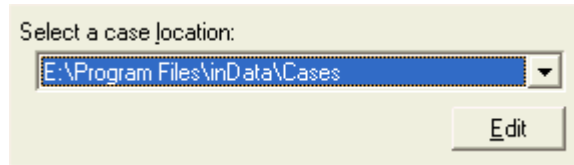
2. The paths that have already been added on your system are listed in a drop-down list. To change the current path, click the drop-down arrow and select an alternate path from the list.
3. After you've identified the case location, you can select the desired case from the list of all cases in the location. Click **Open** to open the desired case.



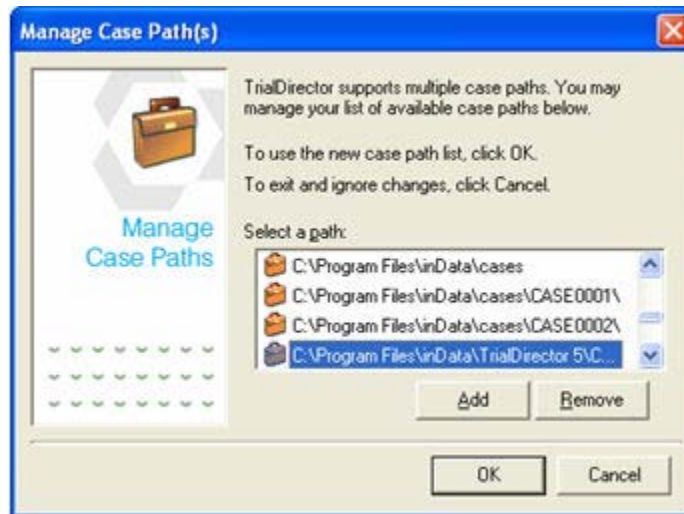
Add or Remove a Case Path

You may occasionally need to add or remove a case path. For example, you may need to access a case on a network computer, or you may wish to simplify your path lists by removing old cases.

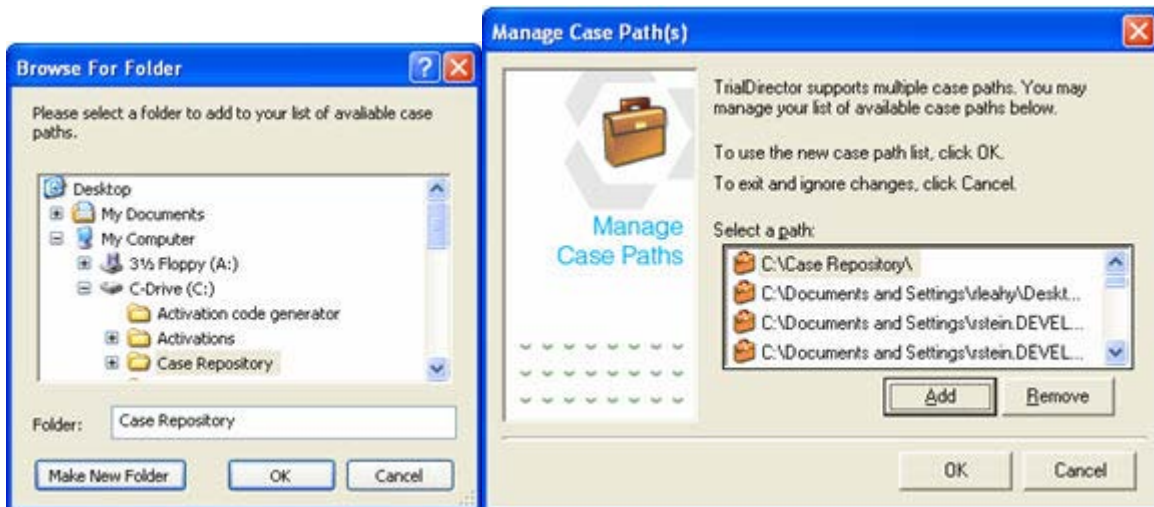
1. To change the list of available paths, click **Edit**.



2. The **Manage Case Path(s)** dialog opens.



3. To add a new path, click **Add**. In the resulting selection window, browse to the new path and click **OK** to return to the Manage Case Paths window. The new path will be listed in the window.



4. To remove a case path, select the path you want to remove and click **Remove**.

5. A warning message will appear. Click **OK** to remove the path or **Cancel** to return to the Manage Case Paths window without removing the path.



Note: This operation will only remove the selected path from the list of case paths and will not delete any files or directories from the selected path.

Explore Case Files

To easily navigate to the location where your case files are stored:

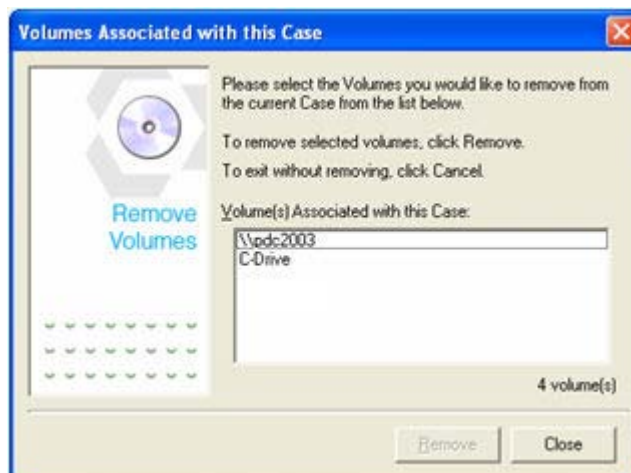
1. Right-click on the case name at the top of the Case Explorer or Transcript Manager.
2. Select **Explore**. Windows Explorer opens to display your case files.

Volumes

Items are automatically associated with a specific volume when they are added to a case. The volume can be a hard drive (local or network), disk or CD/DVD where item source files are located and is identified by a Volume ID.

To remove all items associated with a volume:

1. Select **Remove Volume(s)** from the Documents menu.



2. On the displayed list, highlight the volume(s) you want to remove.
3. Click **[Remove]**.

The volume and all items associated with it are removed from the case.



Note: If you remove a volume from the case, you will no longer be able to access any of the items that were in the volume without reloading them. The volume and items are not removed from the computer; only their association with the case is removed.


Moving and Copying Files

When working in TrialDirector, you may need to move or copy entire cases or files linked in to cases. The Common Tasks table below lists examples and the recommended method for completing each task. Before you use any of these methods, ensure you are familiar with File Management in TrialDirector.

Keep the following in mind:

- The exhibit files in your case, such as the image files and video depositions, are not part of the TrialDirector case file. They exist as separate files on your computer or network, but are used by and displayed by TrialDirector.
- TrialDirector divides exhibit files into two broad categories: *Digital Video Transcripts (DVTs)* and *Documents*. "DVT"s include a specific type of video file and an associated digital transcript; "Documents" include almost everything else, such as image files, photos, native files (Word, PowerPoint, and so on), and many multimedia file types.
- If you're going to be moving and sharing files across multiple computers, we recommend that you establish naming conventions for your file system. This will simplify or even eliminate some file movement concerns. For a very simple example, if your computers all have a CD drive identified as D:\, and your image files are always stored in D:\CaseData\Images, you could move any case to an alternate computer and it would always find its files (if the correct CD was in drive D:\).

TrialDirector Terminology

Term	Definition
Case File	<p>A TrialDirector Case file contains the organization and annotation instructions that you have applied to the case exhibits. This includes all of the databases, workbooks, issue coding, annotations, notes, security options, scripts, and so on related to the case. Your selections within TrialDirector are applied to exhibit files, which can be thought of as existing separately.</p> <p> Note: <i>The exhibit files in your case, such as the image files and video depositions, are not part of the case file. When TrialDirector case files and their associated document files are moved to a different computer, the document files must be reconnected to the case files <u>unless the file and path names are exactly identical in the new location.</u></i></p>
Exhibit File	<p>Exhibit files are the documents, photos, multimedia files, and so on that comprise trial evidence. These items are maintained separately from TrialDirector case files; TrialDirector makes use of them, but does not alter them. (For example, annotations or redactions appear as a separate layer or layers above the original document.)</p>

Load File (or Batch File)

A load file is the easiest way to add a large number of documents to TrialDirector. For example, if a vendor has prepared a large number of scanned & OCR'd image documents related to a case, you will usually be provided with a load file for the documents. When you import the documents using the load file, the documents are added to your case, and all the database records to identify them are created automatically.

You can use TrialDirector to either import or [export \(create\) a load file](#).

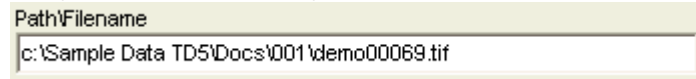
Volume

A volume is the storage location for exhibit files used by TrialDirector. A volume can be on your computer's hard drive, a hard drive on your company's network, or a removable storage device, such as a CD or DVD ROM, a ZIP disk, or a flash drive.

Note that a volume does not have to be the entire storage media. A volume can be a folder on a hard drive, for example, or it might be a CD ROM.

The path is the "address" of a file or it's folder on a volume. Here's an example of a path from an Item Properties screen:

Path



When exhibit files are moved, it is necessary to change the path so that TrialDirector can locate them. This can be done for individual files, or for an entire set of files using the Global Path Editor command.

Common Tasks

If you want to:	Do this:
Take your case with you to trial	Use Pack-N-Go Pack-N-Go makes a compressed copy of your entire case (including all documents, transcripts, video files, and the database) that you can import on another computer with TrialDirector (such as a laptop used for trial).
Copy your entire case to a new location ("Bring it here")	Use Pack-N-Go Pack-N-Go copies your entire case (including all documents, transcripts, video files, and the database) to a specified location, such as a new network drive. It changes all references in the case database to point to the new location.
Try something out on a copy of your case (i.e. you think a document could be corrupt and want to try adding it to a "dummy" case before adding it to your master case)	Use Copy a Case The Copy a Case feature copies the database and all files within the main case folder and subfolders. (It does not copy files linked in to your case that are stored in other locations, such as your My Documents folder or exhibits stored in folders on your network.)
Enable someone else in your office to import your case information	Make Case Load Files This method is faster than using Pack-N-Go if the case includes links to many exhibits stored on your network, and enables the other person to import into an existing case (whereas Pack-N-Go creates a new case). Case load files also enable you to import case information into other programs.
Tell TrialDirector to look in one or more new locations for all of the files (or a batch of files) linked in to your case (i.e. the exhibits are in a network folder now instead of on your hard drive)	Use Global Path Editor
Move a few documents (not DVTs)	Move the files as you would any files on your computer (such as by dragging and dropping between folders). Then, in TrialDirector, right-click on each filename and change the Properties to the new Path\Filename .
Move Digital Video Transcripts (DVTs)	Follow the instructions in Modify Multimedia Source Paths

For information on database management tasks (such as backing up a case database, repairing a case, restoring a case database, etc.), see [Managing Case Databases](#).

Pack-N-Go

Pack-N-Go enables you to do either of the following:

- Copy your entire case (including all documents, transcripts, video files, and the database) to a specified location, such as a new network drive. It changes all references in the case database to point to the new location.
- Pack a copy of your entire case (including all documents, transcripts, video files, and the database) and import it on a another computer with TrialDirector installed, such as a laptop used for trial.

Pack-N-Go differs from the [database maintenance](#) features in TrialDirector that enable you to pack (i.e. clean up) or copy a case because unlike those tools, Pack-N-Go copies *all* of the case files as well as the database. Pack-N-Go also retains case file structure (for example, if you have organized your case with subfolders for each witness, this structure will appear in the unpacked case).



Caution: Pack-N-Go is *not* a data synchronization tool. Only make changes to your master case.

To pack a case

1. On the **File** menu, click **Pack-N-Go**.
The Pack-N-Go Welcome screen appears.
2. Click **Next**.
Pack-N-Go processes your case database to locate all files and determine the total storage space required for the packed case. This may take several minutes or longer if the database is large.
3. If the Missing Files screen appears, click **Reconnect Missing Files**. Use the [Reconnect Missing File Links Wizard](#) to locate the missing files, then go back to Step 1 above to restart Pack-N-Go.
4. After Pack-N-Go successfully locates all files, it prompts you to choose one of the following options:
 - **Copy Files and Update Case Database** - Choose this option if you're relocating your case.
 - **Create Packed Data Set to Import Later** - Choose this option if you want to import a copy of your case on another computer (such as laptop used for trial).
5. Pack-N-Go reports the total amount of space required to store your case. Before you continue, ensure the location where you want to save the packed case has enough space. Then, click **Browse** and select this location.
6. When you are ready to begin the data export process (which may take several minutes), click **Next**.
7. When the process is complete, click **Finished**.

The packed case is saved with a .pak extension in the location you selected. To unpack the case on the other computer, use Import Case from Pack-N-Go Volume.

Reconnect Missing File Links

The Reconnect Missing File Links wizard searches for files that were moved outside of TrialDirector and reconnects the links to the files. If you suspect files are missing (for example, you see missing image icons in your case), use this wizard. You will also be prompted to use this wizard if you attempt to pack a case using [Pack-N-Go](#) and it encounters missing files.



Note: Only use the Reconnect Missing File Links wizard when files have been inadvertently moved and are now "missing" in TrialDirector. To correctly move files, follow the instructions in [Moving and Copying Files](#).

To reconnect missing files

1. On the **Tools** menu, click **Reconnect Missing Files**.
2. In the **Reconnect Missing File Links** wizard, click **Next** to begin the search for missing files.
3. On the **Links to be Fixed** tab, select the first item and click **Fix Item**. Navigate to the missing file. If you need more information, click the Detailed Report tab. Here you can also view the report (to open it in Notepad and print it if needed), or save it to a .TXT file.
4. Repeat Step 3 for each item listed on the **Links to be Fixed** tab until the tab is empty.
5. Click **Next**.
6. When the wizard displays, "You have successfully reconnected all files," click **Finished**.

Managing Case Databases

TrialDirector includes several features you can use as needed to maintain your case database.

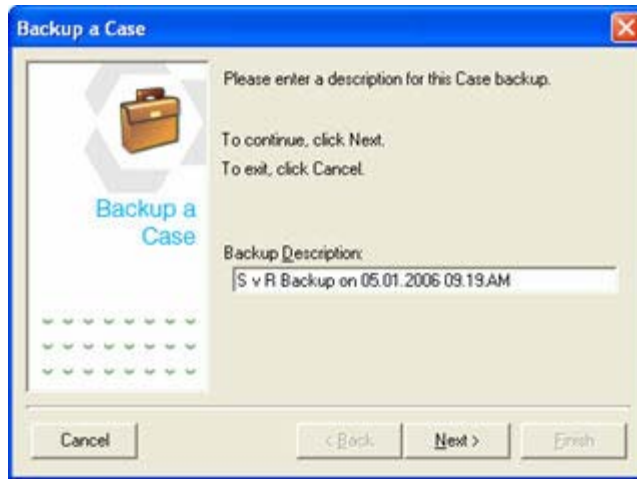
If you want to:	Use this:
Back up your case database (i.e. all notes, markups, annotations, and coding information)	The Backup a Case feature Back up your case every few days and especially before processing large load files or importing information from an external application.
Try something out on a copy of your case (i.e. you think a document could be corrupt and want to try adding it to a "dummy" case before adding it to your master case)	The Copy a Case feature The Copy a Case feature copies the database and all files within the main case folder and subfolders. (It does not copy files linked in to your case that are stored in other locations, such as your My Documents folder or exhibits stored in folders on your network.)
Improve performance for a large case (particularly if the case has had a large number of deletions)	The Pack a Case feature Packing a case is similar to defragmenting your hard drive. It is a cleaning process that removes blank space, which may improve case response time in TrialDirector.
Find missing files and fix the links	The Reconnect Missing Files Wizard
Fix a case that is displaying strange information (i.e. erratic database behavior, fields not properly refreshed, etc.)	The Repair a Case feature
Restore a case database that will not open, continues to display erratic database behavior after repair, or must be reverted back to an earlier state.	The Restore a Database procedure

Backup a Case

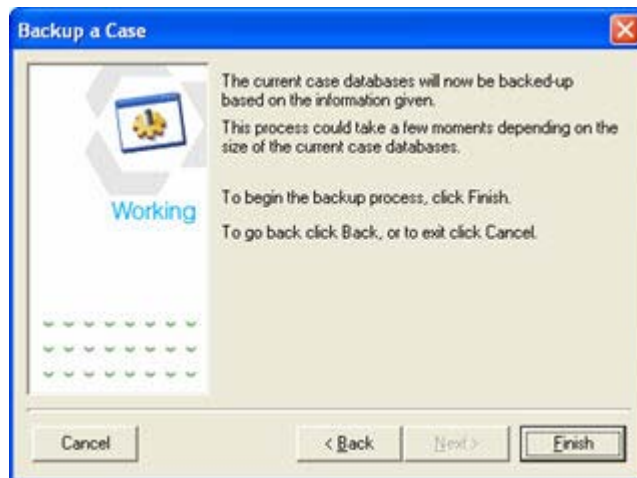
A case backup does not back up all files in a case, rather, it creates a backup copy of the databases associated with the case, which preserves all notes, markups, annotations, and coding information that has been created to support the case documents. (Backup of documents and exhibit files such as transcripts and video are typically handled by separate utilities provided your system administrator.)

inData recommends running the case backup process before processing large load files or importing information from an external application. This provides a fall-back position in the (unlikely) event that a problem occurs during an import.

1. From the **File** menu, select **Case Databases**, then **Backup...**
The **Backup a Case** dialog opens. Specify a description for the backup, then click **Next**.



2. A second screen appears. Click **Finish** to process the backup or **Cancel** to exit.



Note: The time required to backup the case is dependent of the amount of information in the databases. For example, the databases associated with the TrialDirector sample cases will back up in one or two seconds.

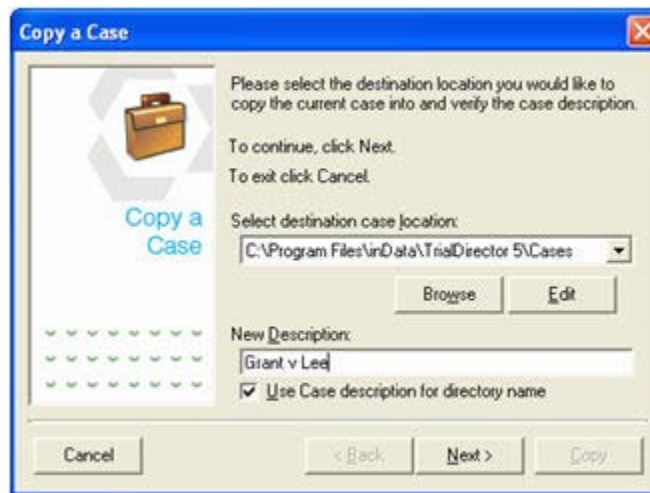
Copy a Case

TrialDirector allows you to create an identical copy of an existing case. Using this method, you can copy a case that exists on your local drive to a network drive where it can be retrieved by other computers. This process will copy the entire contents of the current case directory. All sub-directories, including screen grabs and OCR full text are copied. Secure cases will still retain all user names and associated privileges.



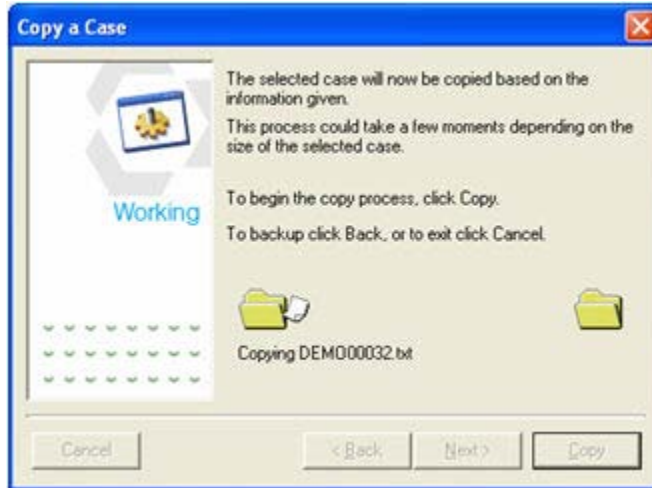
Note: When you create a copy of a case, any changes that you make to either case will not be reflected in the other case. This is because the cases do not share case data.

1. Open the case you would like to copy
2. Open the **File** menu, select **Case Databases** then select **Copy**.



Note: The destination case location can be a shared network drive or a removable disk, such as an external hard drive. This provides an effective way to backup the case databases. Also, the destination case location can be a shared directory on another PC.

3. The default case path is automatically selected as the destination location for the case files.
4. If you want to edit the case path, click **Edit** (see Manage Case Paths). You can also rename the case if desired, using the New Description field.
5. Click **Next**.



6. Click **Copy**. The duration of the copy process depends on the number of items to be copied.



7. When the process is complete, the copied case will display in the destination location selected in the first step. Click **OK**.



Note: The Case Explorer will display the copied case items and the Title Bar will display the new case name and case path.

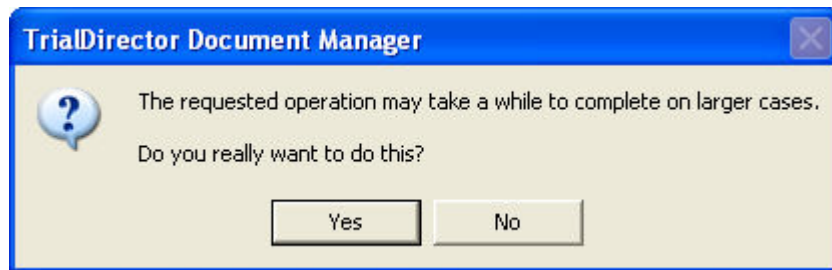
Pack a Case

Packing a database is a housecleaning process that removes blank space left by file deletions. This can improve response time, especially in very large case files or in cases that have had a large number of deletions. This will not affect the current information in the database.

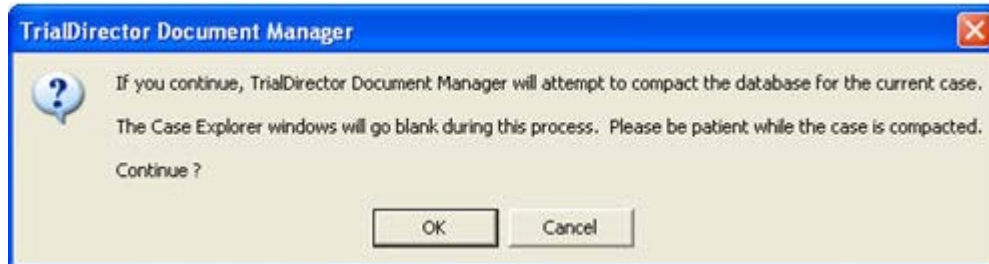
1. Open the **File** menu, select **Case Databases**, choose **Pack**.



Note: If you are working in a network environment, ensure that the case is not open by another user in order to avoid an error message.



2. Click **Yes** to continue or **No** to cancel the process
3. When the process is complete, a message window will appear. Click **OK** to return to the application window.



Note: Attempting to pack large cases may take longer. TrialDirector cases over 100,000 records may take a few minutes to pack.

Repair a Case

A case database should be repaired if the database behavior seems erratic or if the database fields are not properly refreshed. This will not affect the current information in the database.

1. Select **Repair Case Database** from the File menu. (Only visible from the Case Library, Document Manager, or Coding tabs.)
2. Click **Yes** to continue or **No** to cancel the database repair.



Note: If you are working in a network environment, be sure the case is not open by another user in order to avoid an error message.

3. When the database repair is complete, a message window will appear, informing you that the process is complete. Click **OK** to return to the application window.

Restore a Database

Restore a case database from a backup if one of the following occurs:

- The case will no longer open in TrialDirector
- Erratic results continue after you have used the [Repair Case Database](#) utility
- It's necessary to return to a previous database state (for example, if incorrect changes were made to the case that are not easily reversed, you can restore the case database using the previous day's backup)

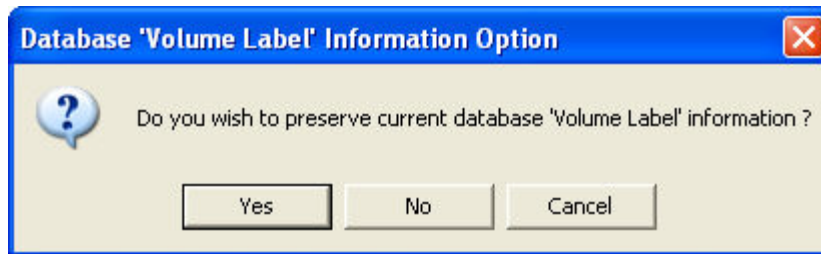
To restore the database:

1. To determine where the case database files are located, right-click on the case name at the top of the Case Explorer or Transcript Explorer tree. Select **Explore Case**.
2. Make sure the case is not open in TrialDirector. Copy all files in the case folder to a new, temporary folder (for example, "Smith Case OLD").
3. Navigate to the location where case backups are stored and locate the most recent backup of the case.
4. Copy all files from the backup case folder to the active case folder you located in Step 1. When the prompt appears, click **Yes** to confirm you want to replace existing files.
5. Open the case in TrialDirector. Once you've determined the case is working correctly and contains the expected data, delete the temporary folder you created in Step 3.

Make Case Load Files

TrialDirector can be used to make load files for sharing exhibit files with other users, moving the case to a different computer, or for use by an alternate program. Before you make case load files, review [Moving and Copying Files](#) to ensure this is the best method for what you want to do.

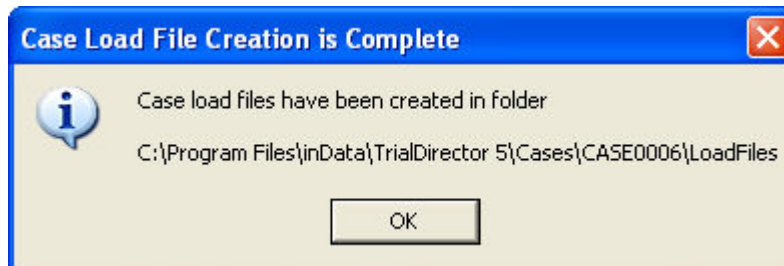
1. To make load files from a case, select the **Make Case Load Files** command from the **Tools** menu. A dialog box will open asking if you want to use the same Volume Label information. If the load file will be used on the same computer or a computer using the same volume naming conventions, click **Yes**. Otherwise, click **No**.



2. If you selected **No**, the dialogue below will open. Specify the desired Volume Label in the field provided, then click **OK**.



3. After you clicked **Yes** in step 1 or **OK** in Step 2, the following screen will appear, giving the location of the load file(s).



Note: Case load files are automatically created in formats required by several different applications. The file with the .oll extension is the TrialDirector format, the .dii file is the one required for CT Summation products.

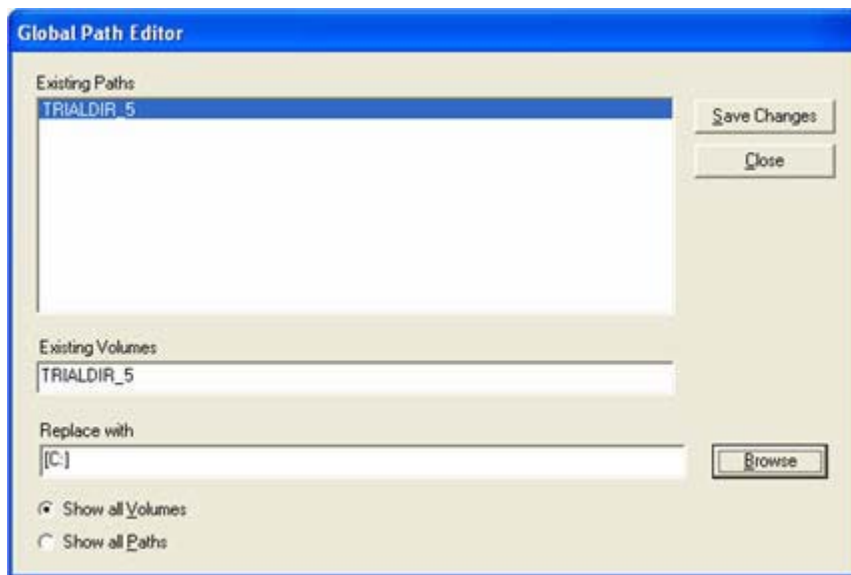
Global Path Editor

Occasionally you may need to move exhibit files (for example, from a CD to a network drive). Move the files as you would any other files in Windows. *Immediately* after moving the files, use the Global Path Editor in TrialDirector to update the volumes and/or paths.

From the **Tools** menu, select **Global Path Editor**. The Global Path Editor dialog box opens, displaying the unique file paths for the current case. Two options are available on the bottom of the screen: **Show all Volumes** and the default, **Show all Paths**. When the **Show all Volumes** option is selected, all unique volumes that have been associated with the current case are listed.

To Change a Volume

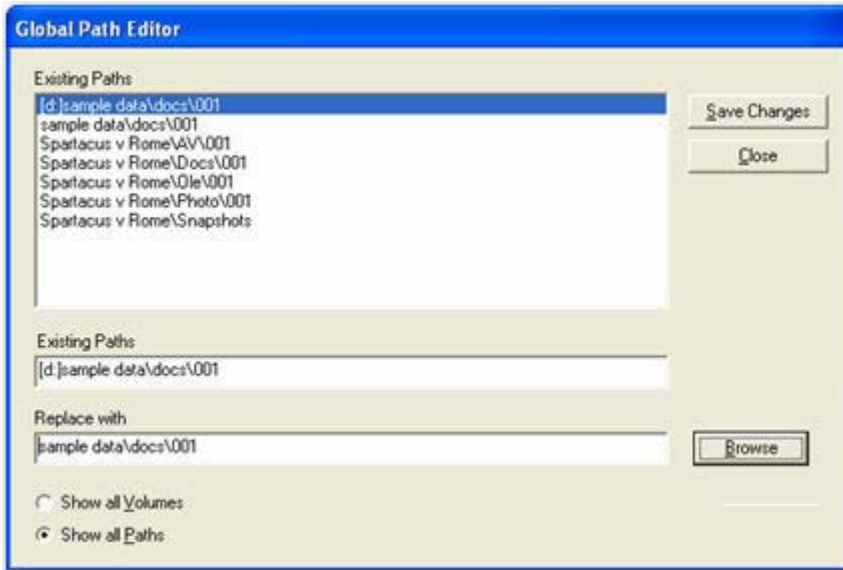
1. Select **Show all Volumes**. A list of all unique volumes associated with the current case is displayed.



2. In the **Replace with** box, enter a new volume identity, or click **Browse** to navigate to the new volume.
In the example above, the case is being redirected from a volume named TRIALDIR_5 to a volume named [C:].
3. Click the **Save Changes** button to add the new volume and make it the active volume for the case.

To Change a Path

1. Select **Show all Paths**. A list of all unique folder paths for the current case displays.



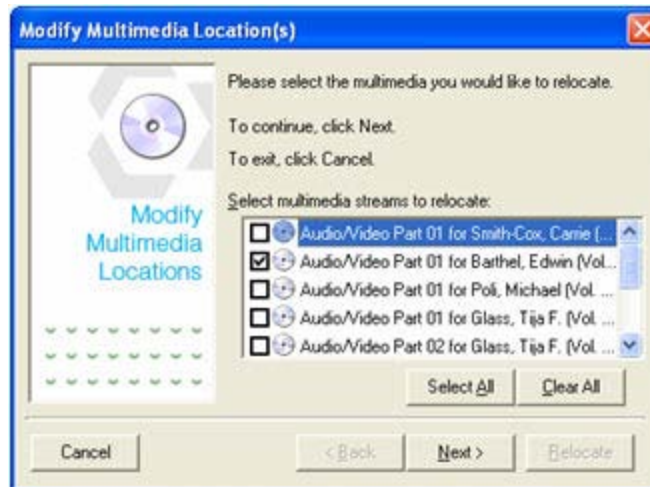
In this example, a group of exhibit files have been moved from a CD in the computer's D: drive to the internal hard drive. The folder names that contain the files have not been changed. (The Sample Data folder and everything in it was copied to the internal hard drive.)

4. Click on the path you want to change in the list.
The selected path appears in the **Existing Paths** box below the list.
5. In the **Replace With** box, edit the path or click **Browse** to navigate to the new path.
In the example above, the only change needed is the removal of the [d:], since the folder naming remains the same.
6. **IMPORTANT:** Click **Save Changes** after editing each path. When all the paths have been revised, click **Close** to exit the dialog box.

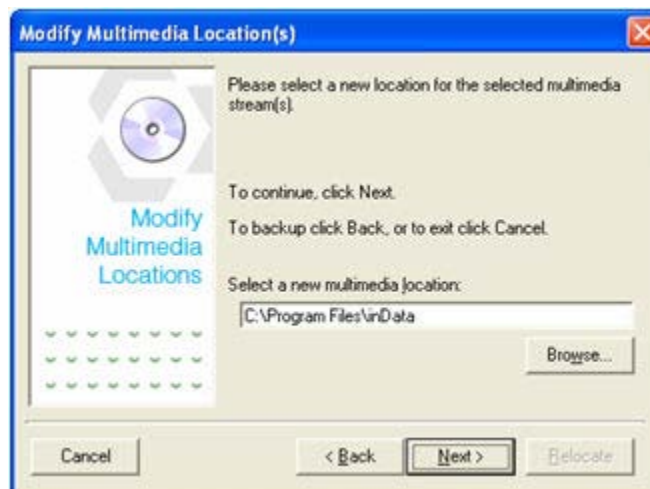
Modify Multimedia Source Paths

If you change the location of the multimedia source files for a Digital Video Transcript, you will need to modify the path to the source files.

1. Select **Modify Multimedia Location(s)** from the Multimedia menu.



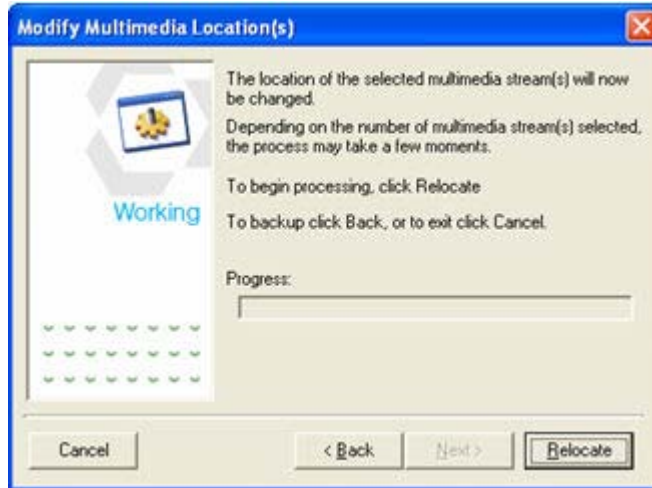
2. Select the multimedia file(s) you want to relocate. Click **[Next]** to continue.



3. Click **[Browse]** to select a new source path for the multimedia file or type in the fully qualified path (including drive letter). Click **[Next]**.



Note: The new source path can be a local or external hard disk, network drive or UNC path.



Note: If you simply enter the drive letter or beginning portion of the new source path, TrialDirector will parse the sub-directories to find the proper source files.

4. Click **[Relocate]** to change the source file location information.
5. When the progress bar reaches the end, click **[Next]**.



Note: A warning is displayed if any of the multimedia source files could not be found in the location entered on Step 3.

8. Review the relocation results carefully to ensure no warnings were issued.
9. Click **[Finished]** to exit the relocation process.

Enable Case Security

When you enable case security for a case, a user name and password will be required to access case data. You can also encrypt case data so that it cannot be opened and read by any other person or program. You can [allow multiple users](#) to have access to the case.

1. Select Create a **New Case** from the File menu.
2. Follow the instructions to Create a New Case to advance through the first two screens of the wizard.



3. To enable case security for the case you are creating, click the **Enable Case Access Security** checkbox.



Note: By default, you are the System Administrator when you create a new case and you must select an Administrator User ID and Password.

4. Modify the Administrator User ID, if desired.
5. Enter an Administrator Password. The Administrators passwords are never displayed in plain text.

6. Enter the Password again to confirm it.



Note: When you enable case access security, you can also enable case encryption, which provides additional security by scrambling your case data so that it cannot be opened and read by any other person or program. However, if you enable case encryption, you will experience a minor loss in performance.

7. To enable case encryption, click the **Enable Case Encryption** checkbox.
8. Click **[Create]** to finish creating the case

Administer Case Users

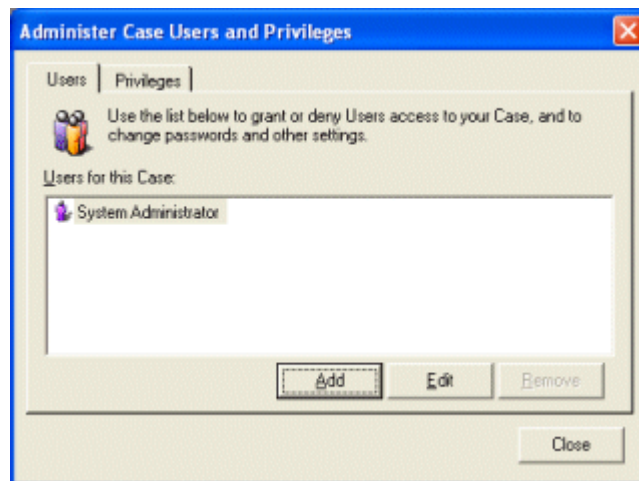
Topics:

- [Add a User](#)
- [Edit a User Profile](#)
- [Remove a User](#)
- [Disable a User](#)
- [Log off a User](#)

On a network, when [case access security](#) is enabled, users with Case Management privileges (including the System Administrator) can add, edit, disable and remove users, as well as modify user privileges.

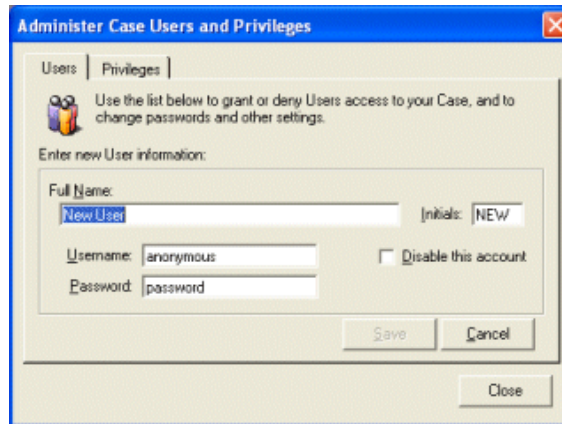
To change user settings

1. Select **Administer Case Users and Privileges** from the **File** menu. (This option does not appear on a non-network system.)
2. The current case users are displayed in the window below. The System Administrator is designated by a purple icon, while all other users are designated by a red icon.



To Add a User

1. Click the **Add** button on the Administer Case Users and Privileges window.



2. Enter the user's full name and initials.
3. Enter a user name and password for the user.
4. Click **Save**.

The user is now able to log into the case. By default, the user has limited case privileges. Click the **Privileges** tab to modify the user's privileges.

To Edit User Information

1. Click the **Edit** button on the Administer Case Users and Privileges window.
2. Make the desired changes to the user information.
3. Click **Save**.

To Remove a User

1. Select the user you want to remove in the Administer Case Users and Privileges window.
2. Click **Remove**.

The user is no longer able to log into the case

To Disable a User

1. Select the user you would like to disable in the Administer Case Users and Privileges window.
2. Click **Edit**.
3. Select the check box adjacent to **Disable This Account**.
4. Click **Save**.

The user is not able to log into the case until you enable the user again.

To Log Off a User

1. Select **Log Off User: (*Name*)** from the **File** menu.
2. The user will be logged off, and the Secure Case Access Login screen will appear, allowing you to log in as a different user.