inData

TrialDirector® 6
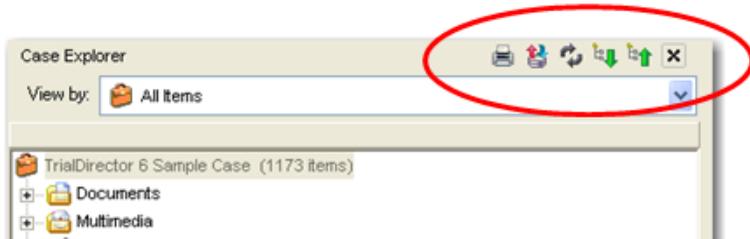## Trial Presentation Software
QUICK REFERENCE

Document Manager & Case Library

| Button	Use to
🖨	Print the entire contents of all fields in the Document Manager or Case Library. When printed, the grid includes the icons identifying document and page level and the type of item (i.e., TIF image, PDF, multimedia), Doc ID, Pg number, Description, Trial Exhibit Number, Exhibit Number, File Volume, File Path, File Name and Modify Date.
	Update the current view with recent changes if they do not appear automatically.
	Locate the item you're currently viewing in Case Explorer or Document Manager.
	Expand the view to display all items and all pages of documents.
	Collapse the view to display only high-level items (individual pages of documents are not shown).
✖	Close this group of tools.

Importing Items or a Batch Load File

Use one of the following methods to import individual items, or a batch load file (such as .OLL):

- Select the items or the batch load file in Windows Explorer, then drag and drop onto the Case Explorer in TrialDirector
- On the **Documents** menu, point to **Import New Item(s) From**, and select **Manual Selection Dialog** or **Batch Import File**.
- Prepare your TWAIN-compliant scanner. Then, on the **Documents** menu, point to **Import New Item(s) From**, and select **Capture Device (Twain Scanner)**.

Presentation - Loading Items

Select an item in the workbook. Click ID, TX (Trial Exhibit), or EX (Exhibit) to change the information displayed.

Select a workbook from the pop-up menu

Load selected item into selected zone
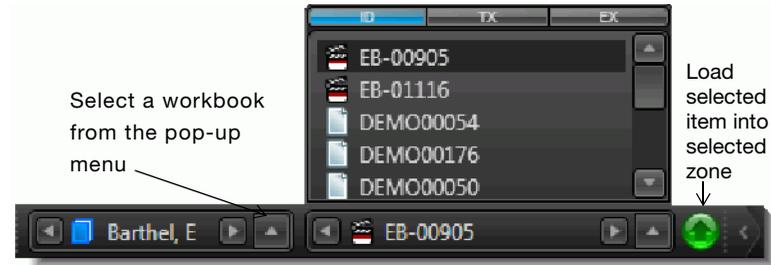
Presentation Zones Use the F keys to select a zone (F1 = Zone 1, F2 = Zone 2, etc.), or use your mouse on the Select Zone/ Zone Indicator at the right end of the toolbar to select the zone. The zones are shown below:
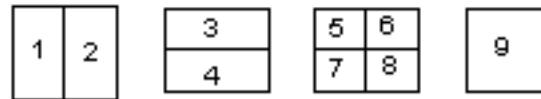
Push Zone Mode enables you to add an item to a specific zone. If you add an item to a zone that is already displaying an item, the old item is moved into another zone.

Replace Zone Mode allows you to replace the item in the active zone with a new item while leaving items in other zones in place.

Click on either icon to switch to the other mode.

Presentation Preferences

Presentation Preferences enable you to customize the look and feel of your presentations, toolbar visibility, exhibit behavior, hotkeys, and much more.

General – Log file, synchronize case opening

Stage – Secondary monitor, theme (background color), toolbar preferences, default zone and other zone preferences, caption box preferences

Exhibits – DVT layout, linked exhibit preferences, startup and shutdown behaviors for DVTs and other multimedia files, transcript font, carousel options, native file preferences

Tools – Default tool, line thickness, redaction options, location of custom stamps, Snapshot/Save Stage preferences, projection options

Hotkeys – Assign your own key combinations to commonly used functions
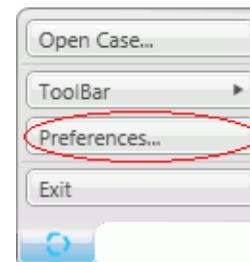
Presentation Toolbar - Annotations

Colored tools: Right-click to change the color (or create a custom color).

Button	Use to
↘ (arrow)	Click and drag to draw an arrow. The first point you click becomes the head of the arrow.
✏ (line)	Click and drag to draw a line. For example, you can use this tool to underline key information.
🟨 (highlight)	Click and drag to highlight an area, such as text you want to emphasize.
🔴 (ellipse)	Click and drag to draw an ellipse. •To draw a perfect circle, hold down SHIFT while you click and drag. •To ensure the point where you first click is in the center, hold down CTRL while you click and drag. **Note:** You can use both of these options together.
🟧 (rectangle)	Click and drag to draw a rectangle. •To draw a perfect square, hold down SHIFT while you click and drag. •To ensure the point where you first click is in the center, hold down CTRL while you click and drag. **Note:** You can use both of these options together.
〰 (pen)	Click and drag to draw freeform with the pen.
T (text)	Click and drag to add a text box, sizing the default "Select text to edit" entry to the desired font size. Then use the Edit Annotations tool to delete the default text and add your own.
◉ (blur)	Click and drag to blur an area, such as a person's face in a photo or video.
▨ (redaction)	Click and drag to draw a redaction box. • You can set the color and opacity first by right-clicking on the tool. • You can enable/disable borders and "redacted" text in Presentation Preferences > Tools.

Annotation Tips & Shortcuts

Setting Line Thickness – To set the width of annotation lines for the new annotations you apply, go to Presentation Preferences > Tools > Annotations.

Starting Over – If you realize you are applying the annotation in the wrong place, press ALT as you are dragging the mouse, then release the mouse button.

Removing an Annotation (Except Redactions) – With the same annotation tool selected, press CTRL while you right-click on the annotation you want to remove.

Removing a Redaction – Select the Edit Annotations tool from the Application Tools, then select the redaction you want to remove. Press CTRL while you right-click on the redaction.

Hiding/Showing "Redacted" – Set an option in Presentation Preferences > Tools to hide or show the word "Redacted" in the middle of new redactions you add.

Presentation Toolbar - Stamps

Colored tools: Right-click to change the color (or create a custom color).

Button	Use to
Y	Click and drag to place the YES stamp and size it as needed.
⊘	Click and drag to apply the no symbol stamp and size it as needed.
X	Click and drag to apply the X stamp and size it as needed.
✓	Click and drag to apply the checkmark stamp and size it as needed.
A	Click and drag to apply the selected Alphabet stamp and size it as needed. **Tip:** To select a different letter, click and hold this button until the palette appears. Then, select the correct letter.
1	Click and drag to apply the selected Number stamp and size it as needed. **Tip:** To select a different number, click and hold this button until the palette appears. Then, select the correct number.
🔖	Click and drag to apply the selected custom stamp and size it as needed. **Tip:** To select a different custom stamp, click and hold this button until the palette appears. Then, select the correct number.

Stamp Tips & Shortcuts

Using Custom Stamps – To set the path where your custom stamps are located, go to Presentation Preferences > Tools > Stamps.

Starting Over – If you realize you are applying the stamp in the wrong place, press ALT as you are dragging the mouse, then release the mouse button.

Removing a Stamp – With the same stamp tool selected, press CTRL while you right-click on the stamp you want to remove.

Customizing Your Quick Access Toolbar

You can drag any tools you use often to the middle area of the Presentation Toolbar. You can even save multiple "flavors" of the same tool (i.e. a red arrow and a purple

Quick Access Toolbar

arrow, specific custom stamps, etc.) Simply select the tool as usual, right-click and set any options/color preferences, then drag it to the Quick Access Toolbar. To remove a tool from the Quick Access Toolbar, just drag and drop it on an empty area of the Presentation stage.
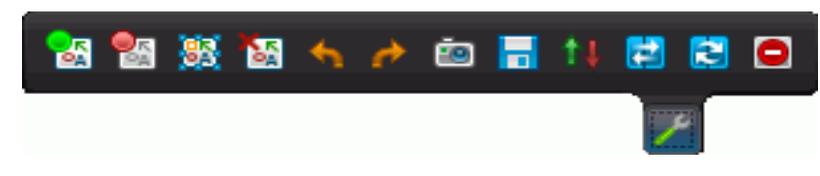
Presentation Toolbar - Callout Zoom Tools

Colored tools: Right-click to change the color (or create a custom color).

Button	Use to
🔲	Click and drag to select an area that will be enlarged to fit the current zone. **Tip:** To pan the item while this tool is applied (i.e. show a different area in the enlarged view), hold the right mouse button down and move the mouse around the screen.
▭	Click and drag to project an enlarged area in a rectangular box with the original item remaining in the background. To change the border color, right-click this tool. **Tips:** • You can set several options for Projections in Presentation Preferences > Tools > Projections. • To move the projection, hold the right mouse button down over the projection and drag the projection to a new location.
⬭	Click and drag to project an enlarged area in an oval with the original item remaining in the background. To change the border color, right-click this tool. **Tips:** • You can set several options for Projections in Presentation Preferences > Tools > Projections. • To move the projection, hold the right mouse button down over the projection and drag the projection to a new location.
▭	Click and drag to project an enlarged area in a box with ragged edges as if the area has been torn from the original. To change the border color, right-click this tool. **Tips:** • You can set several options for Projections in Presentation Preferences > Tools > Projections. • To move the projection, hold the right mouse button down over the projection and drag the projection to a new location.
📝	Click and drag to select an area to display as a separate image. Then, repeat in another area (or as many areas as needed) for comparison purposes. Simply click and drag each image to move it as needed.
⬍	Click and drag to draw a highlighted area. As you scroll, the highlight appears to move as different parts of the text/image move into the area. **Tip:** To move the location of the highlight box, hold the right mouse button down and move the mouse to the desired location.

Using Callout Zoom Tools with Video

Just as you can use callouts to emphasize text in documents, you can use them (as well as annotations) to emphasize graphic images, moving video, and moving transcript text. Simply select a tool on the Presentation Toolbar, then click-and-drag over the area you want to emphasize.

Presentation Toolbar - Application Tools

Button	Use to
🟢	Display all annotations to items in all zones.
🔴	Hide annotations and stamps on items in all zones. **Note:** Callouts/Projections are not hidden.
▦	Edit, move, or reshape annotations. After you select this tool, click on the annotation. A pale blue box appears that enables you to manipulate the annotation.
✖	Delete annotations individually. After you select this tool, click on the annotation you want to remove.
↩	Reverse the last action. You can continue clicking to step back through a series of steps.
↪	Redo the previous action after using the Undo tool. You can continue clicking to step forward through a series of steps after multiple uses of Undo.
📷	Capture a static image of the entire Presentation display. The new image is automatically associated with the item that is active at the time of capture. See "Using Screen Snapshot and Grab Screen Commands" in the TrialDirector Help for more information.
💾	Save the dynamic layout of your presentation at any point in time. **Note:** See "Saving and Loading Stages" in the TrialDirector Help for more information.
⬆⬇	Temporarily hide all items in all zones, then click again when you are ready to display them.
🔄	Switch the position of two items.
🔄	Move zones one counter-clockwise rotation.
⛔	Close all items in all zones without saving any annotations.

More Information About TrialDirector

- TrialDirector Quick Start Guide (available at www.indatacorp.com)
- TrialDirector Help System (accessible from the program Help menu)