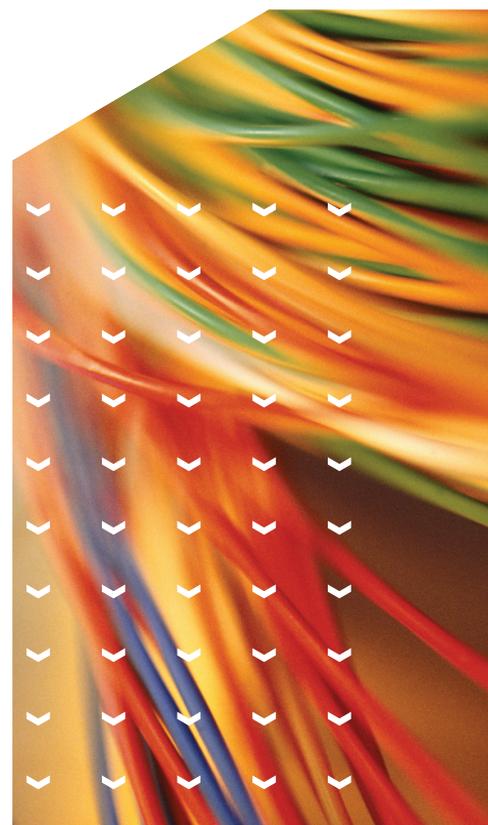


# NETWORK INSTALLATION GUIDE



inData  
**TrialDirector<sup>®</sup> 6**  
Trial Presentation Software

## Contacting inData

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<b>Sales</b>	sales@indatacorp.com
<b>Technical Support</b>	support@indatacorp.com
<b>Training</b>	training@indatacorp.com
<b>Trial Consulting</b>	trialservices@indatacorp.com

## Technical Support

inData Corporation is committed to providing its customers with top quality technical support. You can obtain help with your software by reviewing our online resources at <http://www.indatacorp.com>. Visit the Tips and FAQs page for helpful information about all inData products.

### Standard Technical Support

This service provides telephone, fax, or email support to clients Monday through Friday, 9am – 8pm Eastern Time, excluding holidays.

#### Phone

Phoenix Area: 480-497-0066\*  
Toll Free: 866-419-4298\*

#### Fax

480-497-1833\*\*

#### E-Mail

support@indatacorp.com\*\*

\*Current maintenance contract required.

\*\*Estimated Response Time (ERT) is 4 business hours for customers with a current maintenance contract and 1 day for customers without a current maintenance contract.



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# TABLE OF CONTENTS

Contacting inData .....	1
Useful E-Mail Addresses .....	1
Technical Support .....	1
Copyright Acknowledgements .....	3
Table of Contents .....	4
Welcome to TrialDirector Network .....	5
New TrialDirector 6 Application Features .....	5
Administrative Features .....	7
Server Configuration Recommendations .....	8
Server Hardware Requirements .....	8
Supported Server Operating Systems .....	8
Terminal Server and Citrix Support .....	9
Network Infrastructure Recommendations .....	9
Client System Configuration Recommendations .....	10
Workstation Hardware Requirements .....	10
Supported Client Operating Systems .....	11
Client System Prerequisites .....	11
Installing the TrialDirector Network Server .....	12
Selecting and Mapping the Application Files Network Share .....	12
Selecting and Mapping the Case Data Network Share .....	12
Installing the TrialDirector 6 Network Server Software .....	13
TrialDirector Directory Structure Example .....	19
Installing the TrialDirector Network Client .....	20
TrialDirector 6 sample case data .....	23
existing TrialDirector 5.x Installations .....	23
Client Connection Viewer .....	24
Client Access License Upgrade Tool .....	26

# WELCOME TO TRIALDIRECTOR NETWORK

Welcome to TrialDirector 6 Network edition! We've worked to provide you with the most robust, unique and advanced network-based version of TrialDirector yet.

The TrialDirector 6 Network Version introduces application virtualization, which allows the application to run exclusively from the server. The client workstation deployment has a minimal footprint and by default, deploys only a few files to the client workstation. This virtualization technology eliminates the headaches with DLL/OCX conflicts with other applications, and provides full compatibility with local (mobile) versions of TrialDirector 6.

## New TrialDirector 6 Application Features

Below is a list of a few of the new features included with TrialDirector 6. For a complete list of new features, please access the "What's New?" Help topic or the TrialDirector 6 product page at <http://www.indatacorp.com/TrialDirector.html>.

- **New FreeForm Presentation Stage Feature** – FreeForm enables you to move, scale, and resize any item to any position within the Presentation Stage. This feature is designed to allow you to quickly create compelling Snapshots and Save Stage exhibits, similar to those seen on TV network news programs. You can also build FreeForm stages in real-time within Presentation Preview and immediately present them to the jury.
- **Play Multi-segment DVT Clips with Transition Effects** – A new Presentation Preference enables you to play DVT clips with a Crossfade, Fade to Black, or Wash to White transition between each segment to eliminate hard cuts between segments.
- **Display Linked Exhibit in Same Zone as DVT Clip** – Though it will work for any zone, this new Presentation Preference is ideal when you are using Zone 9 (full screen). When a linked exhibit is introduced, the DVT clip will graciously minimize and the exhibit will fade in to the full screen view.
- **Display Linked Exhibit in User Defined Zone** – A new Presentation Preference enables you to configure any logical combination of zones for DVT clips and their linked exhibits. With more than 40 different combinations, this preference provides maximum flexibility. For example, you can configure the DVT Target Zone as Zone 5 and the Linked Exhibit Zone as Zone 2. When the DVT clips plays in Zone 9 and reaches a linked exhibit, the exhibit will appear in Zone 2 and the DVT clip will automatically resize to Zone 5. This enables you to use the empty area (Zone 7) to add projection callouts and more.
- **New Control Box Button to Toggle Between Linked Exhibit and DVT Clip** – With TrialDirector 6.3, quickly toggle between a linked exhibit and a DVT clip when using the new "Display Linked Exhibit in Same Zone" preference. The new toggle button appears in the control box you can expand beneath the active DVT clip or linked exhibit.
- **New Page and Line Number Display Options for DVT Clips** – New Presentation Preferences enable you to configure whether page and/or line numbers are displayed when playing back a DVT clip. You can define whether page and line numbers, just line numbers, or neither are displayed during playback of a DVT clip.
- **New Create Clips from Clipboard Feature** – TrialDirector 6.3 includes the ability to quickly create multi-segment clips from page/line designations simply pasted into a text box. Litigation support personnel who receive clip designations in other applications, such as Microsoft Word, can quickly copy the text and paste it directly into the new Transcript Manager Create Clips from Clipboard dialog box.
- **New Segment Waveform Editor Seek Functionality** – New functionality in the Transcript Manager Segment Editor enables you to seek backward/forward (in 5-second increments) within the audio waveform for either

the segment start or segment end locations. This functionality is especially handy when attempting to edit clip segments with long periods of silence.

- **New Segment Waveform Synchronized Video Playback Functionality** – Based on popular demand, TrialDirector 6.3 will now play the associated video within the Multimedia Player when playing back segment start/end times within the Segment Waveform Editor. This modification eases the clip editing process, giving you a visual and audio preview of the segment start/end areas when editing clips.
- **Ability to Generate Barcodes and Custom Footers from Export Items to PDF Feature** – You can now use the Export Items to PDF feature within Document Manager to export selected case items to new Adobe PDF files with custom footers and barcodes, as well as all annotations. The output PDF file contains all of the footer, barcode, and annotations branded right into the file. This functionality rivals that of Adobe Acrobat, along with the ability to export thousands of items at once. The custom footer builder is also included in the Export Items to PDF feature so that you can generate new PDF files with page footers to your specifications.
- **Pack-N-Go:** Use this handy wizard to pack up your entire case, then simply unpack it on your laptop for trial.
- **Enhanced Grid View:** Document Manager Grid View is back and better than ever! The Document Manager Tab allows you to view document information in a quick and easy grid format enhanced with shading. Users are able to sort and rearrange data columns to fit their style of working.
- **New Transcript Manager Clip Editor:** The completely redesigned Clip Editor works the way you do. Added flexibility allows you to create new clips, add or remove sections of testimony, and adjust clip data all through one easy-to-use interface.
- **Save Transcript Searches:** Save the keyword searches you perform on case transcripts to quickly pull up the results whenever you need them.
- **New Presentation Mode:** TrialDirector's sleek, dynamic display bestows an unparalleled juror experience. Users can now choose a theme and customize their presentations. New effects such as spotlights, reflections, smooth transitions and more provide a sophisticated, persuasive presentation.
- **Carousels** – Present exhibits effectively with the sleek new Carousels feature. When you create a Carousel Workbook, you can present its contents (images, video, documents, etc.) in revolving fashion, stopping as needed on each exhibit.
- **MultiPlayer Workbook** – Seamlessly present a series of clips from the same deponent or multiple deponents. Additionally, you can add documents and other items with video clips in a MultiPlayer Workbook.
- **Save Stage:** Make the most of your time before the fact-finder by saving the layouts of your exhibits ahead of time. Set up any combination of exhibits in different zones, annotate them as needed, and then simply select "Save Stage". Instantly recall each saved stage when you're ready to present to the jury. And unlike screen snapshots, this feature saves the layout of the actual exhibits, including projections, so that all elements are dynamic and can be manipulated once recalled.
- **Case Open at Startup** – To save you time, TrialDirector now prompts you immediately upon startup to select the case you want to open.
- **Presentation Callouts and Annotations in Video:** Want the jury to notice a deponent looking to his lawyer for cues or that the traffic light was red in a surveillance video? Use the callout feature to magnify portions of still or moving video. Annotations allow for further emphasis.
- **Works with Microsoft Windows 7** – TrialDirector is now supported on Windows 7, as well as XP (with SP2 or later) and Vista. TrialDirector 6 will also run in a Mac® Boot Camp® environment when using any of the aforementioned operating systems.

## Administrative Features

- TrialDirector 6 updates need only be applied to the network server. The administrator is not required to redeploy each network client when new TrialDirector 6 patches and updates are released.
- The TrialDirector 6 client installation is a fully compliant Windows Installer MSI file type. The “InstallClient.msi” can be pushed in a mass deployment method using Active Directory, Microsoft Systems Management Server (aka SMS) or other application management software.
- TrialDirector Network server installations can be performed from either an administrative workstation to the server, or directly on the server itself, eliminating the need to keep that admin workstation intact to administer the TrialDirector Network installation.
- The Client Connection Viewer enables administrators to see who is using TrialDirector Network and what machine they’re logged in from.

## SERVER CONFIGURATION RECOMMENDATIONS

TrialDirector 6 Network is a client/server package that allows a specified number of users to access the TrialDirector application. This type of install offers a lower overall cost of ownership as well as simplified maintenance.

The minimum and recommended hardware configurations for servers are shown below. The minimum configuration will provide adequate performance. However, the recommended configuration provides greater speed, higher performance, and enhanced video playback due to the increased processor speed, additional video memory, and RAM.

### Server Hardware Requirements

#### Minimum Server System Configuration

- Pentium 4 3GHz Processor
- Windows 2003 Server
- 2GB System RAM
- 10GB Hard disk space available (for image, audio/video storage)

#### Recommended Server System Configuration

- Dual Core Intel Xeon 3.0 GHz Processor(s)
- Windows 2008 Server
- 8GB System RAM
- 250GB Hard disk space available (for image, audio/video storage)

### Supported Server Operating Systems

inData has designed, developed, and tested TrialDirector 6 for use with Microsoft Windows servers.

- Microsoft Windows 2003 Server – Standard Edition
- Microsoft Windows 2003 Server – Enterprise Edition
- Microsoft Windows 2008 Server – Standard Edition
- Microsoft Windows 2008 Server – Enterprise Edition
- Microsoft Windows 2008 R2 Server – Standard Edition
- Microsoft Windows 2008 R2 Server – Enterprise Edition

The TrialDirector Network installation should work on other Windows compatible file servers, such as Samba or Novell, however it is not warranted to do so.

**NOTE:** The TrialDirector 6 Network Server application should NOT be installed to a Network Area Storage (NAS) device. The TrialDirector 6 Network Server application should be installed to either a NTFS or FAT32 formatted drive on a file server running one of the supported server operating systems above. However, it is acceptable to maintain TrialDirector 6 case database and reference files (PDF, TIFF, MPEG etc.) on a NAS device.

## Terminal Server and Citrix Support

TrialDirector 6 Network Server has not been designed or tested to run in a Terminal Server, Remote Desktop or Citrix XenApp environment.

If you wish to use TrialDirector 6 with Remote Desktop Services included with Windows Server 2008 R2, please inquire to the inData Sales Dept. about purchasing TrialDirector 6 RDS. TrialDirector 6 RDS has been specially designed to work with Remote Desktop Services included with Windows Server 2008 R2. Remote Desktop Services has replaced Terminal Server and allows users to utilize features such as *RDS Web Access* to run applications, such as TrialDirector 6, from a web page or shortcut without having the client application installed on the local workstation.

## Network Infrastructure Recommendations

The following Network Infrastructure Recommendations are provided to ensure that the inData TrialDirector Network software has a robust operating environment. Adhering to these recommendations will allow faster response times when accessing case databases and image information across the network.

- 1 Gigabit (or better) Local Area Network connections between server and client
- Microsoft NetBIOS based network connectivity for UNC path resolution
- LAN and WAN networks require fiber backbone connectivity between sites
- VPN access via an Internet connection is NOT recommended
- Use of NetBIOS TCP/IP protocol supports both IPv4 and IPv6

**NOTE: Multimedia Playback over Networks** – It is recommended that audio/video files (such as MPEG, AVI, WAV, etc.) be stored locally on Client workstations. Multimedia playback performance can be hindered because of excessive network traffic, slow network connections or high network latency. Users will have the best experience using multimedia that is stored on their local workstations.

# CLIENT SYSTEM CONFIGURATION RECOMMENDATIONS

The minimum and recommended hardware configurations for client workstations are shown below. The minimum configuration will provide adequate performance. However, the recommended system requirements provide greater speed and enhanced video playback due to the increased processor speed, additional video memory, and RAM.

## Workstation Hardware Requirements

### Minimum Client System Configuration

- Intel® Pentium® 4 Processor 3.0 GHz
- Microsoft Windows® XP with Service Pack 2
- 2GB System RAM
- Microsoft .NET Framework 3.5 (SP1) or later\*
- Windows Media Player 11
- 64MB Display Graphics Memory
- 1024 X 768 Display Resolution at 32-bit (or better) color palette
- 32x (or better) CD-ROM Drive
- Sound Card and Speakers/Headphones (Required for audio functions)
- 1GB Hard disk space available
- 1 Gigabit Network Adapter

### Recommended Client System Configuration

- Intel® Core™2 Duo Processor 2.0 GHz (or better)
- Microsoft Windows® 7 operating system
- 4GB System RAM
- 256MB Dedicated Display Graphics Memory\*\*
- 1280 X 1024 Display Resolution at 32-bit color palette
- 8x DVD Recordable Drive
- Sound Card and Speakers/Headphones (Required for audio functions)
- 15 GB Hard disk space available (to store local video and document files)
- 1 Gigabit Network Adapter

\*If you do not have the .NET 3.5 framework (SP1) or later, it can be distributed from the “Pre-Requisites” folder in the TrialDirector 6 Network Server application path. See page 12 for more details.

\*\*Microsoft DirectX 10, DirectX 9, or OpenGL capable graphics card recommended. A Windows Experience Index graphics subscore of 4.0 (or higher) is recommended for best presentation performance.

## Supported Client Operating Systems

The TrialDirector Network Client software has been installed and tested on the following client operating system platforms. If you do not see your operating system listed, it has not been tested and is therefore not supported.

- Microsoft Windows XP Professional (SP2 or higher)
- Microsoft Windows Vista
- Microsoft Windows 7

\*TrialDirector 6 can be run on both 32-bit and 64-bit versions of Windows XP, Windows Vista, and Windows 7 operating systems.

## Client System Prerequisites

inData recommends deploying the following prerequisites on each workstation. These components are necessary for complete and optimal performance of the TrialDirector Network Client software.

- Microsoft .NET Frameworks version 3.5 (SP1)
- Adobe Flash Active X 9.0 (or higher)\*
- Windows Media Format 11
- Windows Media Player 11

\*A Virtualized edition of Adobe Flash 9 Active X control are automatically deployed to the server for your convenience.

If you have live deployments of the Adobe Flash 9 Active X control on your client workstations, you can safely delete the virtualized counterpart (*Flash\_x86\_9.0.115.0\_2.xlayer*) from the TrialDirector 6 Network > Application Files folder on the server.

The Client installation does NOT redistribute and/or install these pre-requisites by default. These pre-requisites can be deployed by the network administrator as needed. If the workstation clients have all of the latest Windows Updates, then none of these prerequisites should be required.

The deployment files are located in the TrialDirector Network Server > Pre-Requisites folder within the TrialDirector 6 Server application data path. Examples of the prerequisites paths are listed below. You can deploy these prerequisites to the client workstations from these locations as needed.

### Microsoft .NET Frameworks 3.5 (SP1):

\\Server\Share\inData\TrialDirector Network Server\Pre-Requisites\Microsoft .NET Frameworks 3.5 (SP1)\dotnetfx35.exe

### Windows Media Format 11\*

\\Server\Share\inData\TrialDirector Network Server\Pre-Requisites\Windows Media Player 11\wmfdist11.exe (\*Must be installed prior to Windows Media Player 11)

### Windows Media Player 11

\\Server\Share\inData\TrialDirector Network Server\Pre-Requisites\Windows Media Player 11\wmp11.exe

### Adobe Flash 10 Active X

\\Server\Share\inData\TrialDirector Network Server\Pre-Requisites\Adobe Flash 10\install\_flash\_player\_10\_active\_x.exe

## INSTALLING THE TRIALDIRECTOR NETWORK SERVER

The Network install procedure consists of three main steps:

1. Mapping the Target Network Drive
2. Selecting the Case Data Network Drive
3. Installing the TrialDirector Network application on the server

### Selecting and Mapping the Application Files Network Share

TrialDirector Network must be installed to a Microsoft Windows network share that is accessible by all Client workstations intended to access the server where TrialDirector Network is installed.

You can install the TrialDirector Network software from either an administrative workstation or from the server itself. In either case, the target Microsoft Windows network share must be a mapped drive on the machine from which the software installation is being run. Perform the mapping operation before launching the TrialDirector Network Server installation. The network share drive mapping is temporary and is only required for the installation of the server.

For example, your target server and share will be:

```
\\SERVER\APPS\
```

The “APPS” share should be mapped to an available drive letter on the administrative workstation or server in order to perform the install. The specific drive letter is unimportant. The installer will automatically detect the first mapped drive letter on the system; clicking **Browse** will allow you to change the default path.

The target location where TrialDirector Network will be installed must be at least one folder deeper than the root of the network share. The default installation will create an “inData\TrialDirector Network Server” folder where the “Application Files” and “Client Install” folders will be placed.

This directory structure segregates the TrialDirector program files from the TrialDirector Client installation files. Using the example above, the final UNC path for the TrialDirector Network installation would be:

```
\\SERVER\APPS\INDATA\TRIALDIRECTOR\
```

### Selecting and Mapping the Case Data Network Share

The TrialDirector Network Case Data folder must be a network share location that is accessible by all Client workstations intended to access TrialDirector case data. Case data can reside on the same server as the TrialDirector Network application files, or on a different server altogether. Cases created and accessed by TrialDirector 6 Network Clients can also be accessed and modified by TrialDirector 5.x Network and standalone Clients. New installations will create a new “Cases” folder from which all Clients will create and execute cases. Upgrade installations and installations where case data already exists on a network share should be pointed to the case data location. (This is the location of the director.dat file, which resides in the root of the Cases folder.)

Just like selecting the location for the Application Files, the Case Data Microsoft Windows network share must be mapped as a drive on the machine where the software installation is being run prior to launching the TrialDirector Network Server installation. The network share drive mapping is temporary and only required during the installation of the server.

For example, your target server and share will be:

```
\\SERVER\DATA\
```

The "DATA" share should be mapped to an available drive letter on the administrative workstation or server in order to perform the install. The specific drive letter is unimportant. The installer will automatically detect the first mapped drive letter on the system; clicking **Browse** will allow you to change the default path.

## Installing the TrialDirector 6 Network Server Software

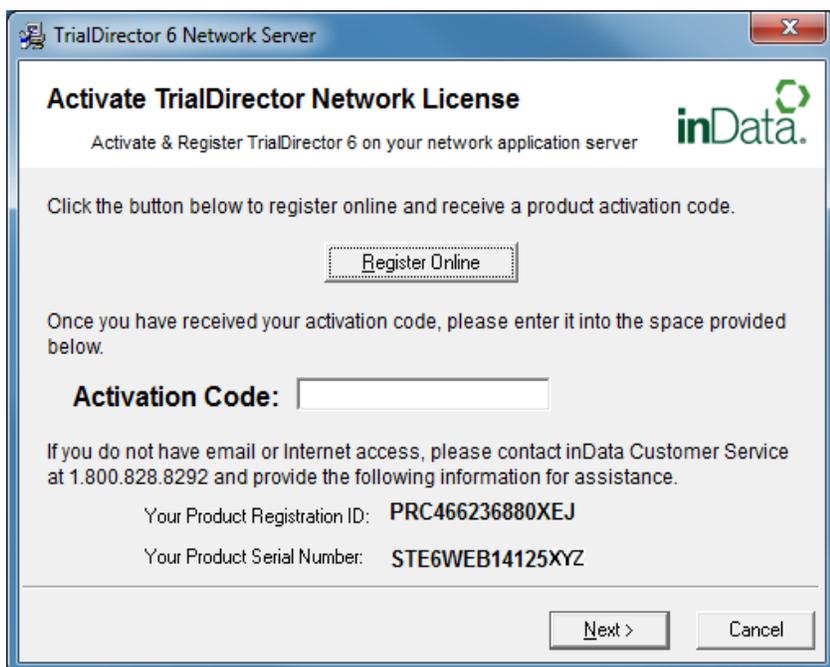
1. Insert the TrialDirector 6 Network installation CD into a CD-ROM drive on either an administrative workstation or on the target server itself. If the installation program does not launch automatically, locate and double-click the TD6NETSETUP.EXE file. This will begin the process of installing the TrialDirector license and the application files to the server.
2. The TrialDirector 6 Network Server installation welcome displays. Take a few moments to read the process overview that is provided in the dialog box. Click **Next** to continue.
3. Read the license agreement and select **Yes** to continue, or select **No** to cancel the installation.



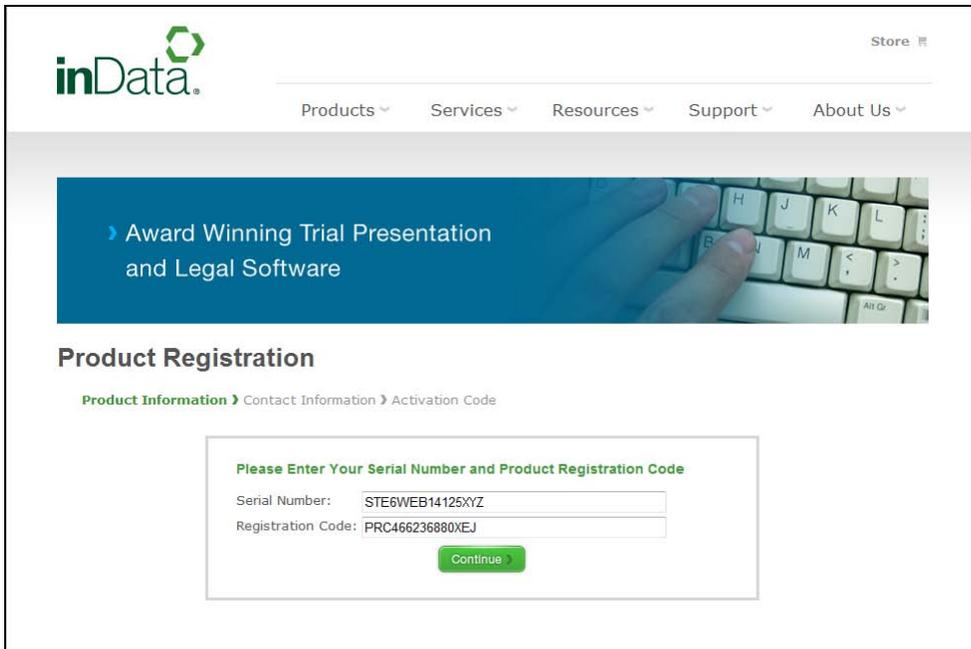
4. Enter the TrialDirector 6 Network Server serial number and click **Next** to continue. If an invalid serial number is entered, you will not be allowed to continue. When a valid serial number is entered, the activation dialog box appears.



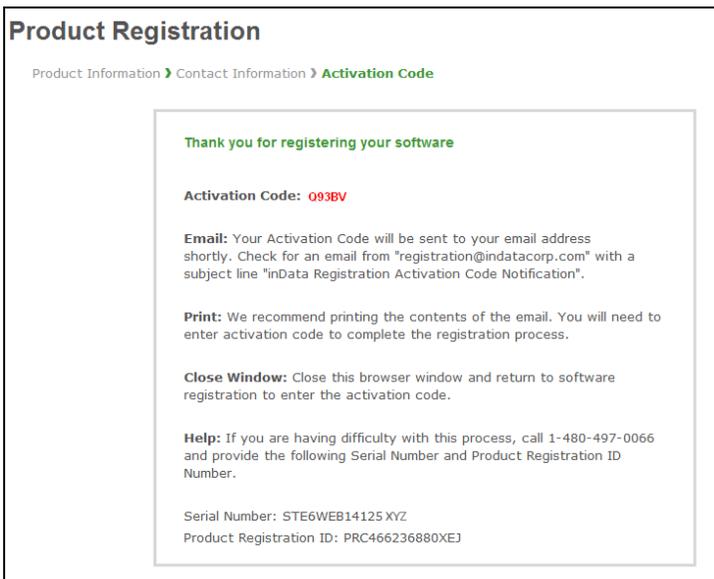
5. The activation dialog box displays the serial number entered on the previous screen, along with the Product Registration ID. You will need these numbers if you are going to call inData for an activation code. (If there is no Internet or e-mail access, use the 800 number to contact inData Customer Service.) Otherwise, click the **Register Online** link to get your activation code over the Internet.



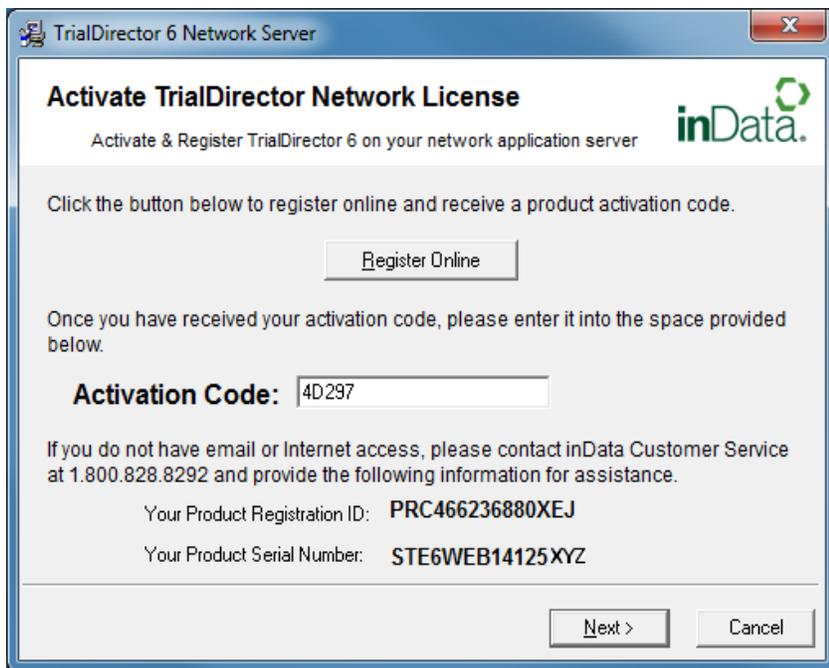
- Clicking the Register Online button will launch the default system web browser and take you to the inData Online registration screen. Enter your contact information, including Title, First and Last name, Email address and Phone number. Your information is used by inData internally only and will never be given or sold to third parties. Click **Submit** to have the Activation Code generated.



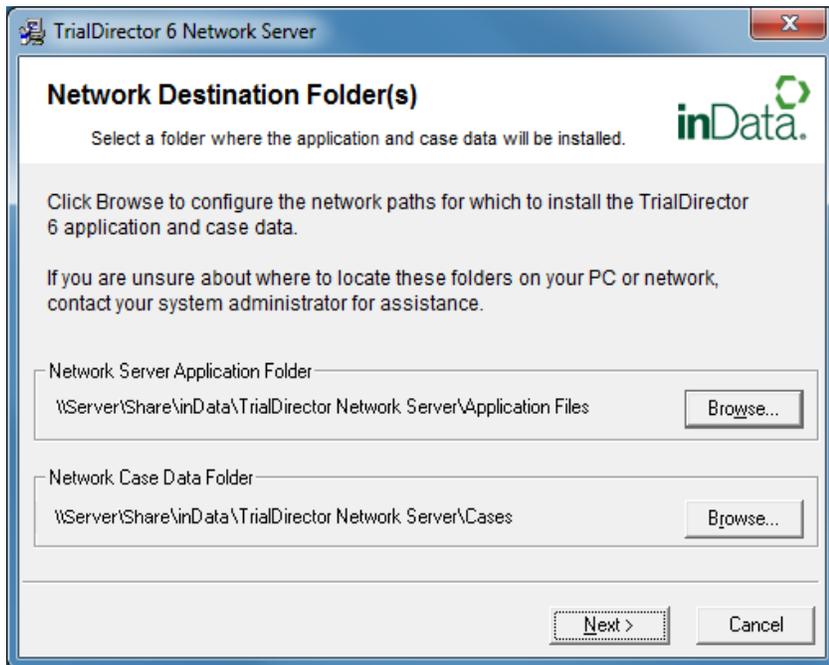
- After you submit your registration information, your Activation Code appears. Take note of, or copy, your activation code. Minimize your browser to return to the installation Registration screen.



8. Paste or type the Activation Code into the space provided on the Registration screen. Click **Next** to continue.



9. The next dialog box shows the default Network Server Application Folder and Network Case Data Folder. The default folders are selected from the first mapped network drive on your system. Click the **Browse** buttons to select different paths on your network.



10. The TrialDirector installation will place the application files at two folder levels. Using the Network Server Application Folder example shown on page 12, the TrialDirector Network program files are stored in the Application Files folder. Cases will be created in the Cases folder. Both folders reside under the TrialDirector Network Server folder by default.

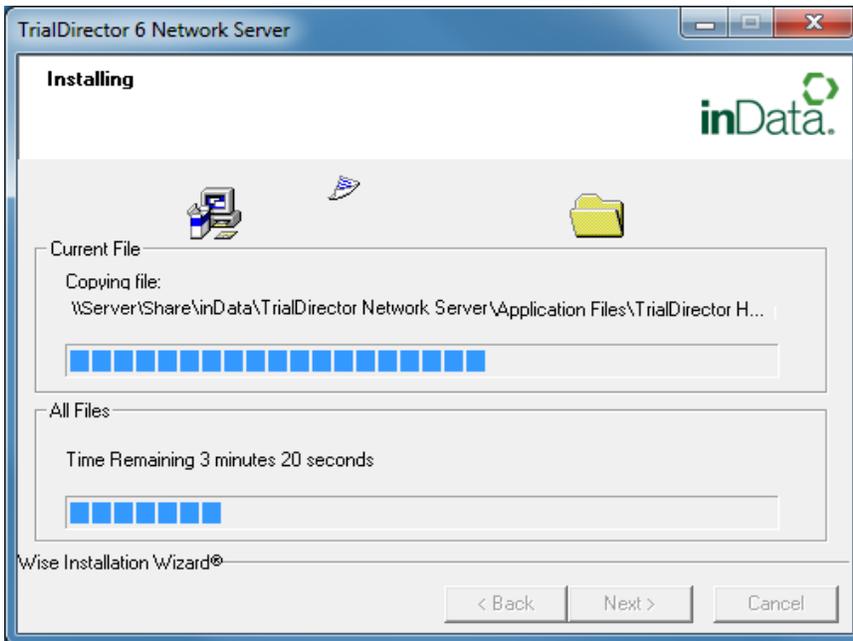
**NOTE:** Case data and the Application Files do not necessarily have to reside in the same parent folder, or even on the same share or same server.

Click **Next** to continue after confirming or selecting the destination folder paths.

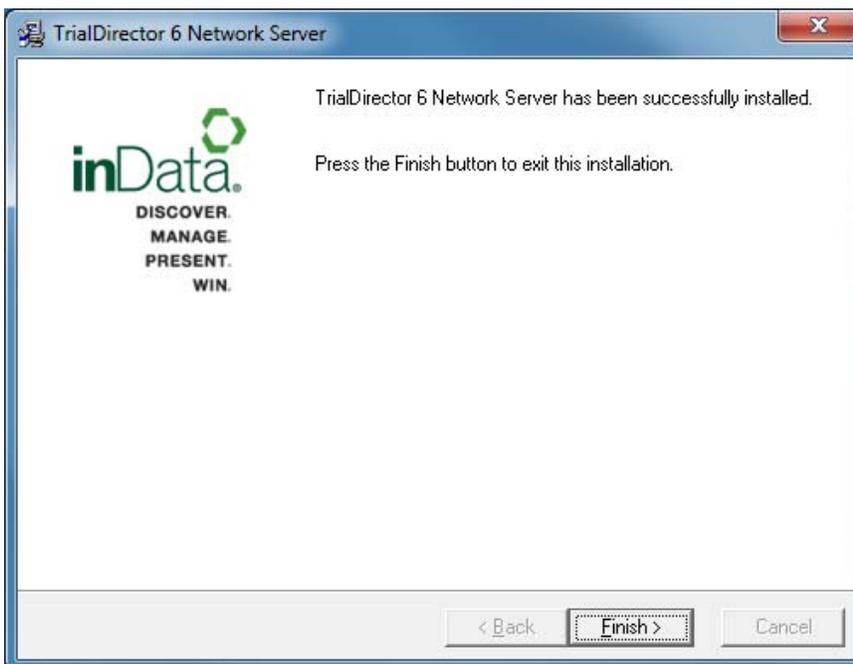
11. In the following dialog box, click **Next** to begin the installation.



- The application and case data files are installed to the Network Server. The TrialDirector Client installation package (InstallClient.msi) is also copied to the application path root.  
(EX: \\Server\Share\inData\TrialDirector Network Server\ )

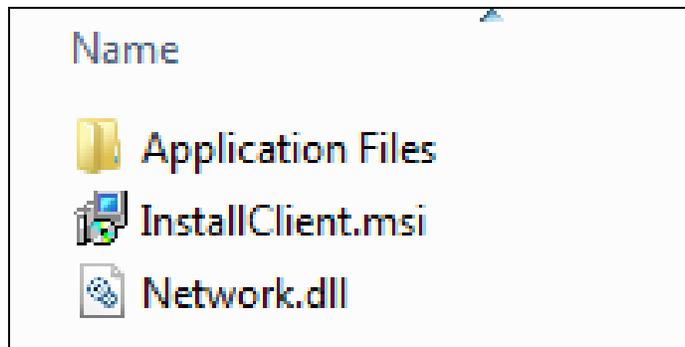
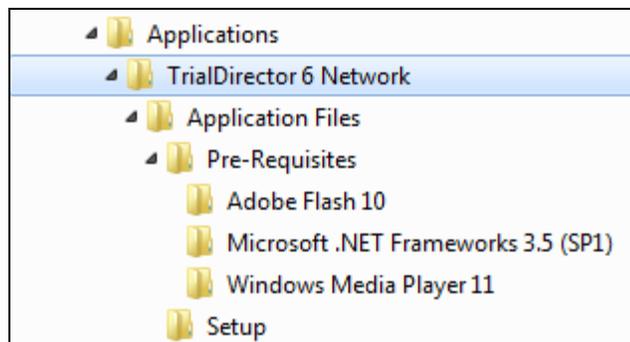


- When the server installation is complete, the following dialog box appears. Click **Finish** to exit the installation.



## TrialDirector Directory Structure Example

The following example shows a sample directory structure and the key files that comprise a TrialDirector 6 Network Server deployment.



**\\Server\Applications\TrialDirector 6 Network\network.dll**

**\\Server\Applications\TrialDirector 6 Network\InstallClient.msi**

**\\Server\Applications\TrialDirector 6 Network\Application Files\Setup\Install.log**

**\\Server\Applications\TrialDirector 6 Network\Application Files\TrialDirector6.exe**

**\\Server\Applications\TrialDirector 6 Network\Application Files\TrialDirector Presentation.exe**

**\\Server\Applications\TrialDirector 6 Network\Application Files\SampleData.exe**

**\\Server\Applications\TrialDirector 6 Network\Application Files\Flash\_x86\_9.0.115.0\_2.xlayer**

**\\Server\Applications\TrialDirector 6 Network\Application Files\TrialDirector Help.xlayer**

**\\Server\Applications\TrialDirector 6 Network\Application Files\Adobe Air.xlayer**

**\\Server\Applications\TrialDirector 6 Network\Application Files\InstallSummationIntegration.msi**

**\\Server\Applications\TrialDirector 6 Network\Application Files\InstalliConectIntegration.msi**

**\\Server\Applications\TrialDirector 6 Network\Application Files\InstallLiveNoteIntegration.msi**

**\\Server\Applications\TrialDirector 6 Network\Application Files\Pre-Requisites\Adobe Flash 10**

**\\Server\Applications\TrialDirector 6 Network\Application Files\Pre-Requisites\Microsoft .NET Frameworks 3.5 (SP1)**

**\\Server\Applications\TrialDirector 6 Network\Application Files\Pre-Requisites\Windows Media Player 11**

# INSTALLING THE TRIALDIRECTOR NETWORK CLIENT

Before you begin the Network Client installation, determine if you want to silently deploy the Windows Installer MSI file.

### Optional Command Line Switches

If you want to silently deploy the InstallClient.msi file, use a command line similar to the example below:

```
MSIEXEC.EXE /I "\\Server\Share\inData\TrialDirector 6 Network\InstallClient.msi" /QN
```

Additionally, if you are deploying the network client from an Active Directory Group Policy, you can enable the “Basic” user interface option when assigning the InstallClient.msi software package to users via a Group Policy Object.

**NOTE:** Any previous TrialDirector 6 Network Client installations will be automatically updated when running the “InstallClient.msi”

### To install the Network Client:

**NOTE:** The Client installation can be run from a UNC path. However, the Client install file (InstallClient.msi) **must** be run from the folder in which the TrialDirector Network server installation deployed it to.

1. Navigate to the server location where the TrialDirector application resides. Within the root location of the server deployment, locate the **InstallClient.msi** file. Double-click this file to begin the Client installation.
2. Click **Next** to begin.
3. Read the license agreement and click **Yes** to continue, or click **No** to cancel the installation.

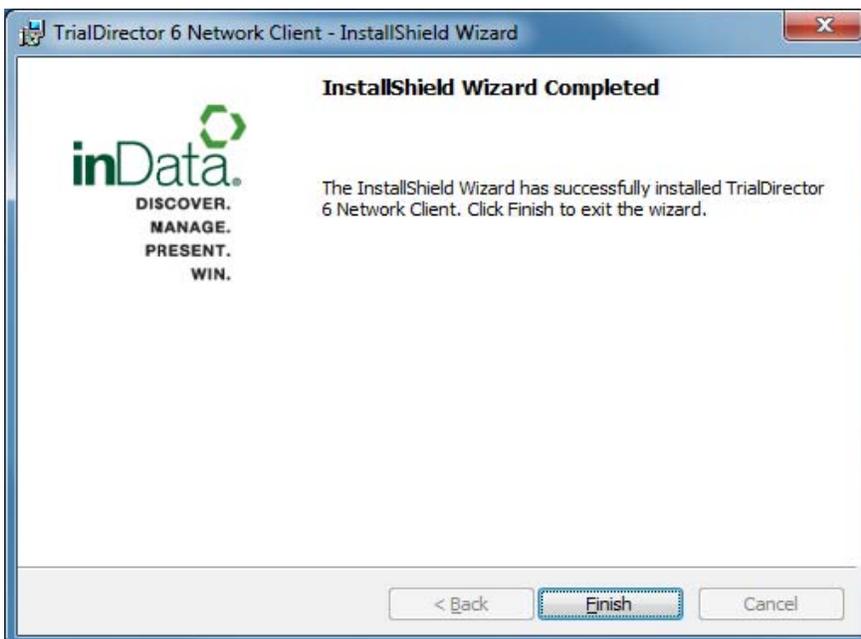


4. In the following dialog box, click **Next** to begin the installation.

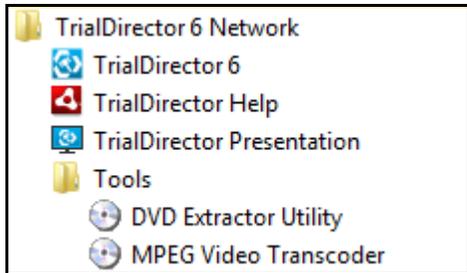


The required local configuration and support files are installed to the local Client computer. Additionally, TrialDirector 6 will be optimized for the workstation PC at the end of the client deployment. This process could take a minute or so, depending upon the speed of the local workstation.

5. When the installation is complete, the following dialog box appears. Click **Finish**.



Once the TrialDirector 6 Network Client is installed, the following Start menu programs will appear for all users on the target workstation:



### Considerations:

- Your TrialDirector Network license count is for concurrently connected Clients. You may install the TrialDirector Network Client software on more workstations than you have server connection licenses for; your users will only be limited by concurrent connections to the server.
- TrialDirector Network will not run when disconnected from the network, or if the server on which TrialDirector Network is installed is unavailable. For mobile users, please consult the inData Sales department for information on TrialDirector standalone licensing.
- A TrialDirector 6 Network Client can reside on the same system that already has TrialDirector 5.x and/or TrialDirector 6 standalone licenses installed.
- If your workstation clients require integration with CT / AD Summation iBlaze or Enterprise, make sure to deploy the InstallSummationIntegration.msi package. This file resides within the Application Files folder in the TrialDirector 6 Network Server location.
- If your workstation clients require integration with LiveNote or West LiveNote applications, make sure to deploy the InstallLiveNoteIntegration.msi package. This file resides within the Application Files folder in the TrialDirector 6 Network Server location.
- If your workstation clients require integration with iConect, make sure to deploy the InstalliConectIntegration.msi package. This file resides within the Application Files folder in the TrialDirector 6 Network Server location.

## TRIALDIRECTOR 6 SAMPLE CASE DATA

TrialDirector 6 Network installs a brand new sample case, aptly named “TrialDirector 6 Sample Case”. This case data is deployed to the network location specified during Step 9 of the TrialDirector 6 Network Server installation.

During the server installation, only the raw case databases are deployed. The images, videos, graphics, etc. that are referenced by the TrialDirector 6 Sample Case are not deployed. If you want to have novice user(s) work with this sample case to become familiar with the application, deploy the SampleData.exe file to those particular workstations.

The SampleData.exe will deploy the sample data files (images, video, PDF documents, etc.) to a preset path on the local workstation. The TrialDirector 6 Sample Case will reference the preset path to enable the user to view these sample files.

Run SampleData.exe from the Application Files folder where TrialDirector 6 is installed on the network. If desired, you can add a /S switch to silently deploy the sample data files. For example:

```
"\\Server\Applications\TrialDirector 6 Network\Application Files\SampleData.exe" /S
```

## EXISTING TRIALDIRECTOR 5.X INSTALLATIONS

It is not necessary to upgrade existing TrialDirector 5.x Network installations.

If you have an existing TrialDirector 5.x Network deployment, please read the following considerations below.

- Install TrialDirector 6 Network Server to a **separate network location** from where the TrialDirector 5 Network Server currently resides.
- TrialDirector 6 and TrialDirector 5.x network clients can reside on the same PC.
- The TrialDirector 6 Network Client must be deployed even if an existing TrialDirector 5.x Client is already present on a user’s computer.

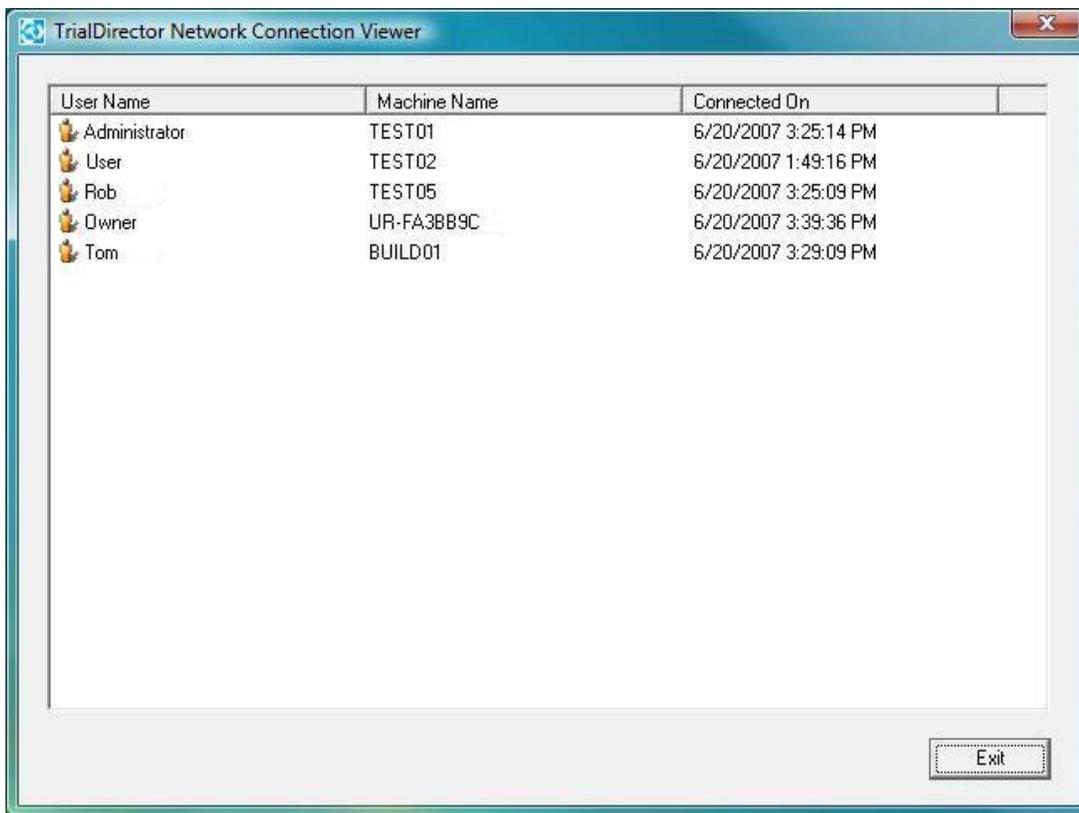
## CLIENT CONNECTION VIEWER

The Client Connection Viewer utility is designed to help server administrators determine who is connected to the TrialDirector Network application at any given time. This simple utility solves the problem of figuring out who is using TrialDirector Network when all concurrent licenses have been used.

The Client Connection Viewer is available from Windows **Start > TrialDirector 6 Network > Client Connection Viewer**.

If this shortcut is not available, the Client Connection Viewer can be launched by manually launching TrialDirector6.exe with a "ConView" argument, as shown in the example below:

**Start > Run:** "\\Server\Share\inData\TrialDirector 6 Network Server\Application Files\TrialDirector6.exe" ConView



The Client Connection Viewer screen displays Client connection information based on Microsoft Windows networking usernames and machine names. In the example above, five Clients are currently connected to the TrialDirector Network Server. In the event that the Client license limit has been reached and the Network Access Temporarily Denied dialog box appears for a user (see example on the following page), the server administrator would use the Client Connection Viewer utility to determine which users are connected to the TrialDirector Server in order to manage the connection count.

As its name implies, the Client Connection Viewer only views current connections; it does not manage them. When all Client Access License connections have been filled and another client attempts to connect, access will be temporarily denied. The administrator will need to contact the currently connected users and determine who will need to disconnect from the server (by exiting TrialDirector Network Client) to allow a different user to connect.

The following dialog box appears in a TrialDirector Network Client in the event that all Client Access Licenses are currently in use. Users are encouraged to contact the administrator for assistance.



## CLIENT ACCESS LICENSE UPGRADE TOOL

The Client Access License (CAL) Upgrade Tool is designed to seamlessly upgrade the number of seats available to an existing TrialDirector 6 Network Server deployment. Additional seats can be purchased from inData Sales Dept. at 877-463-2829. For example, you may initially purchase a 5 seat TrialDirector 6 Network Server package. However, you need to have 10 concurrent users access an active case. Therefore, you would need to purchase an additional 5 TrialDirector Network seats. Once the additional seats are purchased, run the Client Access License Upgrade tool.

The Client Access License Upgrade Tool is available from Windows **Start > TrialDirector 6 Network > Client Access License Upgrade Tools**.

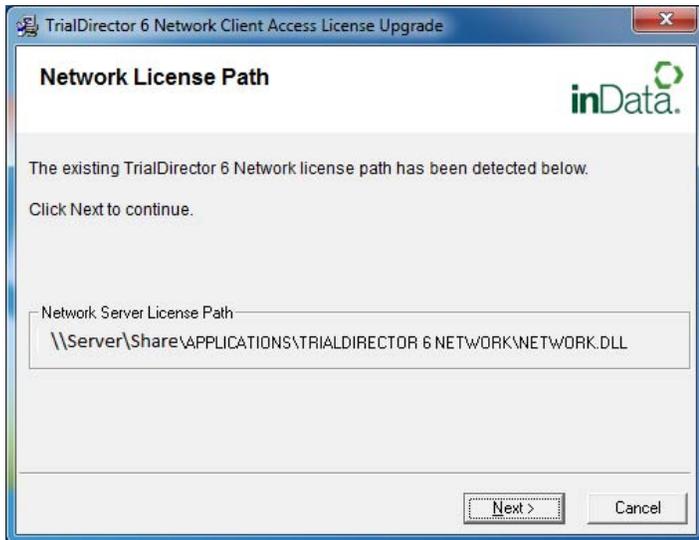
If this shortcut is not available, the Client Access License Upgrade Tool can be launched manually using the example path below.

**Start > Run:** “\\Server\Share\inData\TrialDirector 6 Network Server\Application Files\Admin Tools\CalUpgrade.exe”

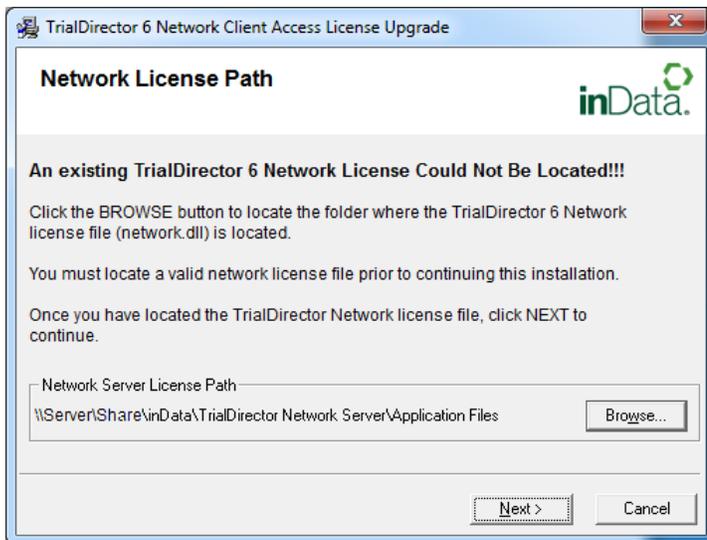
1. The Client Access License Upgrade Tool installation welcome displays. Take a few moments to read the process overview that is provided in the dialog box. Click **Next** to continue.



2. Next, the utility will search for an existing TrialDirector 6 Network Server license file (network.dll) based upon the current configuration of the PC running the program. If a license file is automatically found, the screen below will be displayed. Click **Next** to continue.



- a. However, if the license file cannot be found, a screen similar to the example below will be displayed. You must browse to the mapped network drive path which contains the TrialDirector 6 Network Server license file (network.dll) in order to continue and properly upgrade the Client Access Licenses (CALs).
- b. Once you have browsed to a TrialDirector 6 Network Server license file (network.dll), click **Next** to continue.

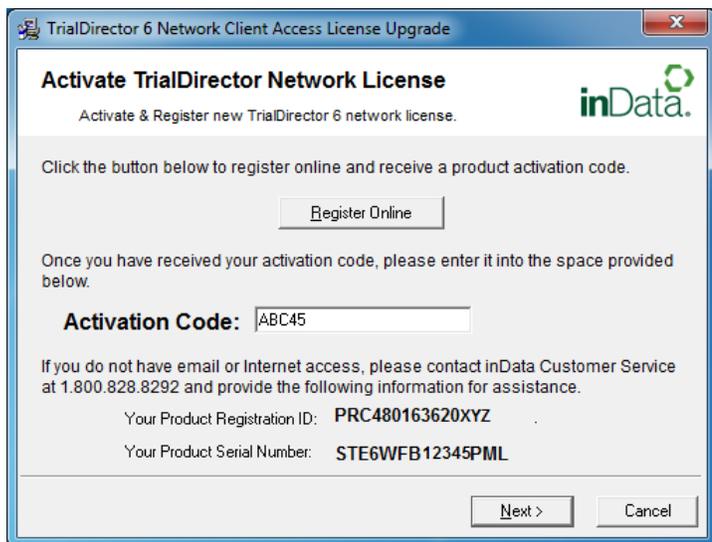


3. Enter the product serial number for the **NEW** TrialDirector 6 Network Server serial number which you just purchased. **DO NOT** enter your original TrialDirector 6 Network Server serial number into this box. Click **Next** to continue.



The screenshot shows a dialog box titled "TrialDirector 6 Network Client Access License Upgrade". The main heading is "Enter Network License Serial Number". Below the heading, it says "Register upgraded TrialDirector 6 serial number on network server" and features the inData logo. The instructions state: "To begin, please enter your new serial number into the place provided below and click Next." and "If you do not have a serial number please contact inData Customer Service at 1.800.828.8292 for assistance." There is a text input field labeled "Enter your product Serial Number:" containing the text "STE6WFB12345 PML". At the bottom, there are "Exit" and "Next >" buttons.

4. You will now be prompted to activate the **NEW** TrialDirector 6 Network Server serial number. Click the *Register Online* button to obtain your activation code. If you do not have an active Internet connection, call inData Customer Service (800) 828-8292 or Technical Support (866) 419-4298 to obtain an activation code. Once you have obtained your activation code, click **Next** to continue.



The screenshot shows a dialog box titled "TrialDirector 6 Network Client Access License Upgrade". The main heading is "Activate TrialDirector Network License". Below the heading, it says "Activate & Register new TrialDirector 6 network license." and features the inData logo. The instructions state: "Click the button below to register online and receive a product activation code." There is a "Register Online" button. Below that, it says: "Once you have received your activation code, please enter it into the space provided below." There is a text input field labeled "Activation Code:" containing the text "ABC45". Below that, it says: "If you do not have email or Internet access, please contact inData Customer Service at 1.800.828.8292 and provide the following information for assistance." There are two lines of information: "Your Product Registration ID: PRC480163620XYZ" and "Your Product Serial Number: STE6WFB12345PML". At the bottom, there are "Next >" and "Cancel" buttons.

5. You are now ready to upgrade your TrialDirector Network Client Access License. Click **Next** to continue.



6. Once the TrialDirector Network license upgrade is complete, the screen below is displayed. This screen will indicate the **NEW** TrialDirector 6 Network Serial Number and the **NEW** client access capacity. Review this information and click **Finish** to complete the process.

