

Quatrix Administration Guide

Version 6.0

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This guide covers features and functions that are available to the account owner and administrator. You will learn how to manage your account and users, control sharing, adjust security options site-wide, track your account activity and automate some of your activities.

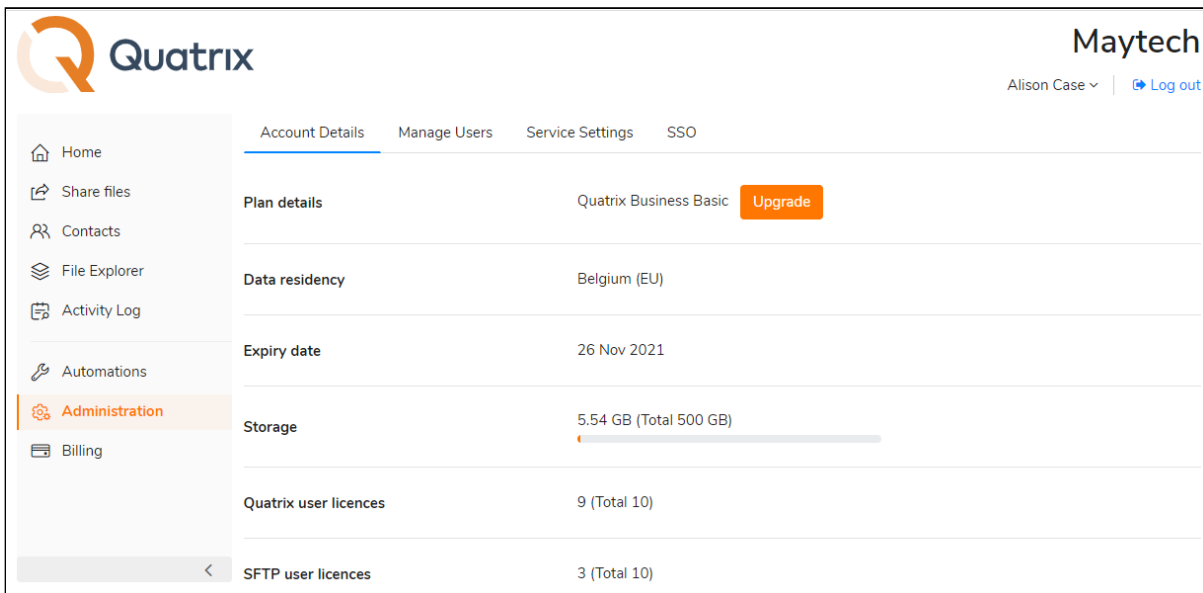
Check out available apps and integrations [here](#).

1 Account Management & Billing

The Administration tab is the central place for management of your account. You can get details of your plan, configure service settings, keep track of your account storage and [manage your users](#).

1.1 Account details

Your account information is displayed on the Account Details sub-tab of the Administration tab. It contains plan details, expiry date, storage amount, number of users allowed for this account, number of SFTP user licences. This information cannot be changed by the account owner or admin, but rather by the Maytech [support](#) team on request.



The screenshot shows the Quatrix Administration interface. The top left features the Quatrix logo. The top right shows the user name 'Alison Case' and a 'Log out' button. The main navigation menu on the left includes Home, Share files, Contacts, File Explorer, Activity Log, Automations, Administration (highlighted), and Billing. The main content area is titled 'Account Details' and contains the following information:

Account Details	Manage Users	Service Settings	SSO
Plan details	Quatrix Business Basic	Upgrade	
Data residency	Belgium (EU)		
Expiry date	26 Nov 2021		
Storage	5.54 GB (Total 500 GB)		
Quatrix user licences	9 (Total 10)		
SFTP user licences	3 (Total 10)		

1.1.1 Storage control

Your storage depends what plan you are using. Quatrix free trial gives you 5 GB of the storage for 5 users. After the upgrade your account storage will change depending on the plan you are going to have. Take a look at the table below.

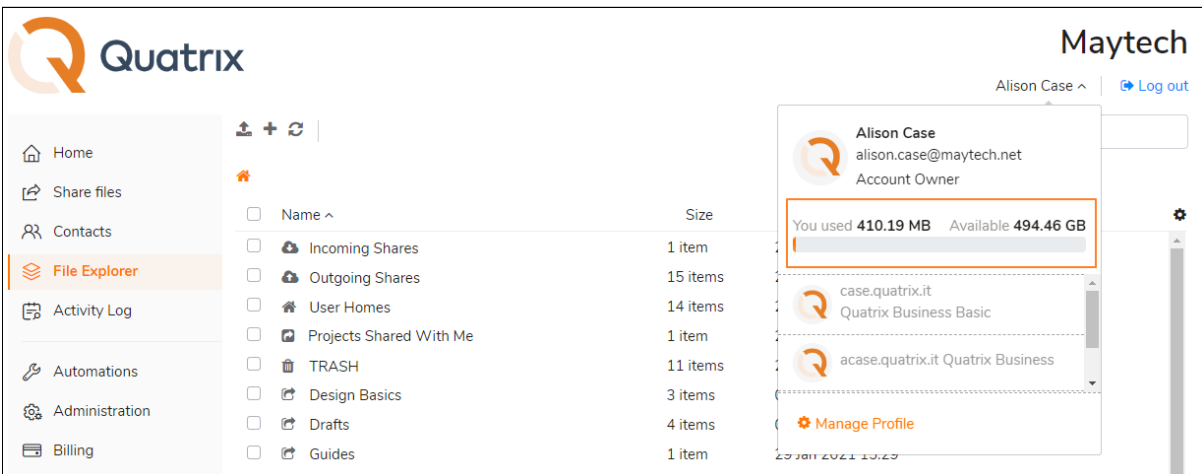
Plan	User Amount	Storage per Account, GB
Quatrix Free Trial	5	5
Quatrix	2 and more*	100 and more

* Minimum number of users: 2 (1 Owner + 1 User).

Maximum number of users: unlimited (You can upgrade up to 249 users on the Billing or Administration tab of your account. For 250+ contact our [Quatrix Customer Care](#)).

1.1.2 Tracking storage

You can track your storage in one click: click on your name at the top right of your account. The status bar shows the amount of used and available storage.



1.1.3 Control the storage of users

Every new user gets unlimited storage by default that equals to your account storage. You can manage your account quota as well as your user quotas within your account quota limit.

To limit or increase the storage of your user follow these steps:

1. Go to the Administration tab and open the Manage users sub-tab.
2. Select the user and click on the Edit icon.
3. Specify the amount of storage you would like to allow for the user and save changes.

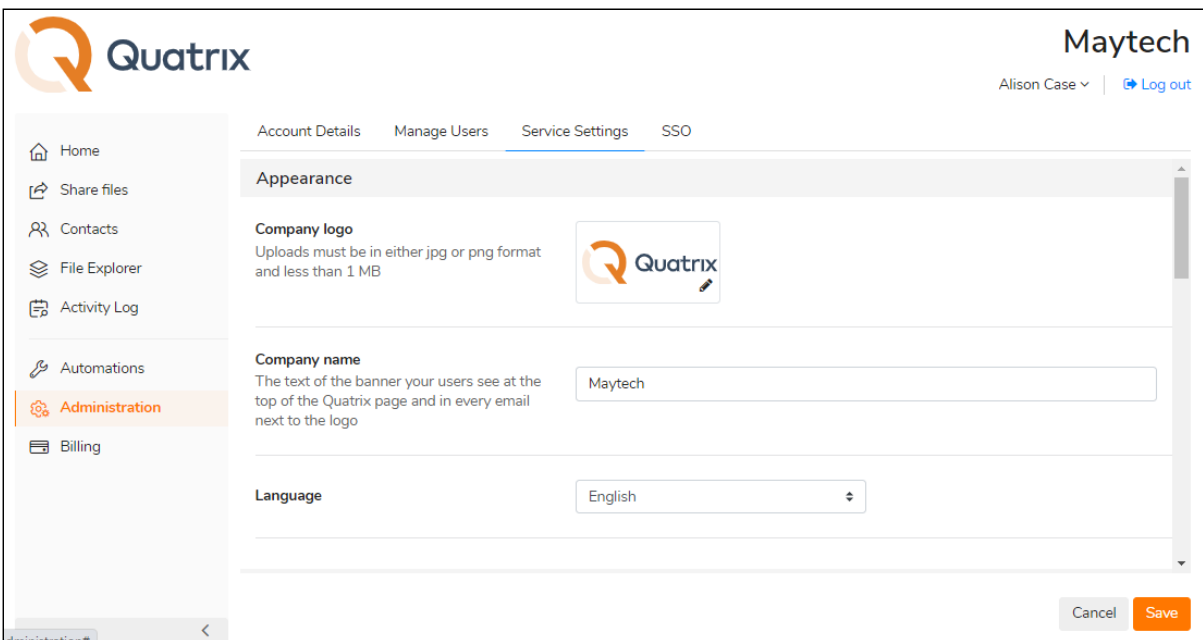
If you would like to increase the storage without adding a new user, contact [support](#).

1.2 Service settings

The Service settings sub-tab of the Administration tab allows you to set your corporate branding, add corporate email footer, specify account language or adjust security settings.

1.2.1 Corporate branding

Every newly created account has the default Quatrix banner text and logo. If you would like to have your corporate branding on every share, go to the Service settings sub-tab and edit the default settings with your corporate banner, logo and email footer.

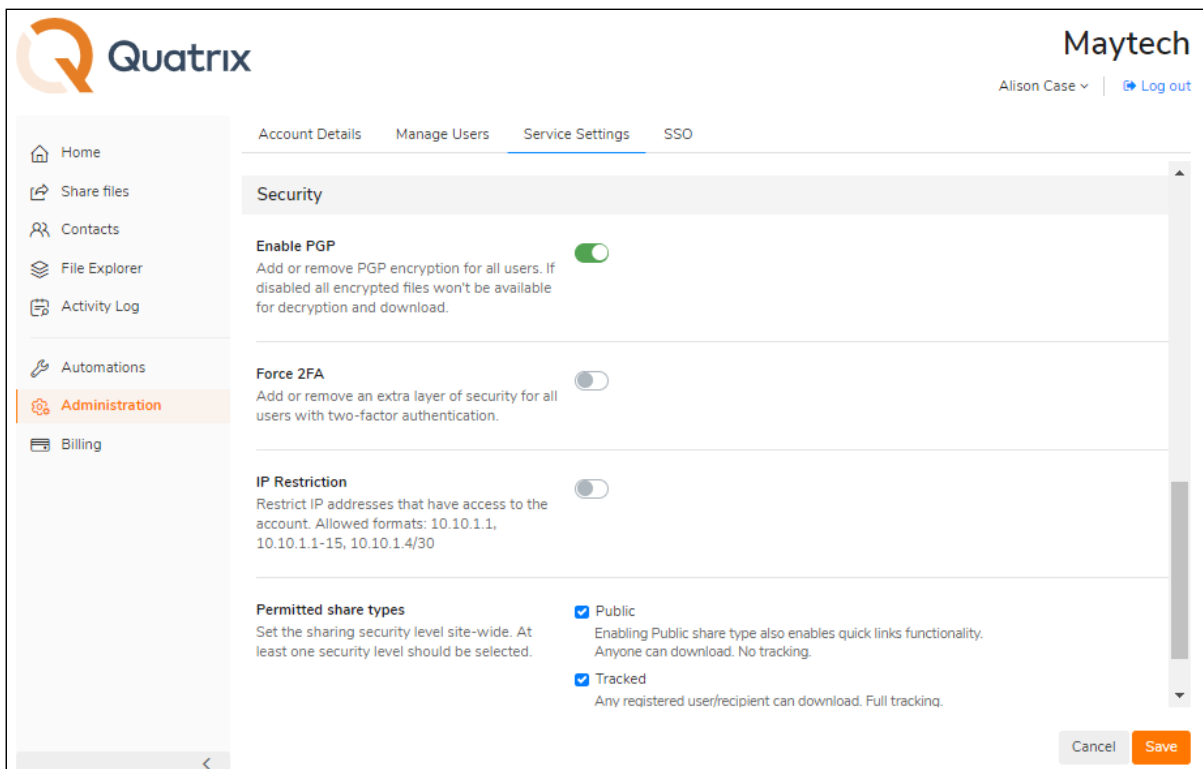


1.2.2 Account language settings

English is adjusted as a default language for the account. If you would like to switch to Chinese, update the language under Appearance section. The language change applies to all users of your account. However, the user can change the language for personal display while managing the profile in the General sub-tab.

1.2.3 Security settings

You can adjust security options for your shares site-wide:



- Enable encrypted file sharing ([PGP](#)) for all users,
- Add extra layer of security with two-factor authentication ([2FA](#)),
- [Restrict IP addresses](#) to have access to your account,
- Set permitted share types (public, tracked, restricted)
 - **Public** - anyone with the link can download the files. Your tracking will show the time and IP address of downloads but will not identify the user.
 - **Tracked** - any user registered on the Quatrix network can download, this may be useful where the links may be forwarded to others working on the project. Your tracking will identify the user for each download event.
 - **Restricted**- only recipients of the email will be able to download, links forwarded outside the recipient list will not work. Your tracking will identify the user for each download event.

Learn more about security and privacy for your account [here](#).

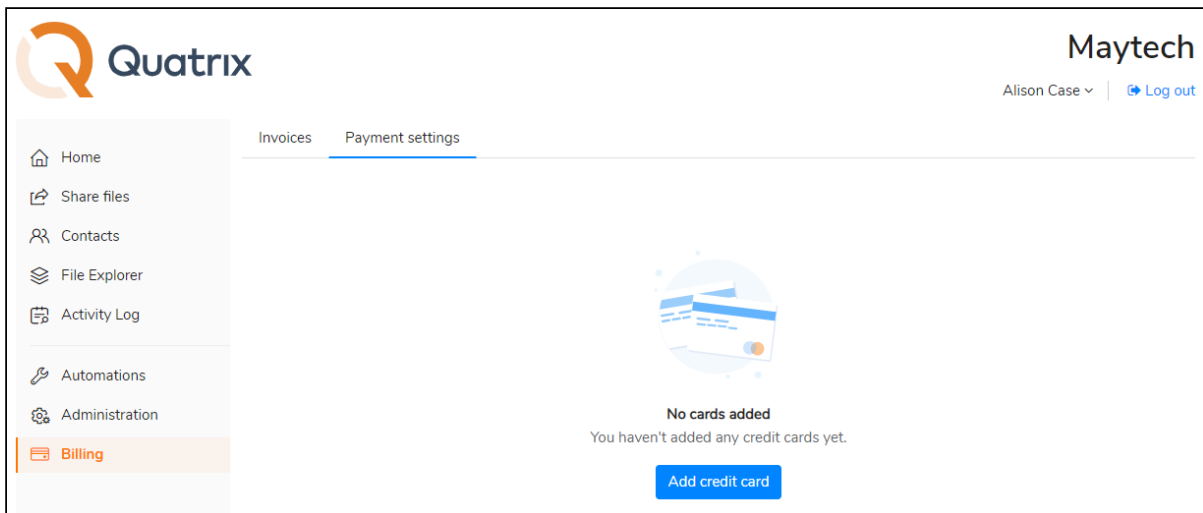
1.3 Billing

The Billing tab is the central place for your billing needs. The account owner or any user with Billing rights can update billing information, check renewal dates, upgrade or downgrade the billing plan, track and view invoices on the Billing tab.

If you would like to delegate Billing to your user, read more [here](#).

1.3.1 Update your billing info

You can access your billing information on the Payment settings sub-tab of the Billing tab. It provides the ability to add credit cards and update their info.

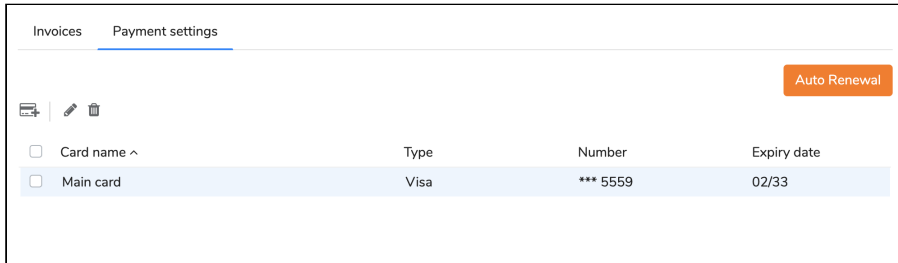


Click on Add credit card button, specify your credit card details and save it. All your saved cards are listed on the Payment settings sub-tab. To update details, select the card and click on the Edit icon from the top menu.

You can edit only the credit card name.

To delete the card, tick the check box next to it, and select an appropriate option from the top menu.

You can turn on the auto-renew feature for your account by clicking on the Auto Renewal button above the list of credit cards.



To enable automatic billing, tick the Active check box on the [Auto Renewal form](#), select the card and save. As soon as automatic account renewal is activated, you will be notified of it. To disable it, uncheck the Active box.

1.4 Upgrade or downgrade your billing plan

Details of your billing plan can be retrieved from the last paid invoice on the Billing tab.

You can change your plan either on the Billing tab, or on the Administration tab by clicking on the Upgrade button.

When upgrading your plan to a higher package e.g. increase a number of users or storage amount, or add Enterprise Security Module, changes will be made immediately after the payment. You will be issued a pro-rated refund for your previous plan and charged for a new one. In this case the billing cycle dates will be changed.

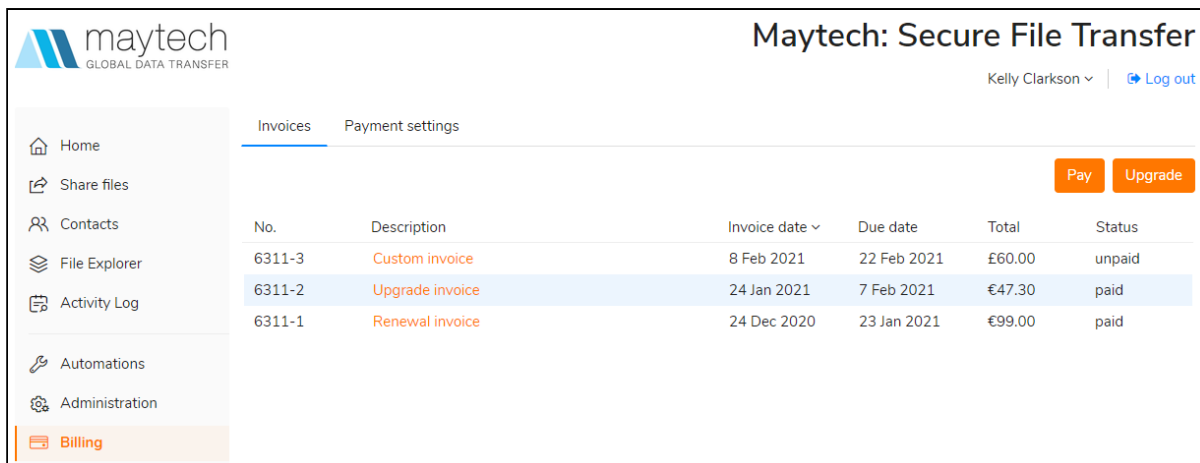
When downgrading your plan, no refund is issued. Changes take effect immediately and your billing plan is changed.

1.4.1 Available billing cycles

You can adjust a monthly or annual billing cycle for your Quatrix account. The subscription will be renewed at the end of each billing cycle as soon as the payment is received. To learn the billing due date information, go to the Account details sub-tab of the Administration tab or to the Billing tab. You can save up to 15 % (2 free months) if you pay annually compared to paying monthly.

1.5 Track and pay invoices

All your paid and unpaid invoices are displayed on the Invoices sub-tab of the Billing tab.



The screenshot shows the Maytech Billing interface. The header includes the Maytech logo (GLOBAL DATA TRANSFER) and the title "Maytech: Secure File Transfer". The user name "Kelly Clarkson" and a "Log out" link are visible. The navigation menu on the left includes Home, Share files, Contacts, File Explorer, Activity Log, Automations, Administration, and Billing (highlighted). The main content area shows the "Invoices" sub-tab with a table of invoices. The table has columns for No., Description, Invoice date, Due date, Total, and Status. There are "Pay" and "Upgrade" buttons in the top right corner of the table area.

No.	Description	Invoice date	Due date	Total	Status
6311-3	Custom invoice	8 Feb 2021	22 Feb 2021	£60.00	unpaid
6311-2	Upgrade invoice	24 Jan 2021	7 Feb 2021	€47.30	paid
6311-1	Renewal invoice	24 Dec 2020	23 Jan 2021	€99.00	paid

Invoices are displayed with the status - paid or unpaid, invoice creation and due date, and the total amount. To view the invoice contents, double-click on it. The invoice will be displayed in this way:

Renewal invoice ✕				
Invoice No.:	6311-1	Status:	paid	
Invoice Date:	24 Jun 2019	Alison Case		
Payment Date:	24 Jun 2019	Maytech		
Coverage Period:	01 Jan 2021 - 31 Dec 2021	Ukraine		
				-
				79000
No.	Description	Quantity	Discount	Total
1	Quatrix Business Custom	1	€0.00	€0.00
2	Quatrix Business Custom - Max Users	25	€0.00	€99.00
3	Quatrix Business Custom - Disc Quota	10 GB	€0.00	€0.00
4	Enterprise Security Module	1	€0.00	€0.00
VAT 0%:				€0.00
Total:				€99.00
<input type="button" value="Cancel"/> <input type="button" value="Download PDF"/>				

You can view the invoice in pdf format by clicking on the Download PDF button.

To pay an outstanding invoice, follow these steps:

1. Open the invoice, view the details and click on the Pay button.
2. Provide payment information or confirm the existing payment method on the Payment Details dialog.

Payment Details ✕

Invoice ↑

Renewal invoice No. 195-1 €79.00

Credit Card Information: ↑

Card Number Add new card

Clicking "Pay" means you agree to Maytech's [Terms and Conditions](#). You agree to receiving occasional product related emails and special offers. You can unsubscribe at any time. Please be assured Maytech does not share your information with third-parties.

3. Confirm your payment by clicking on the Pay button.

As soon as your online payment is processed, you will be notified of it in the email.

If you have any questions about billing transactions, feel free to contact our [Billing team](#).

1.6 Account suspension and deletion

1.6.1 Quatrix Free Trial

You get a 14-day free trial account when you register on our website. You can upgrade to a paid account during this trial period. If your account is not upgraded by the end of the trial period, your trial account will be suspended. On suspension, you still have 14 days after suspension to upgrade your account. If it is not done, your account and all your data on Quatrix will be deleted. To unsuspend your Quatrix Free Trial account contact servicedesk@quatrix.it.

1.6.2 Quatrix Paid Plan

When you purchase Quatrix account on our website, or upgrade your free trial account, you can specify the billing frequency - annually or monthly. Besides you can adjust auto renewal of your account depending on your billing cycle.

If your account is not renewed,

- the account will be suspended in 7 days after the expiry date and all users won't be able to access it.
- the account as well as all your files and data will be deleted in 28 days after expiry date and can't be restored.

You can unsuspend your account anytime until it is deleted. To unsuspend your Quatrix account, go to the Billing tab and pay an outstanding invoice (see the steps above). Your account will be unsuspended, when the payment is received.

1.6.3 Enterprise Security Module

The given module includes the following security features:

- SFTP activation
- Two-factor authentication
- SSO (single sign-on) activation
- PGP encryption
- GDPR data processing agreement
- API activation

The free trial includes Enterprise Security Module. For details on pricing for paid plans, contact sales@maytech.net.

1.7 User with billing permission

If you would like to grant someone permission to manage invoices for your Quatrix account, you should keep in mind what user class your future billing manager belongs to. In case you want to have the administrator that tracks and manages payments, besides administration rights there will be Billing tab available for invoice management. Pro or associate users can cover invoices together with their permissions. The table below could assist you to make a decision what user to choose as a billing administrator.



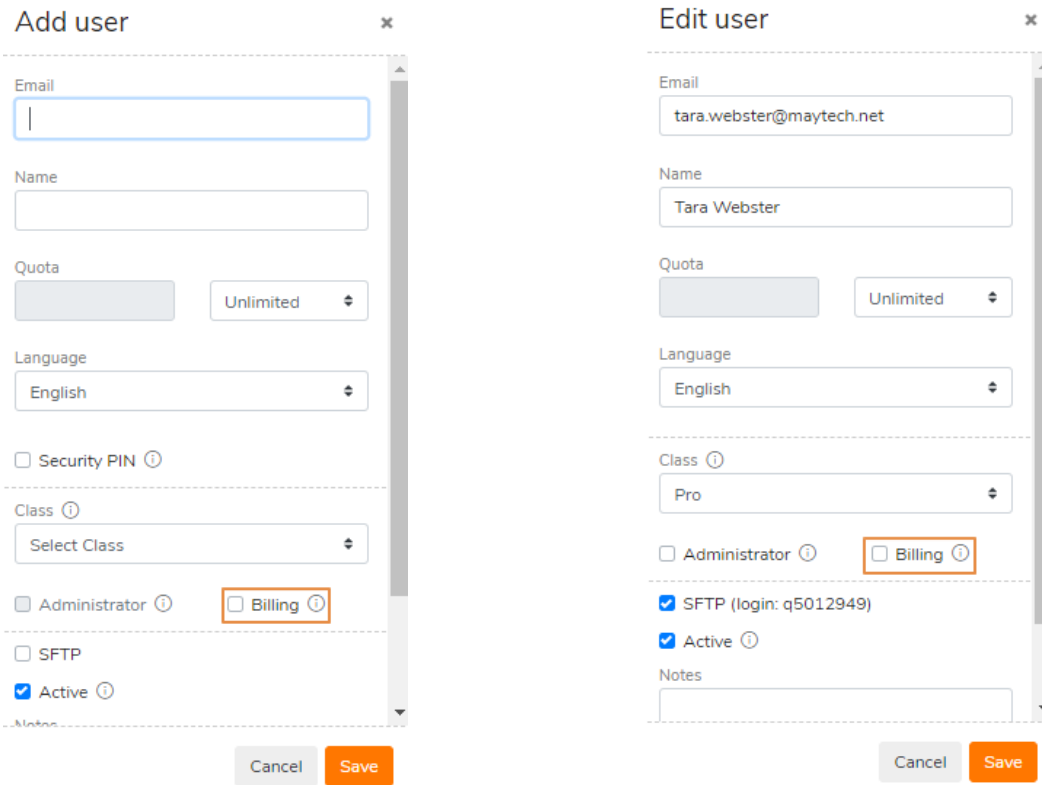
	Jailed	Associate	Pro	Admin
File sharing	✘	Share with <ul style="list-style-type: none"> • Pro users 	Share with <ul style="list-style-type: none"> • Pro users • Associate users • Site contacts • Personal contacts 	Share with <ul style="list-style-type: none"> • Pro users • Associate users • Site contacts • Personal contacts • Admins
File/folder management	✘	View and manage <ul style="list-style-type: none"> • personal incoming and outgoing files/folders • Projects shared with me folder • shared with Pro users project folders Upload files/ folders Create folders and convert them to Project folders	View and manage <ul style="list-style-type: none"> • personal incoming and outgoing files/folders • Projects shared with me folder • shared with other users project folders Upload files/ folders Create folders and convert them to Project folders	View and manage <ul style="list-style-type: none"> • personal incoming and outgoing files/folders • Projects shared with me folder • shared with other users project folders Upload files/ folders Create folders and convert them to Project folders View and manage the User Homes folder (files and folders of users added by the admin)



	Jailed	Associate	Pro	Admin
User/ contact management	✘	View <ul style="list-style-type: none">• Pro users	View <ul style="list-style-type: none">• Pro users• Associate users• Jailed users• Site contacts Create and manage personal contacts	View, create and manage <ul style="list-style-type: none">• Pro users• Associate users• Jailed users• Site contacts• Personal contacts• Admin
Activity history tracking	✘	Only personal	Only personal	Personal and all users activity tracking
Billing	✘	Invoice management	Invoice management	Invoice management

1.7.1 How to assign a Billing permission

You can grant the access to Billing while adding or editing the user on the Administration tab.



If you delegated Billing to your users, don't forget to add their emails to the [Billing BCC](#) on the Service Settings sub-tab of the Administration tab so that they could receive emails about billing transactions.

2 Roles and Permissions

A user's role determines what actions can be performed in the account. The table below displays a list of available roles.

Administrative roles	User roles	Contact roles
<ul style="list-style-type: none"> Account owner Administrator 	<ul style="list-style-type: none"> Pro Associate Jailed 	<ul style="list-style-type: none"> Site Personal

Every added user to the account requires additional user license except contacts (they don't need a licence to receive a file or send files back to you).

2.1 Administrative roles and what they can do

The account is originally set up by the account owner and can be managed by multiple admins.

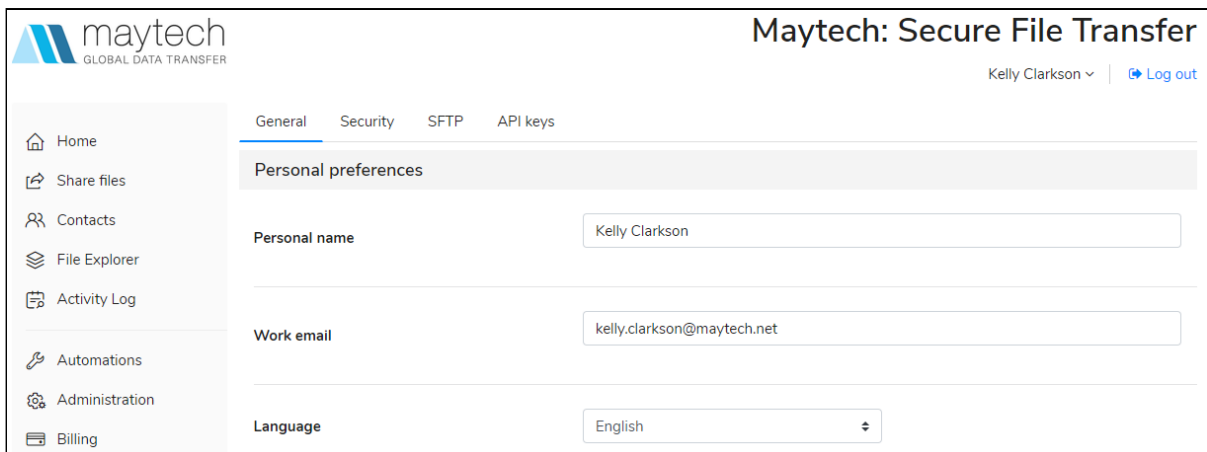
Account owner

The account owner is the top administrator of the account that has access to all Quatrix [features](#) and can purchase more users for the account. They own and manage the account for as long as they are the account owner. At any point, the ownership rights can be transferred to someone else in the account.

Transferring the account ownership

Follow the steps bellow to complete a transfer:

1. Click on your name at the top right of the account and click on the Manage profile link.
2. Change your email and name under Personal preferences sub-tab.



The screenshot shows the 'Maytech: Secure File Transfer' user interface. At the top left is the 'maytech GLOBAL DATA TRANSFER' logo. At the top right, the user's name 'Kelly Clarkson' is displayed with a dropdown arrow and a 'Log out' link. Below the logo is a navigation menu with items: Home, Share files, Contacts, File Explorer, Activity Log, Automations, Administration, and Billing. The main content area has tabs for 'General', 'Security', 'SFTP', and 'API keys'. The 'General' tab is active, showing the 'Personal preferences' section. It contains three input fields: 'Personal name' with the value 'Kelly Clarkson', 'Work email' with the value 'kelly.clarkson@maytech.net', and 'Language' with a dropdown menu set to 'English'.

3. Save changes.

Your new account owner will be notified of the transfer in the email.

If you transfer the ownership rights, you won't be able access the account. Ownership transfers are immediate and can't be undone.

Only the account owner controls invoices for Quatrix account. The Billing rights can be delegated to any user in the account except contacts. [Read more](#) to determine what user role would be the best to perform invoice management in your account.

Administrator

The account admin can [manage users](#), groups, [account](#) storage and access control. Admins can delegate admin rights to other users. Billing is not accessible to admins, but this permission can be granted while editing the admin on the Administration tab.

How to assign an Administrator role?

There are 2 ways to add an administrator to your account: either while adding a new user or editing an existing one. Follow the steps below to create an administrator:

1. Go to the Administration tab and open Manage users sub-tab.
2. Click on the Add user icon from the above menu and specify your admin's name and email, (or Select the user you would like to make an administrator and click on the Edit icon).
3. Tick the check box next to the Administrator option and save changes.

As soon as you administrator is created, you will see the Administrator icon next to your newly created administrator in the list of all users.

If you have several departments in your company, you can add multiple admins to manage their own teams and their sharing.

You can demote the user with the Administrator role afterwards by clearing the Administrator check box.

Account owners can promote and demote administrators and other users.

Administrators can promote users and demote other administrators, but they cannot demote the account owner.

Owner vs Admin permissions

	Owner	Admin
Share		
Tracking		
Contacts		
File Explorer		

Activity Log	✓	✓
Automations	✓	✓
Administration	✓	✓
Billing	✓	✗
Profile Management	✓ Transfer ownership rights	✓
SFTP	✓ Buy SFTP	✓

The table above demonstrates that the administrator has almost the same rights as the account owner with the exception of invoice management, transfer of ownership rights and purchase of SFTP module.

2.2 User roles and their permissions

A user is anyone you want to have regular access to your Quatrix service - there are three types of users:

- Pro users can browse folders and share to any of your users or to their personal contacts who don't need a licence to download (normally your employees).
- Associate users can only use your service to share files back to your Pro Users - great for external partners who need to regularly feed data into your organisation.
- Jailed users have access to files from Projects Shared With Me.

The table below displays permissions depending on the role:

	Jailed	Associate	Pro
Sharing	✗	Share with: <ul style="list-style-type: none"> • Pro users 	Share with: <ul style="list-style-type: none"> • Pro users • Associate users • Site contacts • Personal contacts



	Jailed	Associate	Pro
Tracking			
File/ folder management	 No visibility of any files or folders, except the Projects shared with me folder	 View and manage: <ul style="list-style-type: none"> personal Incoming and Outgoing files/folders Projects shared with me folder shared with Pro users project folders Upload files/folders	 View and manage: <ul style="list-style-type: none"> personal Incoming and Outgoing files/folders Projects shared with me folder shared with other users project folders Upload files/ folders
Project folder management	*		
User and contact management		View: <ul style="list-style-type: none"> Pro users No contact visibility and management	View: <ul style="list-style-type: none"> Pro users Associate users Jailed users Site contacts Create and manage personal contacts
Security options (2FA, PGP**, SFTP**)			
Profile management	 except personal email	 except personal email	 except personal email

* - if permissions are granted.

** - if enabled for account.

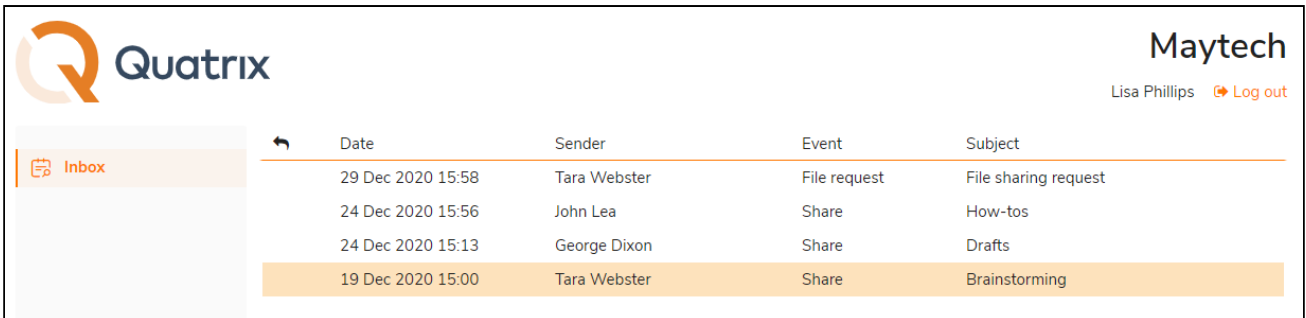
2.3 Contacts in the account


Contacts are grouped into 2 categories: personal and site. The major difference between them is their visibility by other account users.

- Personal contacts are visible to only their creators. Permissions to have a list of personal contacts are granted to account owners, administrators and Pro users.
- Site contacts are created and managed by the account owners or administrators and are visible to their creators as well as Pro users.

If you shared files with someone who is new in Quatrix account, their email will be automatically added as Personal contact to the Contacts list.

As contacts are not licensed in Quatrix, they cannot log in to Quatrix and share files with other account participants. But they can only get shares and file sharing requests from Quatrix users. In order to make one repository of files and file requests for contacts we released Contact's Home Page. This page displays the Inbox tab with files and file requests from users. To log in to this page the contact should follow the link from the file sharing email and register at first. Having logged in the contact can download or return files.



	Date	Sender	Event	Subject
	29 Dec 2020 15:58	Tara Webster	File request	File sharing request
	24 Dec 2020 15:56	John Lea	Share	How-tos
	24 Dec 2020 15:13	George Dixon	Share	Drafts
	19 Dec 2020 15:00	Tara Webster	Share	Brainstorming

If the contact receives shares from several Quatrix accounts, there will be different Contact's Home pages displaying shares and file requests of each account separately. The contact can log in to these pages with the same password.

Check out [Contact Management](#) to learn more how to add, edit or delete a contact.

How to share encrypted files with your contacts?

If you would like to share encrypted files with your contacts, you need to get PGP keys generated by them. Go to the Contacts tab, select the contact(s) and send PGP key generation request. As soon as your contact generates PGP keys, you can share encrypted files.

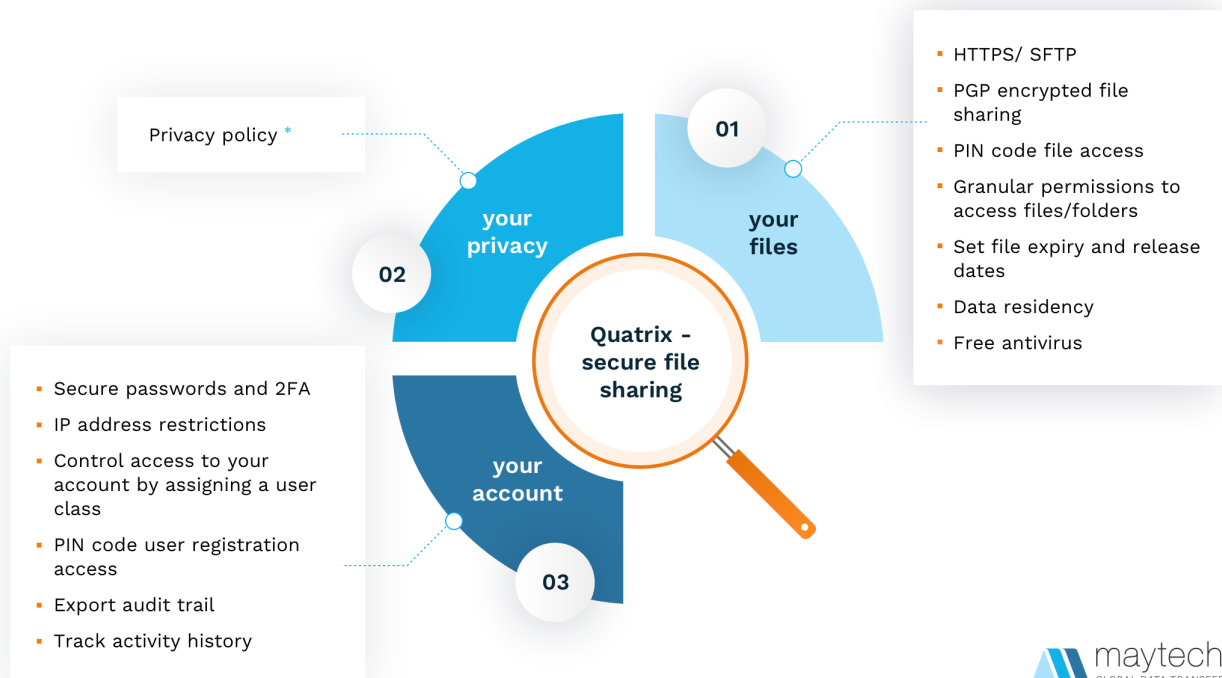
How to convert your contact to a user?

Only account owner or admin can convert a contact to a user. The conversion can be performed on the Contacts tab by selecting an appropriate contact and clicking on the Convert icon from the top menu. A newly created user will be of the Pro users class. To change the class go to the Administration tab and edit the class. The conversion of the user to a contact is not possible. You need to delete the user, and then add a contact with the same email.

If you convert a contact to a user, you need to purchase an additional licence.

3 Security & Privacy

We care for the protection of



* - [Privacy policy](#)

The protection of your files, account and privacy is our top priority. The features listed below are designed to help you make your file sharing easy and secure.

Protect your files	Control account security	Keep your personal information secure
<ul style="list-style-type: none"> • SFTP Module • PGP encrypted file transfer • PIN code file access • Granular permissions to access files • Data residency • Expiry/ release dates for shares • Revocation of files • Free antivirus 	<ul style="list-style-type: none"> • Secure passwords and 2FA • IP address restrictions • Account access control • Account activity monitoring • PIN code user registration • Get copy of all shares via BCC • Intrusion detection and prevention 	<p>Take a look at our privacy policy that was designed to protect you personal information. The privacy notice describes how we collect and use your personal information in accordance to data protection law.</p>

You can easily manage the security and privacy settings for your Quatrix account: enable SFTP, PGP or 2FA, select share privacy type while sharing files, adjust the security PIN or set the release and expiry dates for your shares, apply IP restrictions to prevent unwanted access etc.

3.1 SFTP module

- [Enable SFTP module](#)
- [Add SFTP users](#)
- [Manage SSH keys of users](#)
- [Limit SFTP access for users](#)
- [Custom SFTP login](#)

SFTP module introduces secure, interactive and automated data exchange that allows files to be transferred between hosts in a similar way to SCP protocol. It encrypts both commands and data, which means that sensitive data and user passwords can't be intercepted by third parties.

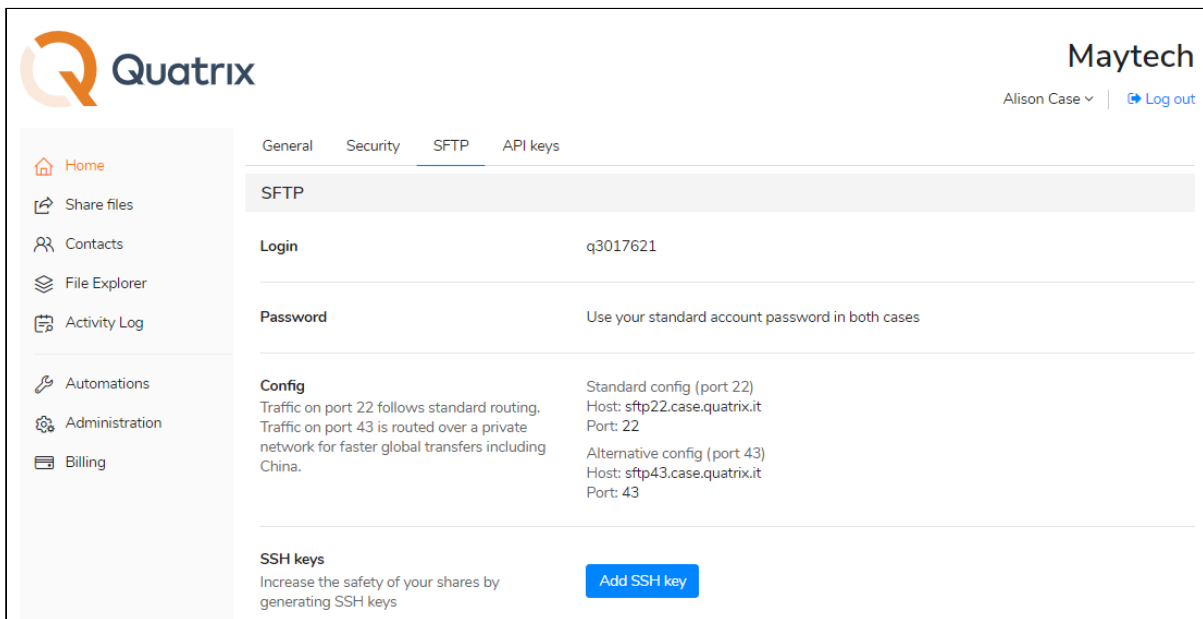
3.1.1 Enable SFTP module

Our [14-day free trial](#) allows you to try out SFTP (as it is included in our Enterprise security module). To continue using SFTP after the termination of trial, you need to purchase the Enterprise security module.

This module can be enabled by sending the request to [Quatrix Customer Care](#) or calling one of the numbers below:

- International: +44 189 286 1222
- US and Canada: 1 800 592 1906
- UK: 01892 861 222

As soon as the module is activated, you will receive an email with SFTP credentials that are also displayed in the account on the SFTP sub-tab (click on the link with your name, go to Manage Profile and select SFTP sub-tab). See the screenshot below.



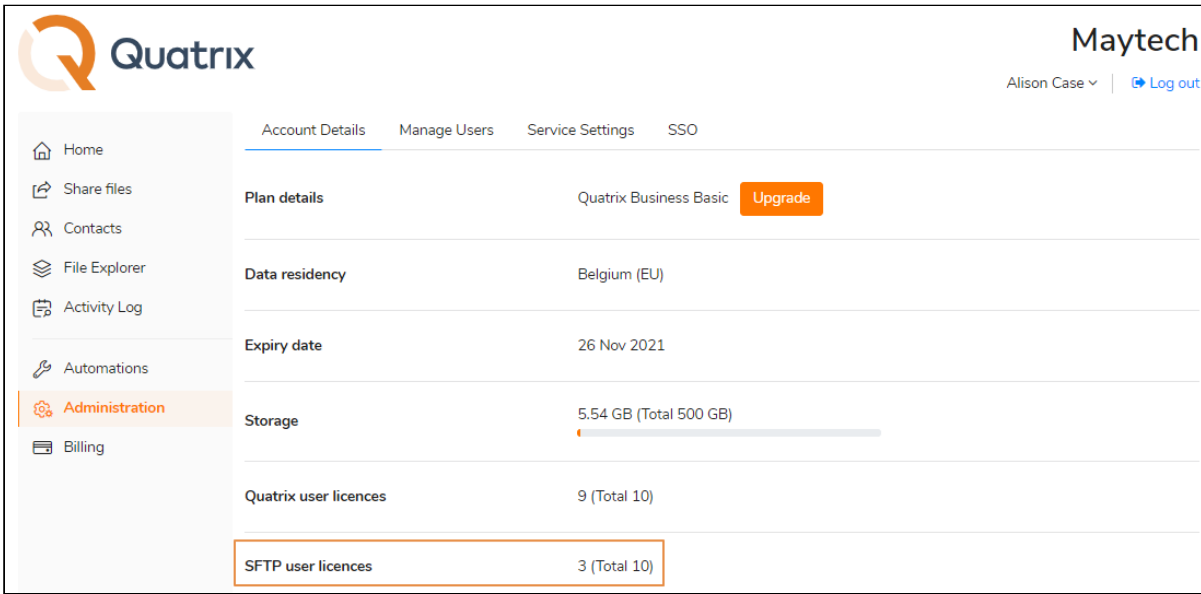
The screenshot shows the Quatrix user interface for the SFTP configuration page. The page is titled 'SFTP' and includes sections for Login, Password, Config, and SSH keys. The Login field shows 'q3017621'. The Password field says 'Use your standard account password in both cases'. The Config section provides details for standard and alternative configurations. The SSH keys section has an 'Add SSH key' button.

You can access SFTP client with your account password.

Learn how to configure SFTP client, add or change SSH keys, and transfer files with SFTP in our [User Guide](#).

3.1.2 Add SFTP users

The account owner or administrator can grant SFTP access to any user of the account. To add SFTP users, check if you have enough SFTP licenses purchased on the Account details sub-tab of the Administration tab.



The screenshot shows the Quatrix Administration interface for a user named Alison Case. The 'Administration' tab is selected, and the 'Account Details' sub-tab is active. The interface displays various account metrics:

Account Details	Manage Users	Service Settings	SSO
Plan details	Quatrix Business Basic	Upgrade	
Data residency	Belgium (EU)		
Expiry date	26 Nov 2021		
Storage	5.54 GB (Total 500 GB)		
Quatrix user licences	9 (Total 10)		
SFTP user licences	3 (Total 10)		

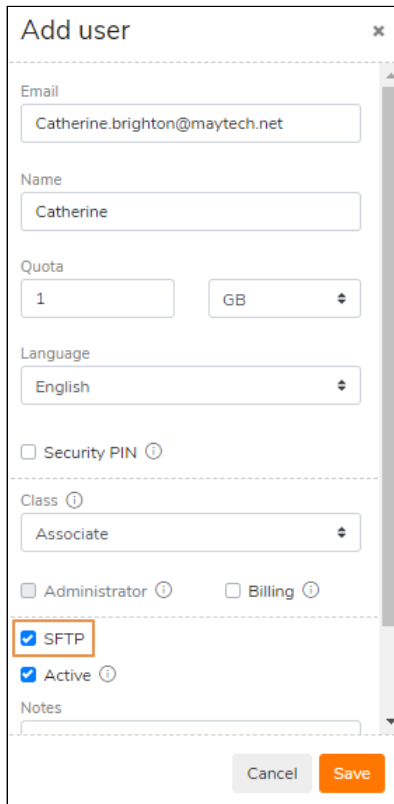
The screenshot above displays SFTP section with 10 available and 3 used SFTP user licences.

If you wish to enable SFTP for your contacts, convert them to users at first (on the Contacts tab, see [Contact Management](#)) and then activate SFTP by ticking an appropriate check box at user creation or edition.

To add SFTP user, follow these steps:

1. Go to the Administration tab and open the Manage users sub-tab.
2. Select the user from the list or add a new one.

3. Tick SFTP check box and save.



The screenshot shows a modal window titled "Add user" with a close button (x) in the top right corner. The form contains the following fields and options:

- Email:
- Name:
- Quota:
- Language:
- Security PIN ⓘ
- Class ⓘ:
- Administrator ⓘ
- Billing ⓘ
- SFTP
- Active ⓘ
- Notes:
- Buttons:

Your user will get an email notification with SFTP credentials as soon as SFTP is enabled.

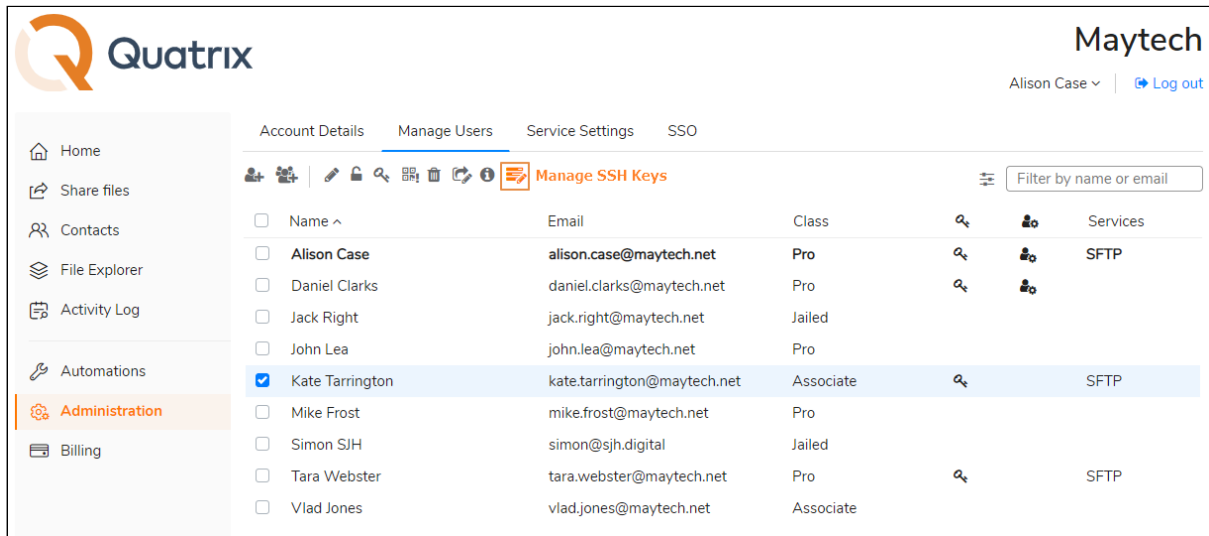
Now your users can access your Quatrix site using any SFTP client software. They must log in with their ID instead of their email address and use their existing account password.

Every added user has unique SFTP credentials that are stored after their deletion. If you restore SFTP access for this user, credentials will be the same.

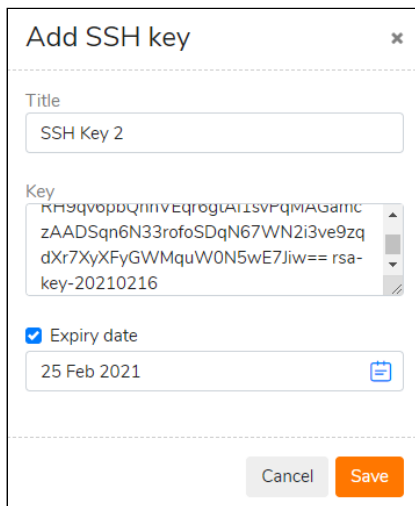
3.1.3 Manage SSH keys of users

You can manage SSH keys of your users on the Manage users sub-tab of the Administration tab. If you would like to add SSH key for your user, follow the steps below:

1. Select the user on the Manage users sub-tab and click on the Manage SSH Keys icon form the top menu.



2. Click on the Add SSH Key button (or Plus sign) on the Manage User's SSH Keys form.
3. Add your previously generated SSH Key. Learn more how to generate SSH keys in our [User Guide](#).



The 'Add SSH key' form contains the following fields:

- Title:** SSH Key 2
- Key:** A text area containing a long alphanumeric string: `Rh9qvopbqnnvEqroGUA1svFqMAgAmCzAADSqn6N33rofoSDqN67WN2i3ve9zqdXr7XyXFyGWMquW0N5wE7Jiw==rsa-key-20210216`
- Expiry date:** A checked checkbox with a date picker set to 25 Feb 2021.

Buttons for 'Cancel' and 'Save' are located at the bottom of the form.

4. Save the key.

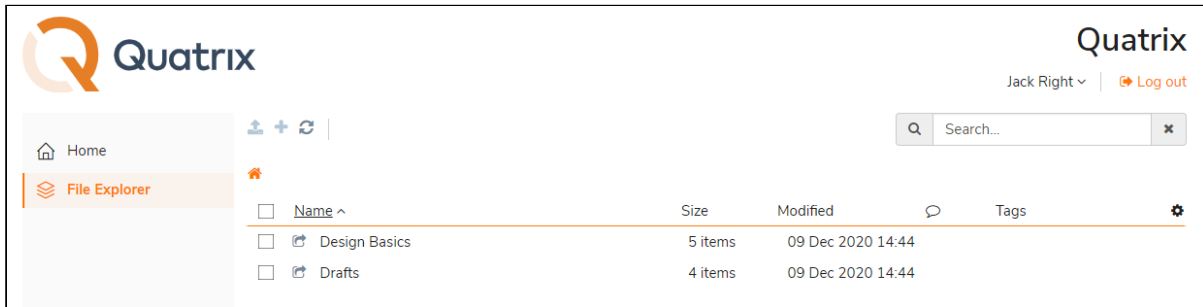
All SSH keys that you added for this user will be displayed in the list on the Manage User's SSH Keys Form.

You cannot edit the key, but only its title.

Your user will be informed about a generated SSH key details in the email.

3.1.4 Limit SFTP access for users

To limit your users to a specific folder via SFTP, select Jailed Users class while adding or editing them. Then add these Jailed users to a relevant Project Folder. This allows you to limit the access of users to only folders shared with them within the folder Projects Shared With Me.



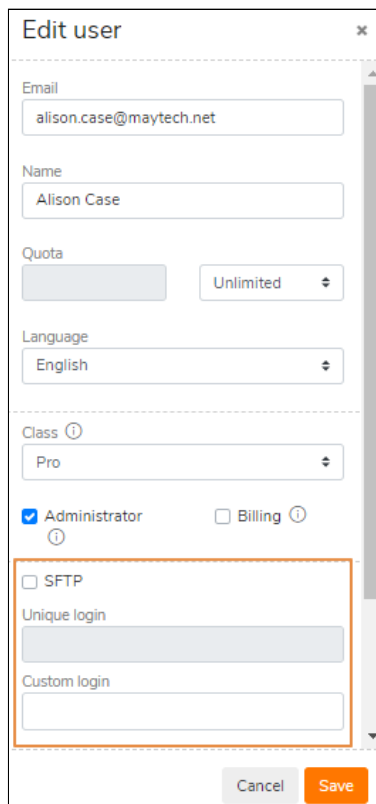
Learn more about project folder management in our [User guide](#).

3.1.5 Custom SFTP login

Connecting to your repository using custom SFTP login can be handy if you would like to use your existing individual SFTP login.

To use a custom SFTP login, follow these steps:

1. Set up a dedicated IP address for your account by sending a request to [Support](#).
2. Update your SFTP details with custom SFTP login on the Administration tab.
 1. Go to Manage Users sub-tab, find yourself in the list and add your custom SFTP login.

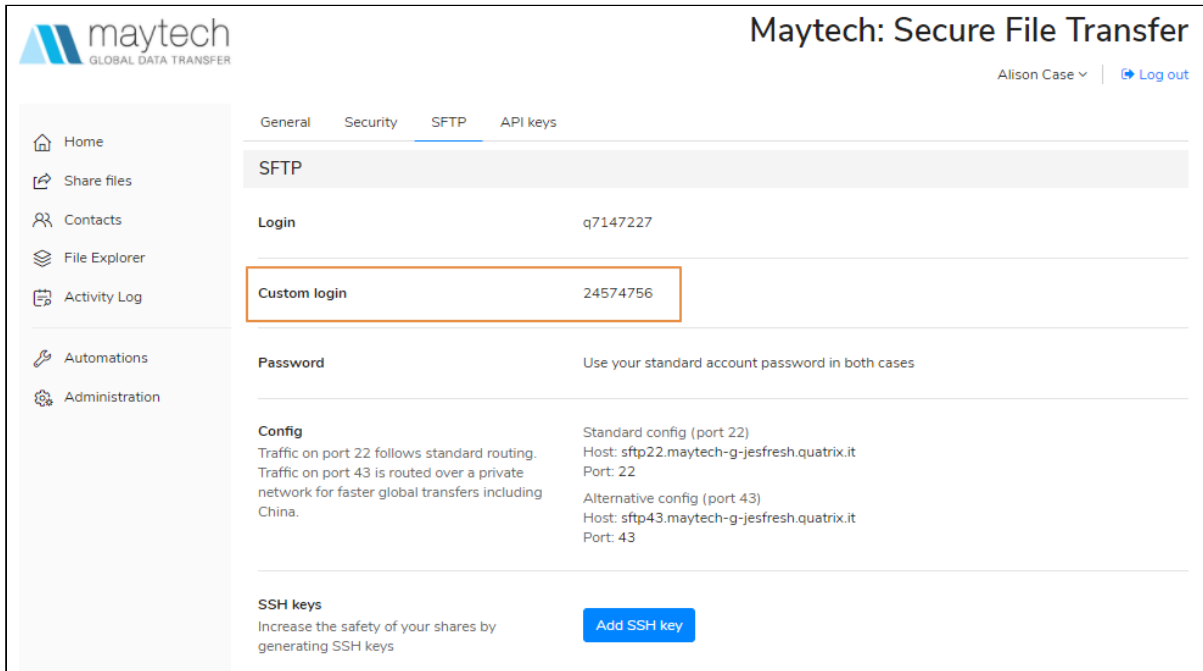


The screenshot shows the 'Edit user' form with the following fields:

- Email:
- Name:
- Quota:
- Language:
- Class:
- Administrator Billing
- SFTP (highlighted with an orange box)
- Unique login:
- Custom login:

Buttons: Cancel, Save

As soon as you saved your custom SFTP login, it will be displayed in the profile under SFTP sub-tab.



maytech GLOBAL DATA TRANSFER

Maytech: Secure File Transfer

Alison Case | Log out

General Security **SFTP** API keys

SFTP

Login	Password
q7147227	
Custom login	24574756

Password Use your standard account password in both cases

Config

Traffic on port 22 follows standard routing.
Traffic on port 43 is routed over a private network for faster global transfers including China.

Standard config (port 22)
Host: sftp22.maytech-g-jesfresh.quatrix.it
Port: 22

Alternative config (port 43)
Host: sftp43.maytech-g-jesfresh.quatrix.it
Port: 43

SSH keys
Increase the safety of your shares by generating SSH keys

Add SSH key

You will also have a possibility to add custom SFTP login to your new or existing users while adding or editing them, as the custom SFTP login is turned on for the account.

3.2 PGP encrypted file transfer

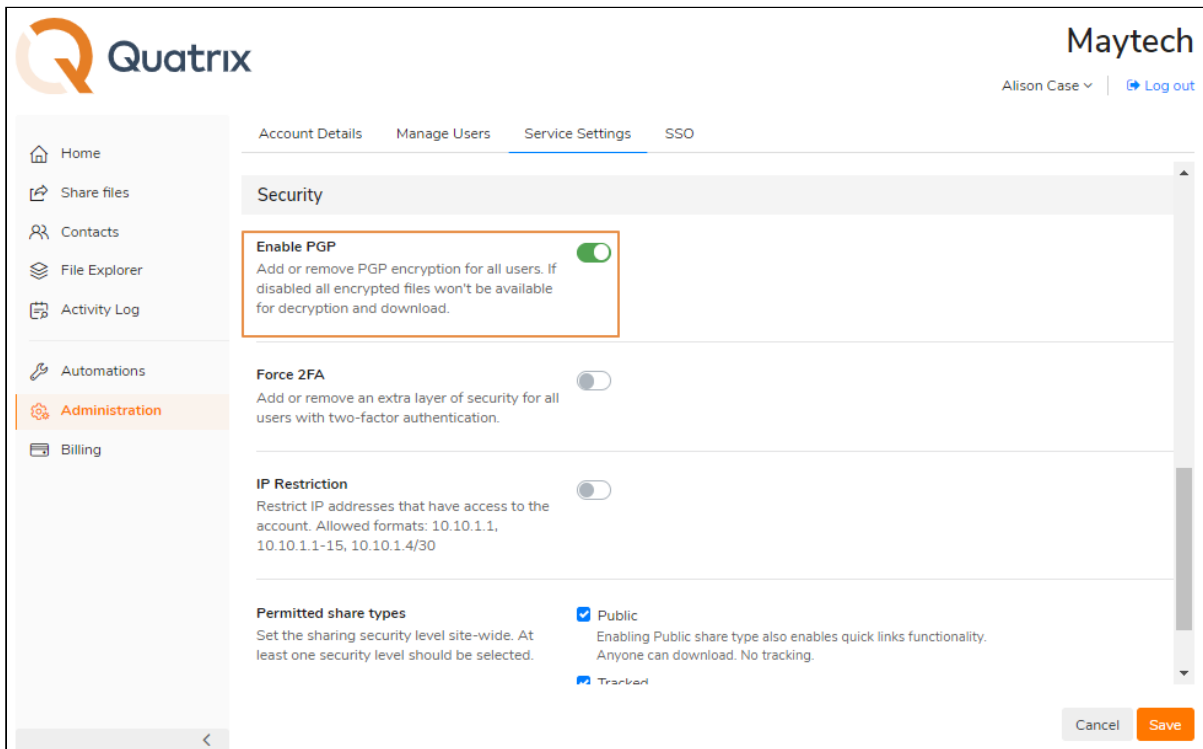
PGP (Pretty Good Privacy) is a protocol that is used for encrypting and decrypting files using a key pair. If you need to be certain that no one (really, no one) except the intended recipient can decrypt your confidential files, you may use PGP encrypted file transfer.

The diagram below displays how PGP works in Quatrix. It uses one key to encrypt the file (the public key) and another to decrypt (the private key) which traditionally makes it much more cumbersome to use than standard levels of encryption. But despite being cumbersome PGP is still a universally-accepted standard for file encryption.



Enable PGP encryption

The account owner or administrator can enable or disable PGP for the account on the Administration tab.



As soon as PGP is activated, all users can share PGP encrypted files, besides contacts that can only decrypt, download and return encrypted files.

If you disable PGP, all encrypted files won't be available for decryption and download.

3.2.1 PGP Key Generation

To proceed with encrypted file sharing you need to check if private and public keys are generated.

As illustrated in the diagram above PGP uses a pair of keys - the public key locks; the private key unlocks. So when sharing files with your users or contacts you'll be encrypting with their public key and when you are acquiring files from your users the files get encrypted with your public key.

Key Security

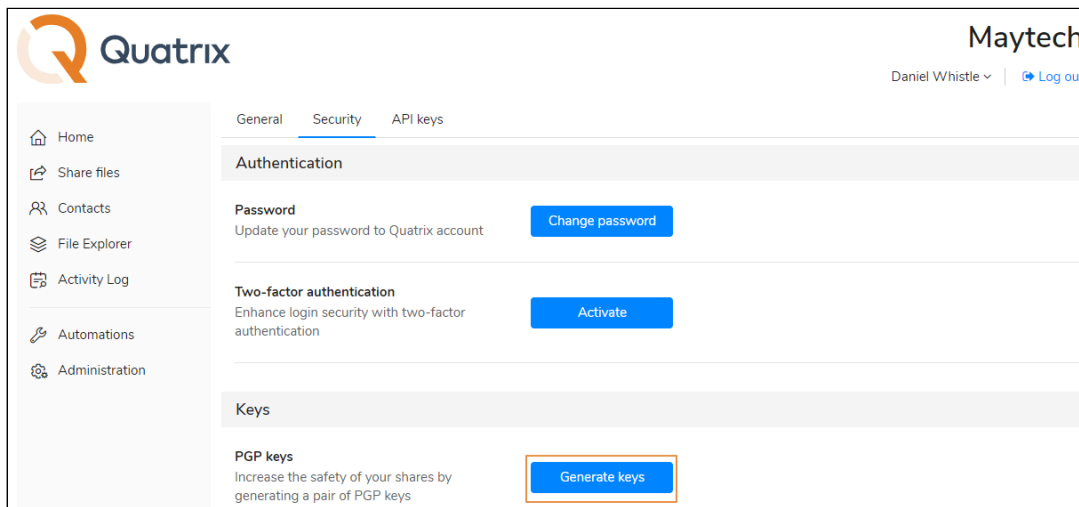
Your keys are securely stored on the Quatrix platform, additionally all private keys are encrypted using your passphrase. The passphrase is not stored or remembered by Quatrix which gives you peace of mind that no one (and that includes Quatrix staff), can ever decrypt files in transit or at rest.

Public Key Generation

You should generate public keys at first - follow 3 simple steps below:

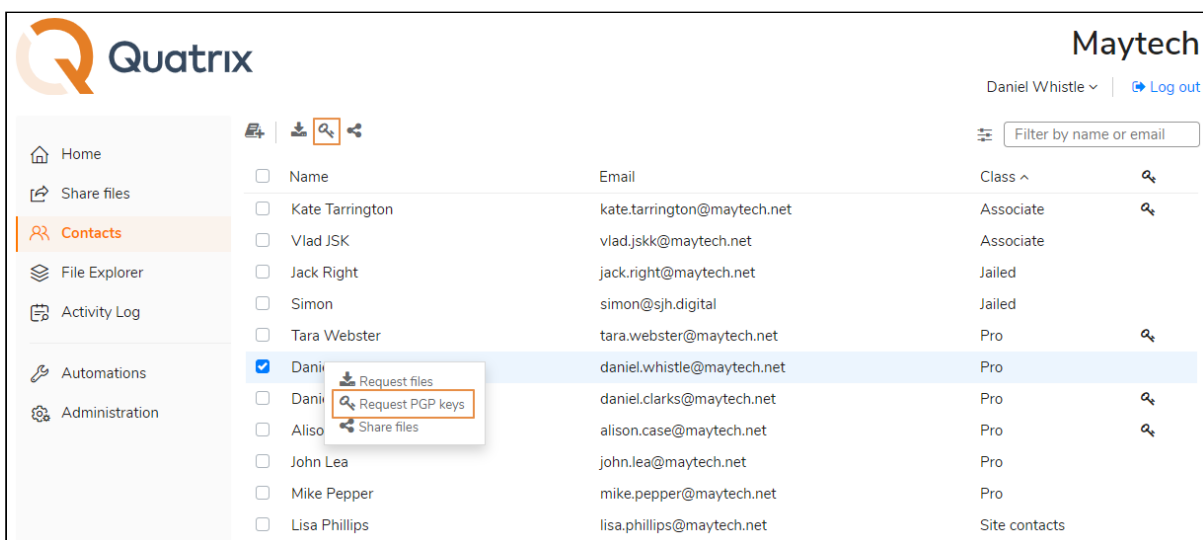
1. Click on the link with your name at the top right and follow the Manage Profile link,
2. Open the Security sub-tab,
3. Click on the Generate Keys button which opens the window for creating the passphrase for your keys.

After clicking on the Generate keys button you get the notification that your PGP keys have successfully been generated.

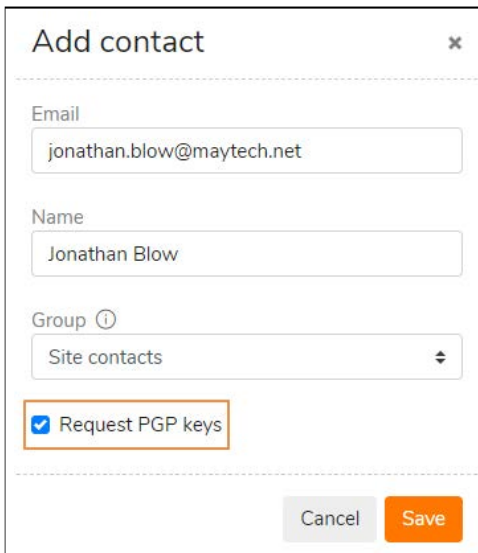


and then request another pair of keys from the intended recipient - send PGP key generation request.

You should determine who you are going to share encrypted files with, tick the boxes next to them either on the Contacts, or on the Administration tab and select the Request PGP keys option from the right-click or above menu.



Besides you can send the request while adding your contacts by ticking the Request PGP keys check box.

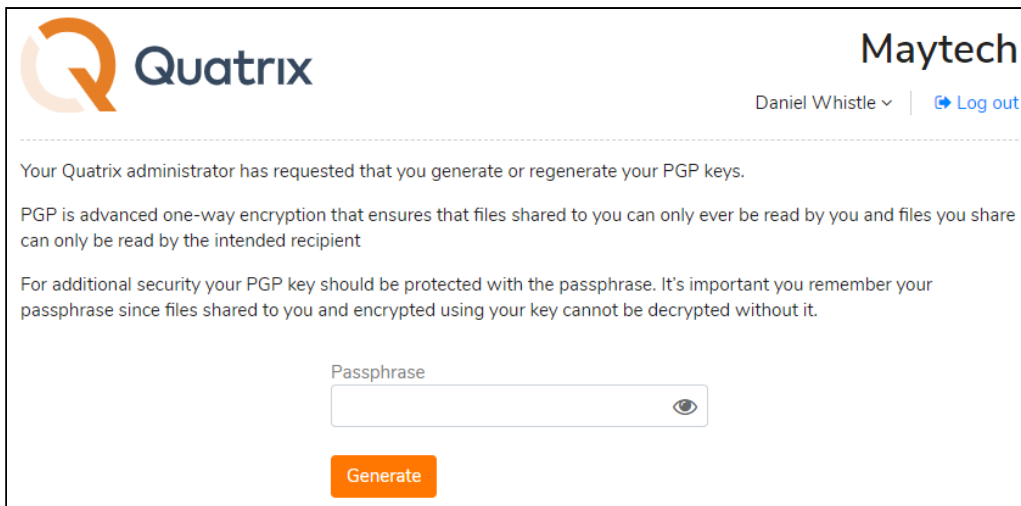


The screenshot shows a modal dialog titled "Add contact" with a close button (x) in the top right corner. It contains the following fields and controls:

- Email:** A text input field containing "jonathan.blow@maytech.net".
- Name:** A text input field containing "Jonathan Blow".
- Group:** A dropdown menu with a help icon (i) and the selected option "Site contacts".
- Request PGP keys:** A checkbox that is checked, highlighted with a red rectangular box.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Private Key Generation

When the request is sent, your recipient gets an email with the link to generate PGP keys. The recipient follows the link and generates PGP keys.



The screenshot shows a web page for PGP key generation. It features the Quatrix logo on the left and the Maytech logo on the right, along with the user name "Daniel Whistle" and a "Log out" link. The main content area contains the following text:

Your Quatrix administrator has requested that you generate or regenerate your PGP keys.

PGP is advanced one-way encryption that ensures that files shared to you can only ever be read by you and files you share can only be read by the intended recipient

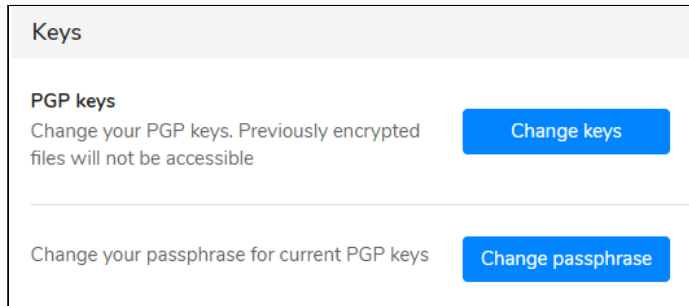
For additional security your PGP key should be protected with the passphrase. It's important you remember your passphrase since files shared to you and encrypted using your key cannot be decrypted without it.

Below the text is a "Passphrase" input field with a toggle icon (eye) and a "Generate" button.

Once PGP keys are generated, a confirmation email will be sent to the sender of the request.

Changing PGP Keys vs Passphrase

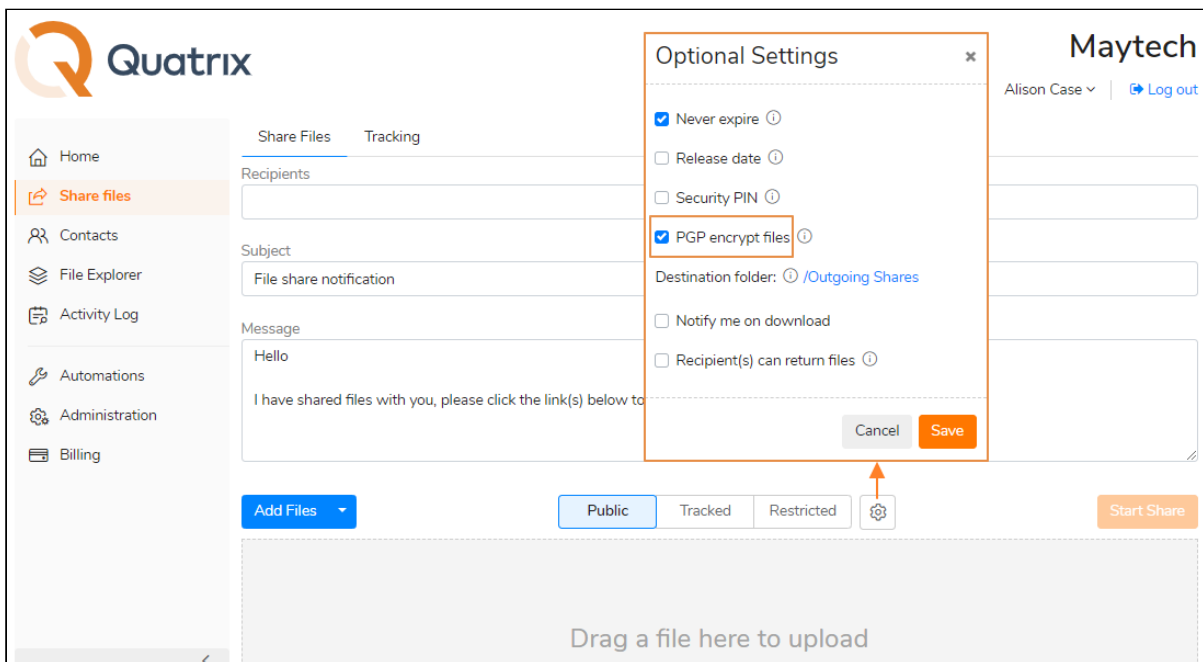
Your PGP keys can be changed at any time on the Security sub-tab, but all previously encrypted files won't be accessible as they were encrypted with the different PGP keys. If you noticed that your passphrase was compromised, you can simply change the passphrase to your keys by clicking on the Change Passphrase button. This preserves you the right to decrypt all previously encrypted files.



3.2.2 Encrypting and Decrypting Files

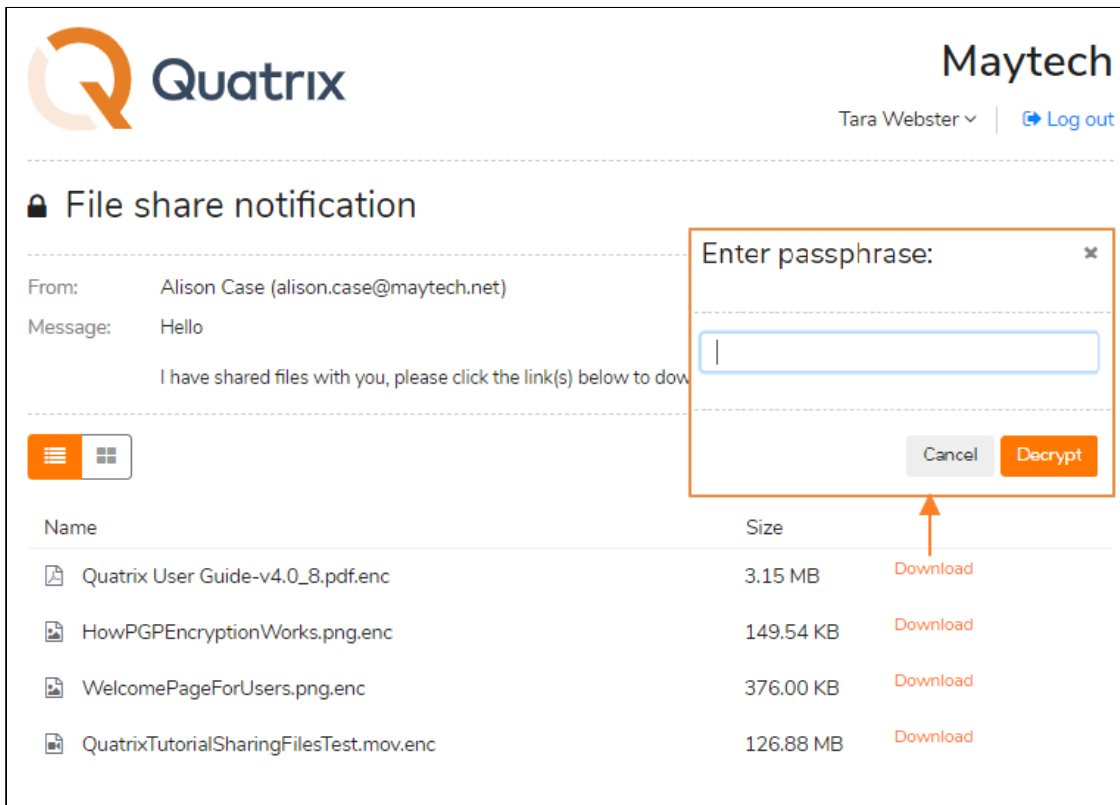
Encrypting files is a way to protect them from unwanted access. There are a few simple steps to share and acquire files with advanced PGP security in Quatrix.

To share encrypted files you should select the PGP encrypt files check box on the Optional Settings section while sharing files.



If your recipient hasn't generated PGP keys, the email will be highlighted in red and you will be notified of missing keys. You should request keys from your recipient on the Administration or Contacts tab to proceed with encrypted file sharing.

You can easily decrypt files by following the Download link from the email and entering the passphrase while downloading files. You can store your files locally or on Quatrix cloud.







Quatrix Maytech
Tara Webster | [Log out](#)

File share notification

From: Alison Case (alison.case@maytech.net)
Message: Hello

I have shared files with you, please click the link(s) below to download

Name	Size	
 Quatrix User Guide-v4.0_8.pdf.enc	3.15 MB	Download
 HowPGPEncryptionWorks.png.enc	149.54 KB	Download
 WelcomePageForUsers.png.enc	376.00 KB	Download
 QuatrixTutorialSharingFilesTest.mov.enc	126.88 MB	Download

If you forgot your passphrase, you won't be able to decrypt shared files! To proceed with encrypted file sharing you need to change your PGP keys on the Security sub-tab.

3.3 File security settings

This page contains features that constitute the security of your files.

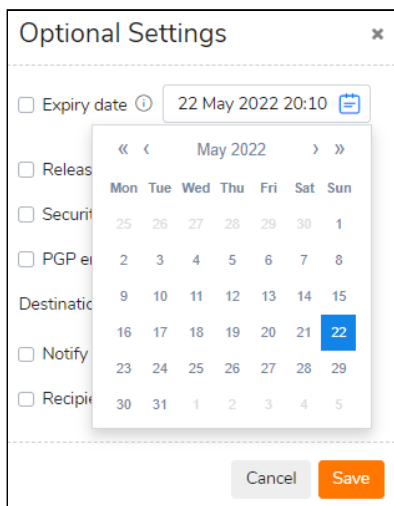
- [Expiry and release dates for shared files](#)
- [PIN code file access](#)
- [Revocation of files](#)
- [Granular permissions to access files](#)
- [Notifications on download](#)
- [Antivirus](#)

3.3.1 Expiry and release dates for shared files

You can share your files with anyone and then for the security reasons you can limit the time your shared files will be available (by setting the expiry time and date) or you can specify the time when your uploaded files will be available for download (by setting the release time and date).

Follow the steps below to share files with the **expiry date**:

1. Go to the Share files tab, specify the recipients and upload files.
2. Select your preferred share privacy and click on the Optional settings icon which opens the window for setting additional share adjustments.
3. Uncheck Never expire and pick the expiry date and time.
4. Save your settings and share your files.



Your uploaded files will be sent with the link that expires on your specified time.

To share files with the **release date** follow the steps above (1-2), and specify the release date and time for your shared files. You can upload your files and send out the links any time, but download links are inactive until the chosen time.

3.3.2 PIN code file access


Users can create a unique PIN code for recipients to enter before accessing the shared files.

To share files with the Security PIN you need to check the corresponding box in the Optional settings while sharing your files.

Optional Settings ✕

Never expire ⓘ

Release date ⓘ

Security PIN ⓘ 

PGP encrypt files ⓘ


Destination folder: ⓘ /Outgoing Shares

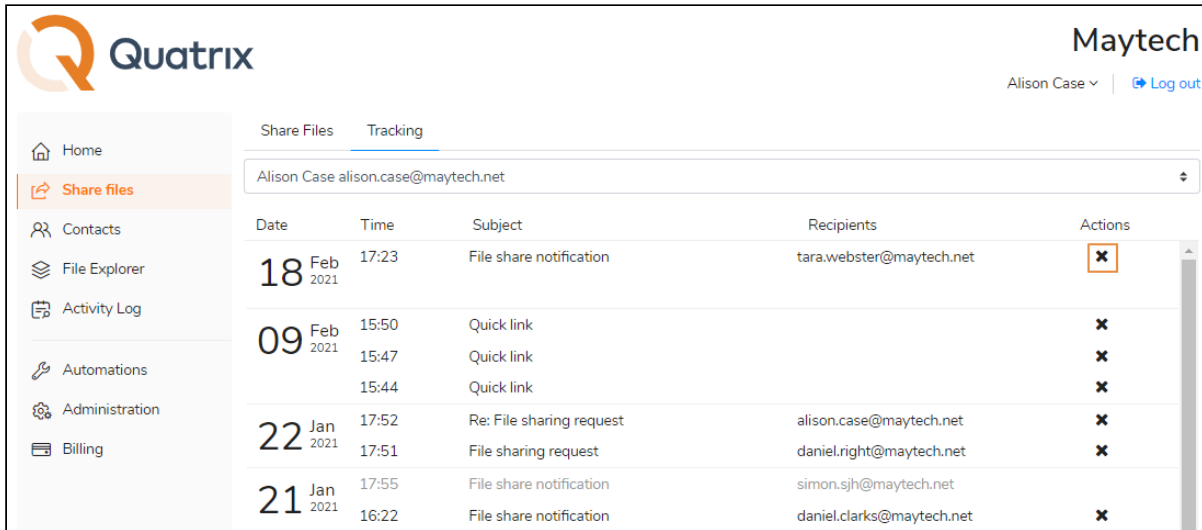
Notify me on download








Recipient(s) can return files ⓘ

PIN code can be used only once. If the user forgot your shared PIN code, you need to share files again, To omit double sharing, save PIN code until the user receives your files.

3.3.3 Revocation of files

If you would like to make already sent files unavailable, go to the Tracking tab, find the required share and click on the  Revoke share icon.



Date	Time	Subject	Recipients	Actions
18 Feb 2021	17:23	File share notification	tara.webster@maytech.net	
09 Feb 2021	15:50	Quick link		
	15:47	Quick link		
	15:44	Quick link		
22 Jan 2021	17:52	Re: File sharing request	alison.case@maytech.net	
	17:51	File sharing request	daniel.right@maytech.net	
21 Jan 2021	17:55	File share notification	simon.sjh@maytech.net	
	16:22	File share notification	daniel.clarks@maytech.net	




The revoked share will be greyed out in the list and the share information will contain the status indication Revoked.

Share information ✕

Details: ↓

Type: Restricted
Date: 21 Jan 2021 17:55
Recipients: tara.webster@maytech.net
Subject: Design templates
Release date: 21 Jan 2021 17:55
Expiry date: Never expire
Status: **Revoked**
Download link: <https://case.quatrix.it/download/442611bb-efc0-471d-a866-856d372325c8>

Files: ↓

Name	Size	Downloads
 UI Design Template 1.png	10.71 KB	0
 UI Design Template 2.png	14.87 KB	0
 Text updates.png	14.38 KB	0

Close

The revoked files cannot be returned back. You can make these files available only by sharing them again.

3.3.4 Granular permissions to access files

You can keep control over what your users can do with what you have shared. Granular permissions in Quatrix allow you to control what files your users can access and what they can do with these files.

Share privacy in Quatrix allows you to set the sharing security level, specifying who can access your shared files.

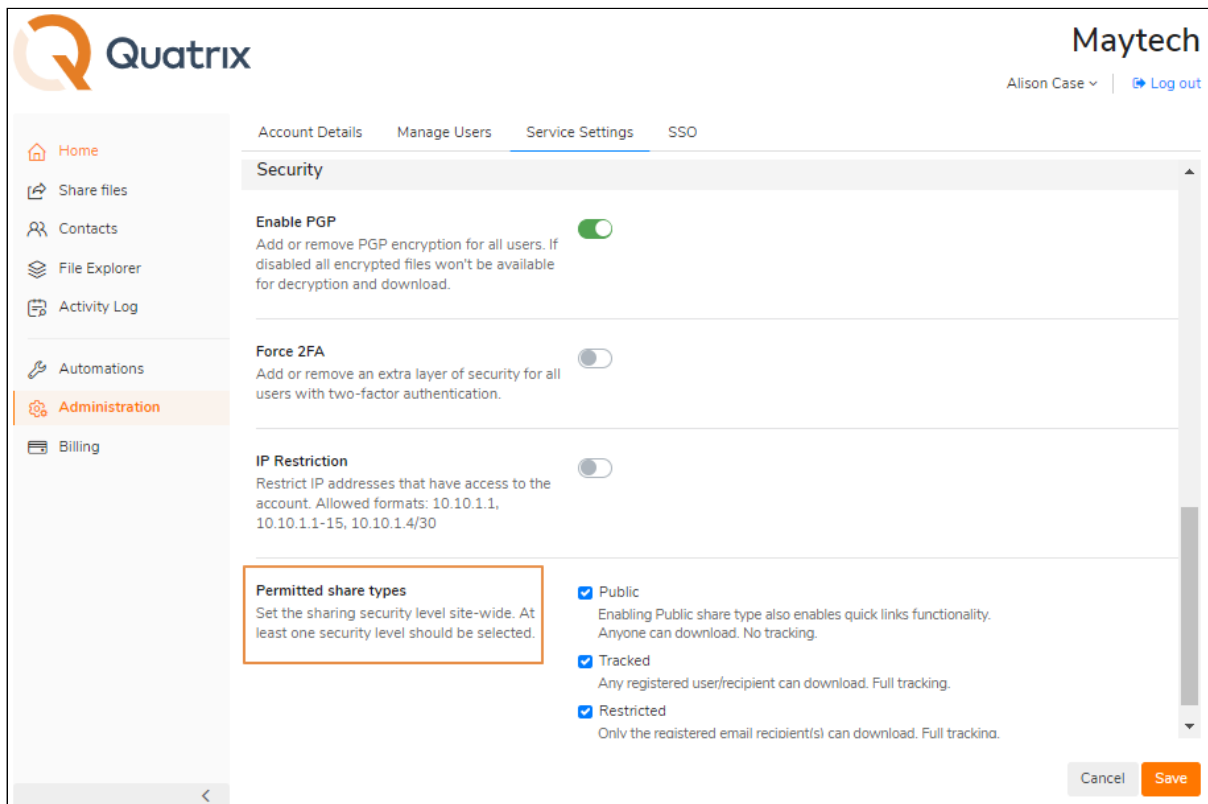
- *Public* - anyone with the link can download the files. Your tracking will show the time and IP address of downloads but will not identify the user.
- *Tracked* - any user registered on the Quatrix network can download, this may be useful where the links may be forwarded to others working on the project. Your tracking will identify the user for each download event.
- *Restricted* - only recipients of the email will be able to download, links forwarded outside the recipient list will not work. Your tracking will identify the user for each download event.

Every user can specify the sharing security level while sharing files. Learn more on [File Sharing](#). Account owners and administrators can adjust share types that will be allowed for sharing on the Administration tab.

If you would like to limit the permitted share types account-wide, follow these steps:

1. Go to the Administration tab and open the Service Settings sub-tab.

2. Tick the check boxes with the share types that you would like to allow.

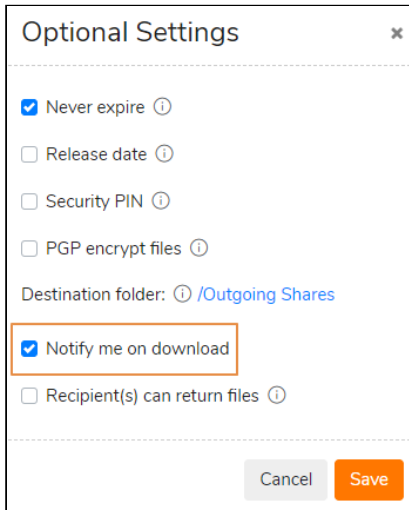


3. Save changes.

The control of files and folders inside Quatrix can be performed via project folder permissions. [Learn more here.](#)

3.3.5 Notifications on download

If you use Quatrix to share files with your clients, you can be notified when your clients have downloaded files. To receive the download notification, check Notify me on download check box in the Optional settings while sharing files.



Optional Settings

Never expire ⓘ

Release date ⓘ

Security PIN ⓘ

PGP encrypt files ⓘ

Destination folder: ⓘ /Outgoing Shares

Notify me on download

Recipient(s) can return files ⓘ

Cancel Save

As soon as your client receives your desired files, you will be emailed the download confirmation with details who, when and how many times downloaded your files.

This feature allows you to control if your shared file was downloaded and if your intended recipient downloaded it.

3.3.6 Antivirus

Since we are responsible for the security of your data that you store or send with Quatrix, an Antivirus is enabled by default.

Once a file is uploaded it is queued for the antivirus check. If a file is infected, it gets blocked for download.

In case a malware is detected an email alert is sent to the owner/ admin(s) and they can log in and delete the infected files. The virus name is also shown in File Info.

Worth mentioning that Antivirus is free!

3.4 Account security settings

We care for the protection of your account security. Here are some tips to help you set up your account securely.

- [Create strong and unique passwords](#)
- [Turn on 2FA verification](#)
- [Set IP address restrictions](#)
- [Adjust PIN code user registration access](#)
- [Control access to your account by assigning a user class or administrator permission](#)

- [Get copy of all shares via BCC](#)
- [Track activity history in your account](#)
- [Intrusion detection and prevention](#)

3.4.1 Create strong and unique passwords

A strong password is the one that you can easily remember, but the hacker will never guess. In order to ensure strong password security for users, Quatrix password must conform the following rules:

- be at least 8 characters long.
- include lowercase and uppercase alphabetic characters, numbers and symbols.
- not be a common dictionary word, email address or any information associated with the account.
- should be unique, different from the previous passwords.

Change your passwords from time to time

If you would like to keep your passwords secure, try to change them regularly and never repeat previously used passwords.

Follow the steps below to change your account password:

1. Click on the link with your name at the top right and follow the Manage profile link.
2. Open the Security sub-tab and click on the [Change password](#) button.
3. Type in your current password and then generate a new one.
4. Save your password.

If you forgot your password, follow the Forgot password link on the Account Login page and follow the instructions sent by email to reset the password.

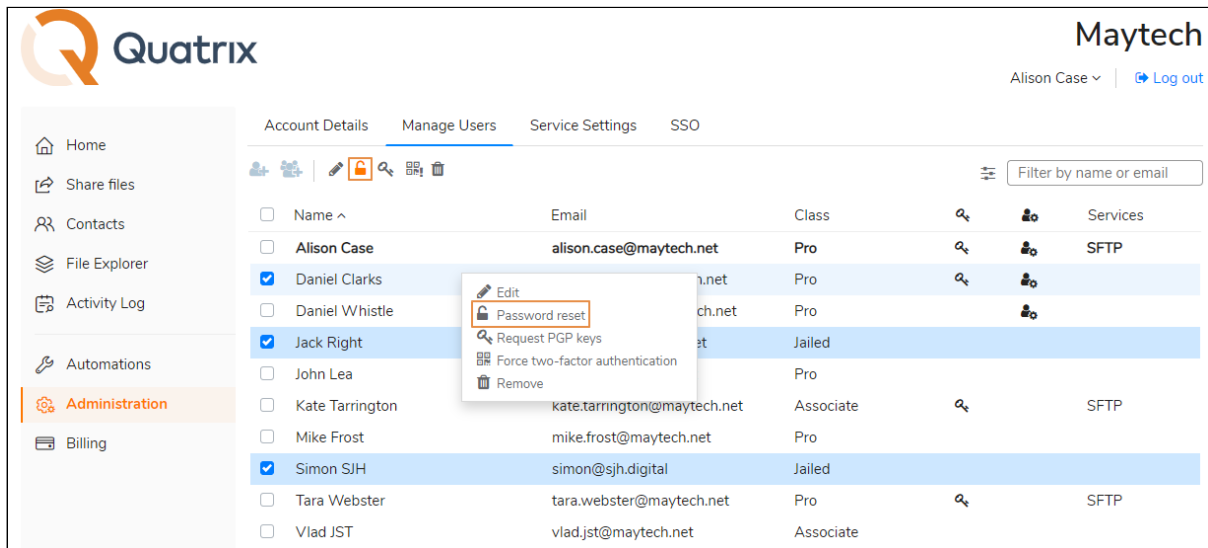
Force password reset for account users

Account owners and admins can keep Quatrix account secure by requiring their users to reset passwords.

To send a password reset request:

1. Go to the Administration tab and open the Manage users sub-tab.

- Select users you would like to change their passwords and click on the Password reset icon from the above or right-click menu.



- Click on the Send button.

Your users will receive emails with the links to reset their passwords.

3.4.2 Turn on 2FA verification

Two-factor authentication (also known as two-step verification or 2FA) adds a second layer of security to your online file sharing. Every time you log in to your Quatrix account, you will need to enter a six-digit security code using your phone or other mobile device in such a way verify your identity. This prevents anyone but you from logging in, even if they know your password. For more information on how to enable or disable 2FA see our [User Guide](#).

Force 2FA for account users

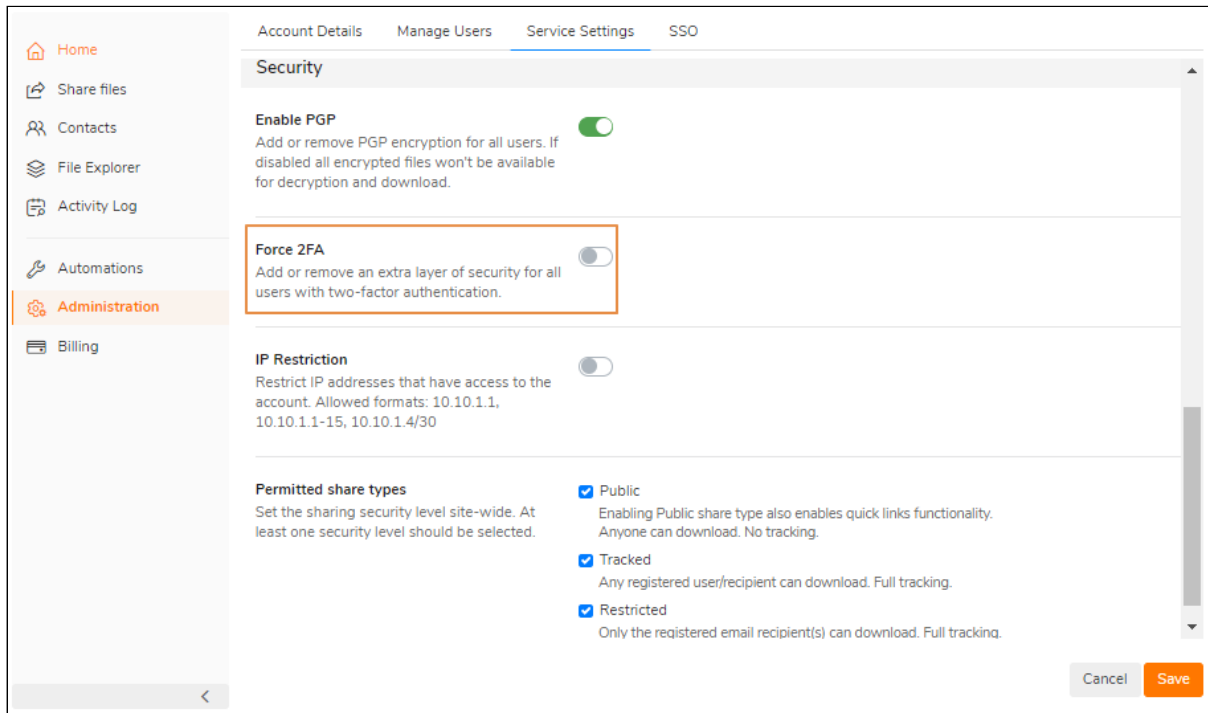
The account owner or administrators can enforce 2FA either for one user, or a group of users, or for all users of the account.

If you would like to force 2FA only to a definite user or a group of users, go to the Administration tab and tick the check box next to the user(s) and select the Force 2FA icon from the drop-down menu or choose an appropriate icon from the above menu.

To make 2FA mandatory for all users on the account level follow these steps:

- Go to the Service Settings sub-tab of the Administration tab.

2. Tap the toggle from off to on next to the Force 2FA under Security section.



3. Click on the Save button.

3.4.3 Set IP address restrictions

As the owner or administrator, you can use the IP Restriction setting to prevent users in your company from logging in to your Quatrix account from any unauthorized locations. You can specify the range of IP addresses (or networks) to allow connection to Quatrix both via HTTPS and SFTP protocols.

To restrict IP addresses that have access to the account:

1. Go to the Administration tab and open the Service Settings sub-tab.
2. To activate IP address restrictions tap the toggle from off to on next to IP restriction. [See the screenshot.](#)
3. Specify a list of IP addresses in any of the allowed formats: 10.10.1.1; 10.10.1.1-15; 10.10.1.4/30.

You must include your current IP address to the list before saving the IP filter configuration.

4. Save changes.

Your users with the listed IP addresses will have access to your account, the others won't be able to log in to Quatrix.

If you would like to deactivate IP restrictions, switch the toggle to off state. This returns the access to your account for all your available users.

3.4.4 Adjust PIN code user registration access

If you add a new user to your account, you can use the Security PIN feature that allows you to check if the person you intend is registering for the account.

To use this feature, you need to check the [Security PIN check box](#) while adding a user and share this PIN code in the most secure way. Your user will perform 3 steps instead of 2 ones to register for the account.

1. Follow the one-time link from the email to set the password.
2. Log in to the account with the already set password and email.
3. Enter PIN code to access the account.

The security PIN is randomly generated and cannot be changed. Save this PIN until your user is registered. If your user loses your shared PIN, you can share your saved PIN code and omit the repetition of adding this user with PIN code again.

For security reasons, we are not allowed to tell the user if they have entered an invalid user name, password, or PIN. If they have forgotten their password, they should go to the Log in page and follow the Forgot password link. If the PIN code is incorrect, the user should contact the administrator mentioned in the email.

3.4.5 Control access to your account by assigning a user class or administrator permission

The access to your account can be managed by assigning a specific user class to your users or by granting administration rights.

You can organize your users into 3 classes: pro, associate and jailed.

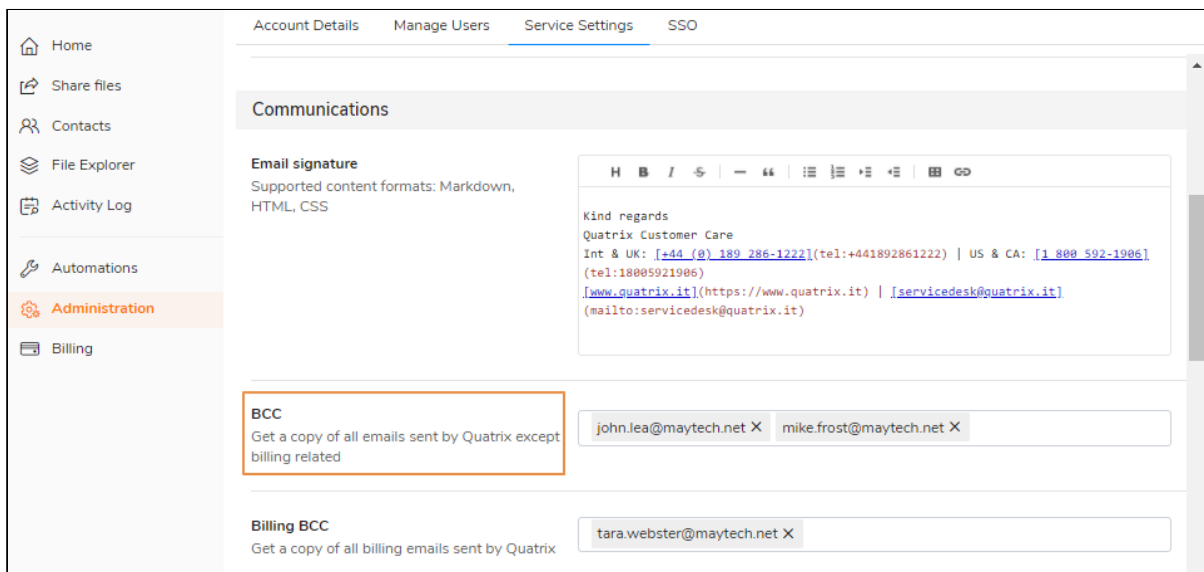
- **Pro Users** can view and share files with other Pro users, Associate users and site contacts. Besides they can create a list of their own Personal Contacts that are invisible to you as the administrator.
- **Associate Users** can view only Pro users and share files with them. They cannot share to the outside world. This facilitates the flow of data from external partners into your organisation whilst preventing external partners from making unauthorised use of your Quatrix site.
- **Jailed Users** have access to files from Projects Shared With Me

Learn more about user classes and their permissions in our [User guide](#).

You can let your users perform account management tasks by granting them administration rights. This can be done while adding or editing a user by checking the Administrator check box. Users with administrative privileges have access to the Administration tab and can manage the access to your account.

Only pro users can be granted administration rights.

3.4.6 Get copy of all shares via BCC



Blind carbon copy (BCC) allows you to specify recipients that will receive a copy of all shared files through Quatrix. They will get emails secretly, i.e. emails will be invisible to others.

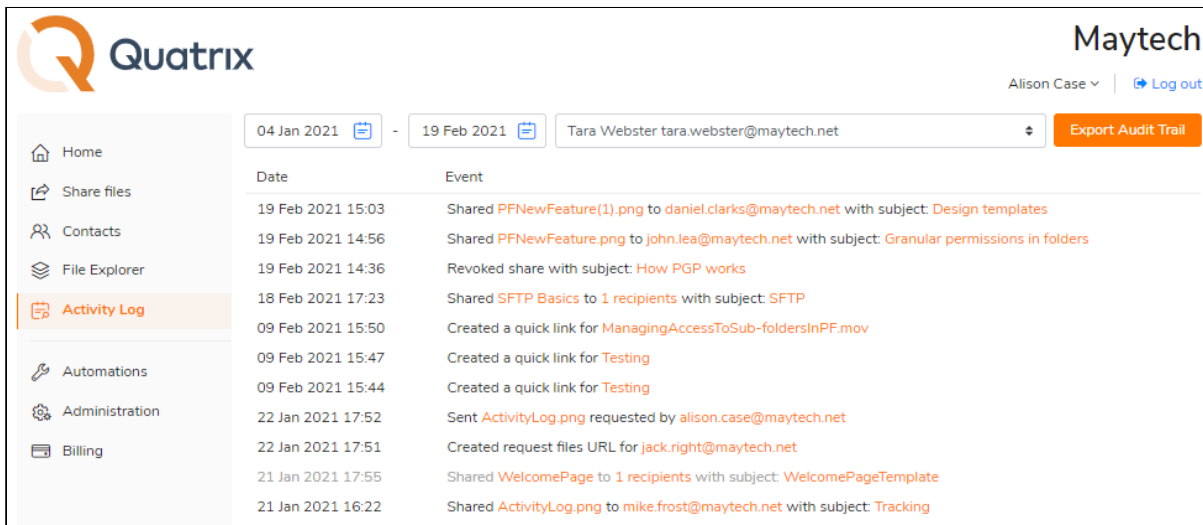
This feature is useful if you would like to keep track of all sharing actions in your account. To get more details of your account activity history, download the account activity log that displays all actions performed in your account on the [Activity Log](#) tab.

BCC can be adjusted by the account owner or administrators on the Administration tab. The recipients in the To field will not know that the others on the BCC field are secretly receiving shares.

BCC recipients get copies of all emails, except the ones that are security related, e.g. password reset emails.

Billing BCC allows recipients to receive all billing related emails: upgrade or downgrade details, etc.

3.4.7 Track activity history in your account



Date	Event
19 Feb 2021 15:03	Shared PFNewFeature(1).png to daniel.clarks@maytech.net with subject: Design templates
19 Feb 2021 14:56	Shared PFNewFeature.png to john.lea@maytech.net with subject: Granular permissions in folders
19 Feb 2021 14:36	Revoked share with subject: How PGP works
18 Feb 2021 17:23	Shared SFTP Basics to 1 recipients with subject: SFTP
09 Feb 2021 15:50	Created a quick link for ManagingAccessToSub-foldersInPF.mov
09 Feb 2021 15:47	Created a quick link for Testing
09 Feb 2021 15:44	Created a quick link for Testing
22 Jan 2021 17:52	Sent ActivityLog.png requested by alison.case@maytech.net
22 Jan 2021 17:51	Created request files URL for jack.right@maytech.net
21 Jan 2021 17:55	Shared WelcomePage to 1 recipients with subject: WelcomePageTemplate
21 Jan 2021 16:22	Shared ActivityLog.png to mike.frost@maytech.net with subject: Tracking

The activity log tracking allows to get an extremely detailed record of all activity from all users within a specified date range. The activity log displays individual actions of users including:

- date and time they logged in and out
- user actions within Quatrix platform
- shared and accessed files
- any updates or changes.

The main goal of audit trail reports is to assist account owners or administrators find out what their users are doing with files while they are logged in to Quatrix platform, providing complete visibility and added peace of mind. The audit log displays cases with multiple log-in attempts to the account which gives administrators information about potential security threats. Besides, if there were made any unauthorized changes to files, the log will determine which user made these changes.

Overall, activity logs provide owners or administrators the tool for getting a better vision of how files within Quatrix platform are being used.

Learn more about [Activity Logs](#).

3.4.8 Intrusion detection and prevention

Multiple incorrect login attempts may trigger a lockout.

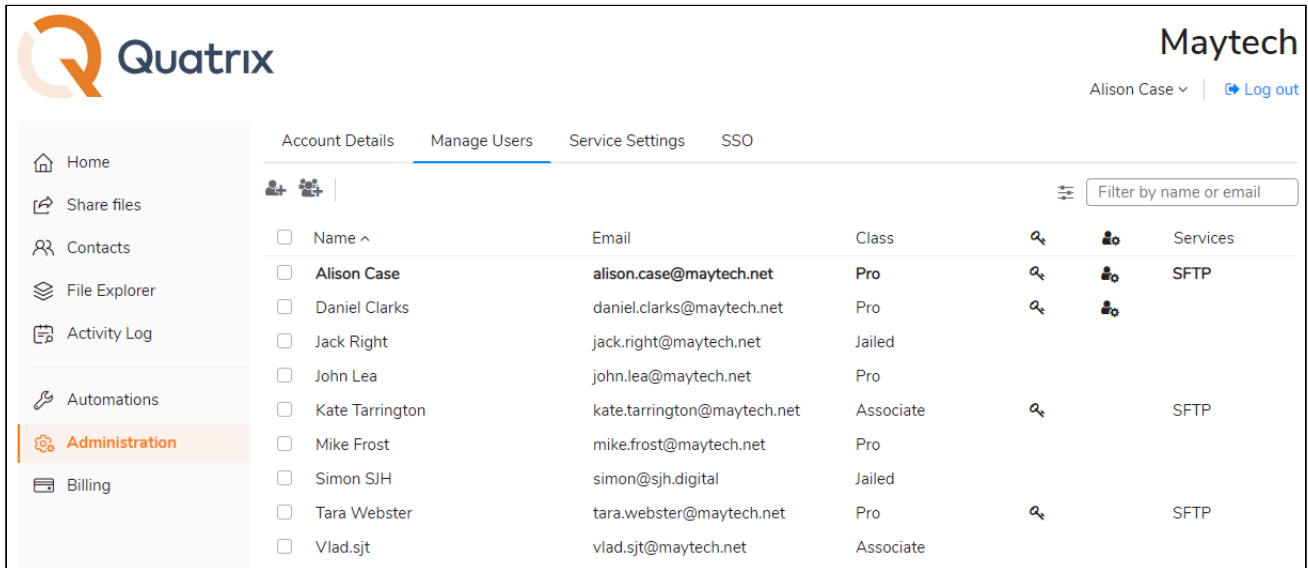
You should enter the CAPTCHA code to unlock.



4 User Management

- [Adding a user](#)
 - [Adding multiple users at once](#)
- [Editing a user](#)
- [Deleting a user](#)
- [Converting a contact to a user](#)

The owner or user with administration rights can manage account users on the Manage Users sub-tab of the Administration tab.



The screenshot shows the Quatrix user management interface. The top right corner displays the user name 'Alison Case' and a 'Log out' link. The main navigation sidebar on the left includes 'Home', 'Share files', 'Contacts', 'File Explorer', 'Activity Log', 'Automations', 'Administration' (highlighted), and 'Billing'. The 'Manage Users' tab is active, showing a table of users with columns for Name, Email, Class, and Services. A search filter 'Filter by name or email' is present above the table.

<input type="checkbox"/>	Name ^	Email	Class			Services
<input type="checkbox"/>	Alison Case	alison.case@maytech.net	Pro			SFTP
<input type="checkbox"/>	Daniel Clarks	daniel.clarks@maytech.net	Pro			
<input type="checkbox"/>	Jack Right	jack.right@maytech.net	Jailed			
<input type="checkbox"/>	John Lea	john.lea@maytech.net	Pro			
<input type="checkbox"/>	Kate Tarrington	kate.tarrington@maytech.net	Associate			SFTP
<input type="checkbox"/>	Mike Frost	mike.frost@maytech.net	Pro			
<input type="checkbox"/>	Simon SJH	simon@sjh.digital	Jailed			
<input type="checkbox"/>	Tara Webster	tara.webster@maytech.net	Pro			SFTP
<input type="checkbox"/>	Vlad.sjt	vlad.sjt@maytech.net	Associate			

This tab displays a list of users with their emails, assigned class, generated PGP keys, admin rights and SFTP adjustments.

4.1 Adding a user

If you would like to add a new user to Quatrix account, follow the steps below:

1. Click on the Add user icon from the top menu on the Manage users sub-tab.
2. Specify your user details and additional adjustments on the Add user dialog box:
 1. user name and email
 2. quota - unlimited by default (=account storage), you can specify the storage limit for this user
 3. language - English or Chinese
 4. user class - Pro, Associate or Jailed. Learn more about [user roles and their permissions](#)
 5. administrator rights - only to pro users
 6. billing - permission to manage invoices and payments (only to pro and associate users)
 7. SFTP - permission to use SFTP
 8. active - activate or deactivate the user. Deactivated users won't be able to log in.
3. Click on the Save button.

For additional security, you can adjust a [security PIN](#) for the user to enter while registering to Quatrix.

4.1.1 Adding multiple users at once

In order to save your time for manual adding of multiple users (e.g. 50 or 100), you can use our Import users from CSV file feature. It allows to automatically add your users from previously generated CSV file.

Follow the steps below to add multiple users:

1. Click on the Import users button from the top menu on the Manage users sub-tab.
2. Prepare CSV file that contains the following fields:
 1. user email
 2. user name
 3. status (active or not)
 4. Administrator - - yes or no
 5. [user class](#) - pro, associate or jailed
 6. PIN - learn details on [Adjust PIN code user registration access](#).

Import from CSV ✕

CSV Fields:

Field	Description	Required	Default
email	user email	true	N/A
name	user name	false	email
active	does user have active status, Y or N	false	Y
admin	does user have admin permissions, Y or N	false	N
class	user class	false	Pro Users
pin	optional PIN the user must enter when registering and setting password - 5 digits	false	-

File example:

```
email,name,active,admin,class,pin
email@quatrix.it,John,Y,N,Pro Users,12345
```

3. Click on the Next button, choose your CSV file and click on the Import.

Import from CSV

Choose CSV file:

Users (1).csv

Data preview:

email	name	active	admin	class
mary.smith@maytech.net	11	Y	Y	A
lora.smith@maytech.net	12	Y	Y	A
sam.smith@maytech.net	13	Y	Y	A
...				

Import log:

4 of 4 users created

- ✓ 14 (bob.smith@maytech.net) created
- ✓ 12 (lora.smith@maytech.net) created
- ✓ 11 (mary.smith@maytech.net) created
- ✓ 13 (sam.smith@maytech.net) created

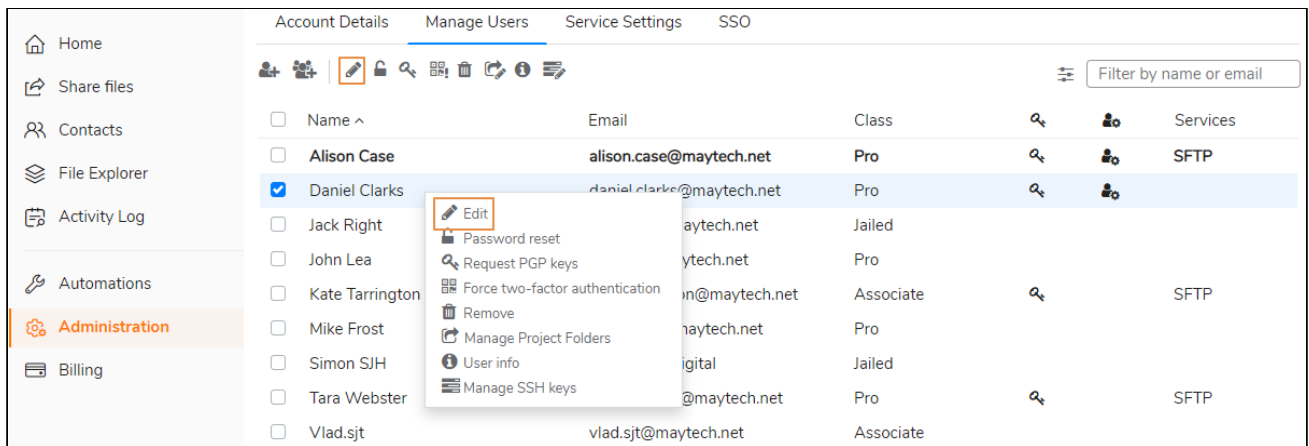
As soon as the import is completed, your users will be automatically added to the account.

Emails already stored in Quatrix won't be imported. If the format is not corresponding, the import won't be allowed until it is corrected.

SFTP can't be adjusted while importing. It can be adjusted while editing one or multiple users.

A CSV file would be rejected if it contains more records than available licences.

4.2 Editing a user



To change user details or update permissions:

1. Select the check box next to the user you would like to edit and click on the Edit icon from the top or right-click menu.
2. Change user details in the Edit user dialog box.
3. Click the Save button.

You get the notification that the user's profile has successfully been edited.

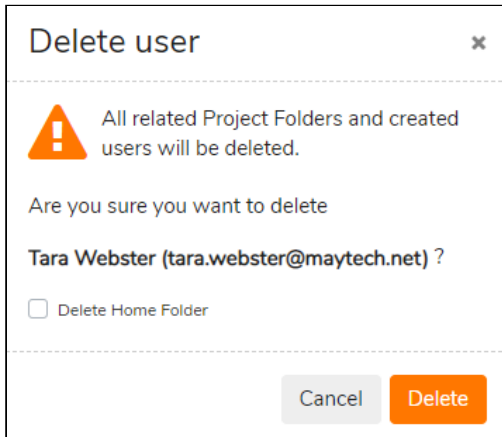
Possible user update cases:

- if you would like to set the limit for user storage, specify the quota amount.
- user class update allows you to [control account access permissions](#) e.g. you can update pro user to jailed user that limits the access to only Projects shared with me folder.
- grant administrative or billing rights if you would like your user to cover account administration or invoice payment.
- enable or disable [SFTP](#).
- activate or deactivate the user - make your account unavailable to access.
- switch the language of the user: from English to Chinese or vice versa.

4.3 Deleting a user

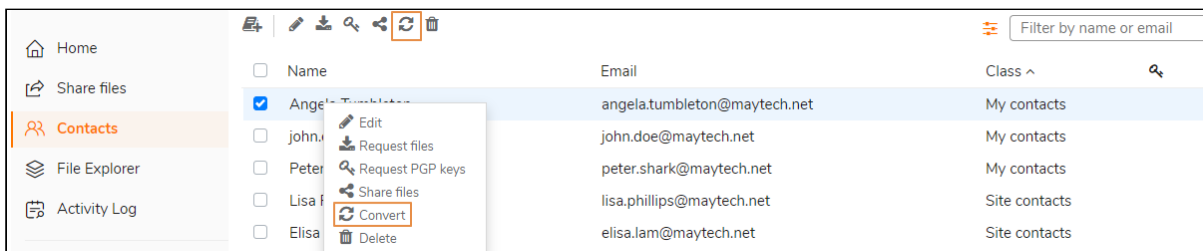
To delete a user select the check box next to the user you would like to remove, click on the Delete icon from the top menu and confirm the deletion. The deleted user won't be able to access their Quatrix account.

If you tick the Delete Home Folder check box while confirming the deletion, all files of the selected user will be deleted. If not, their home folder will stay in the file system and you will be able to access it.



4.4 Converting a contact to a user

If you shared files with someone whose email wasn't used in Quatrix account, this email is automatically written to My Contacts list. You can easily convert your contact (either My or Site) to Pro user by selecting the contact and clicking on the Convert icon on the menu or selecting an appropriate menu option from the right-click menu.

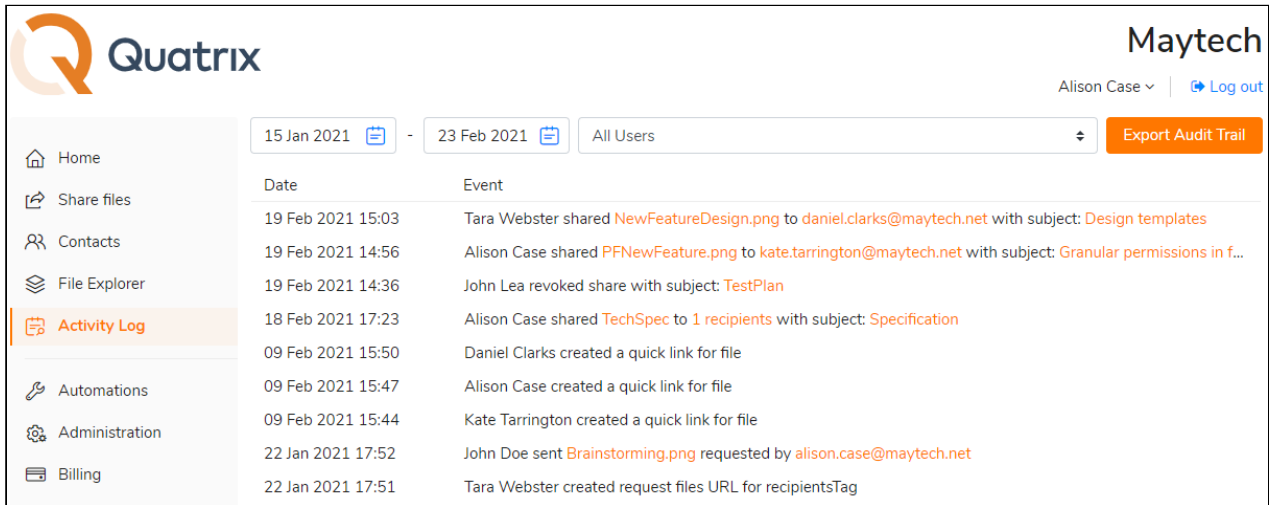


It will soon be released a new version of Quatrix allowing to choose a user class during the conversion.

The conversion of users to contacts is not possible.

5 Track Account Activity

Account owners and admins can get a bird's-eye view of account activity from the Activity log tab. This includes recent sharing activities of the account users, revoked shares, created quick links and file requests.



Quatrix Maytech

Alison Case ▾ | [Log out](#)

15 Jan 2021 📅 - 23 Feb 2021 📅 All Users Export Audit Trail

Date	Event
19 Feb 2021 15:03	Tara Webster shared NewFeatureDesign.png to daniel.clarks@maytech.net with subject: Design templates
19 Feb 2021 14:56	Alison Case shared PFNewFeature.png to kate.tarrington@maytech.net with subject: Granular permissions in f...
19 Feb 2021 14:36	John Lea revoked share with subject: TestPlan
18 Feb 2021 17:23	Alison Case shared TechSpec to 1 recipients with subject: Specification
09 Feb 2021 15:50	Daniel Clarks created a quick link for file
09 Feb 2021 15:47	Alison Case created a quick link for file
09 Feb 2021 15:44	Kate Tarrington created a quick link for file
22 Jan 2021 17:52	John Doe sent Brainstorming.png requested by alison.case@maytech.net
22 Jan 2021 17:51	Tara Webster created request files URL for recipientsTag

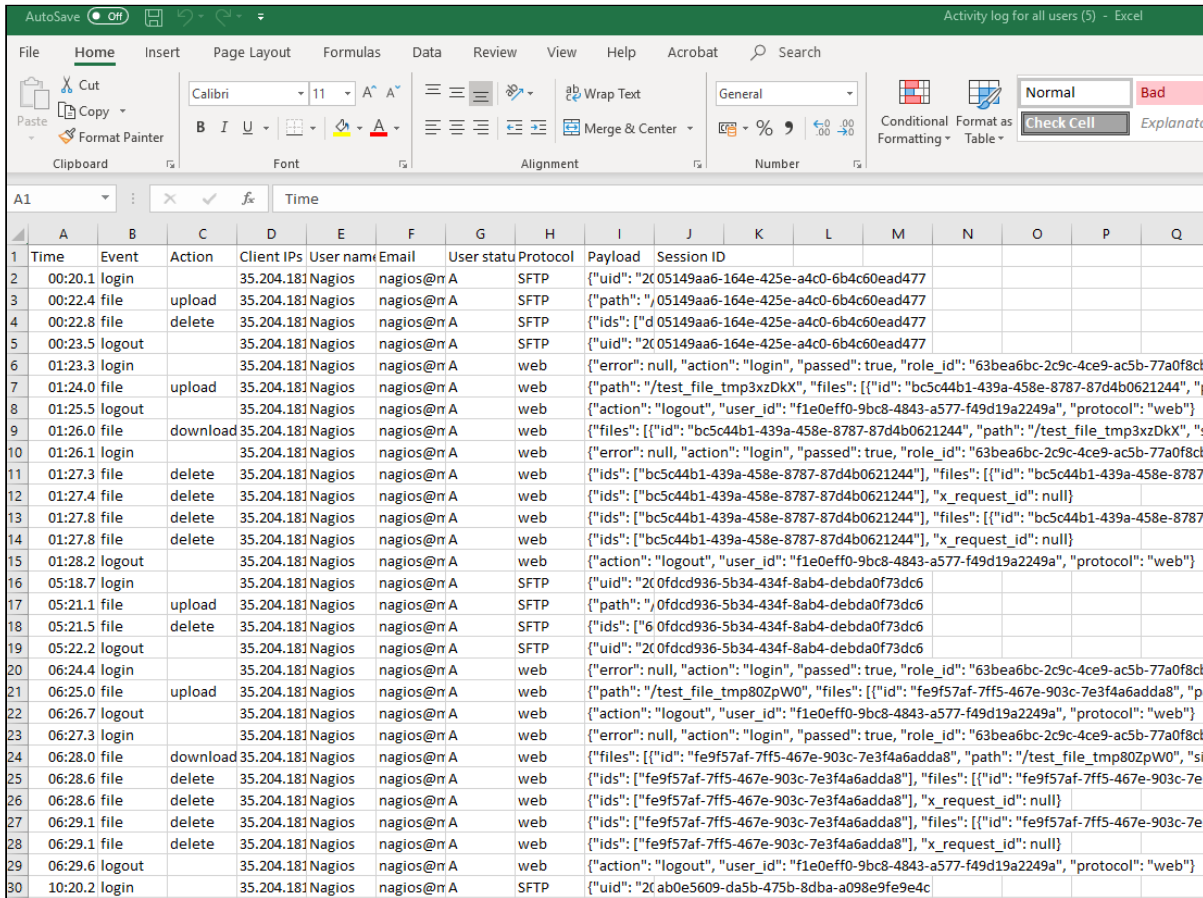
5.1 Activity log display

The Activity log tab allows you to adjust the display of your account activity by selecting a date range and users at the top. The log displays user actions and the date and time these actions were performed.

The default setting of the Activity log is to show your actions for a recent week. If you would like to check all users and their actions select All users and their actions will be displayed in the table. To dig deeper into each action you may left-click on the action and learn additional details in the Action information dialog box. The display of this Action information dialog box depends on the action:

- share action
- quick link
- file request
- file return

Besides these actions you can have details of all possible actions in the account by generating a full report of account activity across your Quatrix account for a specific period by clicking on the Export Audit Trail button in the top right-hand corner. The report will be generated in CSV format and will contain user login activity, password changes, their sharing actions and deletions as well as SFTP actions. See how the report looks like below:



Time	Event	Action	Client IPs	User name	Email	User statu	Protocol	Payload	Session ID
00:20.1	login		35.204.181	Nagios	nagios@n A	A	SFTP	{"uid": "2c05149aa6-164e-425e-a4c0-6b4c60ead477"	
00:22.4	file	upload	35.204.181	Nagios	nagios@n A	A	SFTP	{"path": "/", "05149aa6-164e-425e-a4c0-6b4c60ead477"	
00:22.8	file	delete	35.204.181	Nagios	nagios@n A	A	SFTP	{"ids": ["d05149aa6-164e-425e-a4c0-6b4c60ead477"	
00:23.5	logout		35.204.181	Nagios	nagios@n A	A	SFTP	{"uid": "2c05149aa6-164e-425e-a4c0-6b4c60ead477"	
01:23.3	login		35.204.181	Nagios	nagios@n A	A	web	{"error": null, "action": "login", "passed": true, "role_id": "63bea6bc-2c9c-4ce9-ac5b-77a0f8cb"	
01:24.0	file	upload	35.204.181	Nagios	nagios@n A	A	web	{"path": "/test_file_tmp3xzDkX", "files": [{"id": "bc5c44b1-439a-458e-8787-87d4b0621244", "s"	
01:25.5	logout		35.204.181	Nagios	nagios@n A	A	web	{"action": "logout", "user_id": "f1e0eff0-9bc8-4843-a577-f49d19a2249a", "protocol": "web"}	
01:26.0	file	download	35.204.181	Nagios	nagios@n A	A	web	{"files": [{"id": "bc5c44b1-439a-458e-8787-87d4b0621244", "path": "/test_file_tmp3xzDkX", "s"	
01:26.1	login		35.204.181	Nagios	nagios@n A	A	web	{"error": null, "action": "login", "passed": true, "role_id": "63bea6bc-2c9c-4ce9-ac5b-77a0f8cb"	
01:27.3	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["bc5c44b1-439a-458e-8787-87d4b0621244", "files": [{"id": "bc5c44b1-439a-458e-8787-87d4b0621244", "x_request_id": null}	
01:27.4	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["bc5c44b1-439a-458e-8787-87d4b0621244", "files": [{"id": "bc5c44b1-439a-458e-8787-87d4b0621244", "x_request_id": null}	
01:27.8	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["bc5c44b1-439a-458e-8787-87d4b0621244", "files": [{"id": "bc5c44b1-439a-458e-8787-87d4b0621244", "x_request_id": null}	
01:27.8	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["bc5c44b1-439a-458e-8787-87d4b0621244", "files": [{"id": "bc5c44b1-439a-458e-8787-87d4b0621244", "x_request_id": null}	
01:28.2	logout		35.204.181	Nagios	nagios@n A	A	web	{"action": "logout", "user_id": "f1e0eff0-9bc8-4843-a577-f49d19a2249a", "protocol": "web"}	
05:18.7	login		35.204.181	Nagios	nagios@n A	A	SFTP	{"uid": "2c0fdcd936-5b34-434f-8ab4-debda0f73dc6"	
05:21.1	file	upload	35.204.181	Nagios	nagios@n A	A	SFTP	{"path": "/", "0fdcd936-5b34-434f-8ab4-debda0f73dc6"	
05:21.5	file	delete	35.204.181	Nagios	nagios@n A	A	SFTP	{"ids": ["60fdcd936-5b34-434f-8ab4-debda0f73dc6"	
05:22.2	logout		35.204.181	Nagios	nagios@n A	A	SFTP	{"uid": "2c0fdcd936-5b34-434f-8ab4-debda0f73dc6"	
06:24.4	login		35.204.181	Nagios	nagios@n A	A	web	{"error": null, "action": "login", "passed": true, "role_id": "63bea6bc-2c9c-4ce9-ac5b-77a0f8cb"	
06:25.0	file	upload	35.204.181	Nagios	nagios@n A	A	web	{"path": "/test_file_tmp80ZpW0", "files": [{"id": "fe9f57af-7ff5-467e-903c-7e3f4a6adda8", "pa"	
06:26.7	logout		35.204.181	Nagios	nagios@n A	A	web	{"action": "logout", "user_id": "f1e0eff0-9bc8-4843-a577-f49d19a2249a", "protocol": "web"}	
06:27.3	login		35.204.181	Nagios	nagios@n A	A	web	{"error": null, "action": "login", "passed": true, "role_id": "63bea6bc-2c9c-4ce9-ac5b-77a0f8cb"	
06:28.0	file	download	35.204.181	Nagios	nagios@n A	A	web	{"files": [{"id": "fe9f57af-7ff5-467e-903c-7e3f4a6adda8", "path": "/test_file_tmp80ZpW0", "siz"	
06:28.6	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["fe9f57af-7ff5-467e-903c-7e3f4a6adda8"], "files": [{"id": "fe9f57af-7ff5-467e-903c-7e3f4a6adda8", "x_request_id": null}	
06:28.6	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["fe9f57af-7ff5-467e-903c-7e3f4a6adda8", "x_request_id": null}	
06:29.1	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["fe9f57af-7ff5-467e-903c-7e3f4a6adda8", "files": [{"id": "fe9f57af-7ff5-467e-903c-7e3f4a6adda8", "x_request_id": null}	
06:29.1	file	delete	35.204.181	Nagios	nagios@n A	A	web	{"ids": ["fe9f57af-7ff5-467e-903c-7e3f4a6adda8", "x_request_id": null}	
06:29.6	logout		35.204.181	Nagios	nagios@n A	A	web	{"action": "logout", "user_id": "f1e0eff0-9bc8-4843-a577-f49d19a2249a", "protocol": "web"}	
10:20.2	login		35.204.181	Nagios	nagios@n A	A	SFTP	{"uid": "2cab0e5609-da5b-475b-8dba-a098e9fe9e4c"	

The Audit trail contains the following records:

- Account actions: account creation and updates;
- Log-in and log-out actions: when the user logs in or fails to log in and logs out of Quatrix;
- User and contact actions: creation, deletion and updates;
- Automations: details about automatic rules and their updates;
- Share actions: sharing, revoking or downloading files, crating or revoking quick links, requesting files and returning them back;
- Project folder actions: creation, modification and deletion;
- File actions: file upload and download, modification and deletion.

If you would like to have these reports automatically generated, you can create a rule on the Automation tab. Learn more about automatic generation of Audit Trail reports [here](#).

5.1.1 Revoke the Access to Shares

You can revoke or disable the access to the share by clicking on the Revoke button from the Action information dialog box. The revocation cannot be reverted that's why the share won't be accessible either to the admin or to the user. The revoked share is grayed out in the list on the Activity log tab.

5.2 Track sharing within your account

You can keep track of user sharing activity on the Tracking sub-tab of the Share tab. It displays sharing actions of the current user by default. To get details of shares of a certain user, select the one from the drop-down list.

The following sharing actions are displayed:

- shared files - with your subject or the default "File sharing notification",
- shared quick link - with the default subject "Quick link",
- requested files - with the default subject "File sharing request",
- returned files - with the default subject "Re: File sharing request",
- revoked shares - grayed out in the list.

Besides the Tracking tab contains date and time the sharing action was performed as well as its recipients.




Every above mentioned sharing action contains additional information on the Share information dialog box which can be opened by left-clicking on it. The Share information displays the share type; date and time it was shared, released or expired; its subject; the status (active, revoked or expired); the download link and the download info with the file size and number of downloads.

Share information

Details:

Type: Tracked
Date: 23 Feb 2021 16:04
Recipients: daniel.clarks@maytech.net
Subject: Final Updates
Release date: 23 Feb 2021 16:04
Expiry date: Never expire
Status: Active
Download link: <https://case.quatrix.it/download/4a93e7d5-33e5-459a-bcfa-c2e3827ff59f>

Files:

Name	Size	Downloads	
 Template1.png	47.80 KB	1	
Recipients			
	IP	Download time	Size
alison.case@maytech.net	193.53.89.18	23 Feb 2021 16:06	47.80 KB
 Template2.png	52.35 KB	1	
 Template3.png	76.50 KB	1	

6 Automations

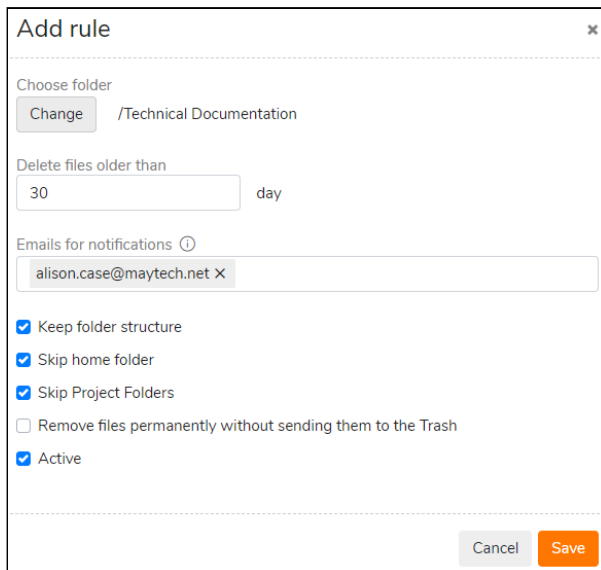
Automations allow you to improve your productivity by automating some of your activities in the account. For example, if you want to delete files or folders every X days, you can add a rule to perform the deletion at a specified interval.

- [Automatic deletion of files or folders](#)
- [Automatic generation of activity exports](#)

6.1 Automatic deletion of files or folders

The Automatic Deletes sub-tab allows you to adjust the workflow for automatic deletion of files or folders that are older than a specified period of time. To add a rule for auto-deletion, follow these steps:

1. Open the Automatic Deletes sub-tab on the Automations tab.
2. Click on the Add rule icon and specify settings for the automatic deletion:



The screenshot shows a modal window titled "Add rule" with a close button (x) in the top right corner. The window contains the following fields and options:

- Choose folder:** A text field containing "/Technical Documentation" and a "Change" button to its left.
- Delete files older than:** A text input field containing "30" followed by the word "day".
- Emails for notifications:** A text input field containing "alison.case@maytech.net" with a dropdown arrow on the right and a close button (x) on the left.
- Checkboxes:**
 - Keep folder structure
 - Skip home folder
 - Skip Project Folders
 - Remove files permanently without sending them to the Trash
 - Active
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

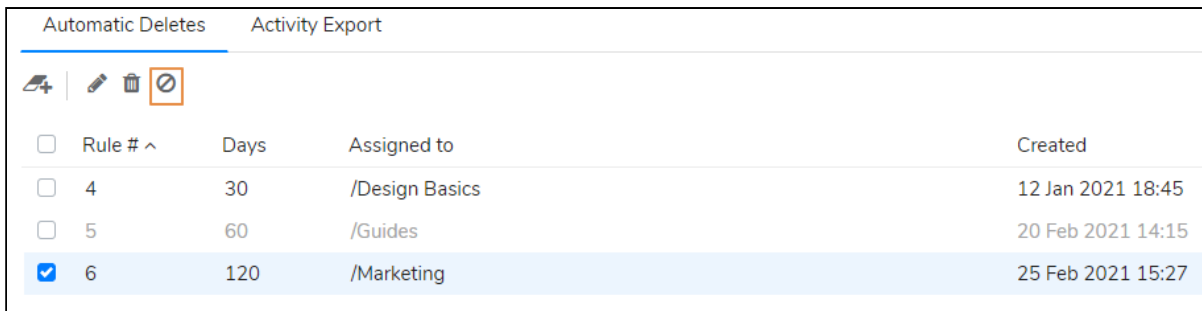
1. Click on the Select button at the top right to choose the folder where you would like to activate the deletion. 1 folder for 1 rule!
2. Specify the time interval the deletion should be performed.
3. Type in emails for file deletion notifications (your email is listed by default).
4. Keep folder structure - tick this check box if you want to save the structure with folders and delete the contents of these folders.
5. Skip home folders - tick if you intend to skip files of inactive users.
6. Skip shared folders - tick to leave Project Folders.
7. Remove files permanently without sending them to Trash.
8. Active - tick if you would like to activate the rule.

3. Save the rule.

If there is an overlapping of auto-deletion rules, the rule created first will apply.

Your added rules will be displayed in the list and will contain brief information about the adjusted deletion. All your listed rules can be easily managed by ticking the check box next to the rule and selecting an appropriate option from the top menu. You can edit, delete, activate or deactivate auto-deletion rules. The edition of the rule presupposes the change of previously specified settings. If you delete the rule, it won't be either available, or applicable. The deletion cannot be restored back.

To make the rule inactive, click on the Deactivate icon and this grays the rule out in the list. Whilst the Activate rule icon allows to turn the rule on again.



Automatic Deletes		Activity Export		
<input type="checkbox"/>	Rule # ^	Days	Assigned to	Created
<input type="checkbox"/>	4	30	/Design Basics	12 Jan 2021 18:45
<input type="checkbox"/>	5	60	/Guides	20 Feb 2021 14:15
<input checked="" type="checkbox"/>	6	120	/Marketing	25 Feb 2021 15:27

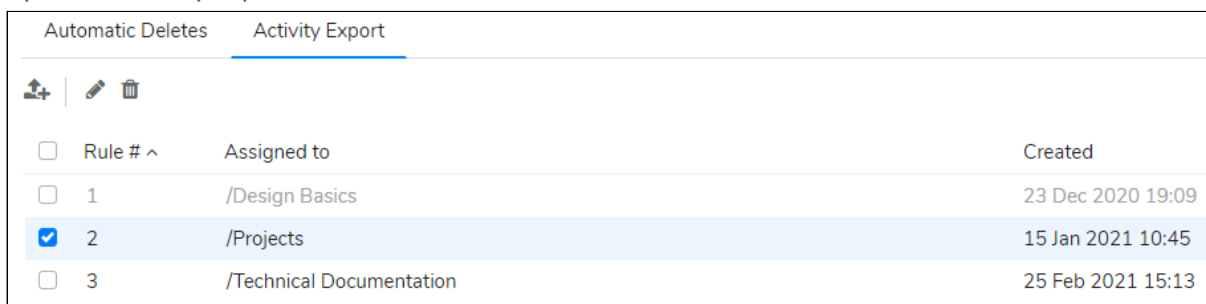
6.2 Automatic generation of activity exports

The Auto-generation of activity exports provides a possibility to automatically receive logs in CSV format (a comma-separated values file that allows data to be saved in a tabular format) with the account activity on a regular basis.

The automation rules created by the owners cannot be updated or deleted by the administrators.

To add a rule, follow the steps below:

1. Open the Activity Export sub-tab of the Automations tab.



Automatic Deletes		Activity Export	
<input type="checkbox"/>	Rule # ^	Assigned to	Created
<input type="checkbox"/>	1	/Design Basics	23 Dec 2020 19:09
<input checked="" type="checkbox"/>	2	/Projects	15 Jan 2021 10:45
<input type="checkbox"/>	3	/Technical Documentation	25 Feb 2021 15:13

2. Click on the Add rule icon and adjust settings for the rule:

1. Select the folder where you would like to store your activity logs.
2. Type in emails for automatic activity log notifications.
3. Pick the start date for the generation of future logs.
4. Choose the frequency of logs: daily/weekly/monthly.
5. Active - tick if you would like to activate the rule.

3. Save the rule.

The logs will be stored in your specified folder in CSV format and sent to the listed recipients in the email notifications.

If you would like to retrieve a log for the past period, go to the [Activity Log](#) tab and manually generate a report there. In order to save your time in future, adjust the rule with the above instructions and receive required logs with the specified frequency.