Three Day Martus Training Plan

Benetech Human Rights Program

Day 1

Session 1: Introduction to Martus

1. Introductions
2. Overview of the Training (Goals, Approach, Review of Agenda)
3. Introduction to the Martus software

Session 2: Installing Martus and Account Creation

1. Installing Martus.
2. Opening a new account.
3. Using Martus effectively for maximum data security: basic principles of encryption.
4. Backing up encryption keys.
5. Deleting and restoring an account.
6. Discussion of security protocol for managing account username, password, and key files.

Session 3: Creating Records

1. Basic data entry in Martus.
2. Saved records versus versioned records and shared records.
3. Creation of 1-2 test records, and view image attachment locations on a map (if geo-location data is available).

Session 4: Backing Up Your Data to the Server

1. Configuring the Martus server.
2. Backing up and downloading records from the Martus server.
3. Setting up auto-sync under Server Settings.

Day 2

Session 1: Introduction to Customization in Martus

1. Basic Martus customization with form templates.
2. Downloading and using generic and Contacts' shared form templates.
3. Demonstration of project customization, if applicable.

Session 2: Advanced Customization in Martus

1. Pilot test: Data entry of 1-5 sample cases or documents.
2. Group reflections on data entry/data management: Does the customization need revisions?
3. Practice making suggested alterations to customization.
4. Review: how to load changes in the future.

Session 3: Sharing Your Data Securely

1. Introduction to Data Sharing in Martus: how to set up secure sharing relationships between accounts.
2. Mapping information flow: Who needs to create data? Who needs to be able to access data for searching, reporting, etc.?
3. Configuration of Contact account relationships and verifying Contacts.

Session 4: Searching, Reporting, and Charts

1. Import Amnesty International Urgent Action demo data. Please contact martus@benetech.org to get these sample records to use in your training.
2. Demonstration of searching, reporting, and charts.
3. Brainstorm, practice, and configuration of searches, reports, charts.
4. The limitations of charts and graphs: data entry errors, controlled vocabularies, and importance of data standardization.

Day 3

Session 1: Mobile Martus

1. Use case for Mobile Martus.
2. Write-only Contact: how to integrate Mobile Martus into your existing system.
3. Downloading and installing Martus on your Android phone.
4. Configuring a Mobile Martus account.
5. Things to keep in mind.

Session 2: Data Quality and Analysis

1. Is Martus a data analysis tool?: Exporting data out of Martus.
2. Selection Bias: Data vs. Reality.

Session 3: Security Culture—Martus in Context

1. Martus in context: What are the elements of a security culture?
2. Where Martus fits in: What can it do? What can't it do?
3. Other tools and resources that might be helpful for the security of communications and information.

Session 4: Basic Martus Troubleshooting

1. Common problems experienced by users.
2. Running with the console log.
3. Server connectivity: Pinging and trace-routing the server.
4. Getting more help: User Guide FAQs & martus@benetech.org.

Session 5: Supporting a Martus Project

1. Outlining a tentative protocol: How does Martus fit into project staff day-to-day operations?
2. Establishing a timeline for integrating Martus.
3. Outlining a plan for immediate follow-up.