Martus™ 5.2.0 Quick Start Guide

https://www.martus.org

Creating an account

1. Start Martus.
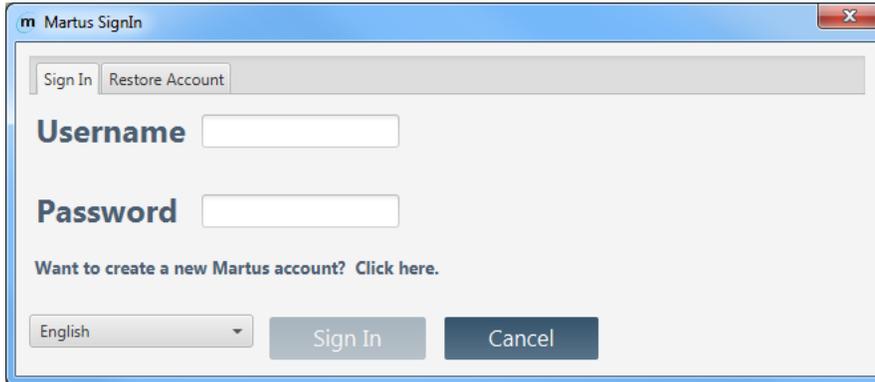
2. Select **"***Want to create a new Martus account?***"** and the *Martus Setup Wizard* will start and walk you through account creation.


3. The next time you open Martus, input your *username* and *password* in the *Martus Sign In* dialog box to access your account.

   *Multiple Martus accounts can exist on the same computer. Select **"Want to create a new Martus account?"** to create additional accounts; select **Restore Account** to restore accounts from key backup files.*
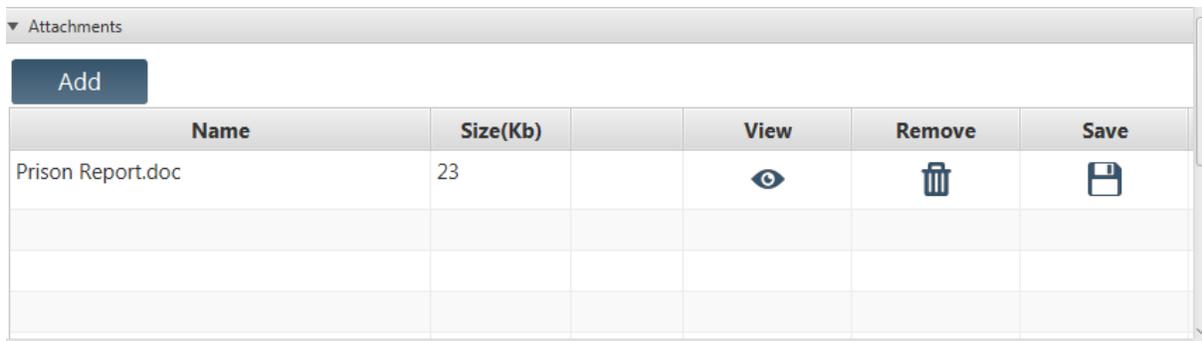
Creating a Record

1. Select **Create new record** ✚ .
2. Input a *Title*.
3. Select **Add Contact** 👤➕ to add contacts with whom you want to share the record.
4. Select **Template Selector** 🗒 to choose a different form template for your record.
5. Input information in the relevant record fields.
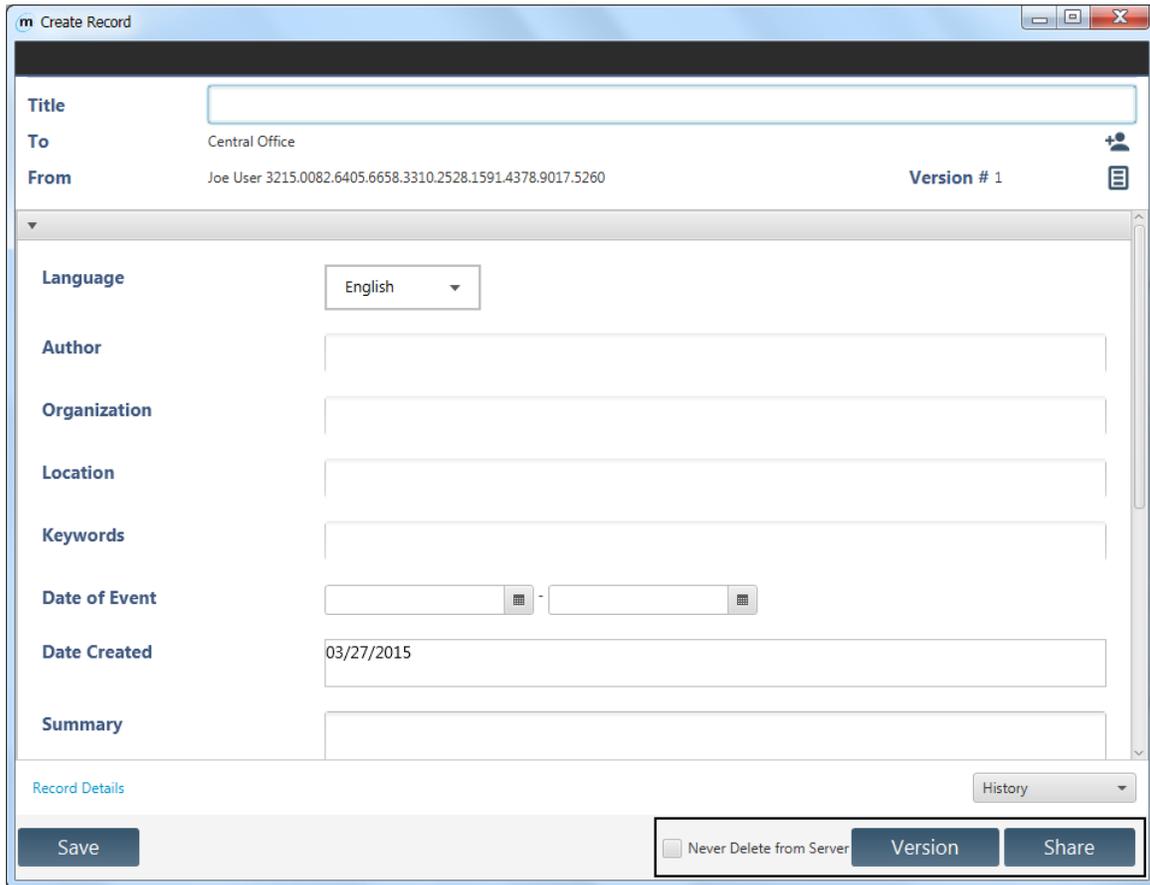
6. Select the **Attachments** tab within the *Create Record* window.
7. Click **Add** and then select the file you want to attach.

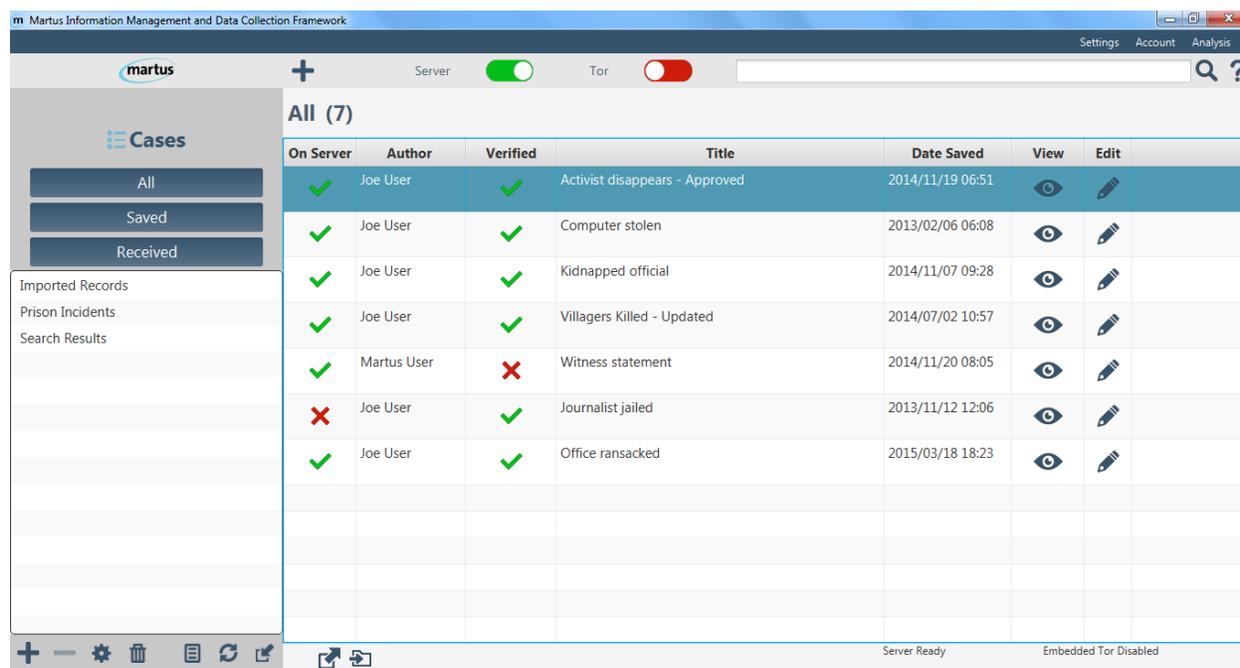8. Choose to **Save**, create a new **Version**, or **Share**.

Martus automatically saves backup copies of saved, versioned and shared records to the Martus server as long as your configured server is set to ON in the Martus main taskbar.

Managing records

The Main Taskbar

- **Create** a record ✚ with the click of a button!
- Toggle your **Server** connection **On** and **Off**: [Server ●]
- Turn embedded **Tor** use **On** and **Off**: [Tor ●]
- Perform a simple text **Search** 🔍 across all of your records.
- Select **Help** ❓ for information about your Martus version and a link to the Martus documentation.

The Record List Pane

- Sort your records by multiple fields:
  On Server (indicates whether or not the record has been saved to your configured server)
  Author
  Verified (indicates whether the record was created by a contact that you have verified)
  Title
  Date Saved

- **View** 👁 and **Edit** ✏ records at your convenience.
- **Delete** ✖, **Export** ↗, **Move** ➲, and **Copy** ▤ records.

The Sidebar

- Customize and organize your Cases (which function like folders) with the **Label Manager** ⚙ and the **Add** ✚ and **Delete** ➖ options.
- Manage deleted records in the **Trash** 🗑.
- Use the **Template Manager** 🗐 to upload, download, and edit customized form templates.
- Upload and download records using the **Sync Manager** ↻.
- **Import Records** ↰ into Martus from your local device.

Finding the record you need

Performing a Simple Search

The simple search allows you to search your records from the Martus main taskbar.

1. Input your search terms in the *Search* field of the Martus main taskbar.
2. Select **Search**. Your search results will be listed in the record list pane under the heading *Search Results*.
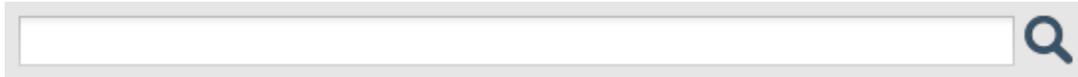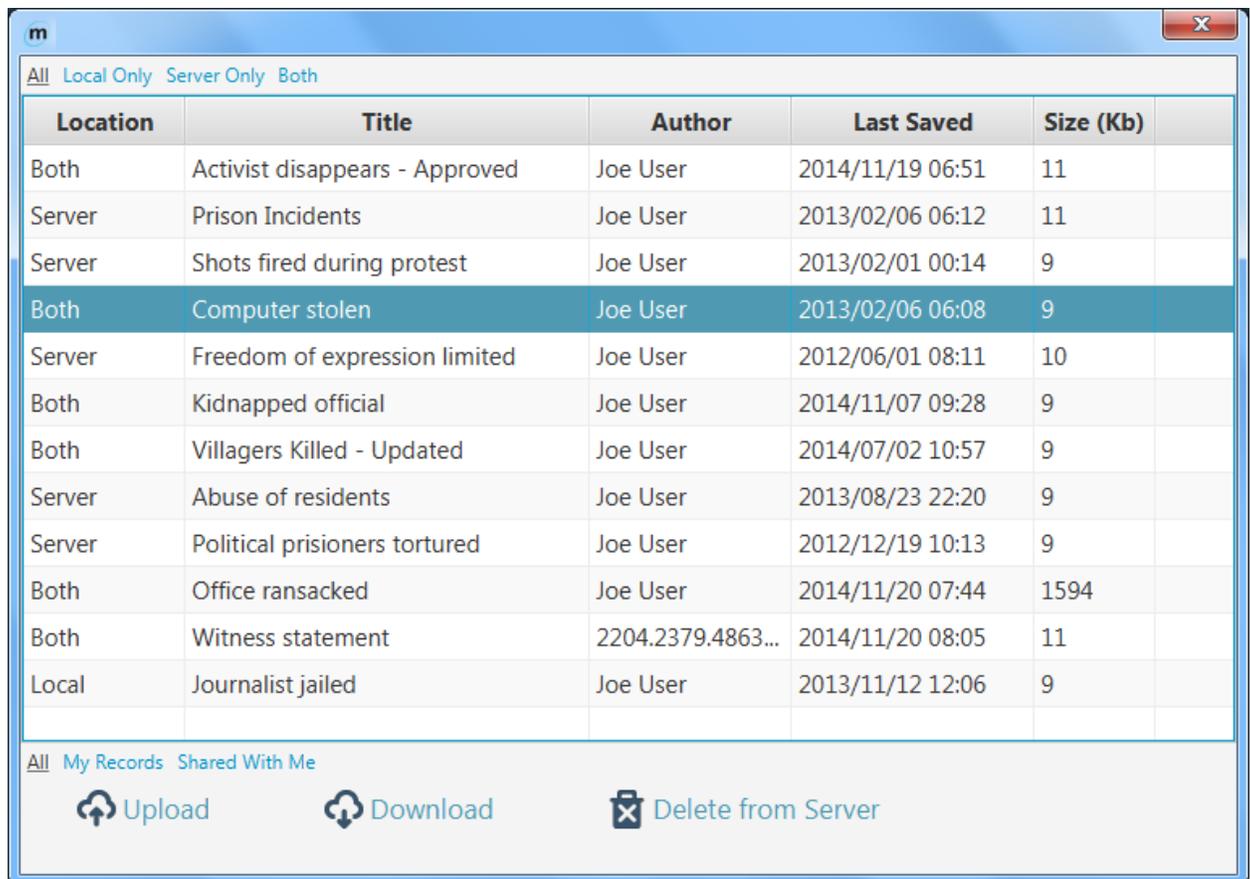
*For advanced search options select **Analysis** > **Advanced Search**.*

Uploading, Downloading, and Deleting records

The Martus **Sync Manager** allows you to upload and download records to/from the server as well as view where records are located and whether they were created by you or a contact.

1. Select **Sync Manager** ⟳ from the Martus sidebar.
2. Select the desired record.

Location	Title	Author	Last Saved	Size (Kb)
Both	Activist disappears - Approved	Joe User	2014/11/19 06:51	11
Server	Prison Incidents	Joe User	2013/02/06 06:12	11
Server	Shots fired during protest	Joe User	2013/02/01 00:14	9
Both	Computer stolen	Joe User	2013/02/06 06:08	9
Server	Freedom of expression limited	Joe User	2012/06/01 08:11	10
Both	Kidnapped official	Joe User	2014/11/07 09:28	9
Both	Villagers Killed - Updated	Joe User	2014/07/02 10:57	9
Server	Abuse of residents	Joe User	2013/08/23 22:20	9
Server	Political prisioners tortured	Joe User	2012/12/19 10:13	9
Both	Office ransacked	Joe User	2014/11/20 07:44	1594
Both	Witness statement	2204.2379.4863...	2014/11/20 08:05	11
Local	Journalist jailed	Joe User	2013/11/12 12:06	9

All My Records Shared With Me

⟰ Upload   ⟱ Download   ☒ Delete from Server

3. Select the records you would like to take action on.
4. Select **Upload** / **Download** / **Delete from Server**.