



## Detailed Martus Configuration Instructions (Martus version 4.4)

### Benetech Human Rights Program

Please use the Martus QuickStart and User Guide documents as reference. These are available at your Martus\Docs directory once you have installed Martus, and at <https://www.martus.org/downloads>.

You can also refer to the installation and introductory usage videos on the Martus website, available at <https://www.martus.org/martusdemo/>.

1. Download the latest Martus installer (for example, version 4.4) from <https://www.martus.org> (or directly at [https://www.martus.org/cgi-bin/download\\_martus.cgi#download](https://www.martus.org/cgi-bin/download_martus.cgi#download)).
  - a. For more information see Section ‘2a. Installing’ of the Martus User Guide, which features detailed installation instructions and screenshots of the installation process.
  - b. In the download Martus page, scroll down until you get the section that says ‘Download Martus Software’ and then,
  - c. Specify which Operating System you will be using (Windows, Mac, or Linux).
  - d. Click on the link to “Download Martus software version 4.4” (or whatever the latest version is).
  - e. If needed, please click on “I CERTIFY” to certify your country.
  - f. For *Windows*, click on the ‘Single file install with Java’. You will be prompted to say whether you want to ‘run’ or save the file. Go ahead and click ‘Run’ (Note: you can also save the installer file to your computer if you want to copy it to a removable media, e.g. USB/CD, for future use). For *Mac*, click on the DMG install.
2. Install Martus. *Windows* instructions are below – for *Mac* and *Linux*, see the Martus User Guide.
  - a. Choose a setup language, and click OK.
  - b. Click ‘Next’ in the “Martus 4.4 setup” Wizard dialog box to install Martus.
  - c. Read the license agreement, and then click “I agree” to accept it. If you do not accept the license agreement, the installer will not install Martus.
  - d. If you are running Windows, decide whether you want to install a Martus shortcut in the Windows Start menu. Click “Yes” if you do, and “No” if you do not, and decide whether you want to install a Martus shortcut on the desktop. Click “Yes” if you do, and “No” if you don’t.

- e. **Note:** Most of our Windows users find it easier to run Martus if a shortcut is included in the windows start menu or on the desktop. But, if you want the presence of the Martus software to be less obvious, don't install a shortcut in the windows Start menu or on the desktop. Regardless of your choice, the Martus installer always adds a Martus shortcut to the Martus directory.
  - f. When prompted, click "Finish" to complete the installation.
3. Create a new account to start using Martus to enter data.
    - a. Double-click on the Martus Desktop short-cut to launch the application.
    - b. If other accounts already exist on your computer, click the New Account tab in the Sign-in dialog box, and then click OK. If there are no existing accounts, Martus will prompt you to either create a new account or restore an account from backup key files.
    - c. Choose a language from the dropdown menu in the Sign In dialog box.
    - d. Type a username that has between 8 and 50 characters.
    - e. Click characters on the on-screen keyboard to type a password that has between 8 and 50 characters (See Martus User Guide Section "2f. Choosing a password" for guidelines for creating a secure, useful password).
    - f. Click OK. The Sign In screen will appear for a second time. Enter the same username and password to verify them, and then click OK.
    - g. If you want to provide contact information, enter it. This contact information may be provided to the Martus server and linked with your data. If you save any data as Public, that data will be published on the Martus Search Engine and this contact information will appear on the Search Engine as well. If you are saving all of your data as Private in Martus, your contact information will be securely backed up to the Martus server if you request it, but will not appear on the Martus Search Engine. If you do not enter anything for Author and Organization, Martus will prompt you for the information every time you start the application.
    - h. *Note: For more information on how to set up your account, refer to the Martus User Guide Section "2e. Setting up your account".*
  4. Back up your key files:
    - a. Back up your key onto removable media and put the file in a safe place. For more information please refer to Section "9b. Backing up your key" of the Martus User Guide.
  5. Configure a connection to a Martus server
    - a. Configure your connection to the Martus server using the following information. For more information see Section "2g. Setting up a server connection" of the Martus User Guide.
    - b. Server connection information may be provided by your trainer, or you can request it by emailing [info@martus.org](mailto:info@martus.org)
    - c. To configure the server:
      - i. Go to Server>Select Martus Server.
      - ii. Enter your user name and password.
      - iii. Enter the IP address for the server.

- iv. Enter Server public Identification code and click OK.
  - v. Click “Accept” when you see the Server Compliance Message.
  - vi. Enter the Magic Word to gain permission to send bulletins to the server.
6. Set your preferences Under Options > Preferences:
- a. If you do not plan on publishing any of your data to the Internet, check the ‘Prevent creating public bulletins’ checkbox. This will disallow any information being published on the web-based Martus Search Engine until it has been approved.
  - b. If the Martus servers are blocked from your location, or you need to help hide that you are connecting to a Martus server, check the ‘Use embedded Tor’ checkbox. This will slow sending of bulletins. You can find out more about Tor at <https://www.torproject.org>.
7. Set up securing data sharing with your colleagues:
- a. Martus can be used to securely share your private data with someone else you trust by creating what is known as a Field Desk-Headquarters relationship, where the “Field Desk” is the account that is sharing data, and the “Headquarters” is the account that is receiving/authorized to view the data. The relationship is directional, not necessarily hierarchical.
  - b. To access data entered by your colleagues (Field Desk (FD) accounts) give them your ‘Public Account ID’ (.mpi file) and your ‘Public Code’ identifier (for more information see Section ‘9f. Sharing your private data with colleagues’ in the User Guide). This is done using the following steps:
    - i. In Martus, choose Tools > Export My Public Account ID, and name the file (e.g. Europe-HQ, Asia-HQ). Martus saves the file with the ‘.mpi’ (Martus Public Information) extension in your account directory in the Martus folder.
    - ii. Choose Help > View My Account Details, and write down your public code.
    - iii. Email the .mpi file to your colleagues whose bulletins you want to access.
    - iv. Through a different, secure communications channel, communicate the public code from your account. It is important that the public code be communicated in a way that it cannot be altered, but it need not be secret. For example, you could use chat (e.g. Pidgin/Adium/Yahoo messenger), Skype/Jitsi (like Skype but more secure), phone or email.
  - c. To provide access to the data you entered in to Martus to your colleagues (Headquarters (HQ) accounts) import the ‘Public Account ID’ (mpi file), along with the ‘Public Code’ identifier. This is done using the following steps:
    - i. In Martus, Choose Tools > Configure Headquarters, enter your username and password (for security), and click ‘Add’ once the screen is displayed.
    - ii. Select the .mpi file the HQ accounts gave you (e.g. ‘London.mpi’), enter the public code they gave you, and enter a label for the HQ account.

- iii. Check the 'Default' box for the HQ account if you would like to share all new bulletins with them. After this point, when you create a bulletin, you will see the HQ checked at the bottom of the bulletin screen.
    - iv. Click Save. For more information see Section '9f. Sharing your private data with colleagues' in the Martus User Guide.
  - d. If someone new needs access to the data at a later stage, follow these steps:
    - i. Configure the relationship between the HQ and the Field Office using the above instructions.
    - ii. If the new HQ needs access only to bulletins created after they are configured, check the default box to give the HQ access to all new bulletins.
    - iii. If the new configured HQ also need access to bulletins created before they were configured, select all the old bulletins that you wish to share (CTRL +A), and update access to all of them at once by going to Edit > Update Headquarters Access.
  - e. To retrieve draft or sealed bulletins created by Field Desk (FD) accounts that have given your account permission to access their data:
    - i. Go to Server > Retrieve Field Desk Sealed Bulletins or Server > Retrieve Field Desk Draft Bulletins.
    - ii. Check the field desk bulletins you would like to download.
    - iii. Select "Retrieve all bulletin versions" to retrieve all versions of a bulletin.
    - iv. Click Retrieve. The bulletins will appear in the Retrieved Bulletins folder.
  - f. **Note:** For more information on accessing Field Desk bulletins once they are created, see Section "6i. Retrieving bulletins created by field desks" in the User Guide.
- 8. Customize your Martus data entry template:
  - a. Obtain the customization file from one of your authorized Headquarters. This should be a .mct file.
  - b. Go to Options > Customize Fields.
  - c. Click on Import Template and select the .mct file designated and sent to you by your headquarters. Click Import, and then Okay.
  - d. If there were no errors, you should have been redirected to your home screen. If there were errors, write down the error messages that you received and send them to your local support or to [help@martus.org](mailto:help@martus.org).
- 9. Document, organize, share, and transform!