

ORGANIZING FOR TRIAL WITH WORKBOOKS AND CAROUSELS



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.

Working with Workbooks.....	1
Create a New Workbook.....	2
Move Items into a Workbook	2
Sort Workbook Contents.....	3
Rearrange Workbook Contents.....	4
Rename a Workbook.....	4
Print Workbook Contents.....	4
Export Workbook Contents to a Script File.....	4
Export Workbook Contents to a Volume	5
Apply Current Label to Workbook Items	11
Remove a Workbook.....	12
Using Carousels	13
To create a carousel.....	13
To make an existing workbook a carousel.....	13
To present a carousel.....	13
Using MultiPlayer Workbooks	15
To create a MultiPlayer Workbook	15
To make an existing workbook a MultiPlayer Workbook	15
To present a MultiPlayer Clip.....	15
Exporting a Workbook to Adobe PDF.....	17

Working with Workbooks

Topics:

- [Create a New Workbook](#)
- [Move Items Into a Workbook](#)
- [Sort Workbook Contents](#)
- [Rearrange Workbook Contents](#)
- [Rename a Workbook](#)
- [Print Workbook Contents](#)
- [Export Workbook Contents to a Script File](#)
- [Export Workbook Contents to a Volume](#)
- [Apply Current Label to Workbook Items](#)
- [Remove a Workbook](#)

In addition to organizing case exhibits using the Document Manager and Transcript Manager Tabs, TrialDirector provides a Workbooks tool that allows you to organize and relate specific groups of items, such as documents or clips related to a particular witness or issue. Note that adding an item to a workbook does not remove it from the Document Manager or Transcript Manager, it simply manages a copy to aid in your trial organization.

By default, TrialDirector creates three workbooks for each case: Search Results, Trial Exhibits, and Witnesses. You can rename these workbooks as desired, and can create as many additional workbooks as necessary. In addition, during trial when documents or clips are admitted in the presentation mode, an Admitted workbook is automatically created. Within the Admitted workbook, a sub-workbook is created and labeled (by date) for each day of trial if exhibits are admitted, and includes all admitted items. Each admitted item is date and time stamped, and includes the item description.




To add items to a workbook, simply open the Case Explorer folder (above the Workbooks Explorer) that contains the item, then click and drag the item to the workbook. The item will be added to the workbook, but will still remain in the original folder.



Note: Documents are not actually copied to the workbook, the 'copy' in the workbook is just a link to the original. As such, any change made to the original, such as a new annotation, will be reflected in the "copy" in the workbook. However, if a change is made to a document, but the change is saved as new revision, the new revision is NOT reflected in the workbook. (In TrialDirector, the revision is actually a separate document from the original.)

Create a New Workbook

To add a new workbook, do one of the following:

- Click on the **Make New Workbook** icon  in the toolbar.
- Select **Create New Workbook** from the Workbooks menu.

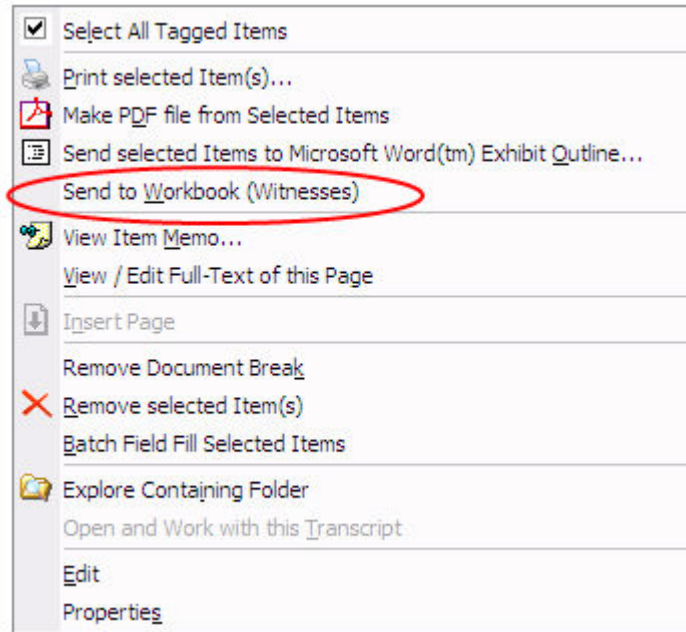
A new workbook called **New Workbook** is added to the Workbooks Explorer. You can then rename the new workbook if desired. By default, the new workbook will be available in the Presentation mode. To make the workbook unavailable, right click on it and clear the **Show in Presentation mode** selector.

To assign a colored icon to the workbook, right-click on the workbook name, point to **Select Workbook Color or Type**, and then click a color. Or, you can designate the workbook as a [Carousel](#) or as a [MultiPlayer Workbook](#).

Move Items into a Workbook

There are two ways to move items to a Workbook:

1. From the Case Library tab, select the item in the Case Explorer and drag the item to the desired workbook.
2. Click on any Workbook to select it, then select items that you would like to add to the workbook (Shift-Click or Alt-Click). Right click on any of the selected items, then select the Send to Workbook command from the shortcut menu.



Note: You can put the same item in one or more workbooks while still retaining its presence in the Case Explorer. You can also put the same item in a workbook more than once.

Sort Workbook Contents

There are two options for sorting items in a workbook:

- Manual Sort Order sorts items in the order they were inserted or manually arranged (see Rearrange Workbook Contents below).
- Item ID Sort Order sorts items in alphanumeric order by Item ID.

By default, items in a workbook are sorted in Manual Sort Order.

To sort by Item ID, do one of the following:

- Right-click on the desired workbook and select **Item ID Sort Order** from the drop-down menu.
- Click on the desired workbook and select **Item ID Sort Order** from the Workbooks menu.

To manually sort items, do one of the following:

- Right-click on the desired workbook and select **Manual Sort Order** from the drop-down menu.
- Click on the desired workbook and select **Manual Sort Order** from the Workbooks menu.

Rearrange Workbook Contents

To change the order of items in a workbook, follow these steps:

1. Right-click on the workbook and make sure the Manual Sort Order option is selected (see [Sorting Workbook Contents](#) above).
2. Select the item(s) you would like to move and drag them in a new location in the workbook. The item(s) will be inserted before the selected position in the workbook.

Rename a Workbook

1. To rename a workbook, click on the desired workbook to make it active.
2. Do one of the following:
 - Press [F2]
 - Right-click on the workbook and select **Rename Workbook** from the drop-down menu
 - Select **Rename Workbook** from the Workbooks menu
3. Type a new workbook name
4. Click on any other workbook in the Workbooks Explorer to save the new name

Print Workbook Contents

To print the contents of a workbook, do one of the following:

- Select a workbook, open the Print window and select Workbook for the Print Range
- Right-click on the desired workbook and select **Print Workbook contents** from the drop-down menu
- Select **Print Workbook contents** from the Workbooks menu

Export Workbook Contents to a Script File

Script files are used in TrialDirector to automate exhibit presentation. When a script file is created from the contents of a workbook, the workbook items are listed in the script file in order, allowing you to present the workbook items sequentially by executing the script.

1. To export the contents of a workbook to a script file, do one of the following:
 - Right-click on the desired workbook and select **Send Workbook Contents To Presentation Script...** from the shortcut menu.
 - Click on the desired workbook and select **Send Workbook Contents To Presentation Script...** from the Workbooks menu.
2. Enter a name for the script in the **Script Name** field.

3. If you would like the script to advance automatically without having to enter the step script command, select the **Advance Items Automatically Every** Option. Adjust the advancement delay (slide interval) as desired.
4. Click **OK**. Then, click **Yes** to confirm.

The script file will be saved in the Scripts folder within the current case folder.

Export Workbook Contents to a Volume

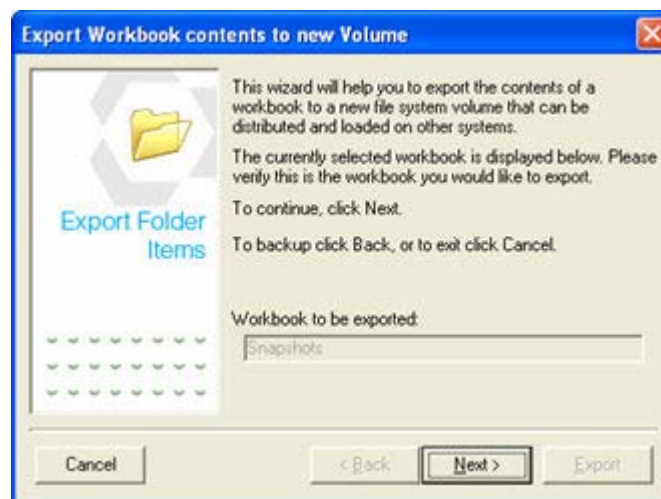
By exporting a workbook, you can make a volume containing the workbook contents. The exported volume will include a load file (*.oll) and a database file (*.mdb) containing all of the items in the folder.

In addition, you can choose to copy all of the source files into the volume folder. This is particularly helpful if the items in your case are located on several different volumes because it saves you from having to switch volumes. For example, you may have a case with a million items spread across 100 volumes, but only 150 of those items will actually be used in trial. By putting those items in a trial workbook and exporting the workbook to a volume, you can create a volume that only contains trial exhibits.

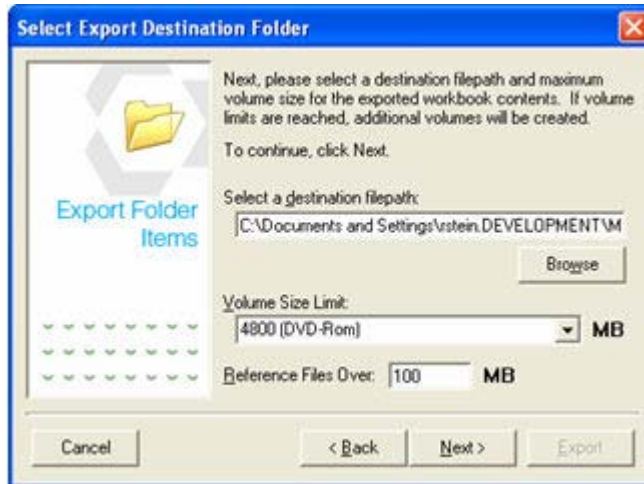


Note: Memo attachments will only be retained if the database file (*.mdb) is used to import the volume into a new case instead of the load file (*.oll).

1. To export a workbook, click on the workbook you want to export to make it active.
2. Do one of the following:
 - Right-click on the workbook and select **Export Workbook Contents To New Volume** from the shortcut menu.
 - Click on the workbook and select **Export Workbook Contents To New Volume** from the Workbooks menu.



3. Verify that the workbook name shown in this window is the name of the workbook you want to export.
4. Click **[Next]**.



5. Enter a destination path in the **Select a Destination Filepath** field or click the **[Browse]** button to select one using a navigation window.

TrialDirector will create the specified folder if it does not already exist. The volume will be copied into this folder.

6. Select a volume size limit in the **Volume Size Limit** field to ensure that the volume will be able to fit on your chosen media (CD ROM, local drive, etc.).

TrialDirector will create additional volumes if your data exceeds the volume size limit. If you plan to copy the volume to a disk or a CD-ROM after it has been exported, choose the appropriate volume size so that the exported volume will not exceed the limits of your media.


7. In the **Reference Files Over** field, enter the size limit (in MB) for files that will be copied into the exported volume folder.

For item files that exceed this size, the load file will reference the original path to the file instead of copying the file to the volume. When the exported volume is loaded into a case, you can view a referenced file by mounting the volume where the file originally existed.

8. Click **[Next]**.
9. Select export options from the selections below.



Export Options

Option	Description
Copy Object Files to New Volume	Allows you to copy the item files to the volume folder. If you do not select this option, the volume folder will only contain the load file, the database file and other related case files. There is no need to copy the files to the new volume if there are no changes to the actual image files and you only want to update the case database on another system to reflect new revisions and memos, etc.
Naming Options for Exported Files	<p>Allows you to determine the naming convention for exported files. The naming options are only available if the Copy object files to new volume option is enabled. Select whether to use the Page ID or a series of sequential numbers for the exported file names.</p> <p>For example, if the Page ID option is used, an exported document item of EXH101001 will have a file name of EXH101001.TIF. If the sequential numbers option is used, each exported object file name will be assigned a new name using a 7-digit numbering scheme; beginning with 0000001. For example, the first document image within the exported folder will have a file name of 0000001.TIF.</p>
Export Media Clips into Individual Media Files	<p>This feature allows users to create individual Windows Media Video (*.wmv) files from Transcript Manager media clips. For example, a media clip is generated from specified in and out points of a parent video (i.e. *.mpeg) file. If the media clips are added to a workbook for export, this option is available. Check this option to export any media clips within the workbook to *.wmv files. The drop down list below is used to select the best encoding profile for the *.wmv file(s) to be created. The encoding profiles are listed by video resolution, video encoding bitrate and audio encoding bitrate. For example, the <i>TDS-352x288-768-64-S-1-1</i> profile will encode the target *.wmv file with a resolution of 352x288, a video bitrate of 768Kbps and an audio bitrate of 64Kbps.</p> <p> Note: Use Transcript Manager to create individual media files (*.wmv) from synchronized DVT Clips.</p>
Pause Export Process Between New Volume Creation	Allows you to permanently apply all markups to the exported image files. If you are providing the exported volume to opposing counsel, you may not want them to be able to remove the markups.

10.

11. After the export options have been set, click **[Next]** to continue. The following dialog will appear:



11. Set the export options as desired. Descriptions of the options are shown below:

Image Options

Option	Description
Export to Multi-page Tiff Format	Allows you to convert all exported multi-page documents into multi-page TIFFs. If you do not select this option, all multi-page documents will be split into single-page documents.
Apply All Markups Permanently to Exported Images	Allows you to permanently apply all markups to the exported image files. If you are providing the exported volume to opposing counsel, you may not want them to be able to remove the markups.
Convert B&W Images with Markups to Color Images	Select this option if you wish to maintain color markups on B&W images during export. This option is only available is the Apply Markups Permanently to Exported Images option is enabled. This option will create a 24-bit color TIFF image from B&W images that contain markups.
Convert All Highlight Markups to Redactions During Export	Allows you to convert all sections of the images that were highlighted with the Highlighter tool into permanent redactions on the exported images.
Apply Watermark	Allows you to permanently apply the currently selected global watermark to all exported images. The [Pick] button allows you to set the global watermark.

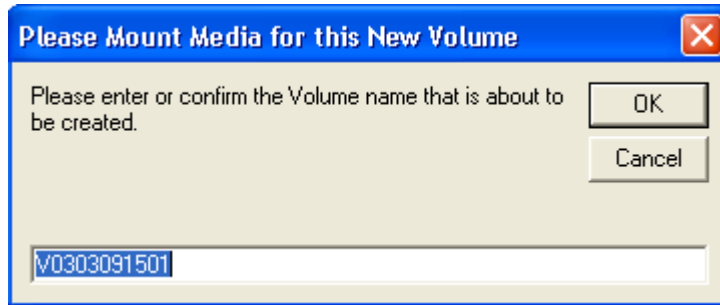
Brand Images With:	<p>This allows you to apply footers to the bottom of all exported images. The default footer is the Document ID followed by the Page Number and then the Item ID.</p> <p>If you would like to customize the footer, you can add, remove, or rearrange the components of the footer in the Brand Images With field.</p> <p>%D% - Document ID %P% - Item ID %N% - Page Number %T% - Trial Exhibit Number %E% - Exhibit Number %DESC% - Description %RECNO% - Universal Record Number</p> <p>For example, if you wanted the Item ID and then the Page Number, you would enter %P% %N% in the field.</p>
--------------------	--

12. When you have finished setting the options, click **[Next]**.



13. Click **[Export]** to begin exporting the volume.

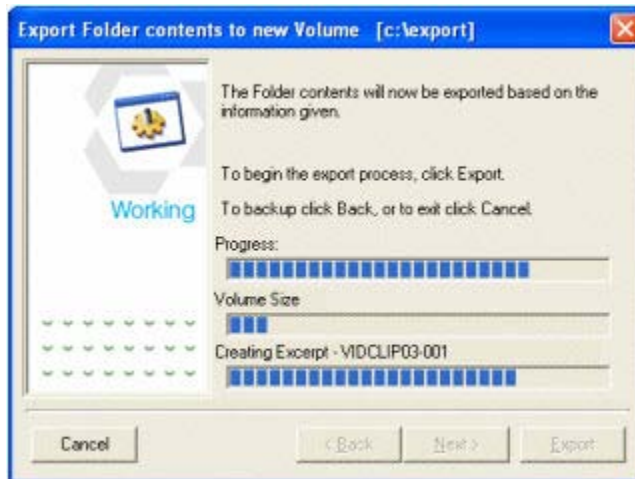
TrialDirector will then prompt for the Volume Name for the export folder about to be created. This volume name is used for the export folder name, load file names and volume label references within some of the export load files. For example, the CT Summation *.dii load file within the export volume will reference a volume name of *V0303091501*, as shown in the figure below.



Enter the desired volume name and click **[OK]** to continue. Clicking **[Cancel]** will cancel the export.

When the export begins, up to three status bars appear at the bottom of the Export window:

- The Export Process status bar shows you the progress of the entire export. When this bar reaches the end, the export is complete. This status bar is always displayed.
- The Volume Size status bar shows you the progress of the current volume. When this bar reaches the end, a new volume will be created, and the export will continue. This status bar is always displayed.
- The Creating Excerpt status bar shows the encoding progress of the current media clip excerpt. This status bar will refresh for each media clip excerpt, within the export folder, that is encoded. Depending on the length of the media clip, this process may take several minutes. This status bar is only displayed when the *Export Media Clips* option is enabled and valid media clips exist in the export folder.



When the export is complete, the following window appears:



14. Click [OK].

In the Destination folder, there are separate folders for each volume. Each volume contains a load file (.oll) and a database file (.mdb). See Importing Items Using a Batch File for more information on importing the workbook contents into another TrialDirector case.

Apply Current Label to Workbook Items

This feature will automatically apply the current exhibit label to all images contained within a workbook. This feature is useful for applying exhibit labels to hundreds (even thousands) of images in a batch processing method. Once the labels are applied to the images, the workbook can be exported or printed. Selecting the **Apply all markups** option when exporting a workbook will "brand" the exhibit label to the exported images.

1. Select the current label style by clicking the [Select Label](#) option within the Label annotation tool drop down list. Also, the label numbering scheme and source field for the label can be set here. It is important to make sure the current label style is set to your specifications prior to applying labels to a workbook. If the label style needs to be changed, you may have to manually remove the label from each image prior to applying labels again.
2. To apply the current exhibit label to a workbook, right-click on the workbook and select **Apply Current Label to Workbook Items**. The following dialog will appear:



3. A thumbnail image of the current label will appear in the upper right side of the dialog, as shown above. If this is not the label you wish to apply, click **[Cancel]** and select the correct label.
4. Select whether to apply the labels to all pages in the workbook or only page 1 of documents contained in the current workbook.
5. Select whether to position the label at the bottom left or bottom right side of the image. A thumbnail image of the label position appears to the right.
6. You can select whether to trim leading zeros that may occur in the label numbering scheme. For example, if you are using the Page ID as the source field for the label numbering and IDs such as EXH002051 exist, enabling this option will trim the 2 leading zeros to create exhibit labels with an ID of EXH2051.
7. Click **[OK]** to begin the labeling process. This process could take several minutes, depending on the number of images in the current workbook. Also, selecting the "All Pages" option can significantly increase processing time. During this process, TrialDirector will not be accessible.

Remove a Workbook

1. To remove a workbook, click on the desired workbook in the Workbooks Explorer.
2. Do one of the following:
 - Right-click on the workbook and select **Remove** from the shortcut menu.
 - Select **Remove** from the Workbooks menu.

A message window will appear, asking if you want to remove the workbook.

- Click **[Yes]** to remove the workbook and its contents. This will not remove the items that were in the workbook from the case.
- Click **[No]** to cancel the removal.

Using Carousels

Carousels enable you to present a group of items in a revolving display, where you can pause as needed on each item. Though not well suited to transcripts or imaged documents, carousels provide a sophisticated way to present photos (such as JPEG, BMP, and PNG), and non-synchronized video (such as MPEG-1, MPEG-2, and WMV).

First, create a new workbook as a carousel, or change an existing workbook to be a carousel. Then, when you open Presentation Preview or Presentation mode, you can select and load the carousel.



Notes:

- Do not include Microsoft Office files in carousels. Although they will appear in the carousel workbook, they are not loaded when you present a carousel.
- Although you can present imaged documents (such as TIFF), PDF documents, and DVT clips in carousels, performance loading and navigating will be affected.

To create a carousel

1. On the **Workbooks** menu, point to **Create New Workbook**, and then click **Carousel**.
-or-
In Workbooks Explorer, right-click **Workbooks**, point to **Create New Workbook**, and then click **Carousel**.
You can also use this method to create the new Carousel Workbook as a sub-workbook under an existing workbook.
2. Drag and drop all of the exhibits you want to include into the new Carousel Workbook. See [Moving Items Into a Workbook](#) for more information.
Be sure all items are listed in the order they should appear in when you present the carousel.

To make an existing workbook a carousel

1. Select the workbook in Workbooks Explorer.
2. On the **Workbooks** menu, point to **Select Workbook Color or Type**, and then click **Carousel**.
-or-
Right-click on the workbook, point to **Select Workbook Color or Type**, and then click **Carousel**.

The Carousel icon appears next to the workbook.

To present a carousel

1. In Presentation Preview or Presentation mode, use the Navigation Tools to select and load the Carousel.
2. Use the arrows on the control bar to advance or reverse the carousel.
To toggle between the carousel controls and the controls for the active exhibit (for example, to pause a video), click the tab on the right side of the control bar.

You can also fling exhibits in the carousel if you have a touch screen, or by clicking and dragging the exhibit. First, ensure the default tool is selected; if another tool is selected, press ALT while double-clicking the left mouse button to clear the tool selection. Then, click and hold on the exhibit momentarily. When the curser changes to this icon, you can drag and release to move the carousel to the next item.



Using MultiPlayer Workbooks

MultiPlayer Workbooks enable you to present a series of clips automatically. In addition, you can add documents and other items to a MultiPlayer Workbook.

First, create a new MultiPlayer Workbook, or change the type of an existing workbook to MultiPlayer. Then, when you open Presentation Preview or Presentation mode, you can select and load the MultiPlayer Workbook to start displaying the clips or other items in succession.

To create a MultiPlayer Workbook

1. On the **Workbooks** menu, point to **Create New Workbook**, and then click **MultiPlayer**.
-or-
In Workbooks Explorer, right-click **Workbooks**, point to **Create New Workbook**, and then click **MultiPlayer**.
You can also use this method to create the new MultiPlayer Workbook as a sub-workbook under an existing workbook.
2. Drag all of the clips and any other items that you want to include into the new MultiPlayer Workbook. See [Moving Items Into a Workbook](#) for other ways to add items.
Be sure all items are listed in the order they should play in when you present the MultiPlayer clip. You can include clips from the same deponent, or from multiple deponents, as well as other documents and images.

To make an existing workbook a MultiPlayer Workbook

1. Select the workbook in Workbooks Explorer.
2. On the **Workbooks** menu, point to **Select Workbook Color or Type**, and then click **MultiPlayer**.
-or-
Right-click on the workbook, point to **Select Workbook Color or Type**, and then click **MultiPlayer**.

The MultiPlayer icon appears next to the workbook.

To present a MultiPlayer Clip



Tips:

- When you create clips referencing synchronized exhibits in Transcript Manager, ensure you specify Clear Synchronized Exhibit at each point in the transcript where an exhibit should no longer appear.
- To ensure each successive video clip plays immediately, ensure the transition Fade Speed is set to Fast in Presentation Preferences > Stage > Zones. Then, ensure the Startup Behavior is set to Play and the Shutdown Behavior is set to Close in Presentation Preferences > Exhibits > Digital Video Transcripts (and under Multimedia if your MultiPlayer Workbook contains non-DVT videos).
- To quickly advance to the next clip, press the [Spacebar] or type -ss + [Enter]. This is particularly important if you've included any documents or images in your MultiPlayer Workbook since they do not automatically close.

1. In Presentation Preview or Presentation mode, use the Navigation Tools to select and load a MultiPlayer Workbook and the first item in it.
The Item ID will appear as *MultiPlay-Workbook Name*. It is a system-generated script.
2. Click the green button to load it.
If each clip does not play automatically (due to Startup Behavior set to Pause in Presentation Preferences), expand the control bar beneath the video.
3. If you want to change the layout of the video and transcript text, click **CTRL+TAB** to open the layout options.

Exporting a Workbook to Adobe PDF

You can export the contents of a workbook to a single PDF file using the Make PDF file from Selected Workbook feature.



Note: Before you use this feature, keep the following in mind:

- A printer driver must be installed on your computer. If you do not have a physical printer to connect to, install any of the printer drivers built in with Windows (Control Panel > Printers and Faxes), or install a virtual PDF printer application (such as CutePDF™).
- If the workbook contains a Microsoft PowerPoint, Excel, or Word native document, a print placeholder will appear in its place within the PDF file.
- If the workbook contains video transcript clips, they will not be included in the PDF.

1. In the Case Library, select a workbook in the Workbook Explorer area.
2. Right-click on the workbook itself (not one of the items within it) and select **Make PDF file from Selected Workbook**.
3. In the dialog box that opens, either enter a file path and name, or click **Browse** to navigate to a location and specify a file name.
4. To include any annotations (markups) that you have added and saved to items in the workbook, select **Apply All Markups Permanently to Exported Images**.
5. If you selected the previous option, you can also select **Convert all Highlight markups to redactions** if needed. The images in the PDF file will include the "Redacted" box wherever you used the Highlighter tool on the original images.
6. Click **OK** to begin the export process.

The PDF export process may take a while, depending on the number of pages being processed.

7. When the confirmation box appears indicating the file name and location, click **OK**.