Martus™ 5.0
Quick Start Guide

https://www.martus.org
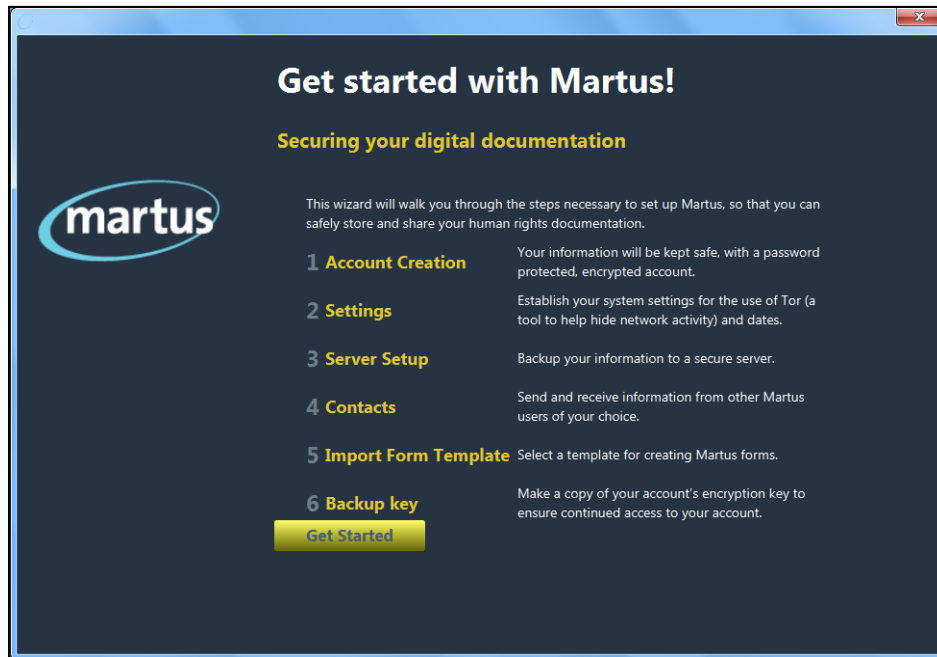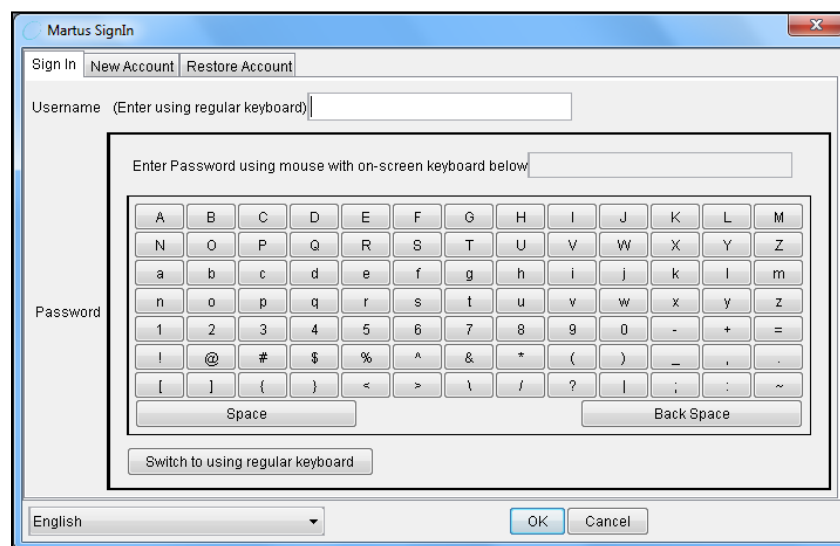
Creating an account

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*.
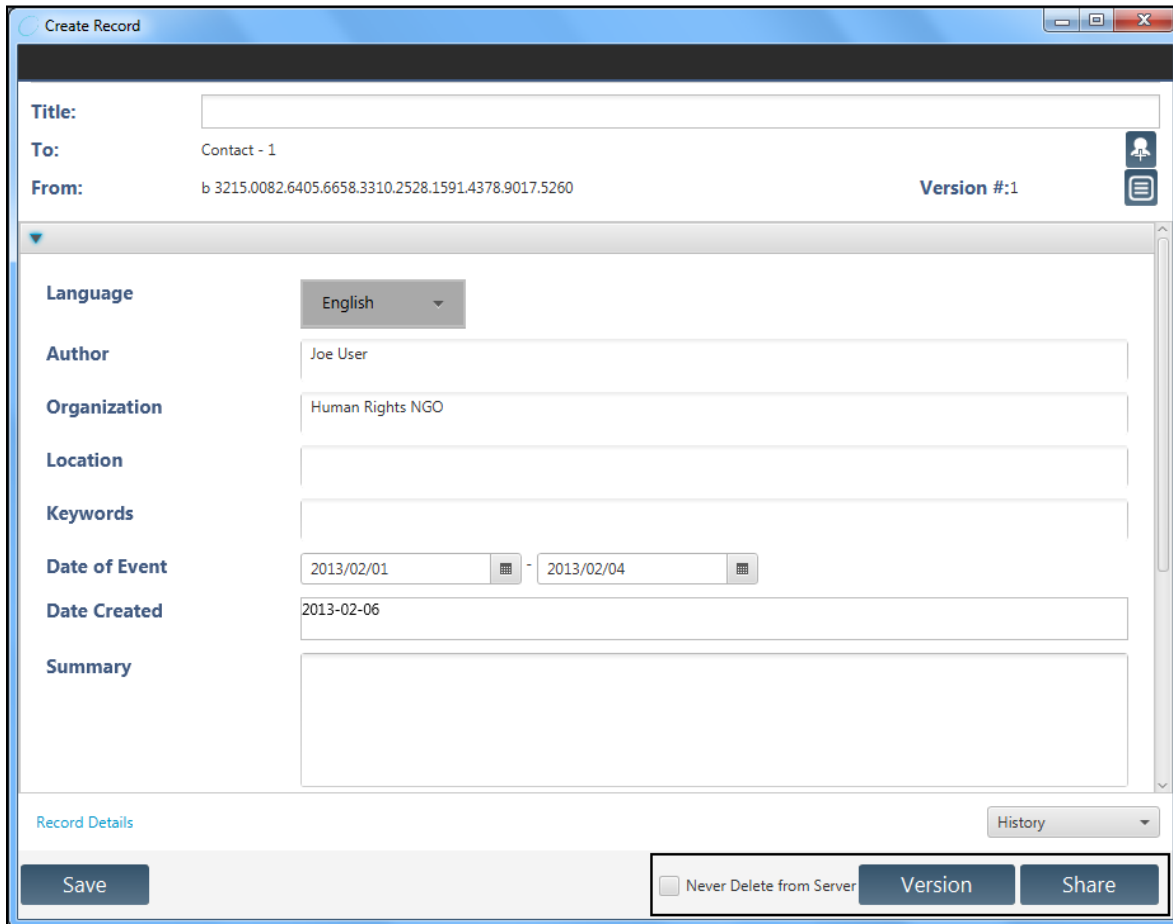

3. The next time you open Martus, input your *username* and *password* in the *Martus Sign In* dialog box to access your account.
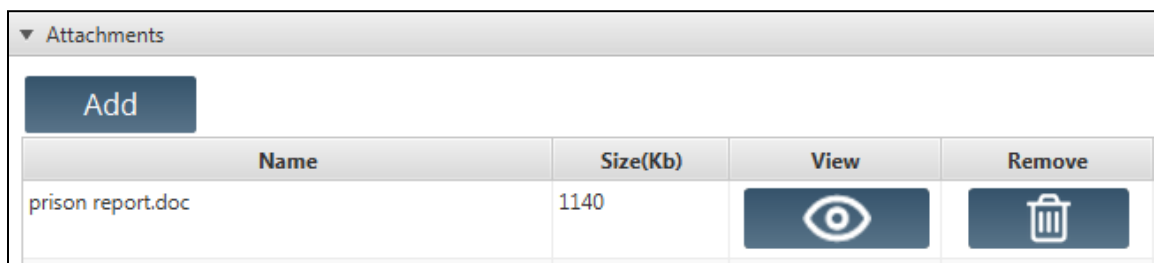

*Multiple Martus accounts can exist on the same computer. Click the **New Account** tab to create additional accounts; click **Restore Account** to restore accounts from backup key files.*

Creating a Record

1. Select **Create**
2. Input a *Title*.
3. Select the **Add Contact** icon ![icon] to add contacts with whom you want to share the record.
4. Select the **Template Selector** icon ![icon] to choose a different template to format your record.
5. Input information in the relevant record fields.

1. Select the **Attachments** tab within the *Create Record* window.
2. Click **Add** and then select the file you want to attach.
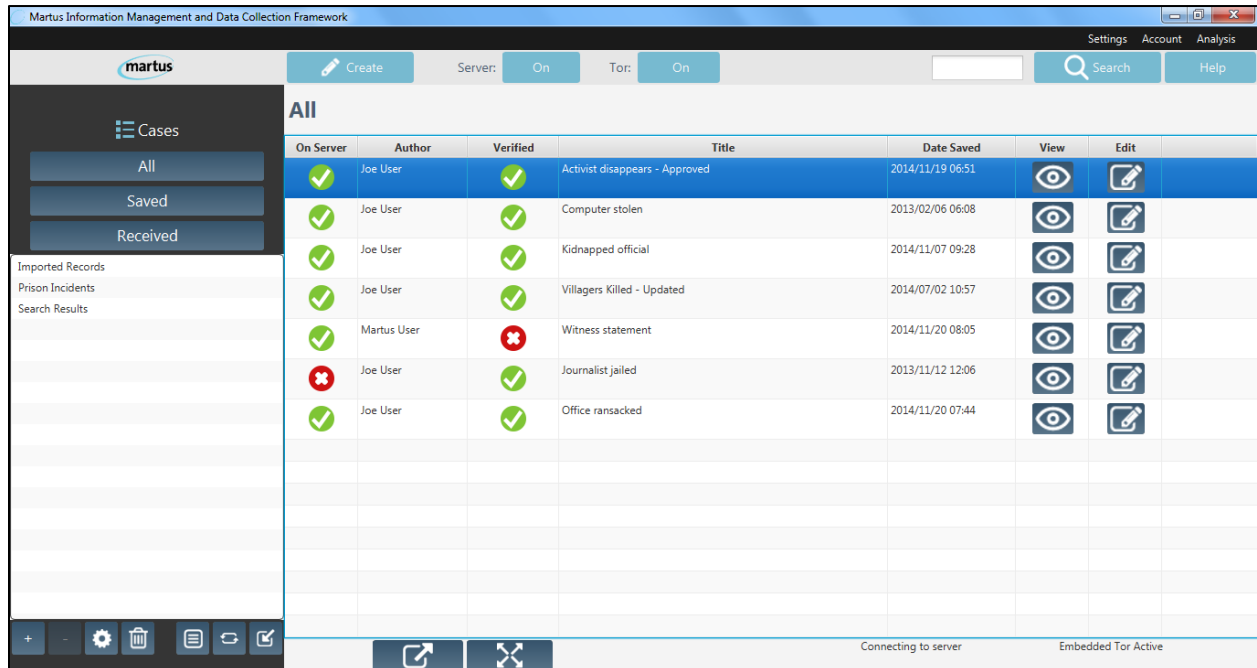

3. Choose to **Save**, **Version**, or **Share**.

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 Cases** 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

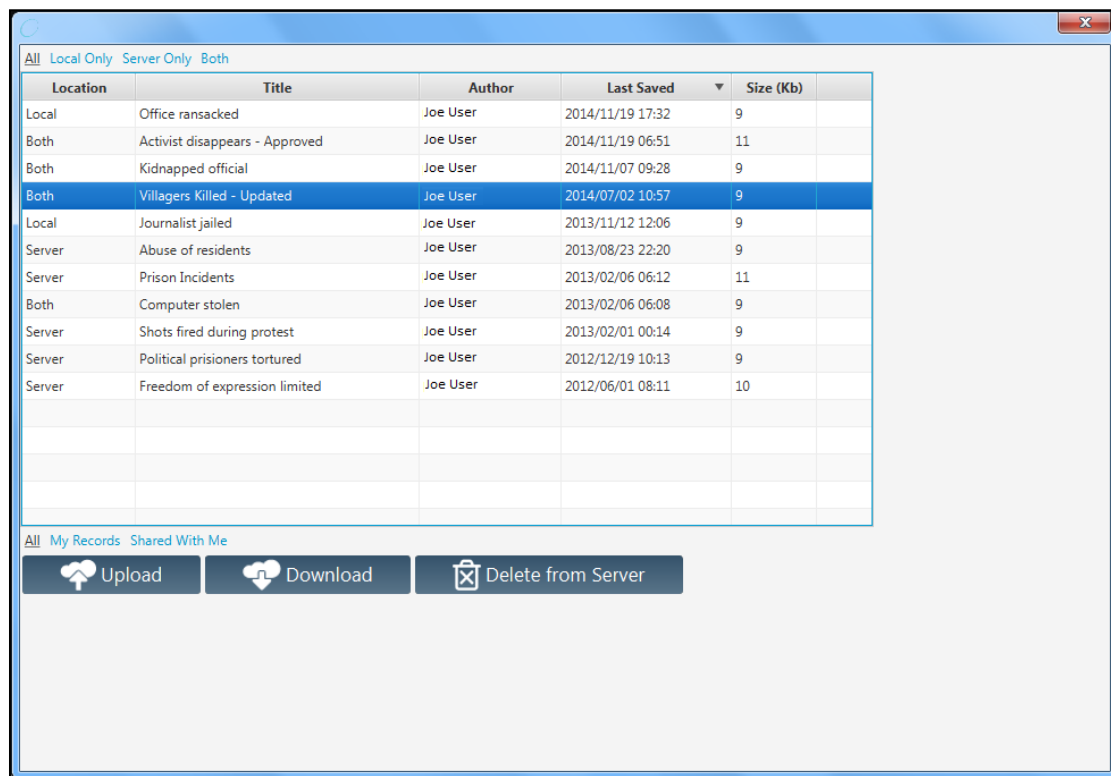The Martus **Sync Manager** allows you to upload and download records to/from the server as well as view where your records are located as well as which records are authored by you or your contacts.
1. Select the **Sync Manager** icon from the Martus sidebar.
2. Select the desired record.

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

All Local Only Server Only Both

Location	Title	Author	Last Saved ▼	Size (Kb)
Local	Office ransacked	Joe User	2014/11/19 17:32	9
Both	Activist disappears - Approved	Joe User	2014/11/19 06:51	11
Both	Kidnapped official	Joe User	2014/11/07 09:28	9
Both	Villagers Killed - Updated	Joe User	2014/07/02 10:57	9
Local	Journalist jailed	Joe User	2013/11/12 12:06	9
Server	Abuse of residents	Joe User	2013/08/23 22:20	9
Server	Prison Incidents	Joe User	2013/02/06 06:12	11
Both	Computer stolen	Joe User	2013/02/06 06:08	9
Server	Shots fired during protest	Joe User	2013/02/01 00:14	9
Server	Political prisioners tortured	Joe User	2012/12/19 10:13	9
Server	Freedom of expression limited	Joe User	2012/06/01 08:11	10

All My Records Shared With Me

Upload   Download   Delete from Server

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