



OnTrial User Manual

The OnTrial Notebook (Standard and Professional editions) and the OnTrial Hearing Notebook

Version 1.0, October 2026

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Part One: Getting started

What the notebooks are

OnTrial makes two notebooks for civil litigators. Each one is a single fillable PDF that works like a paper trial binder: tabs down the side, a page for everything, and room to write. Because it is a PDF, it runs in apps you already have, and what you type stays on your own device.

- **The OnTrial Notebook** organizes a trial from the day it is set to the closing argument: checklists, proof charts, witness outlines, exhibit lists, deposition designations, examination scripts, the objections table, jury pages, a live trial log, and closing pages. It comes in two editions, Standard and Professional.
- **The OnTrial Hearing Notebook** is built for a motion or evidentiary hearing: a one-page Speaking Outline you argue from, a Preparation Outline behind each point, the facts and authorities behind each point, a Rebuttal page, the record, and a place for copies of cases and papers.

	Standard	Professional
Rules	Federal Rules of Evidence and Civil Procedure, with a blank for your state's rule beside each	The same, with your state's rules filled in; more states can be added, each as its own <u>State Rules section</u>
Witnesses	10	20
Claims (proof charts)	6	10, plus a <u>Defenses Dashboard</u> and 10 defense charts
Exhibits (ours / adverse)	85 / 51	170 / 102
Trial days (day plans / log pages)	5 / 8	10 / 16
Deposition designation pages	3	6
Jury panel tracker pages	3	5
Print buttons on list pages	No	Yes

	Standard	Professional
Add your own pages	No (the pages are locked so the notebook stays in order)	Yes, at the end of the notebook
Hearing Notebook	Sold separately	Included

Everything else in this manual applies to both editions. Where a feature is in the Professional edition only, the manual says so.

What you need: the right app on each device

Device	Use	Do not use
iPad	PDF Viewer by Nutrient (from the App Store)	Acrobat Reader for iPad, Apple Books, or the Files app's preview. They show the pages but do not run all of the notebook's buttons.
Mac or Windows computer, desktop or laptop	Adobe Acrobat Reader (free from Adobe)	Apple Preview, Microsoft Edge, or any web browser.

- **Build each case copy on your computer** in Acrobat Reader, where typing is fastest.
- **In court**, use the iPad in PDF Viewer, or a laptop in Acrobat Reader. On a laptop, use Full Screen Mode (Command-L on a Mac, Ctrl-L on Windows); the arrow keys turn the pages.
- **Never save a notebook in Apple Preview.** Preview strips out the buttons and scripts, and they do not come back. If that happens, start a new copy from your blank master and copy your entries across.
- **Work on one device at a time.** If the file is open on your iPad while you save it on your computer, you can end up with two versions. Close it on one device before you open it on the other.

Set up PDF Viewer on the iPad

Do this once, before the first time you take a notebook to court. In PDF Viewer, open a notebook, tap the gear icon, and set:

Page Transition	Jump
Page Mode	Single
Scroll Direction	Horizontal

Page Fitting	Adaptive
Appearance	Default (the white button)
JavaScript	On, if your app shows this setting

With these settings each page shows whole, one at a time, in the right colors. JavaScript runs the bookmarks, the sticky notes, the Admitted Exhibits page and the other buttons that do more than turn to a page; if it is off, those buttons do nothing. After you change the JavaScript setting, close the notebook and open it again.

Tip. In a large notebook, the first button that runs a script after you open the file can take a few seconds. After that, every tap is quick.

Your blank master and your case copies

1. Keep the file you receive as your **blank master**. Do not type in it.
2. For each case, make a copy (in Acrobat Reader: File, Save As) and give it the case name. That copy is your **case copy**. Your license lets you make as many case copies as you need for your own matters.
3. Build the case copy on your computer, where typing is fastest. Then move it to the iPad (by AirDrop, iCloud Drive, Dropbox, or email to yourself) and open it in PDF Viewer.
4. Back up your case copies the way you back up any client file.

The Standard edition is set so that PDF apps that honor its permissions will not add, remove or move pages; if its page count changes, it shows the Modified copy notice. In the Professional edition you can add pages in your PDF app. Add a **blank** page (a copied notebook page shares its boxes with the original, so typing on one changes both), and add it **at the end** of the notebook: a page inserted in the middle shifts the page numbers that the Print buttons, your bookmarks and the printed page references rely on.

Typing, lists, check boxes and dictation

- **Type once.** Many boxes appear in more than one place under the same name, and they fill each other. Type the case name in the CASE box at the top right of any page and it fills every page and the title page. A witness name typed on the Roster fills that witness's Profile, Direct and Cross pages.
- **Lists.** Some boxes are drop-down lists (side, strength, ruling, status and the like). Tap the box and pick a choice.
- **Check boxes.** Tap anywhere in the cell to tick or untick.
- **The yellow tint.** PDF Viewer tints a box yellow while you type in it. That is the app showing you where you are typing; the tint goes away when you leave the box.
- **Dictation.** Tap a text box and speak instead of typing. On the iPad, tap the microphone key on the keyboard (turn it on in Settings, General, Keyboard, Enable Dictation). On a Mac, press the Fn (globe)

key twice, or choose Edit, Start Dictation. In Windows, press the Windows key and H. Depending on your device and settings, Apple or Microsoft may process dictation on its own servers. To check, turn on Airplane Mode and dictate: if it still works, your words stay on the device.

- **Long entries.** In the large boxes (witness profiles, daily plans, case summary, opening, closing, logistics, and the Hearing Notebook's relief, roadmap and closing boxes), the text shrinks to fit as you type, so everything shows and prints. Table cells and other small boxes keep a fixed size and scroll; keep those entries short, because text past the edge of a small box does not print.

Printing a backup copy

Keep a printed copy of your case copy in your trial bag, in case a laptop or iPad fails in the courtroom. Print it the night before trial, and print the pages that change, such as the exhibit lists and the trial log, as the trial goes on.

Where	How
Acrobat Reader (Mac or Windows)	File, Print. Pages: All (or the pages you want). Page Sizing: Fit (or Actual size on 11 x 17 paper). Orientation: Landscape. Under Comments & Forms, choose Document and Markups so everything you typed prints.
PDF Viewer on the iPad	Tap Share, then Print (AirPrint). Each page is fitted to the paper.
Professional edition	The <u>Print button</u> at the foot of a list page prints just that list, all its pages: the exhibit lists, the trial log and the rest. See Print buttons.

Paper size. A notebook page is a wide 15 by 8.5 inches, so it prints smaller on ordinary paper:

Paper (landscape)	Prints at about	Notes
Letter, 8.5 x 11	70%	Readable but small
Legal, 8.5 x 14	90%	Good
Tabloid, 11 x 17	100%	Actual size; needs an 11 x 17 printer or a print shop

What prints. Everything you typed, the check boxes and lists, the sticky notes you have shown, the tabs and page numbers. Links do not work on paper; use the page numbers instead. Text in the large boxes prints in full (see Long entries); text past the edge of a small box or table cell does not, so keep those entries short.

The best backup is a second copy of the file. At the end of each trial day, copy your case copy to another device or to cloud storage, so you can pick up on a laptop if the iPad fails, or the other way around. Paper is the last resort.

Part Two: The OnTrial Notebook

Find your way around

Every page has the same frame: a colored band across the top, the tabs down the right edge, and the page number and section at the bottom left. The band's color tells you where you are: navy for Set Up, teal for Build the Case, plum for In Court, and amber for Live and Finish.



Figure 1. The header band at the top of every page.

- | | |
|---|---|
| 1 The page title, and a one-line note on what the page is for. | 2 BACK and NEXT turn the page. |
| 3 My Bookmarks: three slots. Tap a slot to go to that page. | 4 The × at the right end of a filled slot removes that bookmark. |
| 5 The ribbon: tap it to bookmark the page you are on. | 6 The CASE box: type the case name once and it fills every page. |

The tabs. The twelve tabs on the right read Home, Guide, Prep, Proof, Wits (witnesses), Depo (depositions), Exh (exhibits), Exam, Jury, Log, Close (closing) and Notes. Each jumps to the first page of its section, and the tab you are in stands out. Home opens the title page, Guide the User Guide, and Notes the first Notes page; from Prep to Close, each tab opens on an index page of big buttons to the pages in that section, each showing its page number.

Bookmarks. Tap the ribbon **5** at the top right to bookmark the page you are on. The page number and a short name go into the first empty slot **3**. From any page, tap a slot to go straight to that page. To remove a bookmark, tap the × **4** at the right end of its slot, or go to the page and tap the ribbon again. A fourth bookmark replaces the oldest. In Acrobat the ribbon fills in burgundy on a bookmarked page; PDF Viewer cannot color it, but the slots work the same way.

Start Here. The Start Here page (on the Home tab) lists every section with its page number. Tap a row to go there. It also holds the key dates and courtroom logistics, so the essentials are one tap from the title page.

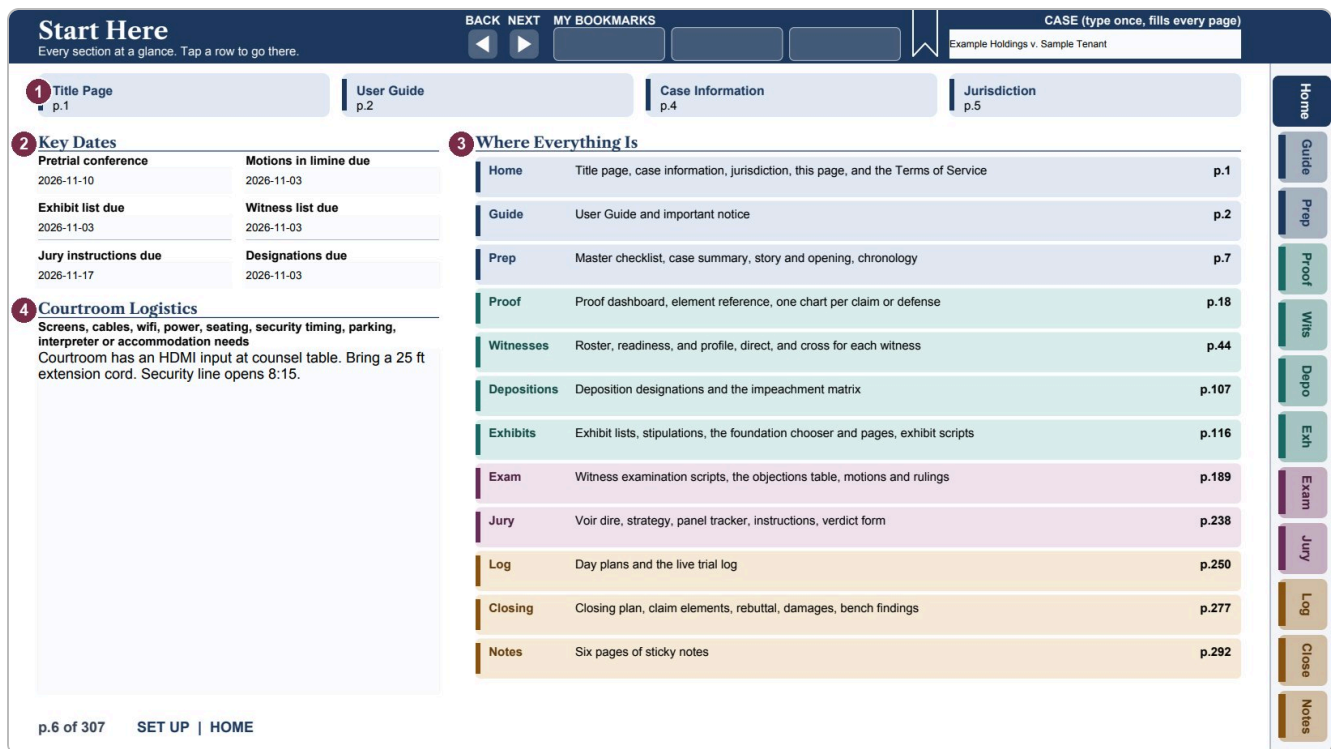


Figure 2. Start Here: every section at a glance.

- 1 Buttons to the title page, User Guide, Case Information and Jurisdiction.
- 2 Key Dates: the same boxes as on the Jurisdiction page, so type them in either place.
- 3 Where Everything Is: tap a row to go to that section.
- 4 Courtroom Logistics: screens, cables, wifi, parking, interpreters.

The page list. Your PDF app's bookmarks or outline panel lists every page, numbered, by section. It is the quickest way to reach a page you know by name.

Home: title page, case information and jurisdiction

Confidential attorney work product.

BACK NEXT MY BOOKMARKS

CASE (type once, fills every page)
Example Holdings v. Sample Tenant

OnTrial Notebook

PROFESSIONAL EDITION, WITH ARIZONA RULES

CASE NAME
Example Holdings v. Sample Tenant

CASE NUMBER
CV0000-000000

3 Read the User Guide
p.2

Enter the case details
p.4

Start Here: every section
p.6

Home
Guide
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Figure 3. The title page.

- 1** The CASE box fills this label plate and every page.
- 2** The case name and number on the label plate. Tap to type here too.
- 3** Buttons to the User Guide, Case Information, and Start Here.
- 4** The tabs. Home always brings you back to this page.

Case Information holds the client, court, judge and counsel details. Fill it in at the start, along with the Jurisdiction page; the case name and number fill the title page.

Case Information

Client, court, and counsel. Name and number also fill the title page.

BACK

NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

1 Client and Case

Case name (short; fills the title page and the CASE box on every page)

Example Holdings v. Sample Tenant

Case caption (as it appears on the pleadings)

EXAMPLE HOLDINGS LLC, Plaintiff, v. SAMPLE TENANT INC., Defendant.

Our client

Example Holdings LLC

Opposing party

Sample Tenant Inc.

Client contact

Pat Example

Client phone and email

602-555-0111

Court

Maricopa County Superior Court

Case number

CV0000-000000

Judge

Hon. Example Judge

Courtroom / division

Room 4B

Trial date

2026-12-01

Start time / estimated days

9:00 AM, 3 days

Trial type

Bench

Our side

Plaintiff

2 Counsel and Court Contacts

Firm

Sample Law PLLC

Trying attorney

Alex Lawyer

Firm file / matter number

2026-114

Attorney phone and email

602-555-0100, alex@samplelaw.example

Second chair / paralegal

Jordan Para (paralegal)

Opposing counsel and firm

Casey Counsel, Other Firm LLP

Opposing phone and email

602-555-0199

Clerk / bailiff / judicial assistant

JA: Riley Clerk, 602-555-0123

Time limit per side

6 hours per side

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Set the Jurisdiction

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Start Here

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Figure 4. Case Information.

- 1 Client and case: name, caption, parties, court, judge, trial date and type.
- 2 Counsel and court contacts: your team, opposing counsel, court staff, time limits.
- 3 NEXT: buttons to the Jurisdiction page and Start Here.

Jurisdiction. Wherever a page recites a rule, it prints the federal cite and then a blank for your state's rule. The Jurisdiction page is where you record your state's evidence code, civil rules, pretrial order rule, local rules, the judge's standing orders, the strike rule, and the scheduling-order dates. In a Professional edition with state rules, this page and every "Your state" blank are already filled in with that state's rules; check them against the current rules before you rely on them, and type over any line to change it.

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MY BOOKMARKS

Example Holdings v. Sample Tenant

1

State

Arizona

Court (name and division)

Judge

Evidence code (name and cite)

Arizona Rules of Evidence (Ariz. R. Evid.)

Civil procedure rules (name and cite)

Arizona Rules of Civil Procedure (Ariz. R. Civ. P.)

Pretrial-order rule, and the rule that sets disclosure of exhibits and witnesses

Ariz. R. Civ. P. 16 (Joint Pretrial Statement, 16(f)); disclosure: 26.1; case tiers and limits: 26.2

Local rules that apply (court and division)

Judge's standing orders and trial procedures

Rule on peremptory strikes and the number allowed

None in civil cases (Order R-21-0020, eff. Jan. 1, 2022); challenges for cause only, Ariz. R. Civ. P. 47

Jury instructions source for your state

RAJI (Civil) 8th, State Bar of Arizona

2

Scheduling-order dates

Pretrial conference	Motions in limine due
2026-11-10	2026-11-03
Exhibit list due	Witness list due
2026-11-03	2026-11-03
Jury instructions due	Designations due
2026-11-17	2026-11-03

Other deadlines and orders (expert disclosures, discovery cutoff, trial brief, other)

Notes on your jurisdiction

Key Arizona differences (rules only; check each against the current official text): cross-examination may cover any relevant matter (Ariz. R. Evid. 611(b)). Former testimony in a civil case comes in without unavailability (803(25)), and a deposition may be used regardless of availability (Ariz. R. Civ. P. 32(a)(3)). Evidence not disclosed under Rule 26.1 is excluded unless the court finds otherwise (37(c)). Impeachment material must be disclosed and listed (26.1(a)(8), 16(f)(2)(E)). One retained expert per issue (26(b)(4)(F)). Renewed JMOL and motions to amend findings are due 15 days after judgment, not 28 (50(b), 52(b)). Bench-trial findings only if requested before trial (52(a)(1)).

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SET UP | HOME

Figure 5. Jurisdiction, in a Professional edition with Arizona rules.

- 1 Your state's codes and rules.
- 2 Scheduling-order dates. These also appear on Start Here.

"Check your state" questions appear on many scripts and foundation pages. They mark points that may differ where you practice. They are prompts to look the point up, not statements that your state differs.

Prep: checklists, theme and chronology

The Prep tab gets the trial organized. Five checklists run from the day trial is set to the last days before trial; then come the case summary, the opening statement, and the chronology.

Case Summary and Theme

Short and plain. Use words a juror would use.

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Theme: one sentence
A lease is a promise, and Sample Tenant stopped keeping it.

The case in five lines (who, what happened, what it cost)
Example Holdings leased a warehouse to Sample Tenant for five years. Tenant paid for two years, then stopped in January 2025 without notice or reason. Holdings sent a notice of default. Tenant stayed in the space for four more months and paid nothing. Holdings lost \$86,400 in rent.

Our claims and defenses (one line each)
Breach of contract (unpaid rent). Breach of the implied covenant of good faith (staying on while refusing to pay).

Relief we are asking for (verdict, amount, equitable relief, fees)
\$86,400 in unpaid rent, late fees under the lease, interest, attorney fees under section 22 of the lease.

Opponent's theory and best facts
They will say the roof leaked and Holdings never repaired it, so rent was excused.

What we must not lose (the facts and exhibits the case turns on)
The signed lease (P-001), the rent ledger (P-003), and the notice of default (P-002).

Settlement posture and authority
Client authority: \$70,000. Mediation set for 11/5.

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SET UP | PREP

Figure 7. Case Summary and Theme.

The **Chronology** (two pages) records every dated event with its source, the witness, and its importance. Each row is numbered, 1 to 38 across the two pages, so you can refer to an event by its number (Chronology 7) in your outlines and notes. Keep it in date order; it becomes the spine of your opening and closing.

Chronology 1

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Every dated event, with its source. Tick Timeline to put it on the Timeline page.

#	Date	Event	Source (Ex. or depo cite)	Witness	Importance	1 Timeline
1	2024-03-01	Lease signed: 5 years, \$21,600 per month	P-001	Pat Example	High	☒
2	2024-11-12	Tenant emails about a roof leak	D-101	Sam Sample	Medium	☒
3	2024-11-15	Roofer repairs the leak	P-004	Pat Example	High	☒
4	2025-01-01	Tenant misses January rent	P-003	Pat Example	High	☒
5	2025-01-15	Notice of default sent by certified mail	P-002	Pat Example	High	☒
6	2025-05-31	Tenant moves out	Sample depo 44:3	Sam Sample	Medium	☒
7						☐
8						☐
9						☐
10						☐
11						☐
12						☐
13						☐
14						☐
15						☐
16						☐
17						☐
18						☐
19						☐

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Figure 8. The Chronology.

- 1 Tick Timeline on the events you want on the Timeline page.

The **Timeline**, right after the Chronology, shows your key events as a picture: a line across the page with sixteen numbered boxes, alternating above and below it. Tick **Timeline** on the Chronology rows you want, then tap **Fill from Chronology**: the ticked events fill the boxes in date order, each with its date, a few words about the event, and its source, which starts with the event's Chronology number (#4 · Ex. 12) so you can find the full entry. Tap it again after you change the Chronology. The boxes are evenly spaced in date order, not to scale, so the words stay readable; text shrinks to fit each box. You can also type straight into any box, which works even with JavaScript off. Fill from Chronology reads dates typed as 3/14/2025, 2025-03-14 or March 14, 2025; a date it cannot read goes last, marked "check date". **Clear Timeline** empties the boxes. The page prints, so it can serve as a draft of a timeline demonstrative.

Timeline

BACK

NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Key events in date order. Tick Timeline on the Chronology, then tap Fill from Chronology; or type in the boxes.

Fill from Chronology

Clear Timeline

Boxes are evenly spaced in date order, not to scale. A date the script cannot read goes last, marked "check date".

2024-03-01

Lease signed: 5 years, \$21,600 per month

#1 · P-001

2024-11-15

Roofer repairs the leak

#3 · P-004

2025-01-15

Notice of default sent by certified mail

#5 · P-002

2024-11-12

Tenant emails about a roof leak

#2 · D-101

2025-01-01

Tenant misses January rent

#4 · P-003

2025-05-31

Tenant moves out

#6 · Sample depo 44:3

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Figure 9. The Timeline.

- 1 Fill from Chronology places the ticked events in date order.
- 2 Clear Timeline empties the boxes.

Proof: the dashboard and the proof charts

The Proof tab maps every element you must prove to the witnesses and exhibits that prove it, so gaps show up early.

1. Start with a **proof chart** for each claim (in the Standard edition, also for any defense). Name the claim, the burden, and the authority or jury instruction. List the elements, one per row. For each element, write the witnesses who prove it, the exhibits, and the deposition cite, then rate it: STRONG, ADEQUATE, WEAK or GAP. Use the last column for the plan to fix a weak element.
2. Then fill in the **Proof Dashboard**: one row per claim (or defense), with the number of elements, how many are GAP or WEAK, the biggest risk, and the plan. The ratings are defined at the top of the page.

Proof Chart: Claim 1

Map every element to witnesses and exhibits. Rate each honestly.

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MY BOOKMARKS

1

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

CLAIM
 Breach of Contract

BURDEN
 Plaintiff

AUTHORITY / JURY INSTRUCTION
 US West Communications, Inc. v. Arizona Corp. Comm'n, 3 P.3d 936, 942 (App. 1999); Graham v. Asbury, 112 Ariz. 184, 185, 540 P.2d 656, 657 (1975)

#	Element	Witnesses who prove it	Exhibits	Depo cite	Strength	Gap plan / notes
1	Offer	Pat Example	P-001	Sample 12:4-18	STRONG	
2	Acceptance	Pat Example	P-001		STRONG	
3	Consideration	Pat Example	P-001 sec. 3		STRONG	
4	Sufficient specification of terms	Pat Example	P-001		ADEQUATE	Walk the rent and term sections
5	Breach: failure to perform as promised	Pat Example	P-003	Sample 31:2-9	STRONG	
6	Damages proximately resulting from the breach	Pat Example	P-003		ADEQUATE	Damages summary under Rule 1006
7						
8						
9						
10						

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 BUILD THE CASE | PROOF

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Figure 10. A proof chart.

- 1 The claim, burden, and authority or jury instruction.
- 2 Strength: pick STRONG, ADEQUATE, WEAK or GAP from the list.

Proof Dashboard

One row per claim. Fill after each claim chart. Gaps first.

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CASE (type once, fills every page)

Example Holdings v. Sample Tenant

1

STRONG: live witness plus an admissible exhibit, and no credibility problem. ADEQUATE: one solid source or two weaker ones. WEAK: a single source, a credibility problem, or an admissibility fight. GAP: no proof yet.

Claim	Burden	# elements	# GAP or WEAK	Biggest risk 2	Plan to fix it
Breach of Contract	Plaintiff	6	0	Tenant claims the roof leak excused rent	Roofer invoice P-004; repair date on the ledger
Breach of Implied Covenant of Good Faith and Fair Dealing	Plaintiff	3	1	Bad faith needs more than nonpayment	Depo: tenant stayed 4 months knowing it would not pay

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Figure 11. The Proof Dashboard.

- 1 What each rating means.
- 2 The biggest risk for each claim, and the plan to fix it.

The **Element Reference** is a worked example of element sets and authorities for common claims (Arizona examples). Use it as a model, and write the elements for your own state on your proof charts.

Professional edition: a **Defenses Dashboard** and ten defense charts, laid out like the claim charts, for defenses, yours or theirs.

Witnesses: roster, readiness and outlines

The **Roster** lists every witness, ours and theirs: role, side, live or by deposition, the day and order, time for direct and cross, subpoena status, and contact. A name typed here fills that witness's three pages.

WITNESS ROSTER

Every witness, ours and theirs. Names here fill each witness page.

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

#	Name	Role / relationship	Side	Live or depo	Day / order	Direct (min)	Cross (min)	Subpoena	Phone / email
1	Pat Example	Client principal	Ours	Live	1	60	20	Not needed	602-555-0111
2	Sam Sample	Tenant officer	Adverse	Live	2		45	Served	
3	Lee Roofer	Roofing contractor	Ours	Live	1	20	10	Served	
4	Morgan Manager	Property manager	Ours	Deposition	2			Not needed	
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
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21									
22									
23									
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BUILD THE CASE | WITNESSES

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Figure 12. The Witness Roster.

The **Readiness Tracker** shows, for each witness, whether the subpoena is issued and served, the prep sessions held, exhibits reviewed, the outline done, travel set, and the day-of call made. Blanks under the next trial day are your to-do list.

WITNESS READINESS TRACKER

Check each box when done. Blanks under the next trial day need work.

BACK NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

#	Name	Subpoena issued	Served or confirmed	First prep session	Final prep session	Exhibits reviewed	Outline done	Travel and time set	Day-of call made	Notes
1	Pat Example	☐	☐	☒	☒	☒	☐	☐	☐	
2	Sam Sample	☒	☒	☐	☐	☐	☐	☐	☐	
3	Lee Roofer	☐	☐	☐	☐	☐	☐	☐	☐	
4	Morgan Manager	☐	☐	☐	☐	☐	☐	☐	☐	
5		☐	☐	☐	☐	☐	☐	☐	☐	
6		☐	☐	☐	☐	☐	☐	☐	☐	
7		☐	☐	☐	☐	☐	☐	☐	☐	
8		☐	☐	☐	☐	☐	☐	☐	☐	
9		☐	☐	☐	☐	☐	☐	☐	☐	
10		☐	☐	☐	☐	☐	☐	☐	☐	
11		☐	☐	☐	☐	☐	☐	☐	☐	
12		☐	☐	☐	☐	☐	☐	☐	☐	
13		☐	☐	☐	☐	☐	☐	☐	☐	
14		☐	☐	☐	☐	☐	☐	☐	☐	
15		☐	☐	☐	☐	☐	☐	☐	☐	
16		☐	☐	☐	☐	☐	☐	☐	☐	
17		☐	☐	☐	☐	☐	☐	☐	☐	
18		☐	☐	☐	☐	☐	☐	☐	☐	
19		☐	☐	☐	☐	☐	☐	☐	☐	
20		☐	☐	☐	☐	☐	☐	☐	☐	
21		☐	☐	☐	☐	☐	☐	☐	☐	
22		☐	☐	☐	☐	☐	☐	☐	☐	
23		☐	☐	☐	☐	☐	☐	☐	☐	
24		☐	☐	☐	☐	☐	☐	☐	☐	

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Figure 13. The Readiness Tracker.

Each witness then has three pages:

- **Profile:** why you need this witness, the exhibits they sponsor, credibility and prior statements, danger zones, prep sessions, points to save for redirect, and presenter notes.
- **Direct Exam Outline:** the goal of the examination, then topics with key questions, the exhibit, the source, and a Done box to tick as you cover each topic.
- **Cross Exam Outline:** chapters with the point to make, the leading questions, the exhibit, and where to impeach from (deposition page and line, or document), plus a Do Not Ask box.

Witness 1: Direct Exam Outline BACK NEXT MY BOOKMARKS p.48 Wit 1 Direct x p.117 Our Exh 1/10 x p.236 Motions x CASE (type once, fills every page) Example Holdings v. Sample Tenant

WITNESS Pat Example GOAL OF THIS EXAMINATION (one sentence) The lease, the missed rent, the notice, and the repair that came before any missed payment. 1 Profile Direct Cross Roster 2

#	Topic / headline	Key questions	Exhibit	Source (depo or doc cite)	Done
1	Who Pat is	What is your role at Example Holdings? How long?		Example depo 5:2	☒
2	The lease	What is Exhibit P-001? Who signed it? What rent did it set?	P-001	Example depo 8:10	☒
3	The roof repair	When did you learn of the leak? What did you do? When was it fixed?	P-004	Example depo 21:4	☐
4	Missed rent	What is Exhibit P-003? What happened in January 2025?	P-003		☐
5	The notice	What did you send? How? What response?	P-002		☐
6					☐
7					☐
8					☐
9					☐
10					☐

OBJECTIONS: tick the ones you expect or raised; tap a name to open it

3 Hearsay ☐ Relevance ☐ Rule 403 ☐ Foundation ☐ Authentication ☐ Pers. knowledge ☐ Speculation ☐ Lay opinion ☐ Expert ☐ Best evidence ☐ Leading ☒ Compound ☐ Asked/answered ☐ Argumentative ☐ Assumes facts ☐ Beyond scope All objections 4

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Figure 14. A Direct Exam Outline.

- 1 Switch between this witness's Profile, Direct and Cross pages, or go to the Roster.
- 2 Done: tick each topic as you cover it.
- 3 Objection chips: tick the box at the left of a chip to mark an objection you expect or raised.
- 4 Tap a chip's name to open that objection's row on the Objections page. All objections opens the whole table.

Objection chips appear at the foot of the witness outlines, deposition pages, exhibit scripts, motions and rulings pages, and the trial log. The left part of each chip is a check box; the name opens the objection on the Objections page, with its rule and a quick answer. BACK only turns to the previous page, so to get back to where you were, bookmark your page with the ribbon before you tap the chip, then tap its slot.

Depositions: designations and impeachment

Designations pages, one per deponent, record each page:line range, the subject, who designated it, any objection and the ruling, how you will use it (affirmative, counter, impeach, rebuttal), and a Read box to tick once it is read in. Record the ruling before the day you read.

Deposition Designations 1

Page:line ranges, ours and theirs. Record the ruling before you read.

BACK NEXT MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

DEPONENT
Sam Sample

DEPOSITION DATE
2025-09-18

VOLUME / REPORTER / VIDEO FILE
Vol. 1, Ace Reporting

From pg:ln	To pg:ln	Subject	Designated by	Objection	Ruling	Use	Read
12:4	12:18	Signed the lease	Ours		No objection	Affirmative	<div checked="" type="checkbox"></div>
31:2	31:9	Stopped paying in January	Ours	403	Overruled	Affirmative	<div checked="" type="checkbox"></div>
44:3	45:1	Move-out date	Theirs			Counter	<div type="checkbox"></div>
							<div type="checkbox"></div>
							<div type="checkbox"></div>
							<div type="checkbox"></div>
							<div type="checkbox"></div>
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							<div type="checkbox"></div>
							<div type="checkbox"></div>
							<div type="checkbox"></div>

OBJECTIONS: tick the ones you expect or raised; tap a name to open it

Hearsay

Rule 403

Foundation

Asked/answered

Authentication

Argumentative

Pers. knowledge

Assumes facts

Speculation

Beyond scope

Lay opinion

All objections

Expert

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Figure 15. Deposition Designations.

The **Impeachment Matrix** lines up what a witness said at trial against the earlier statement, word for word, with the source, a Ready box, and a Used box. Commit, credit, confront, and cite page and line every time.

Impeachment Matrix 1

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Trial answer versus the earlier statement. Commit, credit, confront. Page and line every time.

#	Witness	What the witness said at trial (time or transcript cite)	Prior statement (exact words)	Source: depo pg:in, exhibit, email date	Ready	Used
1					☐	☐
2					☐	☐
3					☐	☐
4					☐	☐
5					☐	☐
6					☐	☐
7					☐	☐
8					☐	☐
9					☐	☐
10					☐	☐
11					☐	☐
12					☐	☐

OBJECTIONS: tick the ones you expect or raised; tap a name to open it

☐ Hearsay
 ☐ Relevance
 ☐ Rule 403
 ☐ Foundation
 ☐ Authentication
 ☐ Pers. knowledge
 ☐ Speculation
 ☐ Lay opinion
 ☐ Expert

☐ Best evidence
 ☐ Leading
 ☐ Compound
 ☐ Asked/answered
 ☐ Argumentative
 ☐ Assumes facts
 ☐ Beyond scope

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Figure 16. The Impeachment Matrix.

Exhibits: lists, status, foundations and scripts

The Exhibits tab holds your exhibit list and the adverse list, a running list of admitted exhibits, stipulations, and the foundation for every kind of evidence.

Admitted Exhibits

Filled in from the Adm boxes on both lists when you open this page.

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CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Our exhibits admitted

4 admitted

P-001 Lease Agreement dated 2024-03-01

P-002 Notice of Default

P-004 Roofer invoice, 2024-11-15

P-005 Certified mail receipt

Adverse exhibits admitted

1 admitted

D-101 Tenant email 2025-02-10

Read-only. To change it, tick or untick Adm on the exhibit lists.

1 Refresh the lists

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Figure 18. Admitted Exhibits.

- 1 Refresh the lists: update the page while you are on it.

The **Stipulations** page records every agreement with opposing counsel: the exact terms, the date, how it was made (email, signed, or on the record), and whether it is in writing and has been filed or read in.

Stipulations

Every agreement with opposing counsel: facts, authenticity, foundation, order of witnesses, schedule.

BACK NEXT MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

#	Stipulation (exact terms)	Date agreed	Email, signed, or on the record	In writing	Filed or read in
1	Exhibits P-001 and D-101 are authentic and admissible.	2026-11-10	On the record at pretrial	☒	☒
2	Tenant occupied the premises through May 31, 2025.	2026-11-12	Email from opposing counsel	☒	☐
3				☐	☐
4				☐	☐
5				☐	☐
6				☐	☐
7				☐	☐
8				☐	☐
9				☐	☐
10				☐	☐
11				☐	☐
12				☐	☐
13				☐	☐
14				☐	☐

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Figure 19. Stipulations.

The **Foundation Chooser** starts with the steps for every exhibit, every time. Below that, find what you are offering, or the problem on the stand, and tap the row to open its page: a foundation page, or, for an expert, a witness problem on the stand, hearsay, objections or stipulations, the script on the **Exam** tab. Each row shows the authentication rule, the hearsay route, and in the Open column the page (and script number) it opens.

Foundation Chooser

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Find what you are offering, or the problem on the stand. Tap a row to open its page.

1

EVERY EXHIBIT, EVERY TIME

1. Marked, and identified in your pretrial disclosures (Fed. R. Civ. P. 26(a)(3)(A)(iii)) unless used solely for impeachment. Practice: deliver a copy to opposing counsel as the pretrial order requires.

2. Identify: "I am showing you what has been marked as Exhibit _____. Do you recognize it?"

3. Authenticate (Rule 901 or 902). If the content matters, the original or a permitted substitute (Rules 1001 to 1007).

4. Relevance: the element or issue it proves, on the Proof Chart.

5. Hearsay: state the route or the non-truth purpose before you are asked.

6. Offer: "Your Honor, I move to admit Exhibit _____."

7. Ruling: write it in the Trial Log and on the Exhibit List.

8. Publish: "Permission to publish."

2

Tap a row to open its page: a foundation page, or a script on the Exam tab.

What you are offering, or the problem	Rule (Fed. R. Evid. unless stated)	Hearsay route	Open (page)
Documents and records you will offer			
Contract or signed agreement	Rule 901(b)(1), (2), (4); 902(8); 1003	If not offered for its truth: 801(c)(2). Against a party: 801(d)(2)	p.139
Lease or rent ledger	Rule 901(b)(1), (9); 1001(d); 902(11)	Ledger: 803(6). Lease: 801(c)(2) if not offered for its truth; 801(d)(2) against a party	p.140
Deed, deed of trust, recorded instrument	Rule 902(4); 901(b)(7); 1005	803(14), 803(15); 805 for statements within it	p.142
Escrow, closing, or title file	Rule 901(b)(1); 902(11)	803(6); 801(d)(2); 805 for statements within it	p.144
Bank or financial records	Rule 901(b)(1), (9); 1001(d); 902(11)	803(6)	p.146
Invoice, estimate, receipt, or payment	Rule 901(b)(1); 602	If offered only to show the charge presented and paid: 801(c)(2). Provider's record: 803(6)	p.148
Medical records or bills	Rule 902(11) or 901(b)(1); Fed. R. Civ. P. 45(a)(4) if subpoenaed	803(4), 803(6)	p.149
Notice, demand letter, certified mail	Rule 901(b)(1), (4); 406	If not offered for its truth: 801(c)(2). Reply: 801(d)(2)	p.151
Ordinary document	Rule 901	Depends on use: 801(c)(2), 801(d)(2), or an exception (see Is it hearsay)	p.153

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Figure 20. The Foundation Chooser.

- 1

Every exhibit, every time: the steps for any exhibit.
- 2

Tap a row to open its page: a foundation page, or a script on the Exam tab.

Each **foundation page** covers one kind of evidence (a contract, a business record, a photograph, an email, a summary, expert opinion, and many more): the authentication and hearsay rules with boxes for your state's rules, what to say in order, the objections to expect with your answers, "Check your state" questions, and your notes.

Mark each step as you say it. On the foundation pages and the scripts on the Exam tab, tap a numbered step once you have said it: the step fades and a green check covers its number, so the next step stands out. Tap it again to unmark it. **Clear checks**, in the middle of the footer, clears every step on that page, ready for the next exhibit or witness. Marking a step works even with JavaScript off; Clear checks needs it.

Business Record

Fill the blanks, say the steps in order, and add your state's rule.

BACK NEXT MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Authentication or foundation: Rule 803(6), 902(11)

Hearsay route: 803(6)

2 What to say, in order

- I'm showing you what has been marked as Exhibit _____. (____) Do you recognize it? What is it?
- What is your position, and how are you familiar with how these records are made and kept?
- Is a record like this made at or near the time of the events it records?
- Is it made by, or from information transmitted by, someone with knowledge of those events?
- Is it kept in the course of the [company's / organization's] regularly conducted activity?
- Is making a record like this a regular practice of that activity? Is Exhibit ____ a record of that kind, a true copy of the record as kept?
- Your Honor, I move to admit Exhibit ____ under Rule 803(6) [with the foundation shown by certification under Rule 902(11); reasonable written notice given on ____; record and certification made available for inspection on ____].
- May I publish Exhibit ____?

YOUR STATE: authentication or foundation rule
 Ariz. R. Evid. 803(6), 902(11)

YOUR STATE: hearsay rule
 Ariz. R. Evid. 803(6)

3

Objections to expect, and your answers

Hearsay. Rule 803(6)(A) to (C) were shown through this witness (Rule 803(6)(D)). If a Rule 902(11) certification is used instead, the proponent must give an adverse party reasonable written notice of the intent to offer the record, before the trial or hearing, and must make the record and certification available for inspection, so that the party has a fair opportunity to challenge them.

Witness is not the custodian. The conditions may be shown by the testimony of the custodian or another qualified witness (Rule 803(6)(D)). This witness has described the practice.

Lack of trustworthiness. Source, method, and circumstances of preparation: _____. The exception does not apply if the opponent shows that the source of information or the method or circumstances of preparation indicate a lack of trustworthiness (Rule 803(6)(E)). The opponent must show it.

4 Check your state

Does your state allow business records to be proved by certification and, if so, what notice does it require?

My notes

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Clear checks

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Figure 21. A foundation page.

- 1 Your state's rule, beside the federal cite (filled in when the edition includes your state).
- 2 What to say, in order. Tap a step once you have said it: it fades and gets a check (steps 1 and 2 here).
- 3 The objections to expect, and the answer to each.
- 4 Check your state: a point that may differ where you practice.
- 5 Clear checks clears the marked steps for the next exhibit.

Exhibit scripts are for the exhibits and testimony you must get in. The Exhibit Scripts Index lists them; tap Open page to go to one. Each script page holds the item, description, sponsoring witness, evidence type, purpose and admissibility path; then what you will say and the answer you need, with a Done box for each step; the objections you expect and your response; a fallback if an objection is sustained; and the result and ruling.

Exhibit Script 1

What to say to hear, and how to answer each objection.

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

EXHIBIT OR ITEM NO.

P-003

DESCRIPTION (one line)

Rent ledger 2024-2025

SPONSORING WITNESS

Pat Example

EVIDENCE TYPE

Key fact through a lay witness

DATE (scene or record)

Jan 2024 to May 2025

Purpose: the element or fact this proves

Breach and damages: shows no rent paid January to May 2025.

Admissibility path: rule, hearsay exception, or non-hearsay use

Business record, Rule 803(6); authenticate under 901(b)(1).

What I say

Answer I need / what I heard

Done

1

I am showing you what has been marked as Exhibit P-003. Do you recognize it?

Yes, our rent ledger for the warehouse.

☒

2

How is it kept? Who enters payments, and when?

Our bookkeeper, the day a payment arrives.

☒

3

Is it kept in the regular course of business, and is that a regular practice?

Yes, for every property, every month.

☒

4

Your Honor, I move to admit Exhibit P-003 under Rule 803(6).

☐

5

What did you do next?

☐

6

[Key question that elicits the fact: _____]

☐

7

Did you do anything to record or document it?

☐

8

Tie to an exhibit: show Exhibit ____ and ask the witness to confirm it matches what they saw.

☐

Expected objection

My response (rule and one sentence)

1

Hearsay

803(6): foundation laid through a qualified witness who knows the practice.

2

Foundation: not the custodian

Rule 803(6)(D) allows another qualified witness.

3

Narrative

Break into short questions (Rule 611(a)).

4

If sustained: fallback (other witness, other foundation, limited purpose, offer of proof)

Call the bookkeeper (on the list as a rebuttal witness), or offer a summary under Rule 1006.

Result and ruling (admitted, limited, refused, reserved)

Admitted, day 1

Transcript cite

Tr. 1:42

OBJECTIONS: tick the ones you expect or raised; tap a name to open it

☒ Hearsay
☐ Relevance
☐ Rule 403
☒ Foundation

☐ Authentication
☐ Pers. knowledge
☐ Speculation
☐ Lay opinion

☐ Expert
☐ Best evidence
☐ Leading
☐ Compound

☐ Asked/answered
☐ Argumentative
☐ Assumes facts
☐ Beyond scope

All objections

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Figure 22. An exhibit script.

- The item, witness, evidence type and date.
- What I say, and the answer I need. Tick Done as you go.
- Expected objections and your one-sentence response.
- If sustained: your fallback.

Exam: scripts, objections, motions and rulings

The Exam tab opens on an index of scripts for examining witnesses, grouped as refreshing recollection, impeachment, experts, then objections, hearsay, stipulations, and bench or jury trial, and other scripts (authentication, business records, photographs, emails, offering an exhibit, depositions at trial, lay opinion, party statements, summaries, public records, offers of proof, and the motion at the close of the opponent's evidence).

Exam

Scripts for examining witnesses, the objections table, motions, and rulings.

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CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Each script prints the federal rule, then a box for your state's cite. "Practice:" sentences are suggestions, not rule text. Tap a script to open it.

A. Refreshing recollection

R1 Refresh recollection p.191

R2 Recorded recollection p.193

R3 "I don't remember" p.194

R4 Other side refreshes p.196

B. Impeachment

I1 Prior statement p.197

I2 Omission p.199

I3 Prior conviction p.200

I4 Specific conduct, truthfulness witness p.201

I5 Bias, interest, motive p.202

I6 Contradiction p.203

I7 Rehabilitate p.204

I8 Hostile or adverse witness p.205

C. Experts

E1 Expert: qualify and tender p.206

E2 Expert: opinion and basis p.207

E3 Expert report p.209

E4 Cross an adverse expert p.211

E5 Challenge or defend an expert p.213

E6 Learned treatises p.215

D. Objections, hearsay, stipulations, bench or jury

O1 Objecting p.216

H1 Hearsay p.218

S1 Stipulations and admissions p.220

B1 Bench or jury trial p.222

E. Other scripts

L1 Authenticate a Document or Physical Item p.223

L2 Business Records p.224

L3 Photographs, Video, Audio, and Screenshots p.225

L4 Emails, Texts, Social Media, and Web Pages p.226

L5 Offer an Exhibit and Meet Objections p.227

L6 Use Deposition Testimony at Trial p.228

L7 Personal Knowledge and Lay Opinion p.229

L8 Statements of a Party Opponent p.230

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Figure 23. The Exam index.

Each **script** prints the rule, a box for your state's cite, and the steps in order. Steps to take before trial are listed first. In the steps, the words you say aloud to the court or the witness are set apart in color with a bar beside them, so you can find them at a glance. A sentence that starts "Practice:" is a suggestion about practice, not rule text. Tap each numbered step once you have said it, and use Clear checks to start again (see Mark each step).

Impeach with a Prior Statement: Deposition, Writing, or Recording

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CASE (type once, fills every page)

Script 11. Impeachment.

Rule: Fed. R. Evid. 613, 801(d)(1)(A), 801(d)(2), 106, 105, 901; Fed. R. Civ. P. 26(a)(3), 30(e), 32, 33(c), 36(b)

YOUR STATE: rule cite

Ariz. R. Evid. 613, 801(d)(1)(A), 801(d)(2), 106, 901; Ariz. R. Civ. P. 16(f)(2), 32, 33(c)

Arizona note: Impeachment material is not exempt. Disclose it (Ariz. R. Civ. P. 26.1(a)(8)) and list impeachment exhibits in the Joint Pretrial Statement; an unlisted exhibit needs good cause (16(f)(2)(E)).

2 Before trial

Rule 26(a)(3)(A) covers evidence you may present "other than solely for impeachment." Evidence used solely to impeach is outside it. For any other use, including its truth, identify the witnesses whose testimony you expect to present by deposition (Rule 26(a)(3)(A)(ii)) and each exhibit (Rule 26(a)(3)(A)(iii)). Check the pretrial order for more.

3 In court, in order

COMMIT: Lock the trial testimony.

"Today you told us _____. Is that your testimony? Any other detail? You are sure?"

2 CREDIT: Deposition:

"You gave a deposition on [date]. Under oath. A court reporter took it down."

If review was requested (see the officer's certificate, Rule 30(e)(2)):

"You reviewed the transcript and made [no / these] changes."

Earlier hearing or trial:

"You testified at the [hearing / trial] in [case] on [date]. Under oath. A court reporter took it down."

Writing:

"Did you write [sign / send / verify] Exhibit ____? You meant it to be accurate. You read it before you [sent / signed] it."

Recording:

"You were recorded on [date]. That is your [voice / image]. You knew you were being recorded."

3 CONFRONT:

"Please turn to page ___, line ___."

Wait.

"Question: _____. Answer: _____. Did I read that correctly?"

For a writing, read the exact sentence. Do not paraphrase. You need not show the statement or disclose its contents to the witness first. On request you must show it or disclose its contents to opposing counsel (Rule 613(a)).

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Figure 24. A script page.

- 1 Your state's rule cite.
- 2 Before trial: what to do ahead of time.
- 3 In court, in order: numbered steps, with the words to say set apart.

The **Objections** page lists the common objections in rule order, grouped by subject (General, Relevance, Privileges, Witnesses, Questioning, Opinions, Hearsay, Authentication, Contents, and Civil Rules). Each row gives the rule, the objection, a quick answer, a (i) note with the rule text and practice notes, and a box for your notes. Tap a group name to zoom to that group.

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Objections

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Rule order. Tap a group to zoom to it. Tap (i) for the rule text and notes. Rule text only; no court holdings.

Group	Rule	Objection	Quick answer	My notes
General	103(a)(1)	Move to strike (request)	The answer came before you could object, or strayed. Ask that the jury be told to disregard.	
	103(a)(2)	Offer of proof (request)	Your evidence was excluded. Tell the court its substance, outside the jury, to preserve the error.	
	104, 602, 901	Lack of foundation	Say which foundation: personal knowledge, authentication, business record, expert basis.	
	105	Limiting instruction (request)	Admitted for one purpose or one party only. Ask the court to restrict it and instruct the jury.	
	106	Completeness (request)	They used part of a statement. Require the rest that in fairness belongs with it, now.	
Relevance	401, 402	Relevance	Name the element or fact it makes more or less probable.	
	403	Rule 403 (prejudice, confusion, delay)	Probative value is not substantially outweighed; offer a limiting instruction or a cleaner version.	
	403	Cumulative	It adds a new point, a new source, or corroborates a disputed fact.	
	404 to 406	Character or other acts	Offered for another purpose (motive, intent, knowledge...), or it is habit.	
	407	Subsequent remedial measures	Offered for impeachment or, if disputed, ownership, control, or feasibility.	
Privileges	408	Settlement negotiations	Offered for bias or to negate undue delay; or it was not compromise talk.	
	409	Offer to pay medical expenses	Offered for something other than liability.	
	411	Liability insurance	Offered for bias, agency, ownership or control.	
	501, 502	Privilege	Not privileged, waived, or an exception applies; ask for in camera review.	
	602	Lack of personal knowledge	Lay how the witness saw, heard or did it.	
Witnesses	602, 701	Speculation	Lay the basis, or ask what the witness saw or heard.	
	607 to 609, 613	Improper impeachment	Name the method and its rule; lay the steps.	
	608(a), 801(d)(1)(B)	Improper bolstering	Credibility was attacked; or a prior consistent statement rebuts a charge.	
	611(a)	Compound	Break it into single questions.	
	611(a)	Asked and answered	It asks a different point, or lays a step for the next question.	
Questioning	611(a)	Argumentative	Withdraw and ask for a fact.	
	611(a)	Assumes facts not in evidence	Lay the fact first, or offer to connect it up.	
	611(a)	Calls for a narrative	Ask a narrower question.	
	611(a)	Vague or ambiguous	Rephrase with a date, a document or a name.	
	611(a)	Misstates the evidence	Quote the record, or rephrase without the summary.	
	611(a), 103(a)	Nonresponsive	The examiner moves to strike and re-asks the question.	
	611(a)(3)	Harassing the witness	Move on; the question goes to a fact in issue.	
	611(b)	Beyond the scope	It goes to credibility, or ask to take it as if on direct.	
	611(c)	Leading	Preliminary matter; hostile, adverse or identified witness; or rephrase: "What, if anything..."	
	612, 803(5)	Reading from a document	Refresh, then take it away; or lay recorded recollection.	
	701	Improper lay opinion	Based on what the witness perceived and helpful; not specialized knowledge.	
	701, 702, 704	Calls for a legal conclusion	Ask for the facts, or ask in non-legal words.	
Opinions	702, 703	Improper expert opinion	Qualified, sufficient facts or data, reliable method, reliably applied.	
	801(c), 802	Hearsay	Not for the truth; opposing party's statement; or name the exception.	
Hearsay	805	Hearsay within hearsay	Name a route for each layer.	
Authentication	901, 902	Not authenticated	Witness with knowledge, distinctive features, or self-authenticating.	
Contents	1002 to 1004	Best evidence	Not offered to prove content; a duplicate; or the original is unavailable.	
Civil Rules	1006	Improper summary	Voluminous, the underlying records admissible and made available.	
	FRCP 37(c)(1)	Undisclosed witness, exhibit or opinion	Disclosed (cite where); or substantially justified or harmless.	

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Figure 25. The Objections page.

- Tap a group to zoom to it.
- Tap (i) for the rule text and notes.
- My notes: your own answer for each objection.

Motions in Limine and Rulings records every pretrial ruling and the limits it puts on you: the motion, who filed it, the ruling, the date, the terms, the witnesses or exhibits affected, and a Comply box to tick once you have briefed the witness or team. **Rulings During Trial** records rulings from the bench, sidebars and instructions to counsel, with the time and transcript cite.

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Motions in Limine and Rulings

Every pretrial ruling and the limits it puts on us. Check "Comply" after you brief the witness or team.

#	Motion or issue	Filed by	Ruling	Date	Terms and limits on us	Witnesses or exhibits affected	Comply
1	Exclude evidence of later roof complaints by other tenants	Ours	Granted	2026-11-10	Do not mention other tenants or other buildings.	Pat Example, Lee Roofer, P-006	☒
2	Exclude our late-disclosed photos	Theirs	Granted in part	2026-11-10	Photos out; Lee Roofer may describe the repair.	P-006, Lee Roofer	☒
3	Bar settlement discussions	Theirs	Granted	2026-11-10	No mention of the mediation.	All witnesses	☐
4							☐
5							☐
6							☐
7							☐
8							☐
9							☐
10							☐
11							☐
12							☐

OBJECTIONS: tick the ones you expect or raised; tap a name to open it

☐ Hearsay
 ☐ Relevance
 ☐ Rule 403
 ☐ Foundation
 ☐ Authentication
 ☐ Pers. knowledge
 ☐ Speculation
 ☐ Lay opinion
 ☐ Expert
 ☐ Best evidence
 ☐ Leading
 ☐ Compound
 ☐ Asked/answered
 ☐ Argumentative
 ☐ Assumes facts
 ☐ Beyond scope
 ☐ All objections

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Figure 26. Motions in Limine and Rulings.

1 Comply: tick once the witnesses or team know the limits.

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Rulings During Trial

Rulings from the bench, sidebars, and instructions to counsel. Record the time or transcript cite.

#	Day and time	Issue	Ruling	Effect on our case	Transcript cite
1	Day 1, 10:40	Hearsay objection to the ledger (P-003)	Overruled; admitted under 803(6)	Damages proof is in	Tr. 1:42
2	Day 1, 2:15	Leading on direct of Lee Roofer	Sustained	Rephrase; no harm	Tr. 1:88
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

OBJECTIONS: tick the ones you expect or raised; tap a name to open it

☐ Hearsay
 ☐ Relevance
 ☐ Rule 403
 ☐ Foundation
 ☐ Authentication
 ☐ Pers. knowledge
 ☐ Speculation
 ☐ Lay opinion
 ☐ Expert
 ☐ Best evidence
 ☐ Leading
 ☐ Compound
 ☐ Asked/answered
 ☐ Argumentative
 ☐ Assumes facts
 ☐ Beyond scope
 ☐ All objections

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Figure 27. Rulings During Trial.

Jury: voir dire, panel, instructions and verdict

The **Voir Dire Question Bank** groups questions by subject; tick the ones to ask and write the follow-ups. The **Jury Selection Strategy** page sets out your ideal juror, your most dangerous juror, the questions that reveal each, themes to plant, cause challenges, strikes allowed and used, and any record to make.

Voor Dire Question Bank

Check the questions to ask. Write the follow-ups in the notes.

CASE (type once, fills every page)

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Neutral, open questions work best. Ask about experiences and feelings, not opinions on the law. Tailor these to the judge's method of voir dire.

Getting to know you

- ☐ Have you served on a jury before? Civil or criminal? Did the jury reach a verdict?
- ☐ Have you or anyone close to you ever been a party to a lawsuit?
- ☐ Have you ever worked in a court, law office, or law enforcement?
- ☐ What do you do for work? What did you do before?
- ☐ What do you read, watch, or listen to for news?

Attitudes about lawsuits and fairness

- ☐ What are your thoughts about people who bring lawsuits to enforce a contract?
- ☐ Does anyone believe there are too many lawsuits? Tell me more.
- ☐ Can you decide this case only on the evidence you hear in this courtroom?
- ☐ Is there anyone who would hold it against a party for asking a jury to decide a dispute?
- ☐ Do you have any feelings about companies suing people, or people suing companies?

Burden of proof and fairness

- ☐ In a civil case the plaintiff must prove the case by a preponderance of the evidence. Can you apply that standard?
- ☐ Would anyone require more proof than the law requires?
- ☐ Would you be comfortable returning a verdict for either side if the evidence supports it?
- ☐ Who here is a person who always asks to see the paper before believing something?

Contracts, business, and real estate

- ☐ Have you ever signed a contract and later felt the other side did not do what they promised?
- ☐ Does anyone own or manage rental property, or work in real estate, title, lending, or construction?
- ☐ Have you ever been a landlord, tenant, buyer, or seller in a dispute over property?

Money and damages

- ☐ If you found for a party, could you award damages for the full amount the evidence supports?
- ☐ Does anyone have strong feelings about awarding money for business losses?
- ☐ Would anyone refuse to award attorney fees if the law allows the court to do so? (Do not ask the jury to decide fees.)
- ☐ Is there anyone who believes that awarding any money damages in a civil case is wrong?

Witnesses and credibility

- ☐ Would you be more or less likely to believe a witness because of a title, profession, or job?
- ☐ How do you decide whether someone is telling the truth?
- ☐ If a witness changed his or her story, how would you view it?
- ☐ Would you give more weight to the testimony of a police officer, a business owner, or a doctor than to anyone else, simply because of the job?

Practical and wrap up

- ☐ Is there any hardship, health, or scheduling issue that would make it hard for you to serve?
- ☐ Does anyone know the parties, the lawyers, or the witnesses on the lists?
- ☐ Is there anything we have not asked that you think we should know?

Figure 28. The Voir Dire Question Bank.

The **Panel Tracker** pages record each panel member: number, name, occupation, household, answers and body language, a rating from -2 to +2, a cause box, and the result (seated, for cause, our strike, their strike, excused).

Jury Panel Tracker 1

Rate each person -2 to +2 as you learn more. Strike order: last column.

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CASE (type once, fills every page)

Example Holdings v. Sample Tenant

1

Panel no.	Name	Occupation / employer	Household / family	Answers, experiences, body language	Rating	Cause?	Result
1	Juror Smith	Owens a small landscaping busin	Married, two children	Has had a tenant stop paying. Nodded at the contract questions.	+2 Great	☐	
2	Juror Jones	Rents an apartment; nurse		Landlord never fixed her heater. Arms crossed.	-1 Risky	☒ Our strike	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	
						☐	

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Figure 29. The Panel Tracker.

- 1** Rating: from +2 (great) to -2 (dangerous), updated as you learn more.

The **Instructions** pages track every jury instruction (proposed, agreed, disputed, given, refused) with its source and your position, and mark the ones to quote in closing. **Verdict Form Notes** walks the verdict form question by question: the answer you want, the evidence that supports it, and the risk. It is the road map for your closing.

Jury Instructions Tracker 1

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Track every instruction: *proposed, agreed, disputed, given, refused*. Mark the ones to quote in closing.

#	Instruction (title and number)	Source of the instruction	Proposed by	Status	Our position or their objection	Quote in closing
1						☐
2						☐
3						☐
4						☐
5						☐
6						☐
7						☐
8						☐
9						☐
10						☐
11						☐
12						☐
13						☐

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Figure 30. The Instructions tracker.

Log: day plans and the trial log

Each **Day Plan** is filled the night before (witnesses and order, exhibits to offer, motions and issues to raise, the judge's instructions) and finished at the end of the day (what you proved, problems and rulings, fixes for tomorrow, and notes for staff).

Day 1 Plan and Wrap-up

Fill the night before. Complete the right column at the end of the day.

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Trial day number	Date	Court hours / breaks	Time used so far (ours / theirs)
Witnesses scheduled and order	What we proved today (elements advanced)		
Exhibits to offer	Problems, surprises, and rulings against us		
Motions and issues to raise	Fixes and homework for tomorrow		
Judge instructions and preferences heard	Staff notes: exhibits, tech, witnesses for tomorrow		

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Figure 31. A Day Plan.

The **Trial Log** is for capturing the trial in real time: the time, the type of entry (testimony, admission, ruling, objection, exhibit, juror reaction, judge comment, demeanor), the witness, what happened, the exhibit or element, and the transcript cite. Tick the star on anything you want in closing. Keep entries short; the transcript comes later.

Trial Log 1

CASE (type once, fills every page)

Capture in real time. Check the star on anything you want in closing. Keep it short; use the transcript later.

DAY NO.
1
DATE
2026-12-01

Time	Type	Witness	What happened or what was said	Exhibit or element	Transcript cite	Star for closing
9:20	Testimony	☒ Pat Example	Lease signed March 1, 2024; rent \$21,600 a month	P-001	1:12	☐
10:40	Ruling	☒ Pat Example	Ledger admitted over hearsay objection	P-003	1:42	☒
11:05	Admission	☒ Sam Sample	"We knew the roof was fixed by Thanksgiving."	Elem. 5	1:57	☒
2:15	Objection	☒ Lee Roofer	Leading sustained; rephrased		1:88	☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐
						☐

OBJECTIONS: tick the ones you expect or raised; tap a name to open it

☒ Hearsay

☐ Relevance

☐ Rule 403

☐ Foundation

☐ Authentication

☐ Pers. knowledge

☐ Speculation

☐ Lay opinion

☐ Expert

☐ Best evidence

☒ Leading

☐ Compound

☐ Asked/answered

☐ Argumentative

☐ Assumes facts

☐ Beyond scope

All objections

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- 1 Type: pick the kind of entry from the list.
- 2 Star for closing: tick it, and the entry is your closing material.

The **Closing Argument Plan** is an eight-step skeleton built from the proof charts and the starred log entries: open with the theme, state what you are asking for, give the road map, walk the elements, credibility, meet their best argument, damages or relief, and return to the theme.

Closing Argument Plan

Build the skeleton from the Proof Chart and the starred Trial Log entries.

BACK

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MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

Theme (same sentence as the opening)
A lease is a promise, and Sample Tenant stopped keeping it.

1. Open with the theme (One sentence. Say it first, say it again at the end.)
A lease is a promise. Sample Tenant made one, and stopped keeping it in January 2025.

2. Tell the jury (or judge) what you are asking for (State the verdict or the relief in plain terms.)
Judgment for \$86,400 in unpaid rent, plus late fees, interest, and fees under section 22.

3. Road map (Name the claims and the questions on the verdict form. Promise to show where the proof is.)
Two claims: breach of the lease, and breach of the covenant of good faith.

4. Walk the elements (One claim at a time. For each element: the question, the witness, the exhibit, the quote.)
Offer and acceptance: P-001. Breach: P-003 and Sample's admission at 1:57.

5. Credibility (Whose story matches the documents. Use the impeachment points. Do not oversell.)
Only one witness admitted the roof was fixed before rent stopped: their own.

6. Meet their best argument (Name it, answer it, tie the answer to an exhibit or an admission.)
The leak. Repaired November 15 (P-004), six weeks before the first missed payment.

7. Damages or relief (Show the math from the damages summary. Ask for a number or the specific relief.)
\$21,600 x 4 months = \$86,400 (P-003). Late fees per section 5.

8. Return to the theme (Close on the same sentence you opened with. Sit down.)
A lease is a promise. Ask for judgment and sit down.

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Figure 33. The Closing Argument Plan.

The **Claim Elements** pages carry each claim's elements over from its proof chart. For each one, write the best proof (testimony, admissions and quotes with cites), the exhibits to show, how you will say it, and tick Done.

Closing: Claim 1 Elements

Elements from the Proof Chart, with the best proof and your words.

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CASE (type once, fills every page)

Example Holdings v. Sample Tenant

CLAIM OR DEFENSE
Breach of Contract

VERDICT FORM Q / INSTRUCTION NO.

#	Element	Best proof: testimony, admissions, quotes with cites (pull the starred log entries)	Exhibits to show	How I will say it	Done
1	Offer				☐
2	Acceptance				☐
3	Consideration				☐
4	Sufficient specification of terms				☐
5	Breach: failure to perform as promised				☐
6	Damages proximately resulting from the breach				☐
7					☐
8					☐
9					☐
10					☐

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Figure 34. Closing: Claim Elements.

Their Best Arguments and Our Answers pairs each argument with your answer, the evidence and the law. **Damages and Relief Summary** shows the math: every item, the amount, how it was calculated, and the exhibit or witness, with the total, fees, costs and interest. **Bench Trial: Findings and Conclusions** drafts the findings of fact and conclusions of law you want, the credibility points, and the relief to request.

Damages and Relief Summary

Show the math. Every number needs an exhibit or a witness.

BACK NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Example Holdings v. Sample Tenant

#	Item of damage or relief	Amount	How calculated	Exhibit or witness
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				

TOTAL REQUESTED

ATTORNEY FEES / COSTS / INTEREST BASIS (statute or contract clause)

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Figure 35. Damages and Relief Summary.

Notes: sticky notes

The Notes tab has six pages of sticky notes, six notes to a page. Type a title on the colored band and the note in the body.

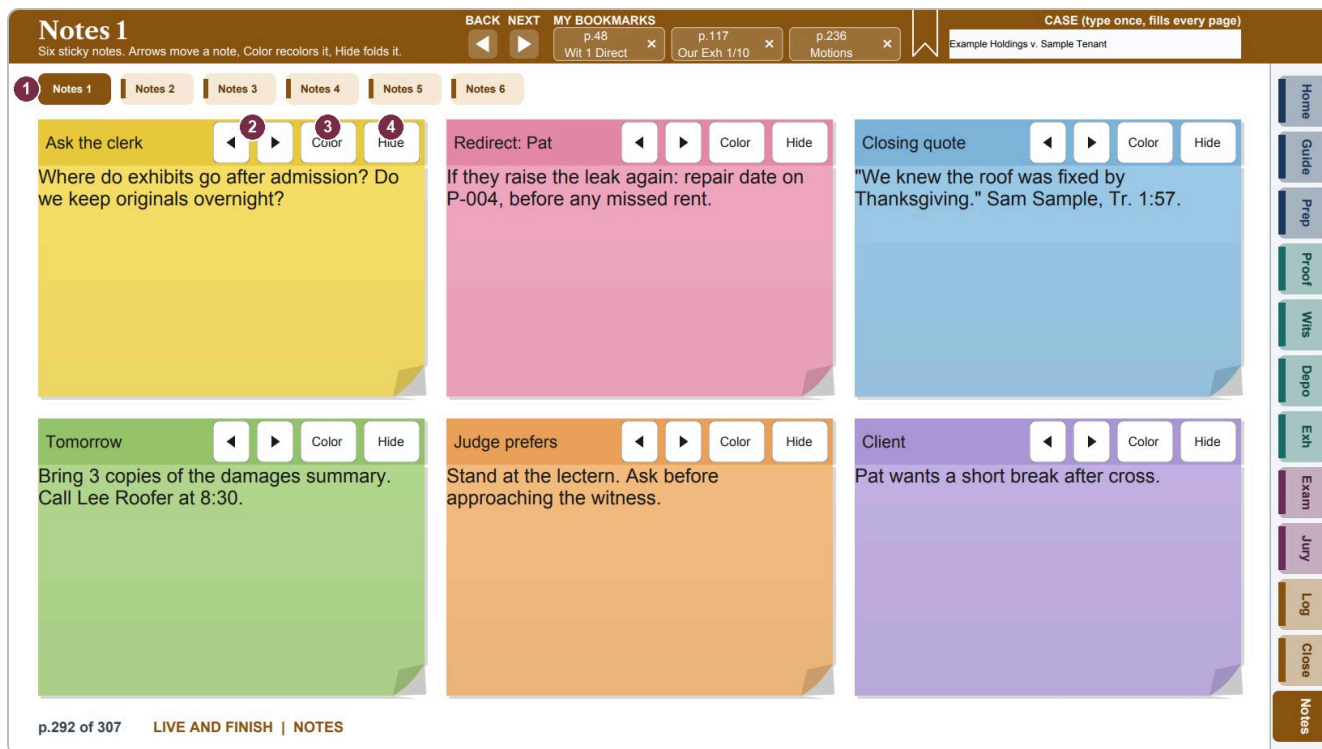


Figure 36. Sticky notes.

- 1 The Notes 1 to Notes 6 buttons switch between the six Notes pages.
- 2 The arrows move a note left or right on the page. Its title, text and color move with it.
- 3 Color: tap, then pick one of six colors.
- 4 Hide folds the note to its title band. Show opens it again.

Professional edition extras

- **State rules.** A Professional copy can include the rules of one or more states. The first state fills in the Jurisdiction page and every "Your state" blank. Each additional state gets its own State Rules section at the front, with a rule-by-rule comparison to the federal rules.
- **Print buttons.** These list pages have a Print button at the foot of the page that prints the whole list, all its pages, to paper or to a PDF: the chronology, witness lists, each witness's pages, the exhibit lists, designations, motions, rulings, panel tracker, instructions and trial log.
- **More room** (see the table in Part One), the Defenses Dashboard and defense charts, and you can add your own pages at the end.
- **The Hearing Notebook** is included.

Nevada Rules: Rule by Rule			
Every federal rule Notebook cites, with the Nevada counterpart.			
Federal rule	Nevada counterpart	Same?	Difference
FRE 101	NRS 47.020	Differs	Title 4 applies to all Nevada courts and magistrates except where relaxed by statute or rule, with privileges applying at all stages; there is no FRE 101(b) definitions list.
FRE 103	NRS 47.040; NRS 47.050; NRS 47.080	Differs	No counterpart to FRE 103(b), so the statute does not say a definitive pretrial ruling excuses renewing the objection or offer at trial.
FRE 104	NRS 47.060; NRS 47.070; NRS 47.080; NRS 47.090; NRS 47.100	Same	
FRE 105	NRS 47.110	Same	
FRE 106	NRS 47.120	Differs	Covers only writings and recorded statements, not oral statements as FRE 106 has since 2023, and says nothing about overriding a hearsay objection.
FRE 107	None	None	Nevada has no statute on illustrative aids.
FRE 201	NRS 47.130; NRS 47.140; NRS 47.150; NRS 47.160; NRS 47.170	Differs	Notice may be taken only before submission to the court or jury (NRS 47.170), notice of law is also covered (NRS 47.140), and there is no FRE 201(f) jury instruction provision.
FRE 401	NRS 48.015	Same	
FRE 402	NRS 48.025	Same	
FRE 403	NRS 48.035(1), (2)	Differs	Exclusion is mandatory ("is not admissible") when probative value is substantially outweighed by unfair prejudice, confusion or misleading the jury; only delay, waste of time and cumulative evidence are discretionary.
FRE 404	NRS 48.045; NRS 48.035(3)	Differs	No notice requirement like FRE 404(b)(3), and NRS 48.035(3) separately admits closely related acts that cannot be described without the other act.
FRE 405	NRS 48.055	Same	
FRE 406	NRS 48.059	Same	
FRE 407	NRS 48.095	Differs	Text bars use only to prove "negligence or culpable conduct" and does not list product defect, design defect or need for a warning as FRE 407 does.
FRE 408	NRS 48.105; NRS 48.109 (mediation)	Differs	Does not expressly bar use of compromise evidence to impeach by prior inconsistent statement or contradiction, and NRS 48.109 separately makes mediation statements inadmissible and not discoverable.
FRE 409	NRS 48.115	Same	
FRE 411	NRS 48.135	Same	
FRE 501	NRS 49.015; privileges in NRS 49.035 to 49.405	Differs	Privileges exist only as provided by constitution or statute (NRS 49.015), not by common law as interpreted in light of reason and experience.

Part Three: The OnTrial Hearing Notebook

How it fits together

The Hearing Notebook is built around one idea: you argue from a single page, and everything behind it is one tap away. Prepare on your computer in this order:

1. **Case Information**: the court, hearing, matter heard, and counsel.
2. **Preparation Outline**: write the opening and close in full, then one page per main point, with its facts and citations.
3. **Speaking Outline**: two or three keywords per point, plus the opening and close as you will say them. This is the page you look at while you argue.
4. **Sources**, **Legal Authorities**, **Rebuttal** and **The Record**: filled in as you build the points.
5. **Case Copies**: copies of the key cases and papers, inserted at the back, so they open without a connection.

The header band, the CASE box, BACK and NEXT, the bookmarks and the sticky notes work exactly as in the OnTrial Notebook (see Part Two). The Hearing Notebook has nine tabs: Home, Guide, Argue (the Speaking Outline, Preparation Outline and Rebuttal), Sources, Law (Legal Authorities), Copies (Case Copies), Record, Prep (the Pre-hearing Checklist) and Notes.

Confidential attorney work product.

BACK NEXT MY BOOKMARKS

CASE (type once, fills every page)
Acme v. Doe (SAMPLE)

OnTrial Hearing Notebook

FOR HEARINGS AND ORAL ARGUMENT

CASE NAME
Acme v. Doe (SAMPLE)

CASE NUMBER
CV-26-01234 (SAMPLE)

Read the User Guide
p.2

Enter the case details
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Preparation Outline
p.6

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Law
Copies
Record
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Figure 38. The Hearing Notebook title page.

The Speaking Outline

The Speaking Outline is a chalkboard: glance down, say it, look up. It holds your opening, your main points as keywords, and your close.

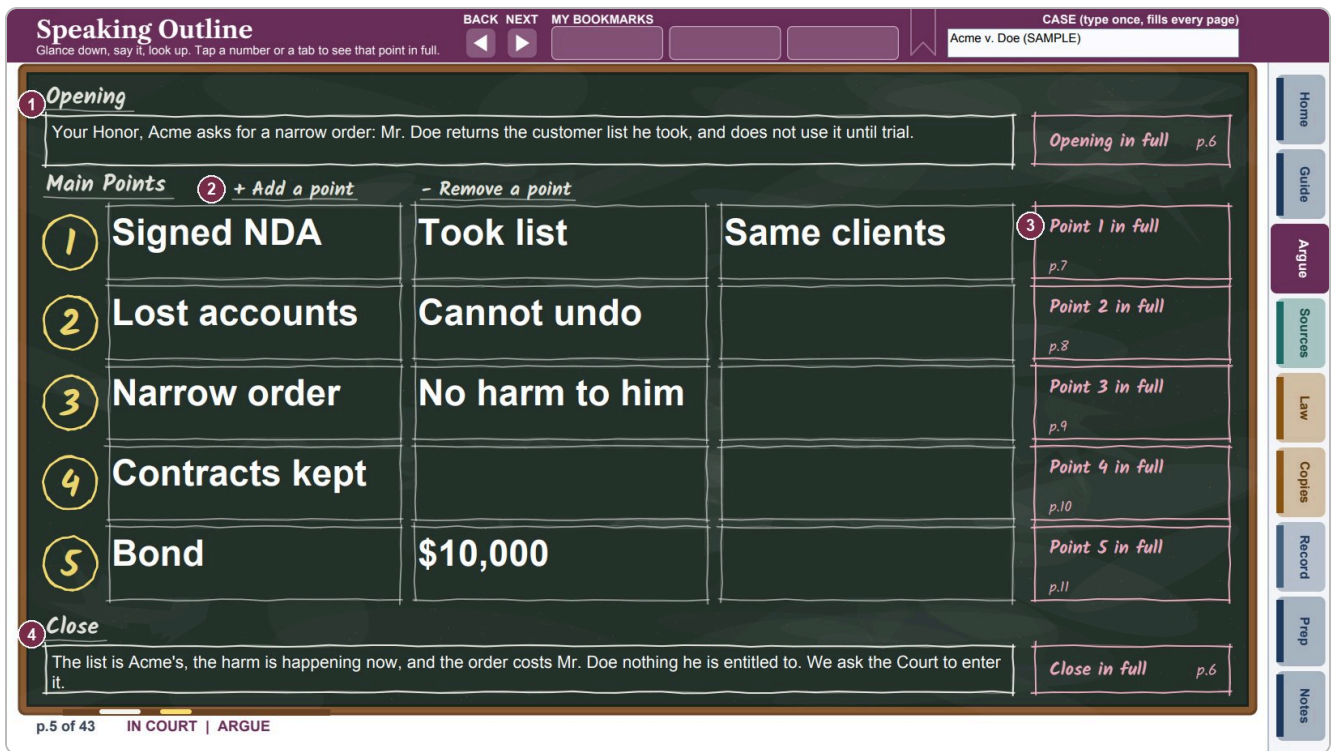


Figure 39. The Speaking Outline.

- 1 Opening: what you will say first, word for word.
 - 2 + Add a point and - Remove a point: three to seven points. The keywords get larger when there are fewer points.
 - 3 Tap a point's number or its tab on the right to open its Preparation Outline page.
 - 4 Close: what you will say last.
- Give each point **two or three keywords**, no more. They are reminders, not sentences.
 - The outline opens with four points. Tap **+ Add a point** for up to seven, or **- Remove a point** for as few as three. The keywords grow or shrink to fill the board.
 - When you clear a box, a chalk eraser appears in it. While you type, the text turns dark so you can read it over PDF Viewer's yellow typing tint; it turns back to chalk white when you leave the box.
 - Tap a point's number, or its tab, to see that point in full; tap **Opening in full** or **Close in full** for those. Every Preparation Outline page has a **Back to Speaking Outline** button.

The Preparation Outline

Opening and **Close** holds both in full: the opening as you will say it, the exact relief you ask for, the road map of your points, the close as you will say it, and the close in full with the points to land and the exact

ask. The short versions are the same boxes as on the Speaking Outline.

Preparation Outline: Opening and Close

Write both in full. The short versions also show on the Speaking Outline.

BACK

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MY BOOKMARKS

CASE (type once, fills every page)
Acme v. Doe (SAMPLE)

Opening

Back to Speaking Outline

OPENING, AS YOU WILL SAY IT (also on the Speaking Outline)

Your Honor, Acme asks for a narrow order: Mr. Doe returns the customer list he took, and does not use it until trial.

THE RELIEF YOU ASK FOR, EXACTLY

An order that Doe (1) return every copy of the customer list within 3 days, and (2) not use it or contact the customers on it until trial. Bond \$10,000.

ROADMAP: THE POINTS IN THE ORDER YOU WILL MAKE THEM

1. Likely to succeed. 2. Irreparable harm. 3. Balance of hardships. 4. Public interest. 5. Bond.

Close

Back to Speaking Outline

CLOSE, AS YOU WILL SAY IT (also on the Speaking Outline)

The list is Acme's, the harm is happening now, and the order costs Mr. Doe nothing he is entitled to. We ask the Court to enter it.

CLOSE IN FULL: THE POINTS TO LAND AND THE EXACT ASK

Land three things: the download on his last day, the calls to the same customers, and how narrow the order is. Then the ask: the order as proposed, with a \$10,000 bond.

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Figure 40. Preparation Outline: Opening and Close.

Each **point page** holds that point's keywords (the same boxes as on the Speaking Outline), the point in full, and up to eight bullets, each a fact or a citation.

Preparation Outline: Point 1 BACK NEXT MY BOOKMARKS CASE (type once, fills every page) Acme v. Doe (SAMPLE)

The point in full, then its facts and citations. **FACT** or **LAW** opens the row; **Notes** opens your notes; **Open** follows the link.

1 KEYWORDS (also on the Speaking Outline)
Signed NDA Took list Same clients **8** Back to Speaking Outline

MAIN POINT, IN FULL
Acme is likely to succeed: Doe signed the confidentiality agreement, downloaded the customer list on his last day, and is now calling the same customers.

Bullets

MOVE	FACT or LAW	THE FACT OR THE CITATION	NOTES	LINK (paste an address)	
3	4	5	2	6	7
▲	FACT ▶	Doe signed the Confidentiality Agreement on March 3, 2024.	Notes	https://www.dropbox.com/scl/fi/ptjk6b8h22ai2fy7ktur/Acme%20Confidentiality%20Agreement.pdf?dl=1	Open
▼	FACT ▶	Doe downloaded the full customer list at 4:52 p.m. on his last day.	Notes	https://www.dropbox.com/scl/fi/f6x5jq0to6do72ajcdey/Acme%20Customer%20List.pdf?dl=1	Open
▲	LAW ▶	Winter v. Natural Resources Defense Council, Inc., 555 U.S. 7, 20 (2008)	Notes	https://tile.loc.gov/storage-services/service/ll/usrep/usrep555/usrep55507.pdf	Open
▼	FACT ▶	Two Acme customers report calls from Doe since he left.	Notes	https://www.dropbox.com/scl/fi/cpenmepcmz9i66ayq7wkd/Two%20Acme%20Customers%20Report%20Calls.pdf?dl=1	Open
▲	LAW ▶	18 U.S.C. sec. 1836(b)(3)(A) (Defend Trade Secrets Act)	Notes	https://uscode.house.gov/view.xhtml?req=granuleid:USC-prelim-title18-section1836-b3-A&num=0&edition=prelim	Open

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Figure 41. A Preparation Outline point page.

- 1** Keywords: the same boxes as the point's keywords on the Speaking Outline.
- 2** + Add fact and + Add citation add a bullet. Remove last asks you to confirm, then takes the last bullet away and clears its row on Sources or Legal Authorities.
- 3** The arrows move a bullet up or down.
- 4** FACT or LAW opens the bullet's row on the Sources or Legal Authorities page.
- 5** Notes opens notes for the bullet that stay hidden until you want them. The tab turns gold when a bullet has a note.
- 6** Link: paste an address (Westlaw, Lexis, a docket entry, a Dropbox or iCloud file).
- 7** Open follows the link.
- 8** Back to Speaking Outline.

1. State the point in full, the way you would write it in a brief.
2. Tap + **Add fact** or + **Add citation** for each bullet, and type the fact or the citation.
3. Paste a link if you have one, and tap **Open** to check it works.
4. Tap **Notes** on a bullet for room to write more about it; tap again to close the notes.

Sources and Legal Authorities

Every fact you add to a point gets a row on that point's **Sources** page, and every citation a row on its **Legal Authorities** page, with the same text and link. Add the document and pin cite (for a fact) or the pin cite and what it supports (for an authority), and the page a copy starts on in the Case Copies section. In each row, **Go** jumps to the copy, **Open** follows the link, and **Back** returns to the point.

Sources: Point 1

BACK

NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Acme v. Doe (SAMPLE)

The facts behind Point 1. A row appears when you add a fact on the Preparation Outline; its text and link are the bullet's.

Preparation Outline: Point 1

#	FACT (from the bullet)	DOCUMENT	PIN CITE	LINK	COPY AT P.			
1	Doe signed the Confidentiality Agreement on March 3, 2024.	Ex 3 Confidentiality Agreement	sec. 2	https://www.dropbox.com/scl/fi/ptjk6b8h22	44	Go	Open	Back
2	Doe downloaded the full customer list at 4:52 p.m. on his last day.	Smith Declaration	para. 7	https://www.dropbox.com/scl/fi/ff6x5jq0to6	46	Go	Open	Back
3	Two Acme customers report calls from Doe since he left.	Jones Declaration	paras. 4-6	https://www.dropbox.com/scl/fi/cpenmepci	48	Go	Open	Back
4								
5								
6								
7								
8								

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Figure 42. Sources: the facts behind a point.

Legal Authorities: Point 1

BACK

NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Acme v. Doe (SAMPLE)

The citations behind Point 1. A row appears when you add a citation on the Preparation Outline; its text and link are the bullet's.

Case Copies p.43

Preparation Outline: Point 1

#	CITATION (from the bullet)	PIN CITE	WHAT IT SUPPORTS	LINK	COPY AT P.			
1	Winter v. Natural Resources Defense Council, Inc., 555 U.S. 7, 20 (2008)	20	The four things a party must show for a preliminary injunction.	https://tile.loc.gov/storage		Go	Open	Back
2	18 U.S.C. sec. 1836(b)(3)(A) (Defend Trade Secrets Act)	(b)(3)(A)	A court may grant an injunction to prevent actual or threatened misappropriation.	https://uscode.house.gov		Go	Open	Back
3								
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Figure 43. Legal Authorities: the citations behind a point.

Rebuttal and The Record

On the **Rebuttal** page, list the counterarguments you expect. When the other side argues one, tick **Argued**, so you answer it. The rows under Raised at the hearing are for points you did not expect.

Rebuttal

BACK NEXT MY BOOKMARKS

CASE (type once, fills every page)
Acme v. Doe (SAMPLE)

List the counterarguments you expect. When the other side argues one, tick Argued, so you answer it.

Anticipated

Back to Speaking Outline 1

ARGUED

1

The customer names are public on LinkedIn.

☒

2

Acme waited six weeks to file, so there is no emergency.

☒

3

The order is a non-compete in disguise.

☐

4

The bond should be at least \$250,000.

☐

5

The download was routine work on his last day.

☐

6

☐

7

☐

8

☐

9

☐

10

☐

Raised at the hearing

ARGUED

11

Customers called Doe first, not the other way around.

☒

12

☐

13

☐

14

☐

15

☐

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Figure 44. Rebuttal.

1 Argued: tick when the other side raises it.

The **Record** (two pages) lists the orders, motion, response, reply, declarations, exhibits and transcripts: the type, title, who filed it, the date, the docket number, the key pages or paragraphs, the link, and the page its copy starts on, with Go and Open buttons.

The Record 1 of 2

BACK NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Acme v. Doe (SAMPLE)

Orders, the motion, response, reply, declarations, exhibits, transcripts. Paste a link and tap Open to bring the paper up.

#	TYPE	DOCUMENT (title or description)	FILED BY	DATE FILED	DOCKET	KEY PAGES / PARAS	SINK	COPY AT P.		
1	Motion	Motion for Preliminary Injunction	Acme	09/18/2026	12	pp. 1-3	https://www.dropbox.com/scl/fi/xd	50	Go	Open
2	Declaration	Smith Declaration	Acme	09/18/2026	12-1	para. 7	https://www.dropbox.com/scl/fi/ft6	46	Go	Open
3	Declaration	Jones Declaration	Acme	09/18/2026	12-2	paras. 4-7	https://www.dropbox.com/scl/fi/cp	48	Go	Open
4	Exhibit	Ex 3 Confidentiality Agreement	Acme	09/18/2026	12-3	secs. 1-3	https://www.dropbox.com/scl/fi/ptj	44	Go	Open
5	Response	Doe Response	Doe	10/02/2026	20	paras. 1-5	https://www.dropbox.com/scl/fi/fq	53	Go	Open
6	Order	Proposed Order	Acme (proposed)	09/18/2026	12-4	paras. 1-3	https://www.dropbox.com/scl/fi/pr	55	Go	Open
7	Order	Order Setting Hearing	Court	09/22/2026	15	Sets hearing for 10/20			Go	Open
8									Go	Open
9									Go	Open
10									Go	Open
11									Go	Open
12									Go	Open

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Figure 45. The Record.

Case Copies

Courthouse wifi fails. A link needs a connection; a copy inside the notebook opens anywhere, at once. The Case Copies page is the last page of the notebook, so copies you add go after it and no page number before it moves.

Case Copies

Copies inserted after this page. Write where each starts; Go jumps there.

BACK NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Acme v. Doe (SAMPLE)

Index of copies

#	CASE OR PAPER	STARTS AT P.	
1	Ex. 3, Confidentiality Agreement	44	Go
2	Smith Declaration	46	Go
3	Jones Declaration	48	Go
4	Motion for Preliminary Injunction	50	Go
5	Doe Response	53	Go
6	Proposed Order	55	Go
7			Go
8			Go
9			Go
10			Go

How to add copies

Insert after this page. The pages you add go after the dashed line below, so no page number before it moves. Highlights come with them.

Index them. Write each copy and the page it starts on here, and in the Copy at p. box of its row on Legal Authorities, Sources or The Record.

How to insert. In Acrobat on a Mac: Organize Pages, then Insert, then From File (a paid feature). Other apps that insert pages also work.

Why copies. A link needs a connection, and courthouse Wi-Fi fails. A copy here opens anywhere, at once.

Before the hearing. Tap every Go and check it lands on its copy.

Legal Authorities: Point 1
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INSERT COPIES AFTER THIS PAGE

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Figure 46. Case Copies.

1. Insert each copy after the Case Copies page. In Acrobat on a Mac: Organize Pages, then Insert, then From File (a paid Acrobat feature). Other apps that insert pages also work.
2. In the index, write each copy and the page it starts on. Write the same page in the Copy at p. box of its row on Sources, Legal Authorities or The Record.
3. Before the hearing, tap every **Go** and check it lands on its copy.

Pre-hearing Checklist and Notes

The **Pre-hearing Checklist** covers what to confirm before you leave for court: the time and courtroom or remote link, the time allowed, the judge's procedures, every paper and link, every citation checked, the outlines final, the proposed order, witnesses and exhibits for an evidentiary hearing, the court reporter and interpreter, the iPad, and the client. The **Notes** page has six sticky notes, as in the OnTrial Notebook.

Pre-hearing Checklist

Tick each item when it is done. Add your own in the blank rows.

BACK NEXT

MY BOOKMARKS

CASE (type once, fills every page)

Acme v. Doe (SAMPLE)

DONE	ITEM	DATE	NOTES
☒	Hearing date, time, and courtroom, or the remote link, confirmed	10/09	
☒	Time allowed, and who argues first, confirmed	10/09	
☒	Judge's procedures and standing orders read (tentative rulings, courtesy copies, exhibits)	10/12	
☒	Every paper on The Record page, and every link opens	10/12	
☐	Every citation checked against the current official text; case copies inserted		
☒	Speaking Outline final; a Preparation Outline for every point	10/14	
☒	Rebuttal: the counterarguments you expect are listed	10/14	
☒	Proposed order prepared, and lodged if the court requires it	09/18	
☐	Evidentiary hearing: witnesses and exhibits disclosed, subpoenas served, copies for the court and the other side		
☐	Court reporter or recording arranged, if needed		
☐	Interpreter arranged, if needed		
☐	iPad charged; PDF Viewer set up as the User Guide says (JavaScript on); every file opens without a connection		
☐	Client told the date, the time, and what to expect		
☐			
☐			

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Figure 47. The Pre-hearing Checklist.

Part Four: Troubleshooting and help

Buttons, bookmarks or sticky notes do nothing on the iPad.

Make sure the notebook is open in PDF Viewer by Nutrient, not in Acrobat Reader for iPad, Books or the Files preview. Then open PDF Viewer's settings and make sure JavaScript is on, then close the notebook and open it again. Check that the file was never saved in Preview; if it was, start a new copy from your blank master. Plain page links (the tabs, BACK and NEXT, the index buttons) work even without JavaScript.

The first tap takes a few seconds.

In a large notebook, the first button that runs a script after the file opens takes a moment. After that, taps are quick.

The top of the page is cut off, or pages scroll together.

Use the PDF Viewer settings in Part One: Page Transition Jump, Page Mode Single, Scroll Direction Horizontal, Page Fitting Adaptive.

The colors look brown or all one color.

PDF Viewer is in Sepia or Night mode. Set Appearance to Default (the white button).

A box turns yellow while I type.

That is PDF Viewer showing which box you are typing in. The notebook cannot turn it off; it goes away when you leave the box.

The ribbon does not turn burgundy on the iPad.

PDF Viewer cannot color the ribbon. Your bookmark is still in the slot; the ribbon turns burgundy in Acrobat.

Buttons do nothing on Windows.

Open the notebook in Adobe Acrobat Reader, not in Edge or another browser.

I see a "Modified copy" notice.

The notebook checks itself when it opens. If its pages or parts have been changed, it shows the notice. Your entries are safe; contact support for a clean copy with your entries carried over.

I have two versions of a case copy.

The file was saved on two devices while it was open on both. Keep the newer one. Next time, close the file on one device before you open it on the other.

How do I print?

See Printing a backup copy: the print settings for Acrobat Reader and PDF Viewer, which paper size to use, and what prints. In the Professional edition, the Print button on a list page prints the whole list.

Does the notebook send my information anywhere?

No. What you type stays in the file on your device. The notebook does not send it to OnSide Software or anyone else. The Hearing Notebook's Open buttons go only to the addresses you paste in.

Getting help. The help assistant on onsidesoftware.com answers questions about both notebooks. For anything else, write to support@onsidesoftware.com.

The notebooks are organizing and reference tools. They are not legal advice and do not create an attorney-client relationship. Check every rule, citation and deadline against current official sources and your court's local rules. Use is governed by the OnSide Software Terms of Service, at the back of each notebook.

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