Sample ½ Day Martus Training Plan

Benetech Human Rights Program

Note: You can cover the material below in about four hours. However, we suggest that you carefully monitor the time spent on any one segment, and as much as possible use the concepts/content you generated in one step for the following step. For example, have trainees create a few records. Then, have them configure the server. Immediately after they do so, you will be able to quickly point out the automated backup of existing records. Immediately after that, quickly have participants practice deleting a record and downloading it back from the server.

1. Introduce software with basic overview presentation (without in-depth detail). [30 minutes]
2. Install Martus and create accounts on all user computers. [20 minutes]
3. Review key aspects of the Martus account and workspace. [10 minutes]
4. Explain best practices for preserving and protecting project username/password/key data. [15 minutes]
5. Train on how to back up the Martus encryption key. [15 minutes]
6. Introduce data entry in Martus. Explain how to create a Martus record, the difference between saved, versioned and shared records and how to edit an existing record. [15 minutes]
7. Have participants create 1-3 practice records. *Be sure to limit the amount of time participants spend on this exercise.* [15 minutes]
8. Train on how to configure the Martus server and how to back up to the Martus server. [15 minutes]
9. Observe the backup process. [5 minutes]
10. Train on how to delete records. Have each participant choose one of their records to delete and remove from the Trash. [10 minutes]
11. Practice downloading data from the Martus server. [10 minutes]
12. Introduce how to set up secure data sharing relationships between two Martus accounts. Demonstrate and practice setting up Contact account relationships. [20 minutes]
    Note: You will want to streamline this exercise as much as possible. Provide everyone with your (the trainer's) access token and ask them to configure you as a Contact. Then, have them create a single record and share it with you as a Contact. Then, you can demonstrate downloading hopefully several records into your Martus account via the projector.
13. Introduce searching in Martus. Discuss simple and advanced searching. Demonstrate and practice. [15 minutes]
14. Introduce reporting/charts in Martus. Discuss when reports might be used. Practice creating a table report and bar chart. Have trainees follow along with your example on the projector. [20 minutes]
15. Demonstrate deleting a Martus account and restoring an account using a participant's backup key, username and password. [10 minutes]
16. Demonstrate how to download and use a customization template for records, ideally using the Martus Customization template example since it shows one of each type of field. [10 minutes]
17. Briefly introduce Mobile Martus for Android. [10 minutes]