



Martus™ 5.0

Quick Start Guide

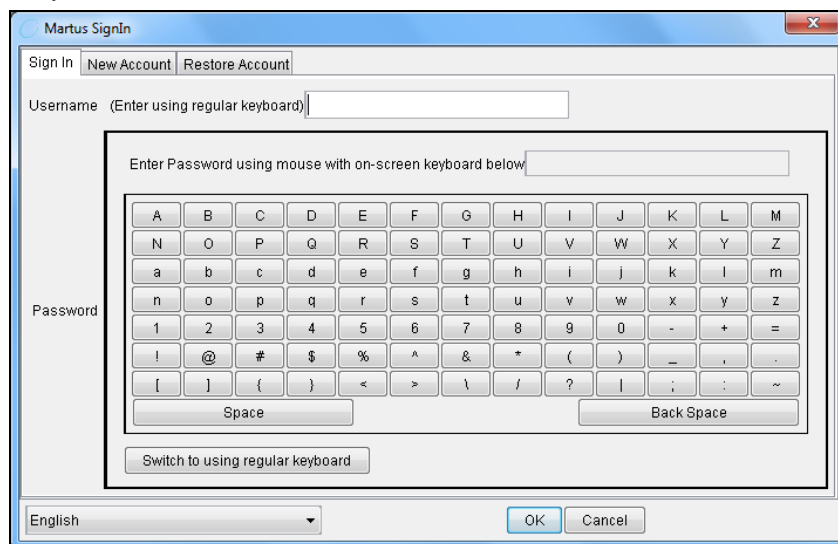
<https://www.martus.org>

Creating an account

1. Start Martus.
2. If there are no other Martus accounts on your computer, the *Martus Setup Wizard* will start and walk you through account creation. If other accounts already exist on your computer, click the **New Account** tab in the *Martus SignIn* dialog box to start the *Martus Setup Wizard*.





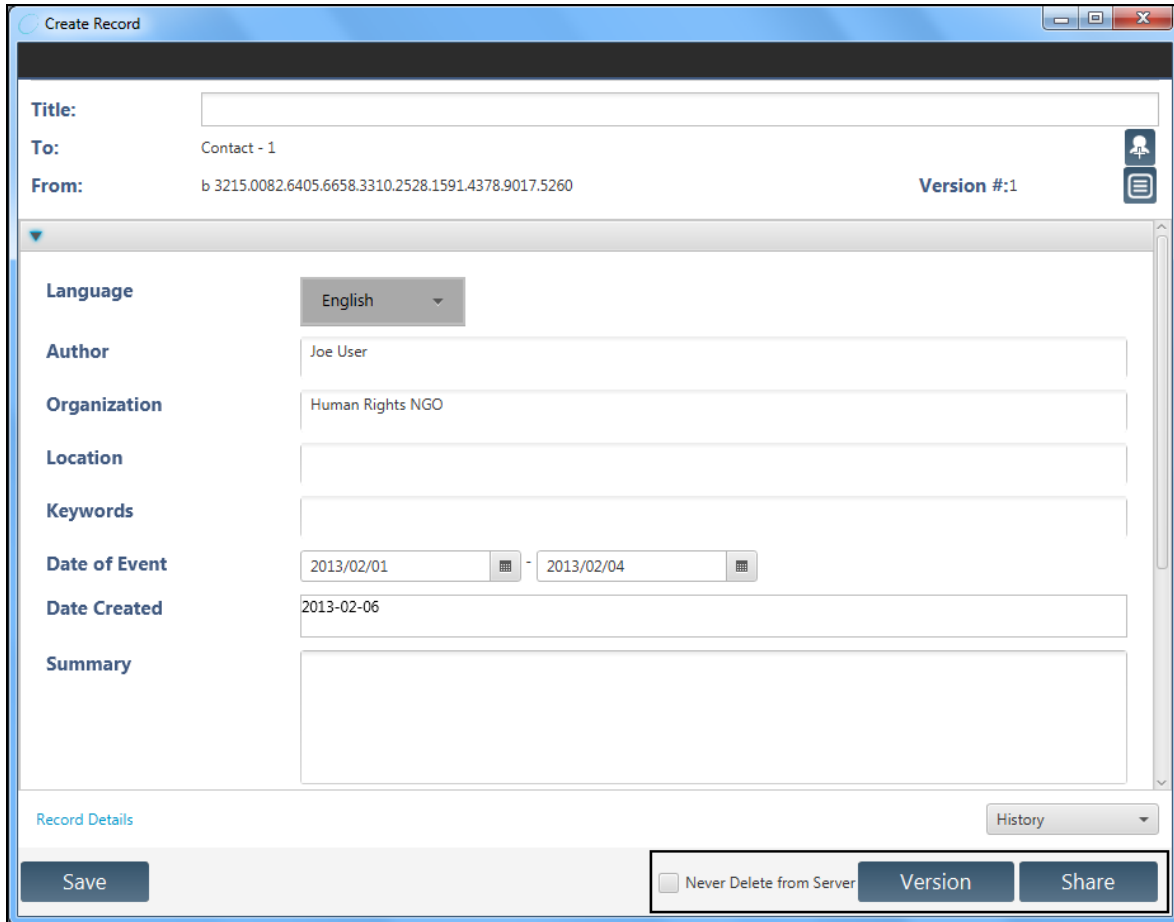
3. The next time you open Martus, input your *username* and *password* in the *Martus Sign In* dialog box to access your account.



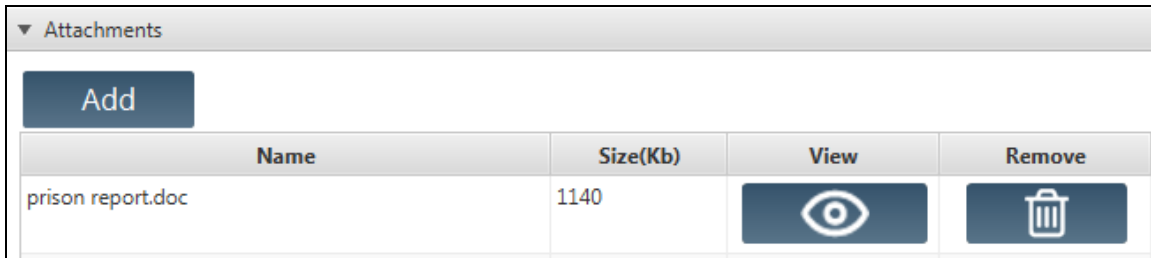
Multiple Martus accounts can exist on the same computer. Click the **New Account** tab to create additional accounts; click **Restore Account** to restore accounts from key backup files.


Creating a Record

1. Select **Create**.
2. Input a *Title*.
3. Select the **Add Contact** icon  to add contacts with whom you want to share the record.
4. Select the **Template Selector** icon  to choose a different template to format 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.

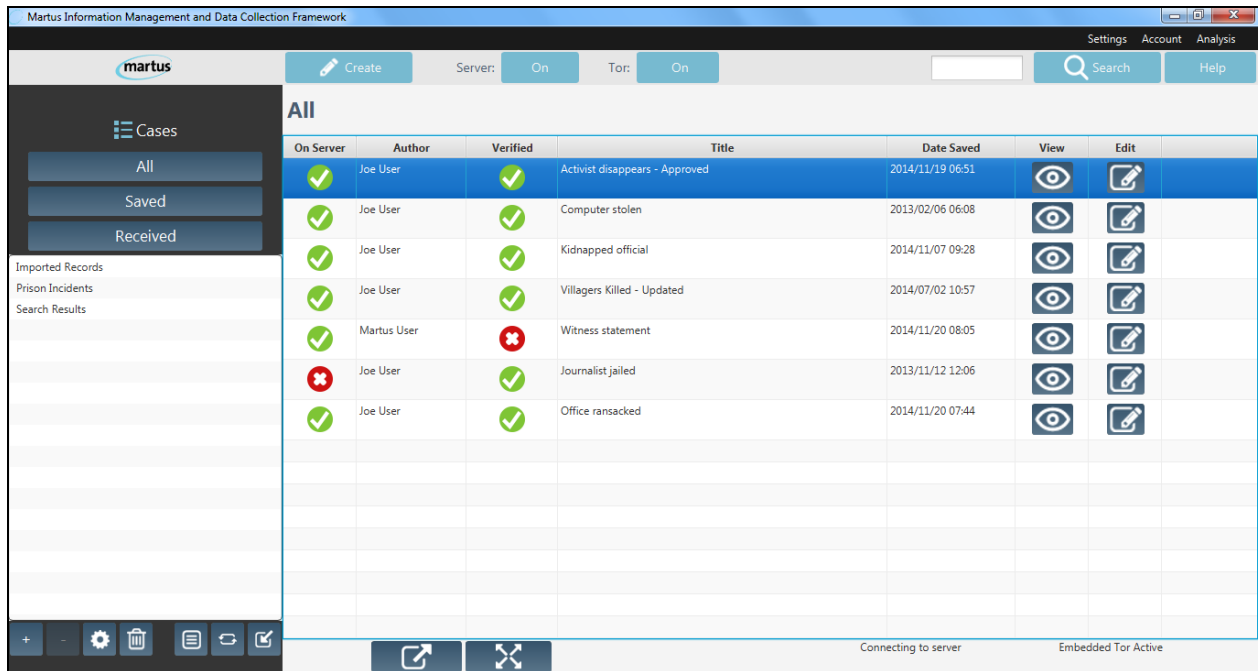


Name	Size(Kb)	View	Remove
prison report.doc	1140		

8. Choose to **Save**, **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**.
- Turn embedded **Tor** use **On** and **Off**.
- Perform a simple text **Search** across all of your records.
- Select **Help** for information about your Martus version and 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 your Case labels (which function like folders) with the **Label Manager**  and organize records with the **Add**  and **Delete**  options.
- Manage deleted records in the **Trash** .
- Use the **Template Manager**  to upload, download and edit customized data entry 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*.

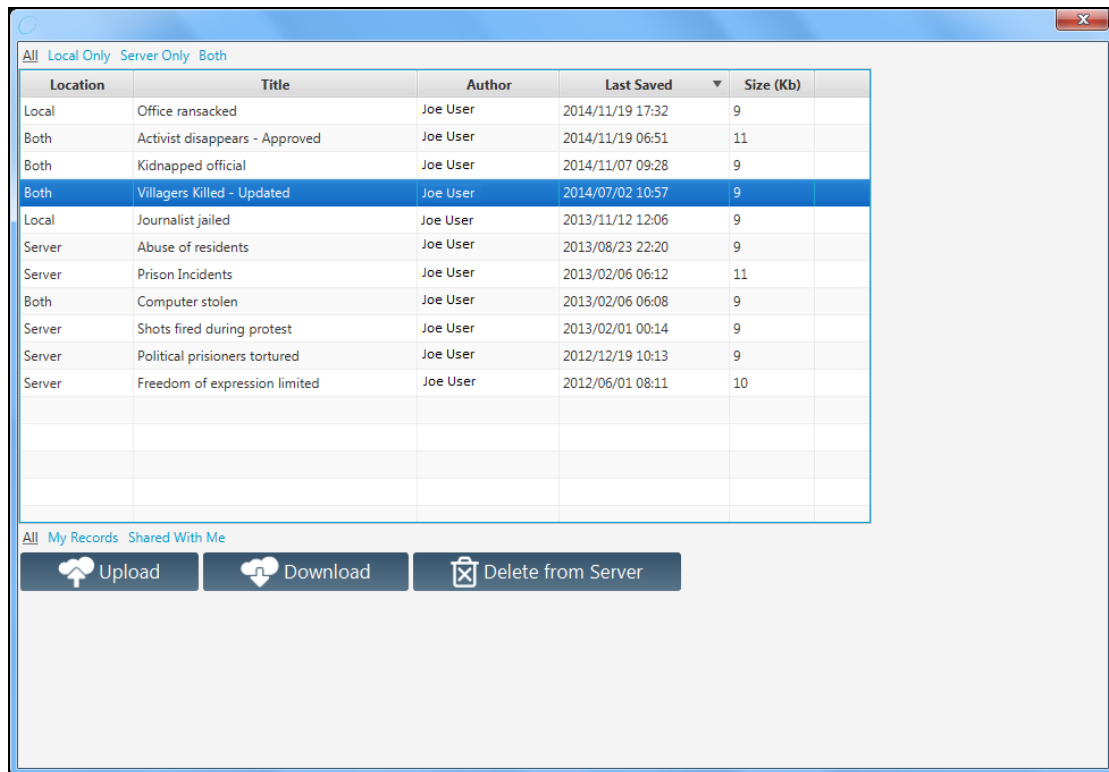


Uploading, Downloading, and Deleting records

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

Note: The **Sync Manager** may not appear immediately, depending on the speed of your Internet connection.



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