

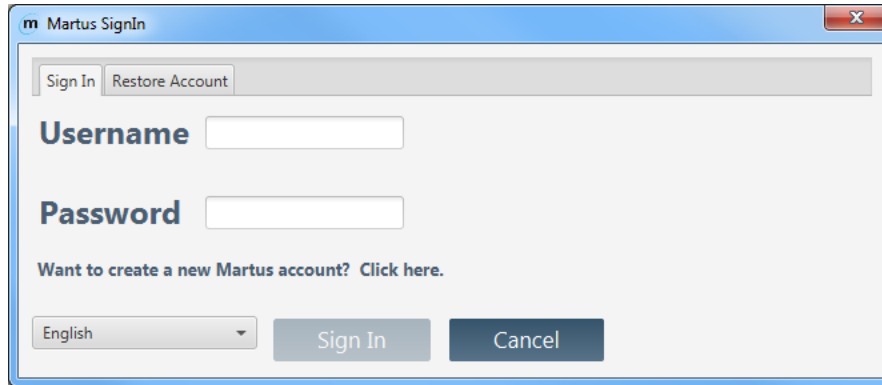


Martus™ 5.1 Quick Start Guide

<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.

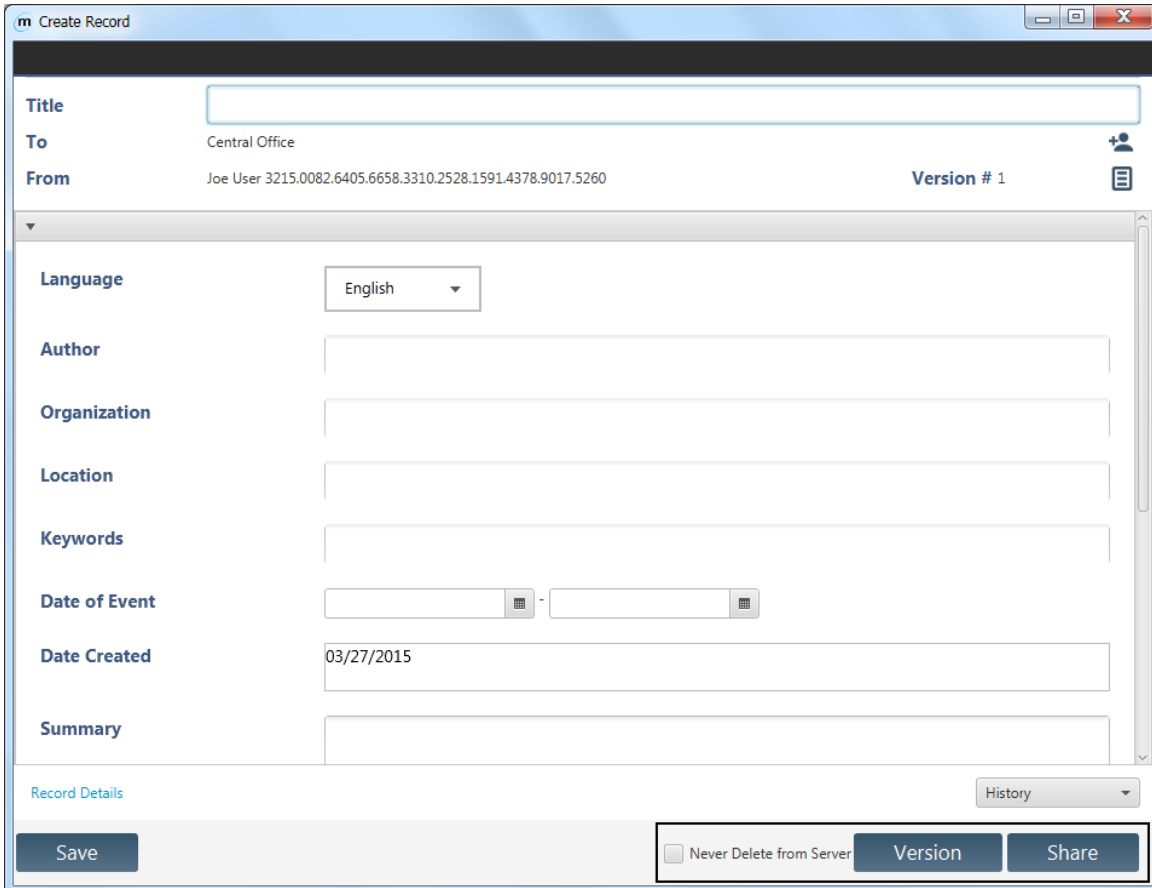


3. The next time you open Martus, input your *username* and *password* in the *Martus Sign In* dialog box to access your account.

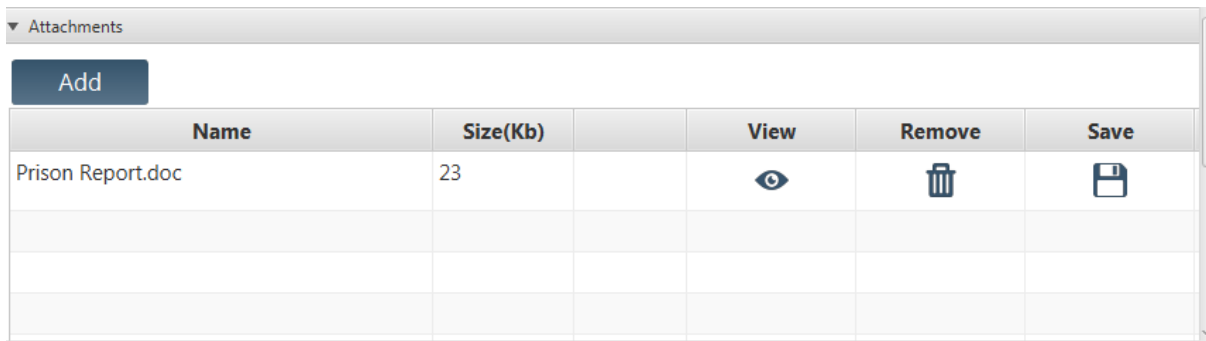
*Multiple Martus accounts can exist on the same computer. Select “Want to create a new Martus account?” to create additional accounts; select **Restore Account** to restore accounts from key backup files.*




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.

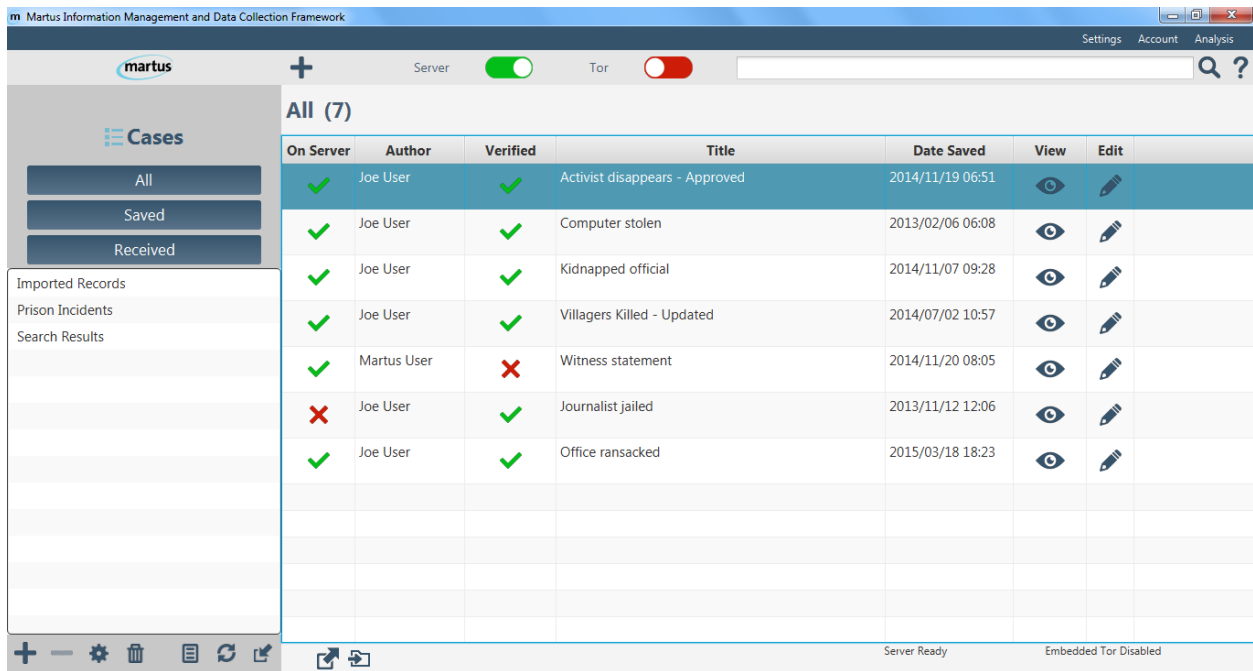


Name	Size(Kb)	View	Remove	Save
Prison Report.doc	23			






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**: 
- 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 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*.

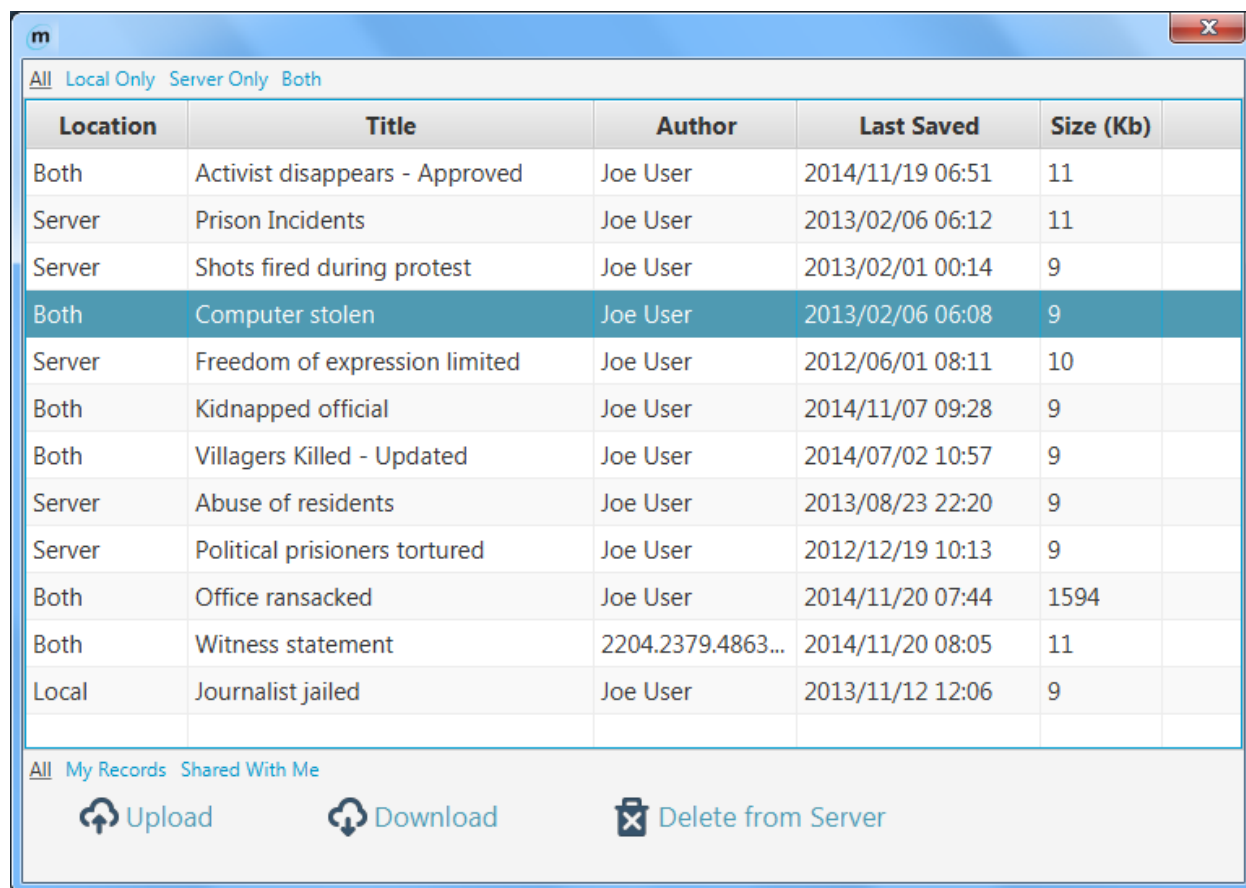
A search field with a magnifying glass icon on the right side.

*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.

A screenshot of the Martus Sync Manager window. It features a table with columns: Location, Title, Author, Last Saved, and Size (Kb). The table lists various records, some of which are highlighted in blue. Below the table, there are tabs for 'All', 'My Records', and 'Shared With Me'. At the bottom, there are three buttons: 'Upload', 'Download', and 'Delete from Server'.

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