

QUICK START GUIDE



inData
TrialDirector[®] 6
Trial Presentation Software

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WELCOME TO TRIALDIRECTOR 6

Welcome to TrialDirector®, trial presentation software for attorneys and litigation support professionals. TrialDirector helps you organize exhibits and depositions, prepare cases for trial, and enhance case presentations. Whether you're working with documents, images, photographs, transcripts, video testimony, or animations, you can easily view, manage, and present them using TrialDirector.

This guide is divided into four main sections:

- [Navigating in TrialDirector](#) – Shows you the modules and tabs within TrialDirector.
- [Creating and Organizing Your Case](#) – Explains how to create a new case file and add items to your case.
- [Preparing for Trial](#) – Details basic case preparation, including how to add markups to images, add issue codes to transcripts, create focused video clips from transcripts, and use workbooks to organize exhibits.
- [Presenting at Trial](#) – Introduces the Presentation mode and explains how to retrieve exhibits, mark up exhibits, and display video clips.

Other Resources

This guide provides a basic introduction to TrialDirector. Check out our other valuable resources to help you tap into the powerful features of the program:

- **Tutorials** – Free tutorials are available on inData's Web site (www.indatacorp.com).
- **Help** - In addition to this guide, the TrialDirector Help system contains many feature overviews and task-specific topics that you can locate through the Contents or by searching on key words. To access the TrialDirector Help, open the **Help** menu in the program and click **Contents**.
- **Training** – Contact inData's Training Department at 800-828-8292 or visit inData's Web site to learn about our training classes.
- **Technical Support** – The Technical Support staff is available Monday through Friday from 9 a.m. to 8 p.m. Eastern Time (excluding holidays) at 866-419-4298 to help you with any questions you have about TrialDirector.

Recommended System Requirements

- 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)

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

**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.

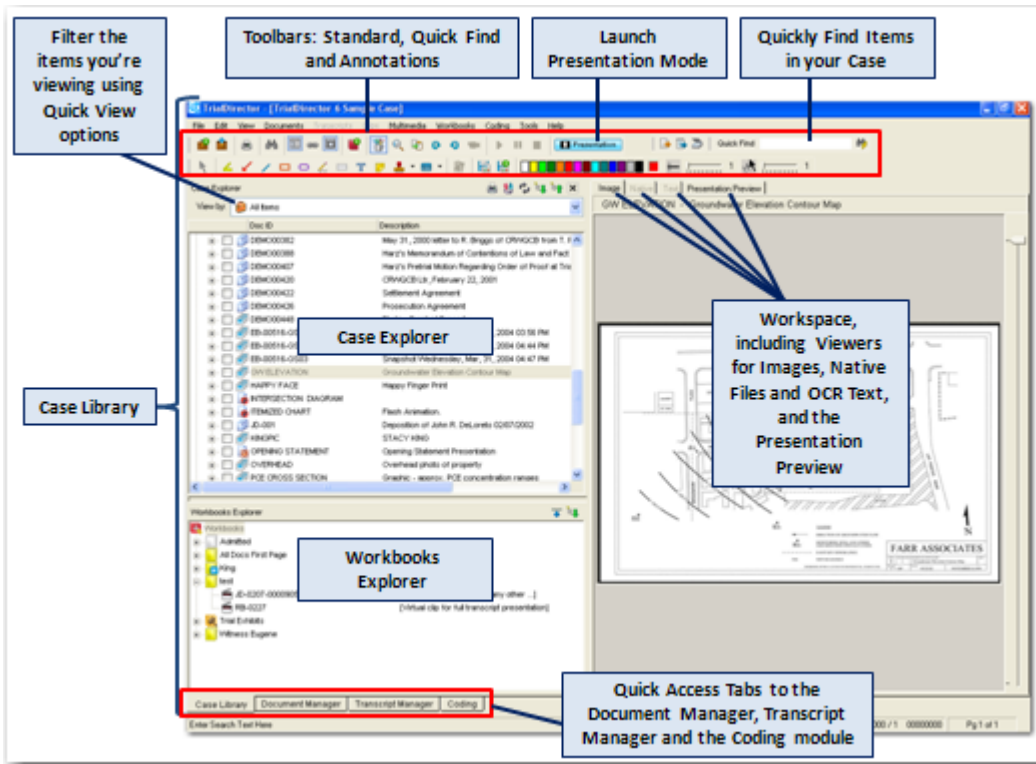
WHAT DO YOU WANT TO KNOW?

If you don't have time to read this guide now, use the table below to find the information you're looking for quickly. This Quick Start Guide provides basic information to help you get started, while the TrialDirector Help system includes detailed instructions and tips for using all features.

If this is your question....	...then look here for your answer
What exactly do each of the categories – Case Library, Document Manager, Transcript Manager, and Coding – mean to me when I'm setting up a case in TrialDirector?	Guide: "Navigating in TrialDirector" on p. 5 Help: "Getting Started with TrialDirector" See the "Navigating in TrialDirector" section.
How do I create a new case?	Guide: "Creating and Organizing Your Case" on p. 7 Help: "Creating a New Case"
How do I get to the point where I can see documents and transcripts in my case?	Guide: "Adding Items to the Case" on p. 9 Help: "Loading Items into Your Case"
What do I need in order to have transcripts and video that work together?	Help: "Loading Synchronized Transcripts"
How do I redact confidential information from my documents before presenting them in the courtroom?	Guide: "Annotating Images" on p. 28 Help: "Working with Annotations/Markups"
How do I find an item in my case or specific transcript text quickly?	Guide: "Finding Items and Transcript Testimony" on p. 18 Help: "Finding Items" and "Searching Transcripts"
How do I label an area in testimony that applies to a particular issue so I can easily refer back to it?	Guide: "Working with Issue Codes and Transcripts" on p. 22 Help: "Working with the Coding Database"
How do I print a list of exhibits in my case?	Help: "Creating Exhibit Lists"
What are Workbooks, and how do they help me organize my case and present it in court?	Guide: "Organizing Exhibits Using Workbooks" on p. 30 Help: "Working with Workbooks"
How can I present two documents side-by-side for comparison in court?	Help: "Using the Presentation Zones"
How do I mark up and emphasize areas of exhibits during trial?	Guide: "Annotating Exhibits" on p. 34 Help: "Using Annotations in Presentation"
How do I play a video and scrolling transcript text when presenting my evidence?	Guide: "Presenting Video" on p. 34 Help: "Presenting Digital Video Transcripts (DVTs)"

NAVIGATING IN TRIALDIRECTOR

The diagrams in this section explain the main features of the TrialDirector interface. To explore these features, open the sample case provided with the program.



Case Explorer

The Case Explorer window is shown with the following callouts:

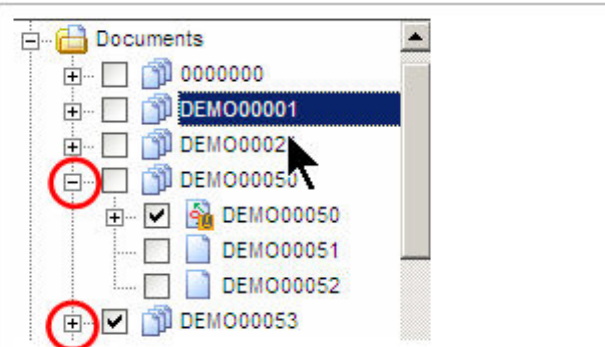
- To see the entire list of every item in your case, you can expand the entire list by clicking on the **Expand Items** button . To contract the list back down to the main three categories, just click on the **Collapse Items** button.**: Points to the expand/collapse icons in the top right of the Case Explorer window.
- To filter the items listed in the Case Explorer to only a certain type of item, click the pull-down arrow to the right of the **View By** window and select the item.**: Points to the 'View by: All Items' dropdown menu.

The Case Explorer lists all items in your case, organized by category:

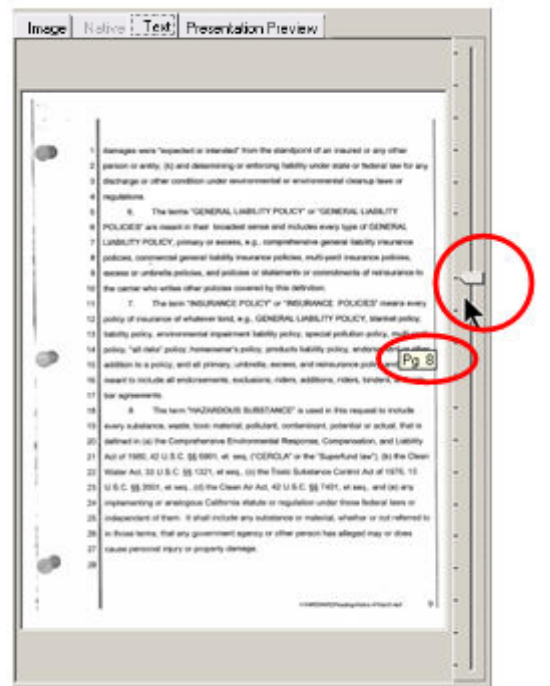
- Documents** includes images, photo files (including .bmp and .jpg) and native files. You can enter descriptions and assign exhibit numbers to any Document or Multimedia item in the Case Explorer.
- Transcripts** includes text-only and synchronized transcripts, including any clips (excerpts from transcripts that may be played during your presentation)
- Multimedia** includes, for example, animations or videos without transcript text (i.e., surveillance video)

View Items

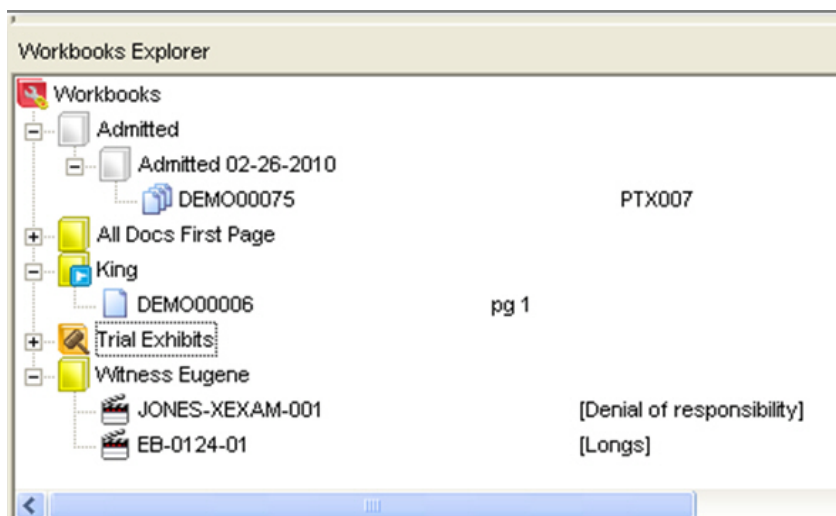
- Click on a document (item) ID and the first page of the document appears in the workspace area to the right of the Case Explorer
- Click on the + sign next to the item ID (or folder) to view page list (or folder contents)
- Click on the – sign next to the item ID (or folder) to contract the document page list (or contents)
- Use the scrollbar to move through a long list of items in the Case Explorer



To move between pages of a multi-page document, drag the slider tool to the right of the document image. A tip window appears identifying the page location within the document.



Workbooks Explorer



Below the Case Explorer is the **Workbooks Explorer**.

When you first create a case in TrialDirector, only the Trial Exhibits Workbook appears. As you add trial exhibit numbers to the items in your case, those items are automatically added to the Trial Exhibits Workbooks.


TrialDirector uses three types of workbooks: Standard, Multiplayer and Carousel. Create Workbooks for the Opening, Closing, direct and cross examination of witnesses – wherever you might use a folder when preparing your case without TrialDirector. Then you can use Workbooks to present those items in the courtroom, to print witness books, to create an outline in Word, and so many other tasks.

CREATING AND ORGANIZING YOUR CASE

Creating a Case

The first step in trial presentation is to create a case in TrialDirector.



- 1 Click on the  tool on the toolbar, or open the **File** menu and select **Create a New Case...**
- 2 Either accept the default location shown in the dialog box or browse to the location where the new case will be stored. By default, TrialDirector creates a **Cases** folder within the folder that contains the TrialDirector software.



- 3 Click **Next** and enter information about your case.



- Click **Next** again. If you want, you can assign a password and other security to your case. See "Enable Case Security" in the Help system for additional information.



- Click **Create**.




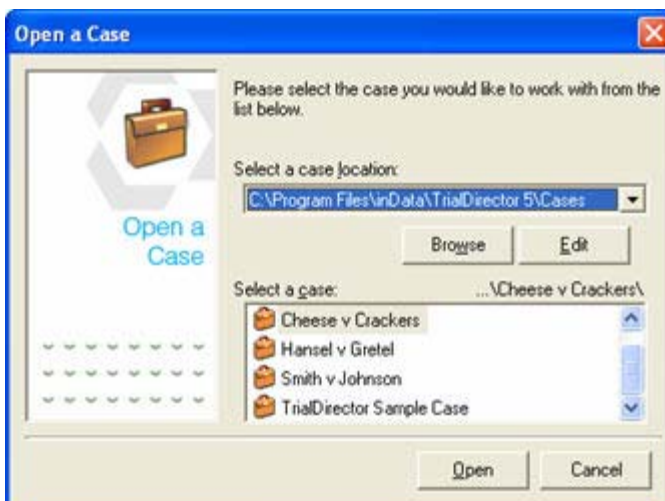
Tip

If you're using TrialDirector as an add-in to Summation iBlaze/Enterprise or Concordance, a new case is created for you when you activate the add-in. See Application Integration in the TrialDirector Help system for more information.

Opening an Existing Case



- Click the  tool on the toolbar, or open the **File** menu and select **Open a Case**.



- Your case names will appear in the **Select a case** box. Click on the name of the case to select it, then click **Open**. (If the case you want to open does not appear in the list, browse to the location where the case is stored.)

Adding Items to the Case

After you create a case, you will need to add items to it. The types of items that can be viewed in TrialDirector include:

- Images
- Photographs
- Native files (Microsoft Word, PowerPoint, Excel, PDF, and so on)
- Transcript text
- Video synchronized with transcript text
- Multimedia (animations, video and audio files)

To access these items from within TrialDirector, you must import them to your case. Adding items can be done by (1) dragging and dropping the item onto the Case Explorer tree, (2) using the Add Items dialog box or (3) scanning documents or photographs directly into TrialDirector. (For instructions on scanning documents directly into TrialDirector, see Loading Items Using a Scanner in the TrialDirector Help system.)

When adding items using drag-and-drop or the Add Items dialog box, you can add items one at a time or in batches, using a “load file.” Load files are usually provided by vendors or may be created using higher end scanning programs. A load file automates the process of adding items to your case. The following sections detail adding individual items, as well as using a load file.

Adding Items Using Drag and Drop

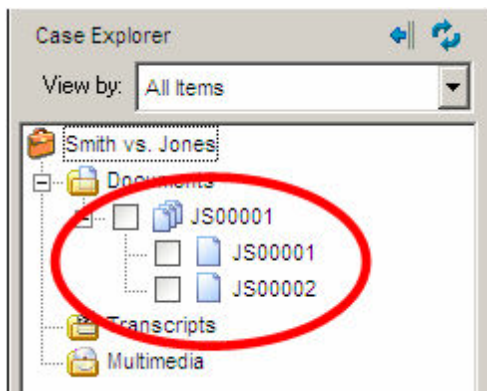
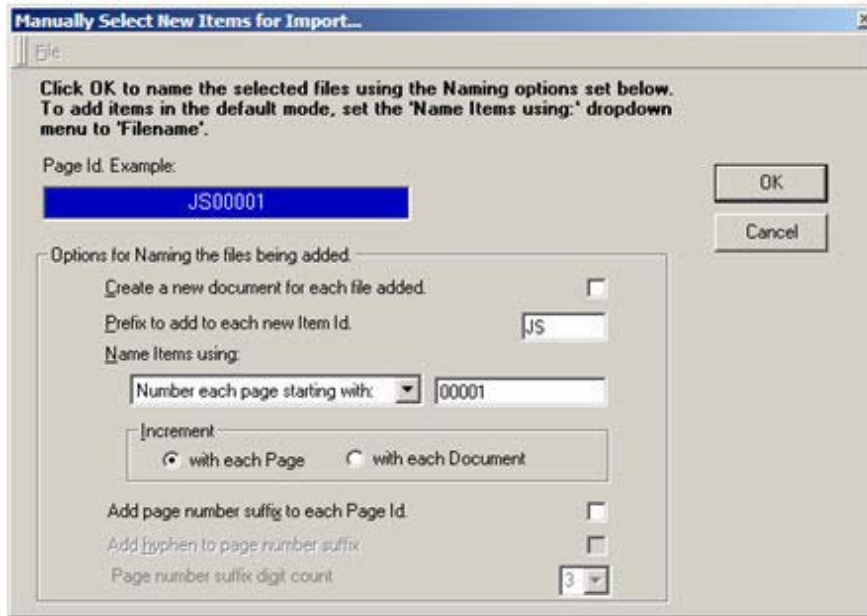
- 1 Arrange your Windows desktop so that you can view both the TrialDirector Case Explorer pane and the Windows Explorer (or My Computer) pane.
If the items are on a CD or DVD, copy them to the drive on which you want to store them before you load them into TrialDirector.



Tip Within the case folder where the rest of your case information resides, you may want to create folders for the various types of items you are adding. For example, folders called Images, Video, Animations, Native Files, and Transcripts. Doing so will make it easier for you to locate and work with the files as your case progresses.

- 2 In the Windows Explorer (or My Computer) window, navigate to the location of the items you want to add to TrialDirector.
- 3 Select the item(s) you want to add to TrialDirector. Once they are selected, drag the items from the Windows Explorer (My Computer) window and drop them onto TrialDirector’s Case Explorer pane.
 - Use **CTRL+[click]** to select multiple non-adjacent items or **SHIFT+[click]** to select multiple adjacent items.
 - When adding single-page TIF images to TrialDirector, make sure to add only one document at a time. If you add more than one single-page TIF document at once, the individual documents will be added as a single multi-page document. (They can be separated later within TrialDirector, but it’s simpler to add them individually.) On the other hand, if you are adding multi-page TIF images, each file represents an entire document.

- You do not need to be concerned with where to drop the items within the Case Explorer. TrialDirector determines the correct type of item and its folder in the Case Explorer.
4. Decide on the method you want to use for naming the files being added to TrialDirector. After you make your selections and confirm that the Page ID example accurately reflects what you want, click **OK**.
- In the following example, the item will be named JSS0001. If it is a multi-page document, each page is assigned the next unique number.
 - Note that a Page ID example is displayed in the dialog box.



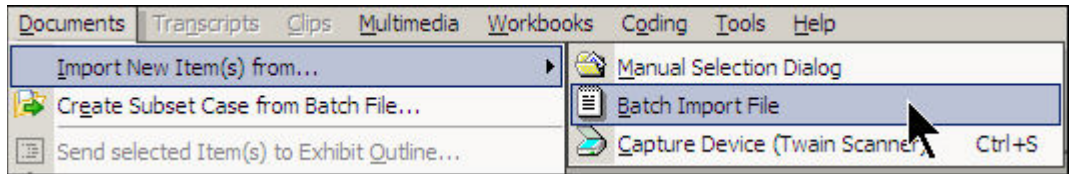
The items you added now appear in TrialDirector's Case Explorer. In this example, the added items were images of documents, so they appear under the Documents folder in the Case Explorer. Within the Documents folder, there is now an item for the two-page document (JS00001) and then, within that document, you see entries for individual pages of the document. You can now work with the document in its entirety or just with individual pages of the document depending on the task you want to perform.

Adding Items Using a Batch Load File

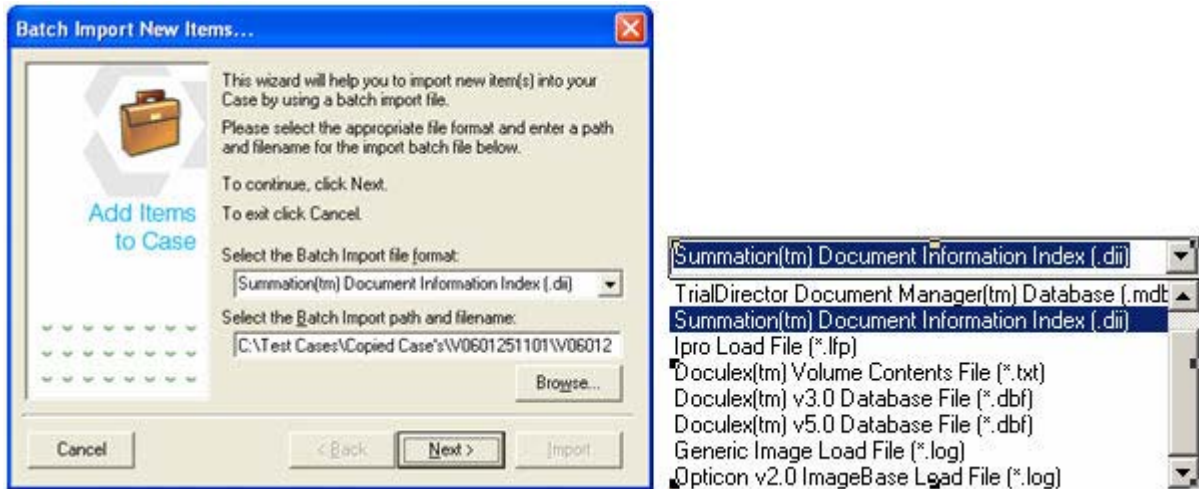
Accepted Batch Load File Formats

- | | |
|---|---|
| <ul style="list-style-type: none"> OLL (TrialDirector®) DII (Summation®) LPT (IPRO®) TXT or DBF (Doculex®) LOG (Opticon® or generic load file) | <p>The “name” of the load file reflects the 3-character file extension, e.g., Jones.OLL is a load file named “Jones” that was created specifically for TrialDirector. Jones.DII is a load file created to load images into Summation Enterprise/iBlaze.</p> |
|---|---|

You can use the same drag-and-drop technique described previously with batch load files or you can use TrialDirector's Document Import dialog box.



- 1 On the **Documents** menu, point to **Import New Item(s) from...** and click **Batch Import File**.

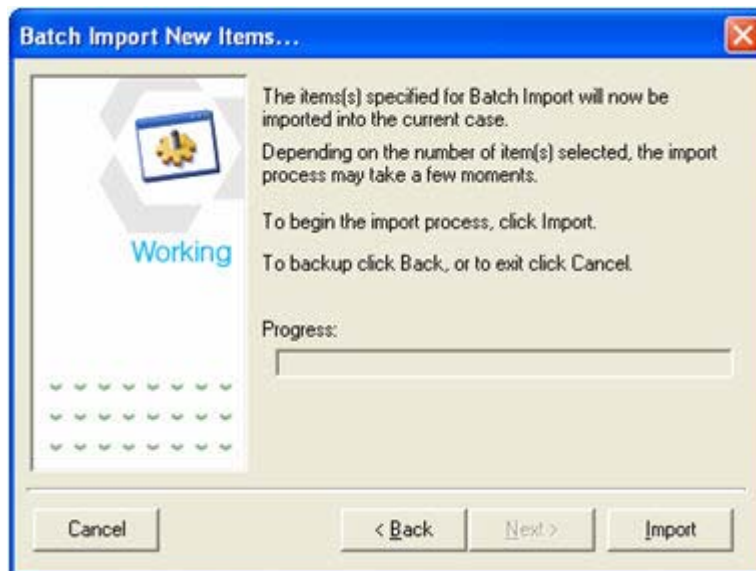


- 2 Click on the drop-down arrow to locate the file format of the load file you're using. If necessary, click on the **Browse** button to navigate to the location of the load file. Once you have selected the file format and located the file, click **Next**.
- 3 The following dialog box provides options to set a standard rotation for images.



You can also adjust settings relating to Summation's DII file format:

- **Replace @V Volume Label\Path with:** _____ lets you replace the @V designation with a specific path where the images are stored.
 - When **Increment document page with suffix (IE:-0002)** is checked, each page in the document will be numbered with the Doc ID number followed by a page suffix (i.e., -0002, -0003, -0004, and so on). Summation deals with documents on a document level where TrialDirector deals with documents on a page level. When you load documents using a Summation DII file, TrialDirector accommodates the document-level format by using page suffixes. If this option is not checked, the document will be added to TrialDirector using sequential numbering for each page. (For more information about working with Summation DII files, visit [Summation's knowledge base.](#)) Click **Next**.
- 4 Click **Import** in the following dialog box. The progress bar will advance as items are loaded into your case.



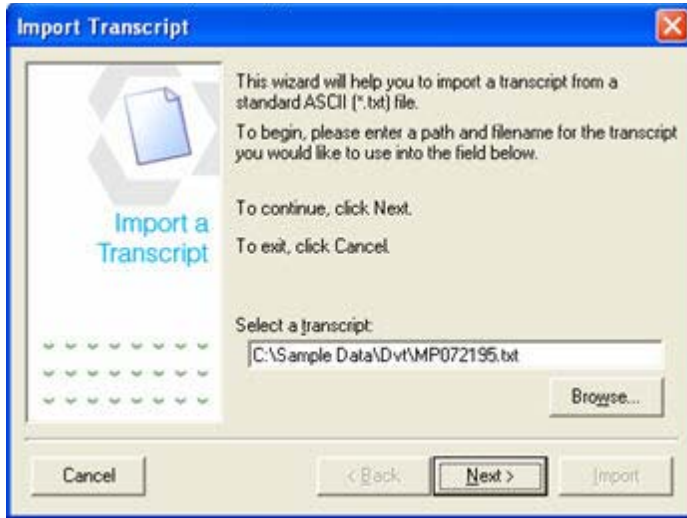
- 5 After the batch processing is completed, click **OK** to view the items that were added to your case.

Adding Transcripts

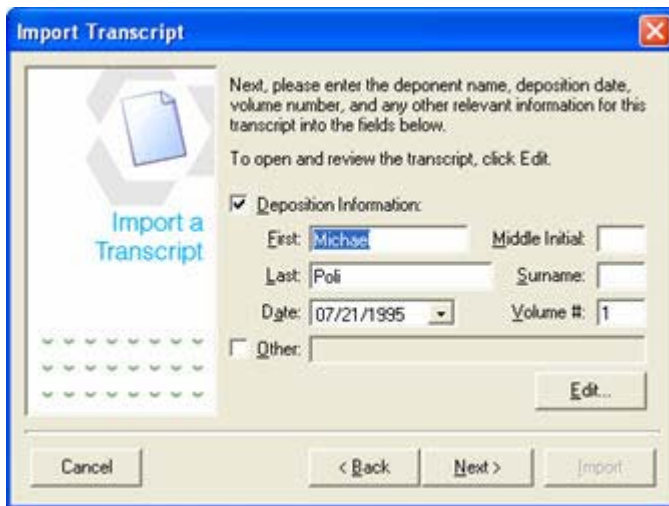
TrialDirector can load transcripts (text-only transcripts or transcripts synchronized with video) in a variety of formats, including ASCII, AMICUS, DVT (Digital Video Transcript media), or a TrialDirector case file (CMS).

- 1 Click on the Transcript Manager tab at the bottom of the TrialDirector desktop.
- 2 Using the drag and drop technique described previously, drag and drop the transcript file onto the Transcript Explorer pane.
-or-
Click the **Transcripts** menu, point to **Import Transcript(s) from...**, and select the appropriate format from the list.

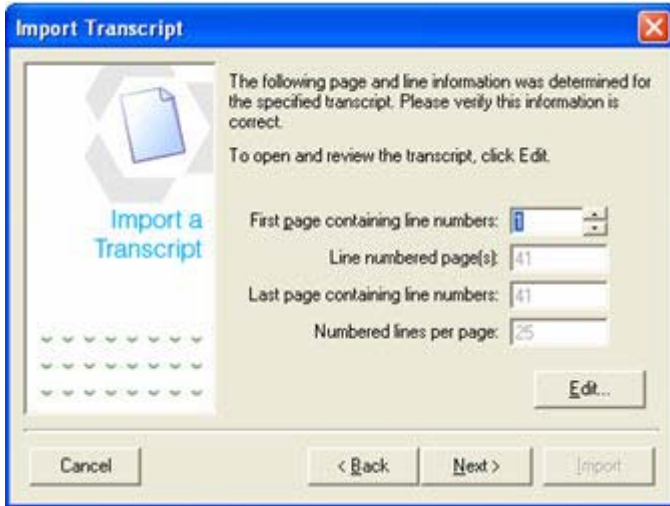
- 3 The Import Transcript wizard opens. Click the **Browse** button and locate the transcript you want to load. When you select the transcript, the path and the selected transcript file appear in the Import Transcript wizard. Click **Next**.



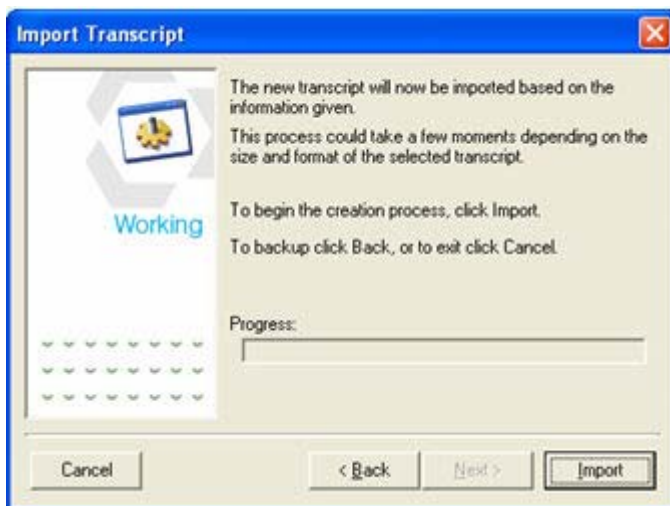
- 4 Review and modify the deposition information, if necessary. If you need to review the transcript, click **Edit**. If the information is correct, click **Next**.



- 5 Verify that the pagination is accurate in the following dialog box. This is important in order to be sure that your page and line references are correct.



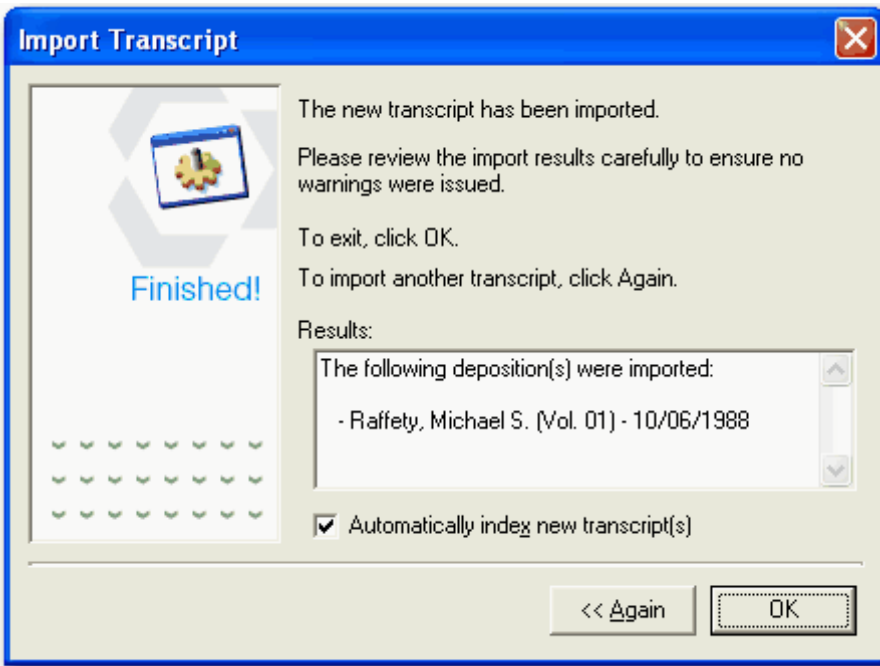
- 6 Click **Import** to load the transcript into your case.



- 7 When the progress bar reaches the end, click **Next**.

- When the transcript import process is complete, you can click either **OK** to return to the Transcript Manager window, or **Again** to load another transcript.

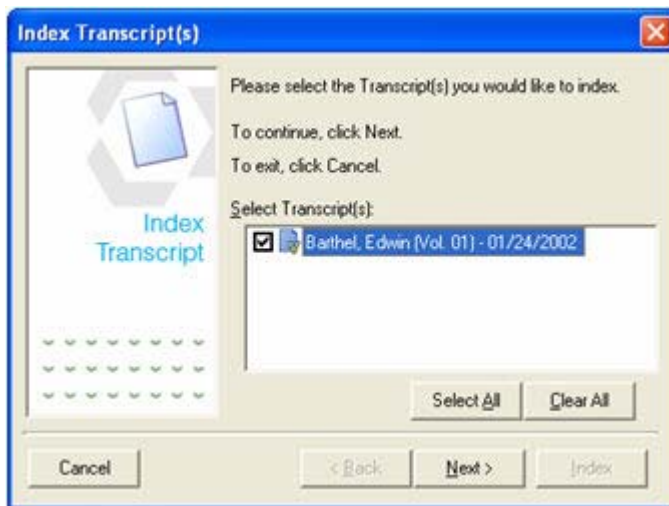
If the check box next to **Automatically index new transcript(s)** is checked, the transcript will be indexed before it is added to the Transcript Explorer. If the check box is not checked, you can index transcripts later. Indexing transcripts is important. See “Indexing Transcripts” in the TrialDirector Help system for more information.



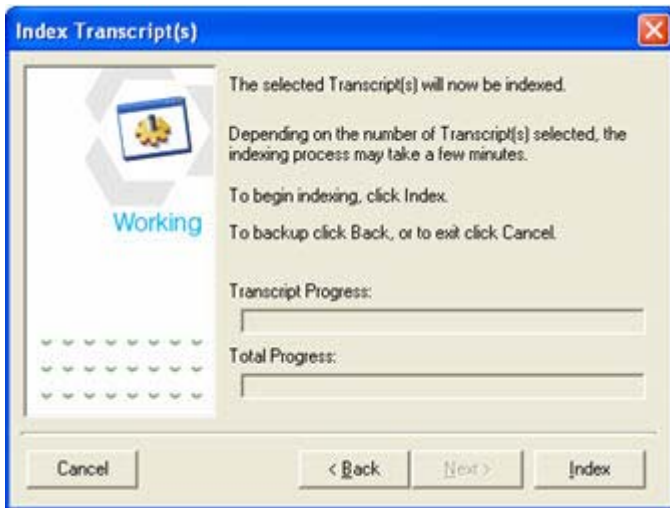
Indexing Transcripts

If you choose not to index the transcripts when they are loaded, you can index them later from within the Transcript Manager. To do so:

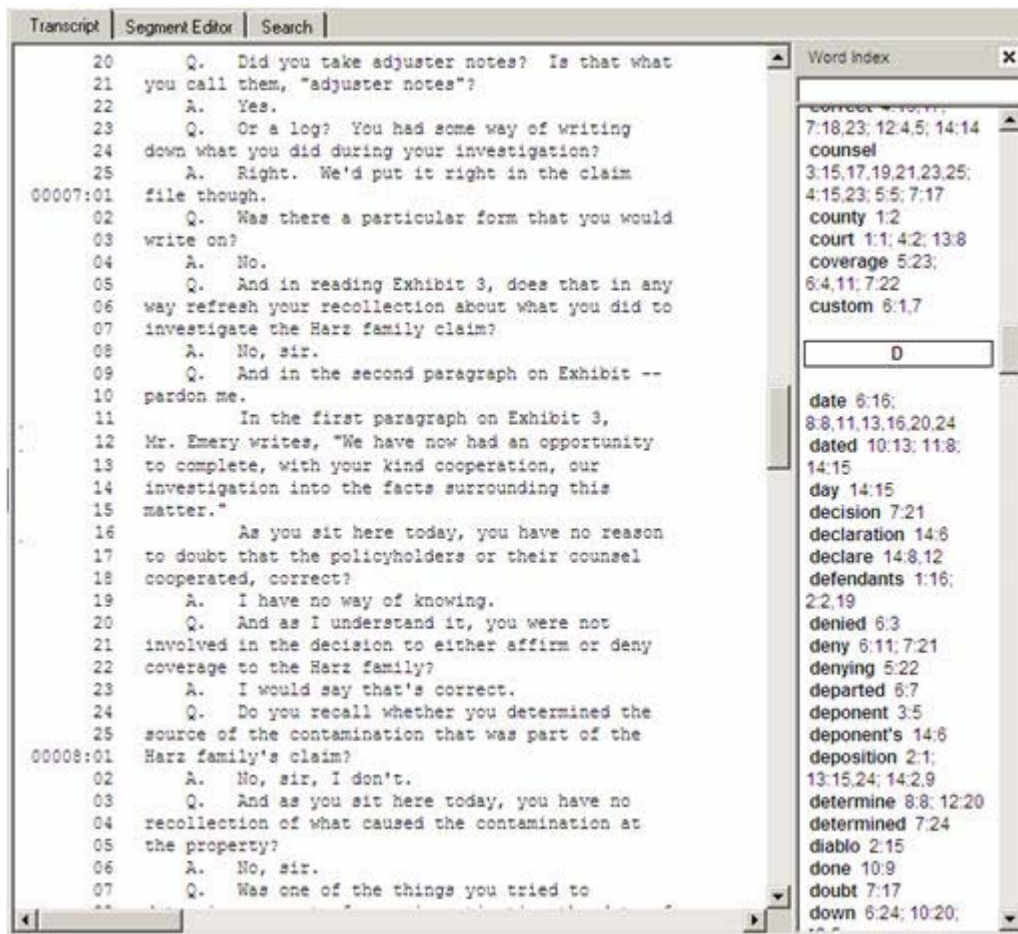
- In the Transcript Manager, open the **Transcripts** menu and select **Index Transcripts....**



- 2 The transcripts requiring indexing are listed. Select one or more transcripts (or click **Select All** to choose all of the transcripts). Then click **Next**.
- 3 Select **Index** and allow the program to index the transcripts.



- 4 When indexing is completed, click **OK**. Now you will be able to search the contents of the transcript as well as view the list of words contained within the transcript.



See “Loading Items into Your Case” in the TrialDirector Help system for more information on all of the methods for adding documents and transcripts to your case.

PREPARING FOR TRIAL

TrialDirector gives you the option to assign issues (such as elements of proof, defenses, and specific witnesses) to documents, transcript testimony and other pieces of potential evidence in your case.

You can search document indexes, the content of documents (if they were run through a full-text OCR process), and testimony. Attach memos and notes to items in your case. Add highlighting, redactions, and other markups (annotations) to images in your case in order to focus on key points you may want to pursue. Markups can also be displayed during presentation in the courtroom, or you can create markups “on the fly” in Presentation mode. (For suggestions on using markups during your presentation, see the Presenting at Trial section of this guide.)

Understanding Coding

Information about the documents in your case may be imported into TrialDirector from other database programs, such as Summation Enterprise or iBlaze. You can also enter information directly into TrialDirector’s Coding tab. Certain fields from the Coding tab can be synchronized with the items listed in the Document Manager and Case Explorer using TrialDirector’s synchronization feature.

Entering a brief description for each item in your case makes it easier to locate those documents within your case. You can also use the database to sort the information chronologically, for example, or perhaps by author. Since entering information about your documents (also known as “coding”) can be time-intensive, you may want to limit coding to those items that are going to be used at trial.

Issue-Coding Many litigators use issue coding to help categorize the evidence in their cases, even if they don’t refer to the process as “issue-coding.” For example, you may attach sticky notes or scribble a word or two in the margin of transcripts in order to remind you of the topic the testimony relates to. You may have several file folders on your desk, each one of which relates to a particular topic or element of proof or defense or witness. As you come across documents and testimony that relate to any of these, you might copy the document or transcript page and toss it into one or more file folders, depending on your organizational system. You can do this electronically in TrialDirector, color coding excerpts of testimony, annotating documents, and collecting documents and testimony excerpts in workbooks.


Finding Items and Transcript Testimony

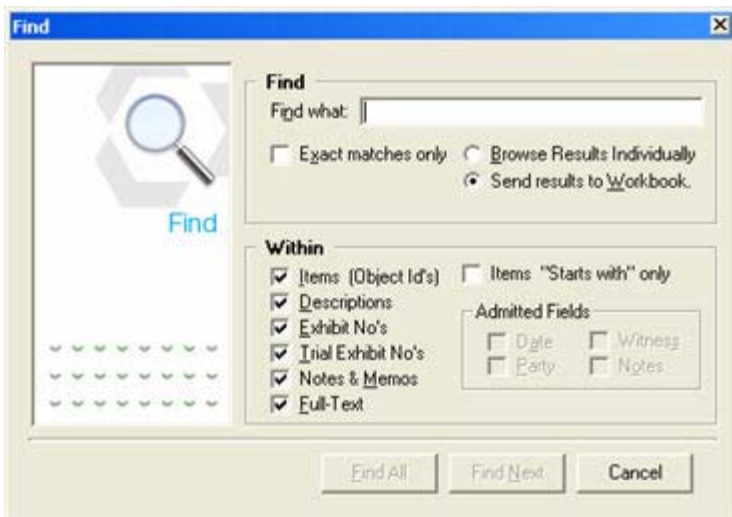
Before you begin coding and using other methods to organize your case, it's helpful to understand the ways you can find items and specific transcript testimony.

Finding Items in Your Case

It's easy to locate items in the Case Explorer using the **Find** tool. You can search for any of the following criteria:

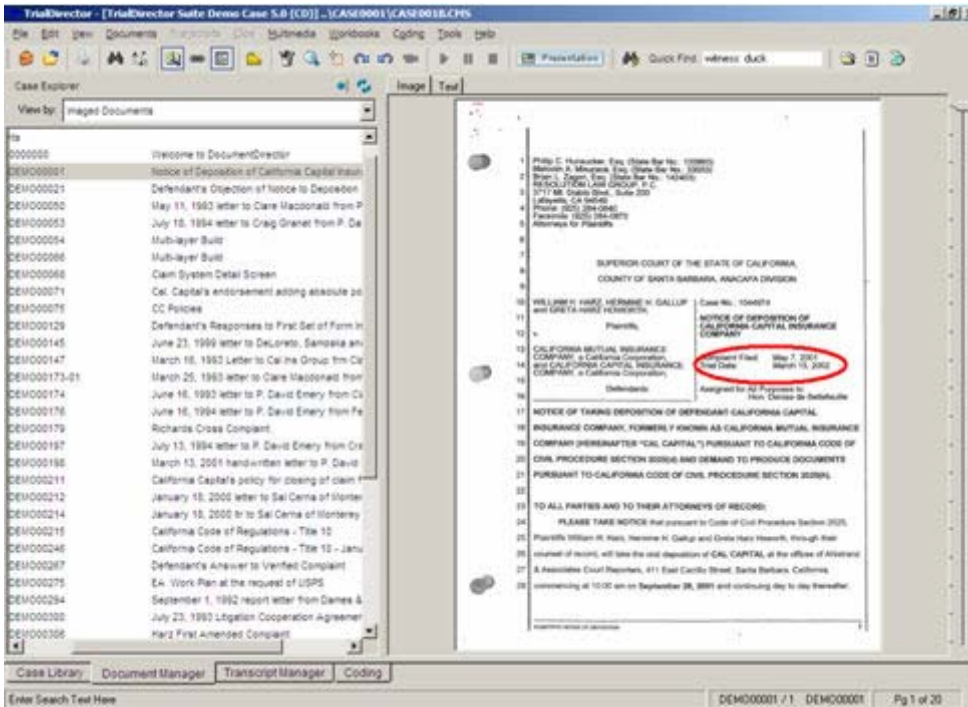
- Item ID number (e.g., DEMO00002)
- Description (a brief “shorthand” title for the item to help you identify it quickly during trial)
- Exhibit No. (deposition exhibit number)
- Trial Exhibit No. (trial exhibit number)
- Notes & Memos (the contents of the Summary field, if data is imported from Summation. Alternatively, you can easily add memos to any of the items in your case.)

- 1 Click on the  tool on the toolbar in the Case Explorer or Document Manager, or click on the **Edit** menu and select **Find...**
- 2 In the **Find** dialog box, enter the word you want to look for and the other criteria for your search. It is not necessary to use a wildcard character. So searching for anim finds animation, animated, animations, animal, animals, etc.



To view each item one at a time, select **Browse Results Individually**.

Click **Find First** to display the first item. Click **Find Next** to continue viewing each of the other items found as a result of the search.



To view all of the items at once, select **Send Results to Workbook**. Click **Find All** to run the search. A **Search Results** workbook is created in the Workbook Explorer section of the Case Library. From there, you can view all of the items located as a result of your search.

TrialDirector gives you several methods to locate testimony within transcripts. You can search the Word List for each of the transcripts. You can also search within a single transcript for a word or phrase or search across multiple transcripts.

Opening a Transcript and its Word List

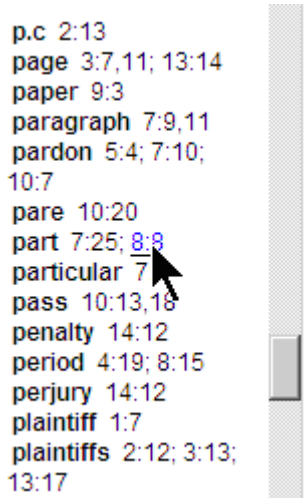
- 1 Click the **Transcript Manager** tab to display the transcript workspace.
- 2 In the Transcript Explorer, expand the transcript you wish to work with. (Click on the **+** to the left of the transcript name.)

The following items may appear under your transcripts:

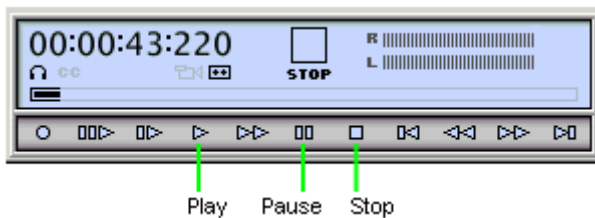
- ASCII Transcript for [deponent's name]
- Audio/Video for [deponent's name] (if a video version of the transcript has been loaded into your case for the selected deponent)
- One or more Clips (each clip contains one or more segments of synchronized text and video)
- A Virtual Clip (the synchronized text and video for the entire transcript)
- Exhibits attached to the transcript
- Issue Codes and Annotations

- 3 Double-click on **ASCII Transcript for [deponent's name]**. The transcript opens on the desktop.

- To view the Word List, with the transcript open on the desktop, click on the **View** menu and select **Word Index**.
- When you locate a word that interests you, you can click on the page:line reference(s) adjacent to the word to jump to that point in the transcript and the synchronized video (if any).

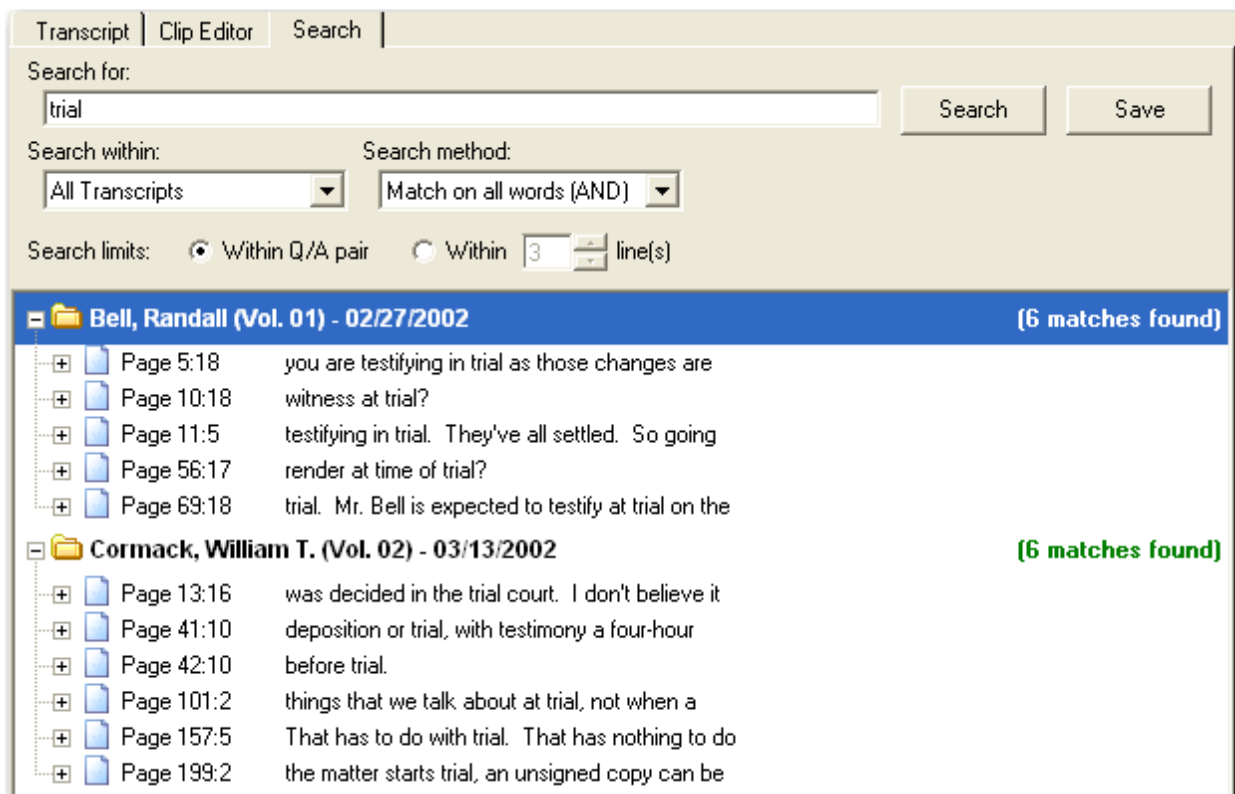


- TrialDirector takes you to that location within the transcript and, if the transcript has associated video, the Multimedia Player displays the associated segment of the video. To play the video, click on the **PLAY** button. To stop the video playback, click on the **STOP** button.

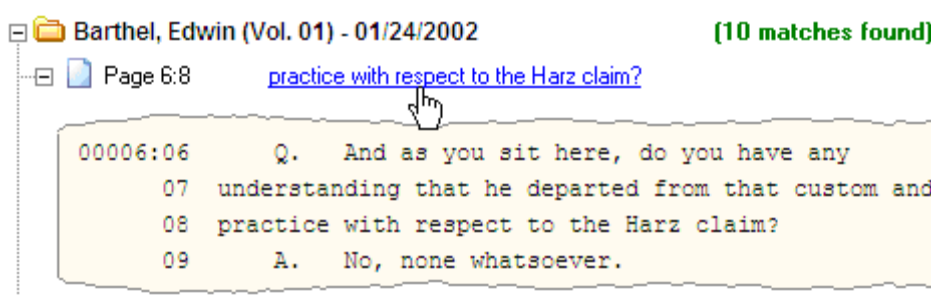


Searching One or More Transcripts

- With a transcript open on the desktop, click the **Search** tab at the top of the desktop.
- Enter the term(s) you want to find in the **Search for:** box.
Use the wildcard character ***** to locate variations of a term. For example, search for "claim" and you will only find where that exact word appears. Search for "claim*", and you will find all occurrences of claim, claims, claimed, claiming.



- 3 In the **Search within** box, select whether you want to search all of the transcripts, only selected transcripts, or only the current transcript.
- 4 In the **Search method** box, choose whether you want to find the exact word or phrase entered in the **Search for:** box or whether you want to develop a compound search using AND or OR.
- 5 After your search criteria are specified, click on the **Search** button. A list of the transcripts containing the search term or phrase appears on the screen. The number of matches is displayed to the right of each transcript name.
 - Click on the **+** sign for each transcript to view a list of the page:line citations.
 - Click the **+** next to each page:line reference to view the question-and-answer pair in which the search term appears.
 - Click on the line of text adjacent to the page:line citation to jump to that location in the transcript.



Working with Issue Codes and Transcripts

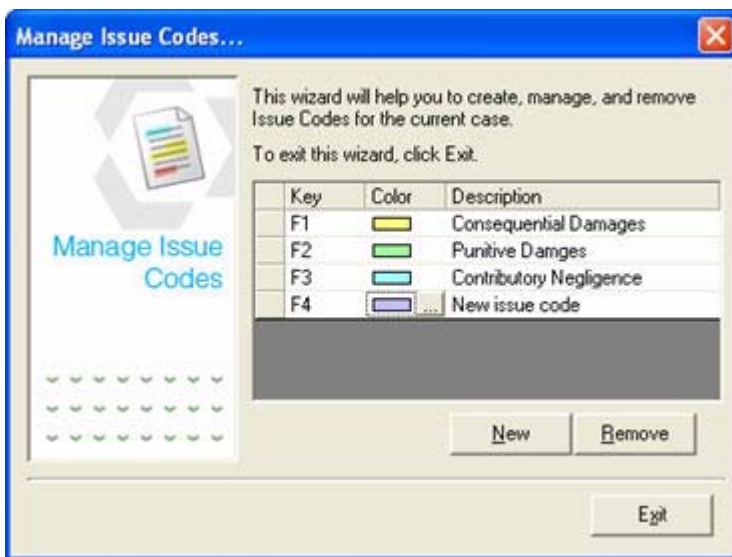
Before you assign issue codes to transcript testimony, you'll want to begin by creating the issue code list.



Tip Keep your list of issues simple. The more complex an issues list becomes, the more difficult it is to use.

Managing Issue Codes

- 1 In the Transcript Manager, open the **Transcripts** menu and select **Manage Issue Codes....**
- 2 In the dialog box, click the **New** button.



- 3 Replace the text “New Issue Code” with a short title for the issue you want to add.
- 4 To change the color of the highlighting that will appear in the transcript for the new issue, click on the color box. A spectrum dialog box opens from which you can select a color.

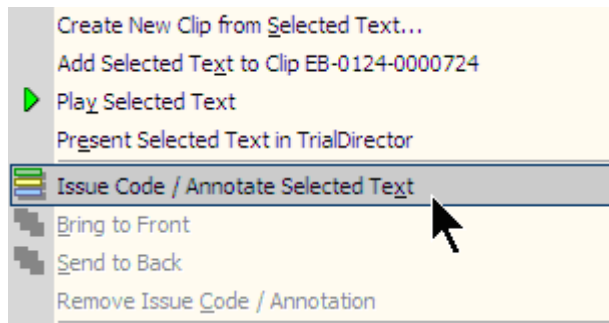


Tip Avoid using dark colors for issue codes or you won't be able to view the testimony through the issue code highlighting.

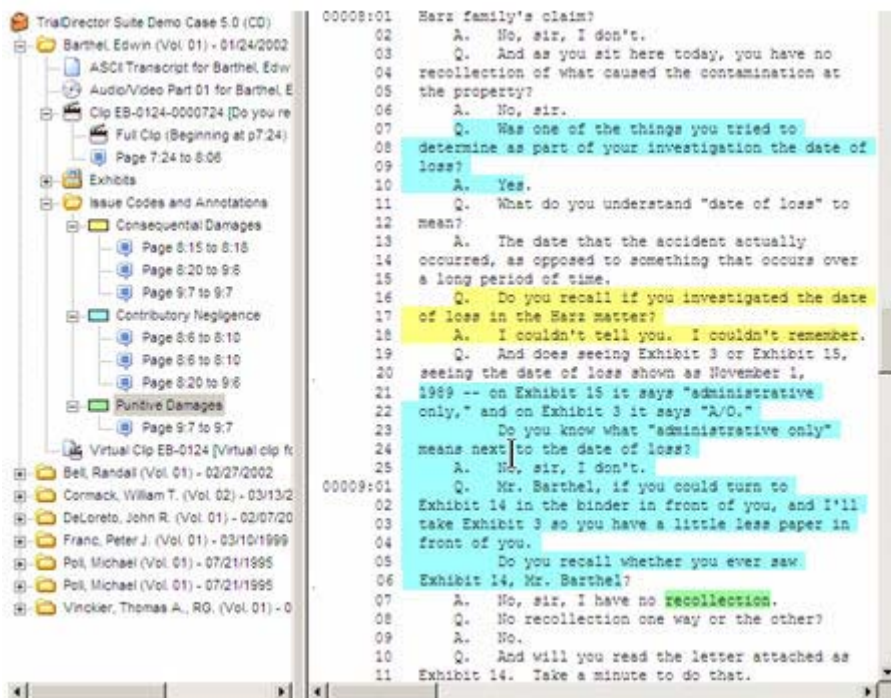
- 5 To change the function key associated with the issue, click on the F# and select the new function key from the list.
- 6 Continue adding issues as desired. When you are finished, click **Exit**.

Assigning Issue Codes to Testimony

- 1 With a transcript open in the Transcript Manager, locate and highlight testimony to which you would like to assign one or more issue codes.

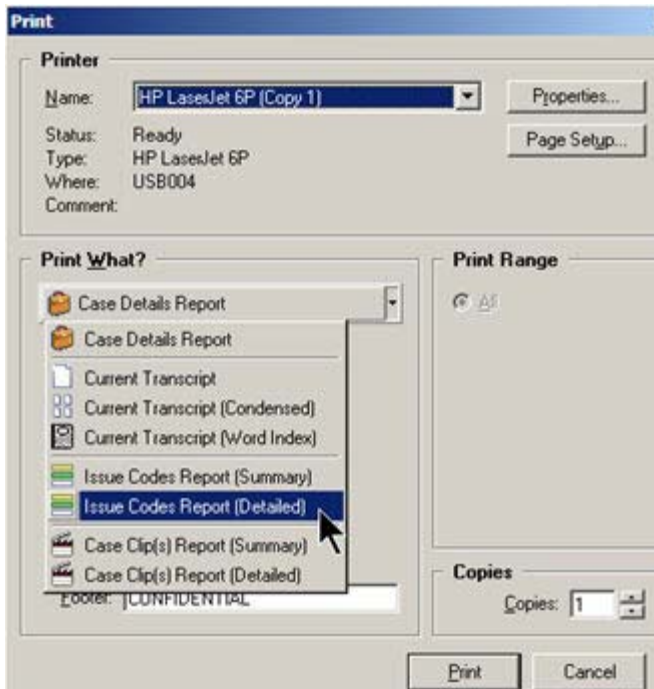


- 2 Right-click on the selected text, then select **Issue Code/Annotate Selected Text**. The issue code list opens.
- 3 Click on each of the issues that you want to assign to the text. Click **Apply**, then **Exit**. When you assign issues to text, two things happen:
 - The transcript is highlighted to reflect the color of the issue you assign. If you assign more than one issue to the same text, only the color of the last issue code appears on the screen.
 - In the Transcript Explorer, the text citation appears under Issue Codes and Annotations for that witness, organized according to issue.

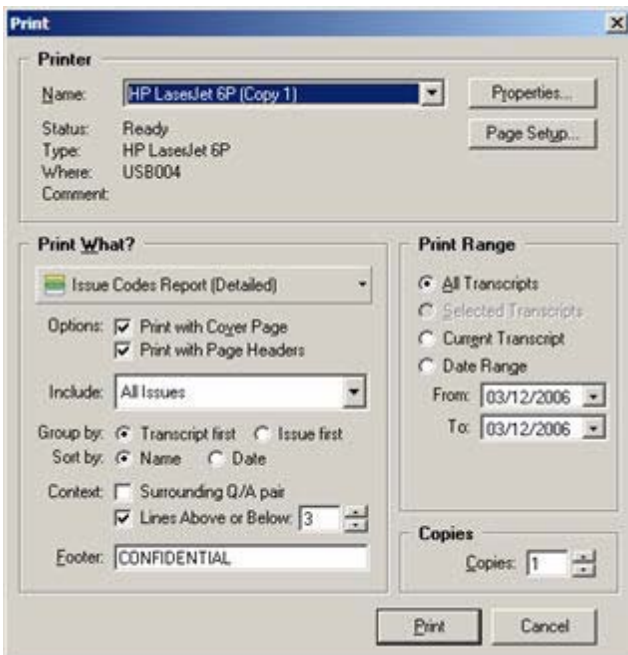


Printing Issue Code Reports

- 1 From anywhere in TrialDirector, open the **File** menu and click **Print**.
- 2 Under **Print What?**, click on the drop-down arrow and select **Issue Codes Report (Detailed)**.




- 3 Customize the Issue Codes Report using any of several settings. Group by transcript name or by issue. Include all issues or only selected issues. Display the related Q&A pair or only a selected number of lines. Print the issues for all transcripts, the current transcript, selected transcripts or transcript within a specified date range.







- 4 Click **Print**. The report is compiled and printed by TrialDirector. Depending on the selections you made in the Print dialog, your issue report may look like the following example:

Case IssueCodes Detailed Report
Friday, April 14, 2006, 4:07:00 PM


Jones v Smith

 **Barthel, Edwin (Vol. 01) - 01/24/2002**

 Page 5:16 to 5:19

-  FIDUCIARY LAPSE
-  FIDUCIARY LAPSE
-  THE LETTER ABOUT DEATH

13 Exhibit 3? Take as long as you like to look at
14 Exhibit 3.
15 A. (Witness complies.)
16 Q. Do you recall receiving Exhibit 3,
17 Mr. Barthel?
18 A. I don't have no specific recollection of
19 it.
20 Q. Do you have any understanding as to
21 whether your investigation was completed before
22 Mr. Emery sent the May 11, 1993, letter denying

 Page 5:25 to 6:05

-  FIDUCIARY LAPSE

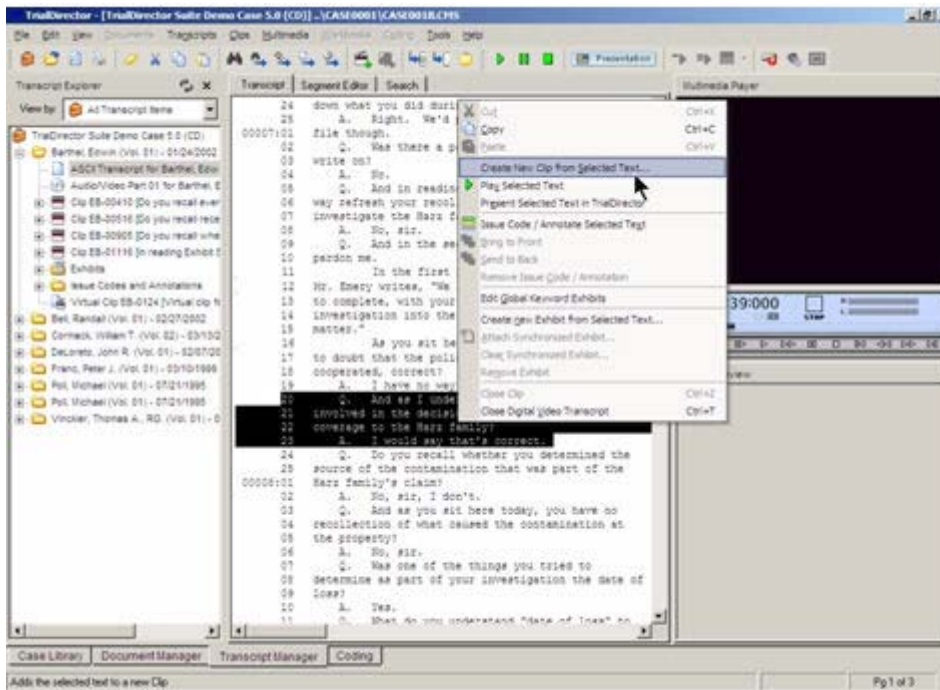
22 Mr. Emery sent the May 11, 1993, letter denying
23 coverage?
24 A. I wouldn't be able to remember that.
25 Q. Would it have been Mr. Emery -- do you
00006:01 have any understanding as to Mr. Emery's custom and
02 practice? Would he wait until you completed your

Working with Video Clips

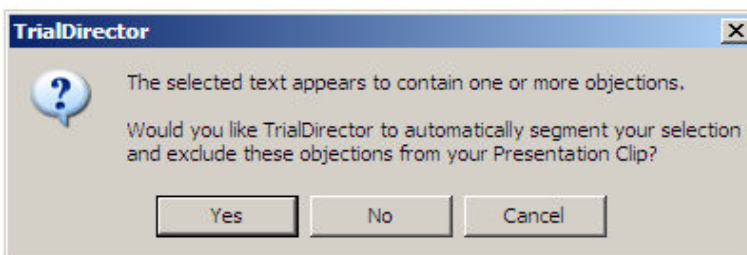
Creating a video clip is easy in TrialDirector. A video clip consists of one or more segments taken from a synchronized transcript, such as a digital video transcript (DVT). By combining several segments into a single clip, you can play relevant testimony sequentially, without interruptions such as long pauses, objections or irrelevant testimony. In this section, we'll show you how to create a video clip using one method. TrialDirector gives you the flexibility to create clips using a variety of other methods as well. Refer to "Working with Transcript Clips" in the TrialDirector Help system for more information on creating and managing clips.

Creating a Video Clip with Multiple Segments

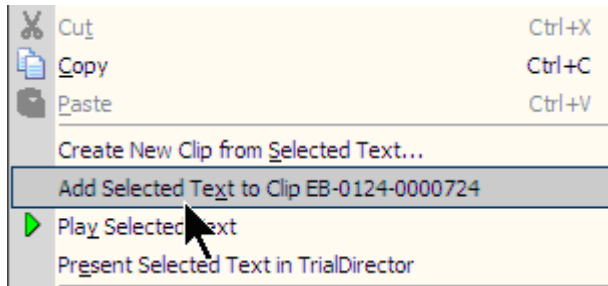
- 1 Select the Transcript Manager tab.
- 2 Either open the ASCII transcript for a particular deponent or run a search as described previously. If the transcript is linked to synchronized video, the video will appear in the Multimedia Player in the upper right corner of the Transcript Manager.
- 3 Locate the lines of text you want to capture in the clip. Highlight the lines, right-click and select **Create New Clip from Selected Text...**



- 4 If the highlighting covers objections in the testimony, you will see the following dialog box, which gives you the opportunity to edit the clip so that only pertinent testimony is played:



- 5 Move to the next segment you want to add to the clip. Highlight the segment, right-click, and select **Add Selected Text to Clip [clip identifier]**.



- 6 To create a new clip rather than a segment, select **Create New Clip from Selected Text....**

Tip

In Presentation mode, you can move from clip to clip easily. Be conservative when adding segments to clips so that you can easily exclude a piece of testimony should it not be necessary to play it, or should opposing counsel object to its use at trial. Remember, a clip plays all segments successively as one continuous chain.

All clips are displayed in the Transcript Manager and within the Transcripts section of the Case Library, organized according to deponent or witness. You can drag and drop clips into a workbook when organizing your evidence or preparing for trial.


Annotating Images

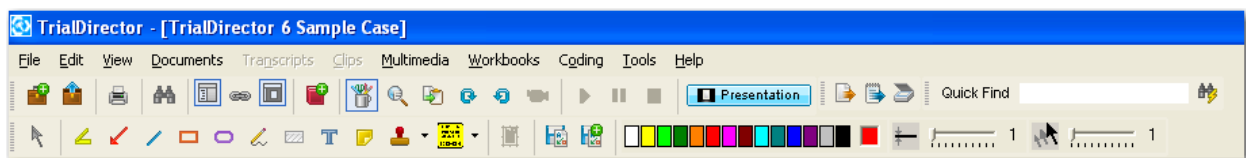
TrialDirector offers a variety of helpful tools to use for marking up images. You may choose to apply annotations (also referred to as “markups”) before you ever get to the courtroom; this is referred to as “pre-treating” the images. You may also choose to wait until you present images in the courtroom and mark them up in real time. Or you may use a combination of these techniques to create an effective trial presentation.

Adding Annotations to Images

The annotations that can be added to the images in your case are:

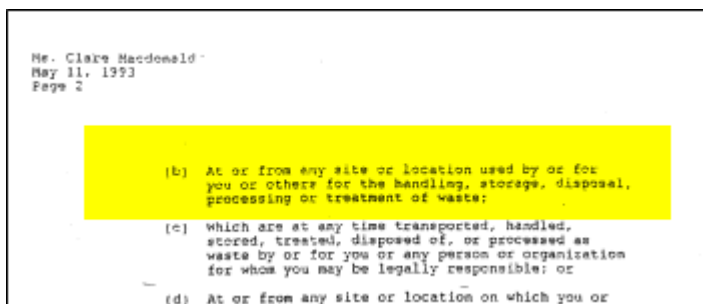
- Highlighting (in multiple colors)
- Redactions
- Arrows (in multiple colors and widths)
- Text
- Lines (in multiple colors and widths)
- Sticky Notes
- Boxes (in multiple colors and widths)
- Circles (in multiple colors and widths)
- Stamps (which can be customized)
- Free-hand drawing
- Exhibit stamps



- 1 Click on the  tool on the toolbar OR select **Show Image Annotation Toolbar** from the **Documents** menu. The annotation toolbar is displayed on the desktop.

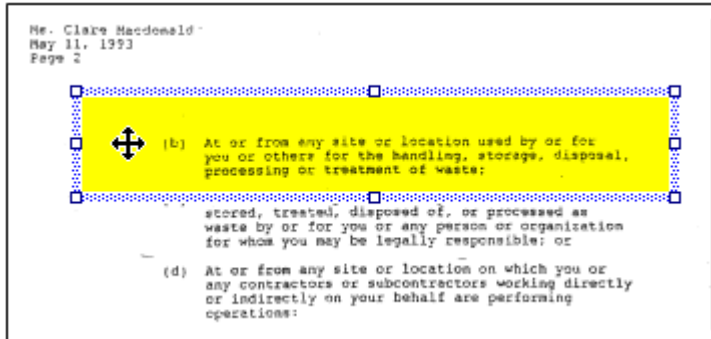


- 2 Select the annotation tool you wish to use. Then, if applicable, select the color of the tool from the color bar.
- 3 Draw the annotation on the image.

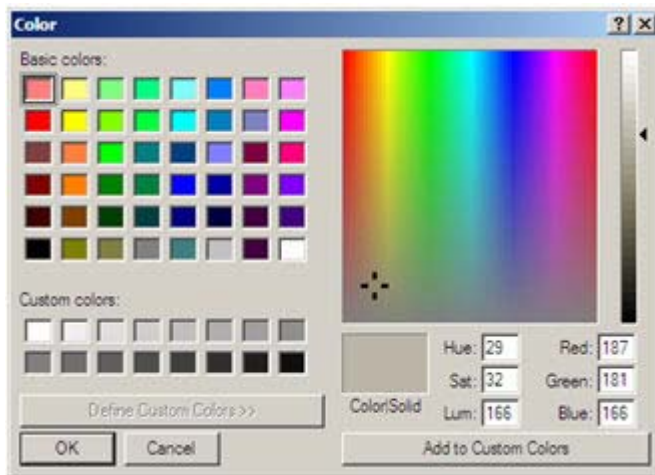
When you create the annotation, it appears on the page as shown below. (The following example was created using the Highlight tool, with the color set to yellow.)



To delete or move the annotation, click on the  tool on the toolbar, then click on the annotation. Notice the outline around the annotation. When you see this outline, your mouse pointer will appear as a . At this point, you may move the annotation or delete it by clicking on the **Delete** key on your keyboard OR by right-clicking on the selected annotation and selecting **Delete** from the shortcut menu.



To change the color of the annotation, select it (as shown above) and right-click on the annotation. Select **Set Background Color**, and the following dialog box opens. Choose the color you wish to use and click **OK**.



For more detailed information on adding annotations, see “Working with Annotations/Markups” in the TrialDirector Help system.

Organizing Exhibits Using Workbooks

The Workbooks Explorer is a convenient and flexible way to organize and work with the exhibits in your case. When you first create a case, three workbooks are created for you: Search Results, Trial Exhibits and Witnesses. You can create additional workbooks as needed for your case. Use workbooks to select groups of items for printing, to create exhibit outlines (see below), to display exhibits at trial, and to easily create a PDF file of the images in the workbook, among other things. Basic information is included below. See “Working with Workbooks” in the TrialDirector Help system for detailed information.

Creating a Workbook

- 1 Click  on the toolbar.

TrialDirector creates a workbook with “New Workbook” selected in Workbooks Explorer so you can change the name.

- 2 Type a name for the workbook.

Adding Items to a Workbook

- To add an item to a workbook, simply drag and drop it from the Case Library.
- To select multiple items in the Case Library to add to a workbook, hold the **CTRL** button down as you click on the items.
- To select multiple adjacent items, hold the **SHIFT** button down, click on the first item in the group, then click on the last item in the group.



Tip

Continue to hold down the CTRL or SHIFT button as you drag the items to the Workbook Explorer and drop them on the desired workbook.

Setting the Workbook Color or Type

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. These special types of workbooks are designed for presentation. For more information, see “Using MultiPlayer Workbooks” or “Using Carousels” in the TrialDirector Help system.

Creating an Exhibit Outline from a Workbook

An Exhibit Outline is a printed summary of the contents of a workbook. The exhibit outline displays the item ID and notes, an image of the item, and a barcode that represents the item. The barcodes can be used to quickly display the item during trial. Exhibit outlines are exported to a Microsoft Word format.

- 1 Right-click on the workbook from which you want to develop an Exhibit Outline.
- 2 Choose **Send Workbook contents to Microsoft Word Exhibit Outline** from the shortcut menu.
- 3 The Exhibits Outline can be edited using Word.

8_SHOULDER SURGERY pg 1	
HAPPY FACE pg 1	
OVERHEAD pg 2	
JD-001 pg 1 Trial Exhibit #: 00002222	
JD-002 pg 2	

PRESENTING AT TRIAL

As an experienced litigator, you know that two of the keys to effectively telling your case's story in the courtroom are organization and the ability to respond quickly to changing events. TrialDirector helps you with both.

TrialDirector's Presentation mode starts with a blank screen and a toolbar along the bottom of the blank screen. Your exhibits are displayed on the screen without the interference of menus or other "noise" on the screen to distract jurors. The toolbar can be customized to suit your presentation style, and, if you wish, it can be hidden completely until you are ready to use it. (For more information, see "Presentation Preferences" in the TrialDirector Help system.)



Tip Consider connecting and enabling dual displays when you present your case (such as a laptop screen plus an external monitor, or a laptop screen and a projector). This makes presentation much easier because you can "drive" the presentation from your laptop while the jury only sees the Presentation display on the external monitor or projector. See "Using Presentation Preview" and "Dragging and Dropping Items onto the Presentation Display" in the TrialDirector Help system for more information.

Retrieving exhibits in Presentation mode can be accomplished in a number of ways, two of which are covered here. For more information on other methods, see "Displaying Items in Presentation Mode" in the TrialDirector Help system.

Retrieving an Exhibit Using an ID

- 1 From the main TrialDirector window, click **Presentation** on the toolbar.
- 2 After Presentation mode opens, simply type the Item ID number, Exhibit Number, or Trial Exhibit Number (assigned in the Document Manager or Coding tabs).
As you type, the number appears in the lower right corner of the display area.
- 3 Press **ENTER**.

EXHIBIT 417

AIRTOUCH Cellular

Monthly Service Packages

Monthly Activity

	Start Date	Stop Date	Charges
MONTHLY SERVICE CHARGE	08/14/98	09/13/98	24.95
CALL WAITING			INCLUDED
THREE WAY CALLING			INCLUDED
CALL FORWARDING			INCLUDED
Total			\$24.95

Airtime and Long Distance Charges

Date	Time	Call Origin	To Location	Area Code	Number	Per	Type	Min/Sec	Charge	Carrier	Per	Charge
08-02	17:22	WGA	AZ PHOENIX	AZ	(800)882-2886	X	V	1:00	0.00			
08-02	17:24	WGA	AZ INDIANAP	AZ	(800)888-0882	X	V	1:00	0.00			
08-02	17:38	WGA	AZ INDIANAP	AZ	(800)888-0882	X	V	1:00	0.00			
08-02	17:38	WGA	AZ INDIANAP	AZ	(800)888-0882	X	V	2:00	0.00			
08-11	18:42	WGA	AZ PHOENIX	AZ	(800)888-2886	X	V	1:00	0.00			
Total Peak Usage									1:00			
Total Other Usage									4:00			
Total									5:00			\$0.00

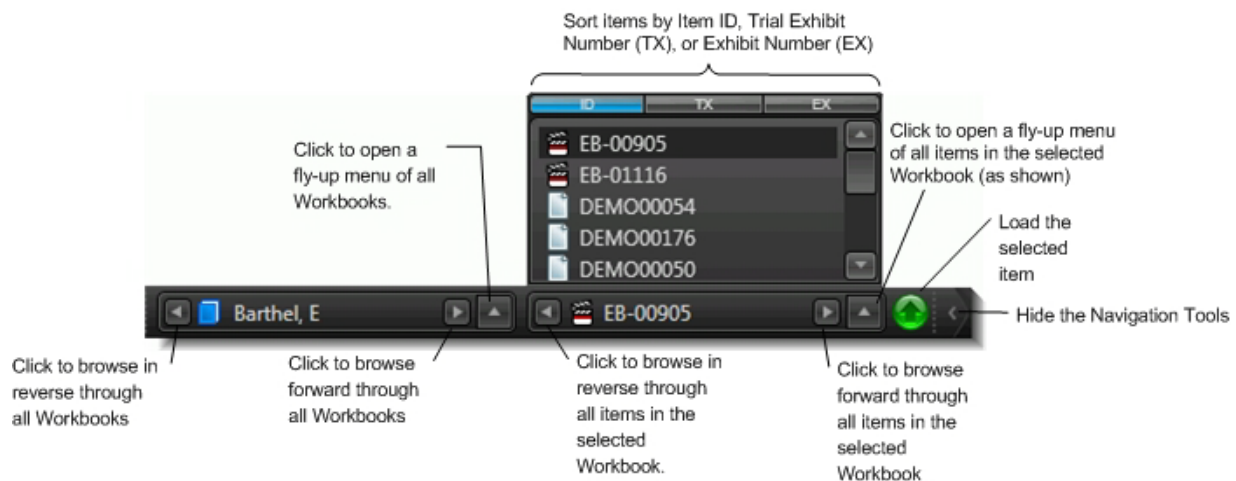
Voice Airtime Summary

Period	Price Level	Min/Sec	Rate	Airtime Charges
Peak	Allowance	1:00	\$0.00	\$0.00
Other	Allowance	5:00	\$0.00	\$0.00
Total		6:00		\$0.00

EXHIBIT 417

Retrieving an Exhibit Using the Toolbar

The Navigation Tools on the left side of the Presentation Toolbar enable you to navigate through the items in your case in several ways.



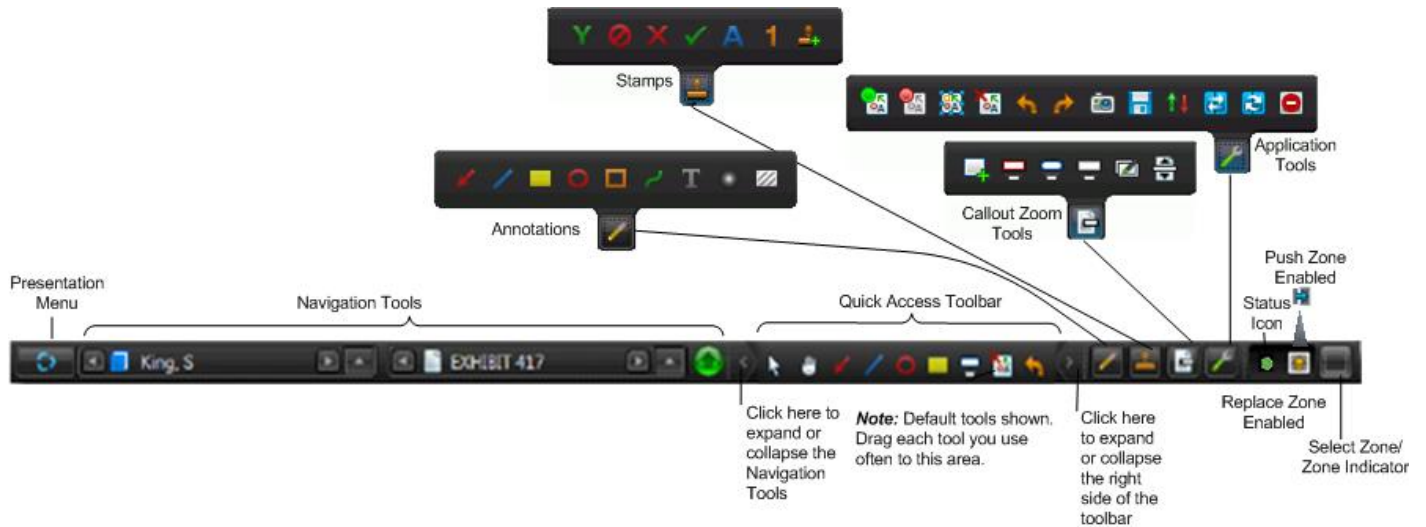
To load an item using the toolbar:

- 1 Select the appropriate workbook, then select the item you want to load.
- 2 Click the green button to load the item.

Annotating Exhibits




Once an exhibit or other item is loaded in Presentation mode, you can use many different tools to annotate and emphasize it.

Check www.indatacorp.com for tutorials on using these tools.

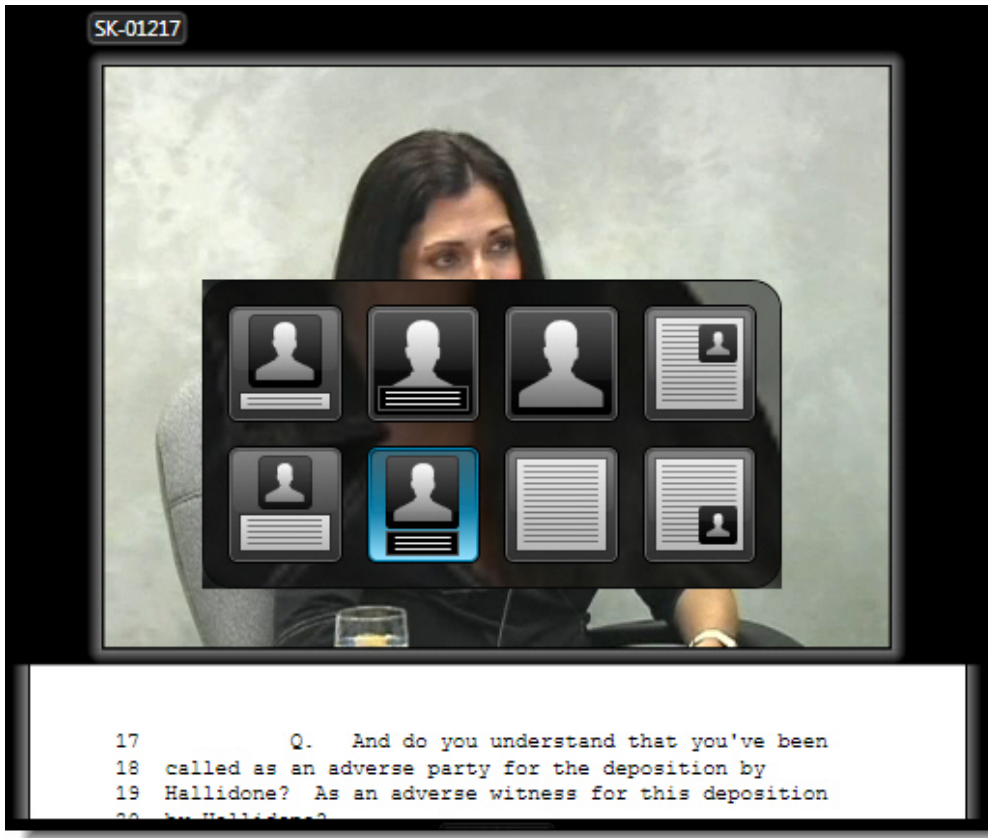


Presenting Video


You can present synchronized video transcripts, such as Digital Video Transcripts (DVTs) of depositions, surveillance video, and other video footage to captivate the jury as you present your case. Load video the same way you load documents and other items (such as by entering an ID, or using the Navigation Tools on the Presentation Toolbar). Then, use the tools to annotate and emphasize areas in the running video. For example, consider:

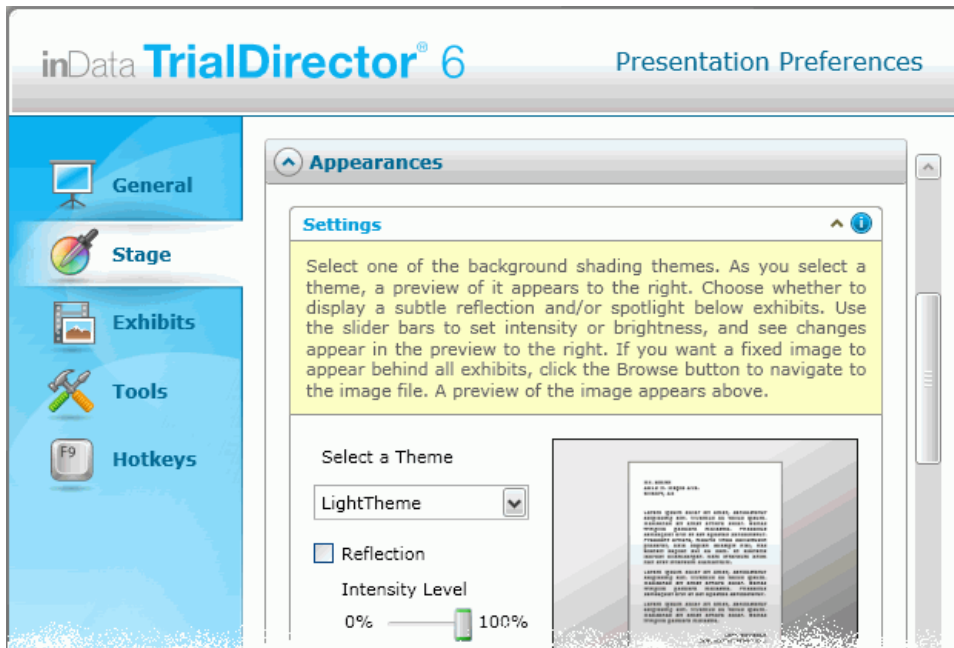
-  The **Projection Zoom** tool (Callout Zoom Tools) to enlarge an area and draw attention to it, such as a license plate or a deponent's eyes.
-  The **Blur** tool (Annotations) to make a person or other identifying information not applicable to your case unrecognizable.
-  The **Ellipse** tool (Annotations) to circle the area where you want the jurors to focus their attention.

When you present a clip from a DVT, the transcript text scrolls as the video plays.
Press **CTRL + TAB** to open the layout options to select a different layout, as shown:



Setting Preferences

Many settings in Presentation Preferences influence appearance and behavior. To open Presentation Preferences, click the Presentation menu button  at the far left end of the toolbar, and then click **Preferences**.



YOU'RE ON YOUR WAY...

This guide was intended to help you become accustomed to some of the popular features in TrialDirector, but many more features exist. When you are comfortable with the basics, you'll want to look into other topics in the TrialDirector Help system, such as:

- “Working with the Clip Editor” to revise starts and stops to be exactly where you need them.
- “Using the Presentation Zones” to enable side-by-side comparisons of documents.
- “Saving and Loading Stages” to preserve the dynamic layout of your presentation and all annotations.
- “Using Pack-N-Go” to put a copy of your TrialDirector case on a laptop.
- And much more....