

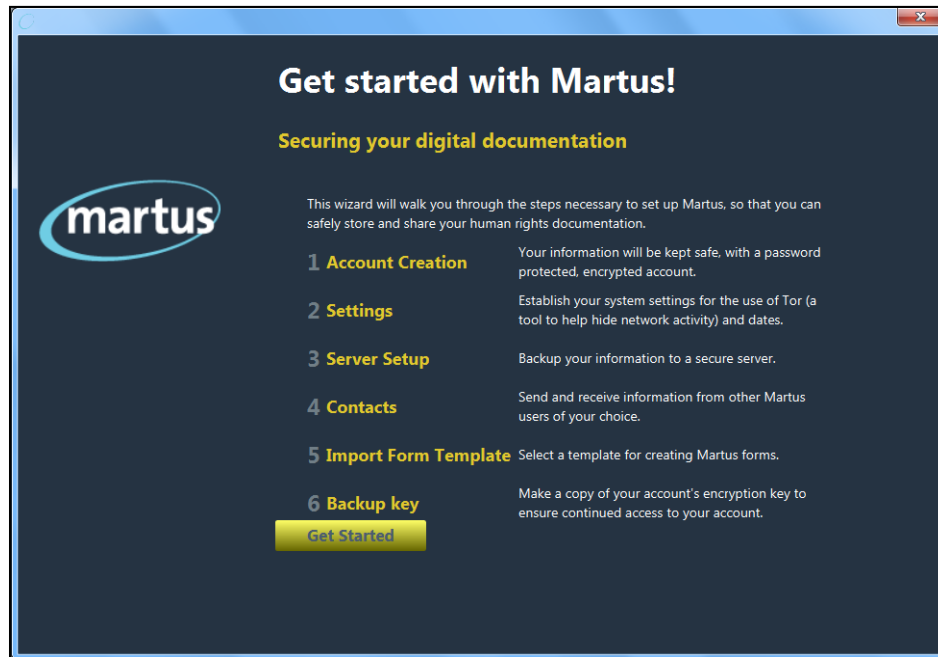


# Martus™ 4.5 Quick Start Guide

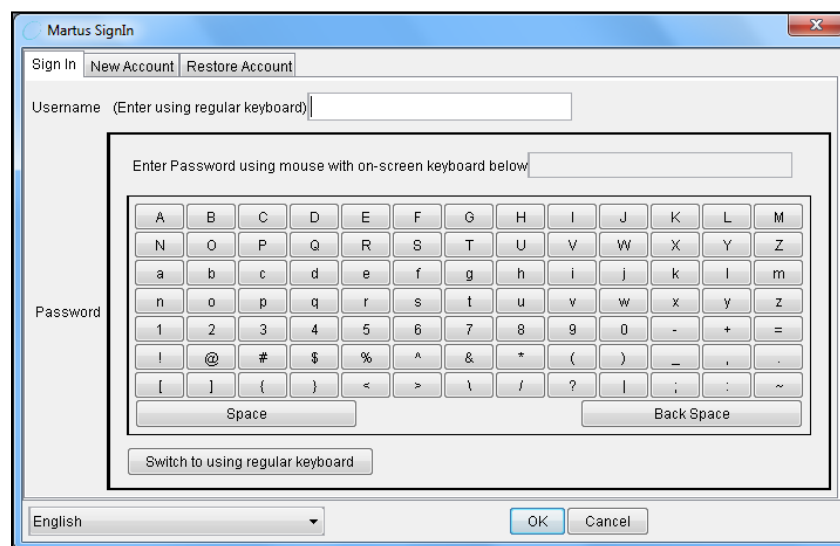
<https://www.martus.org>

## 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*.





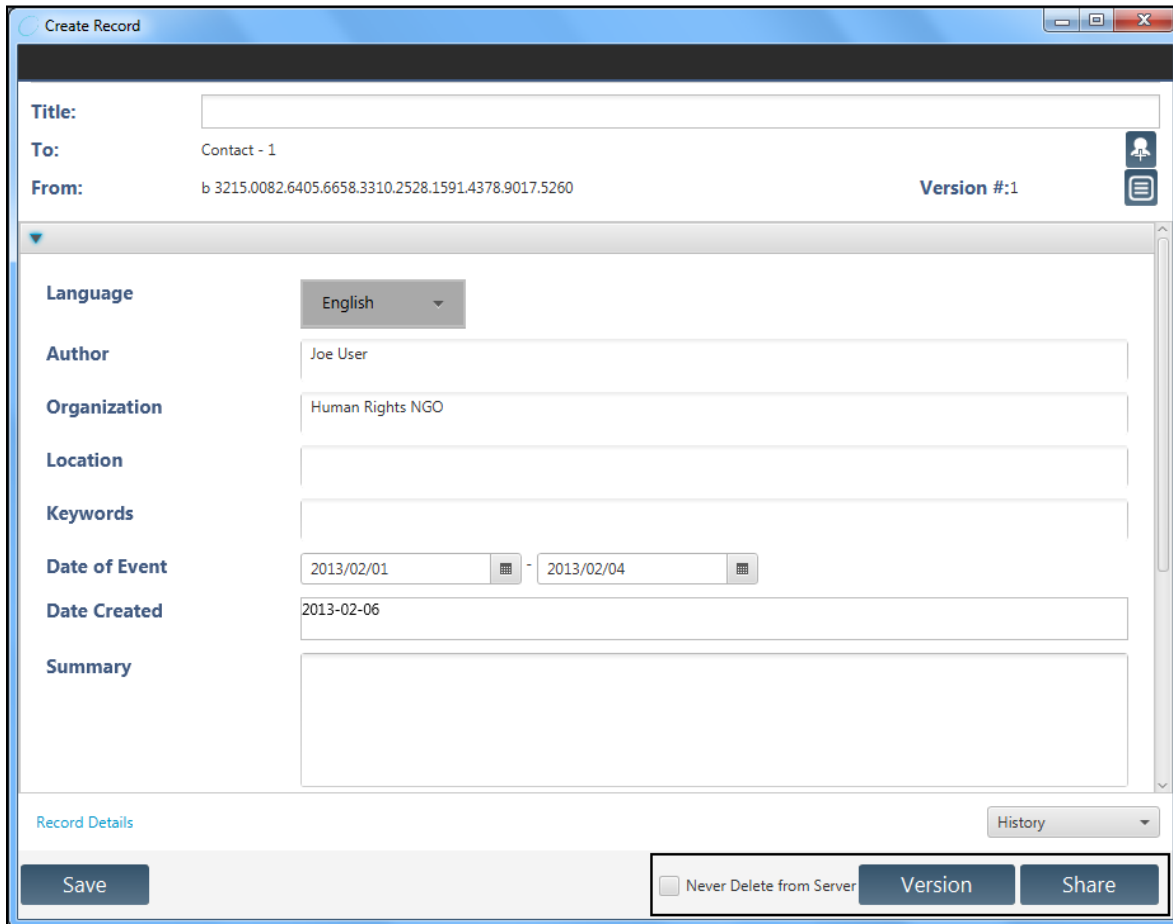
3. The next time you open Martus, input your *username* and *password* in the *Martus Sign In* dialog box to access your account.



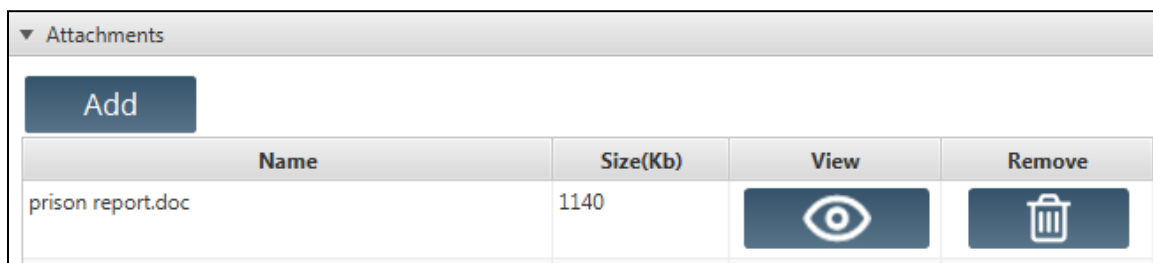
Multiple Martus accounts can exist on the same computer. Click the **New Account** tab to create additional accounts; click **Restore Account** to restore accounts from backup key files.



## Creating a Record

1. Select **Create**
2. Input a *Title*.
3. Select the **Add Contact** icon  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.



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

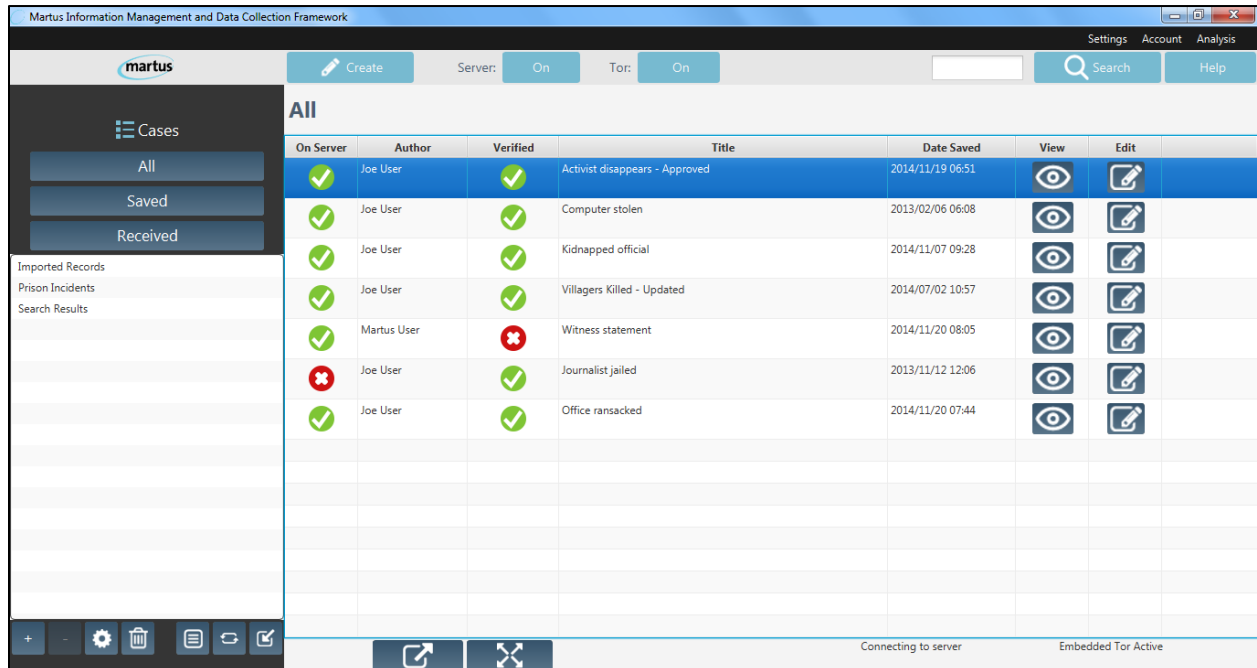


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3. Choose to **Save**, **Version**, or **Share**.

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*.

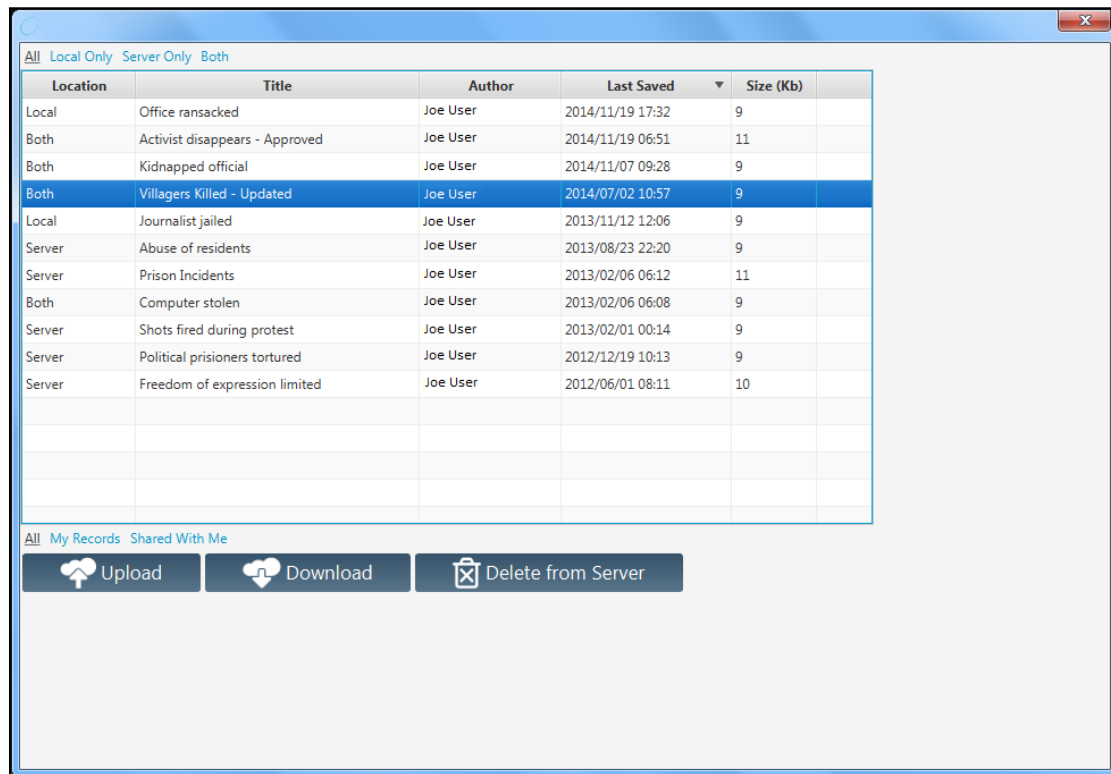


### Uploading, Downloading, and Deleting records

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.



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