



**Quatrix**

Quatrix Administrator Guide

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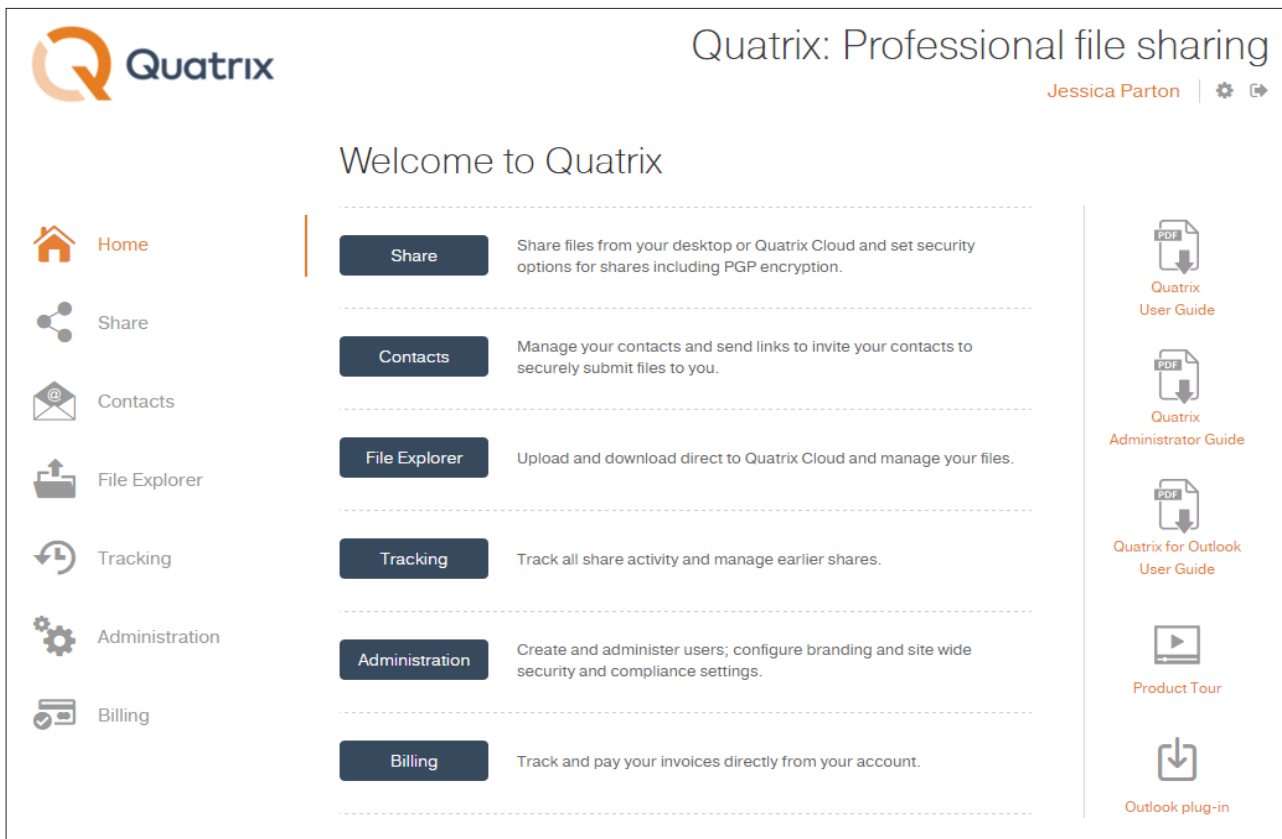
## 1. Quatrix Overview

Quatrix® by Maytech provides simple one-step web-based file sharing for end users with enterprise level controls empowering IT to enforce compliance, data protection and information security policies. Quatrix provides login, tracking and a full audit trail. It can also be white labelled to fully integrate with your brand and identity.

Quatrix secures your data in transit via HTTPS or SFTP and at rest using AES-256 bit encryption. A unique Quatrix PGP feature provides advanced security for highly confidential data.

## 2. Getting Started

On login as a Quatrix administrator you see the Administration tab which is not visible to ordinary users. Here you can create and administer users, set up branding and configure service wide options including security and compliance settings.



For information on sharing and requesting files, tracking shares, file and folder management, encrypted file sharing see Quatrix User Guide.



## 3. Quatrix Features

Quatrix® provides a full range of features to meet any need.

### 3.1. Easy and Secure File Sharing

#### ➤ Easily share and upload files

Easily drag and drop files from your desktop to Quatrix.

#### ➤ Set permissions for shared files

Create shared projects with any users and set file permissions (read/write/share).

#### ➤ Share file links

You can send files with a unique URL link instead of an email attachment. File links can even be mass distributed, making download available for a wide audience.

#### ➤ Advanced end-to-end encryption

Maytech offers secure data transfer with end-to-end encryption as standard. Data is encrypted in transit using HTTPS or SFTP and at rest using AES-256 bit encryption. The browser-based PGP module is available in Quatrix and ensures you enjoy the highest level of encryption leverage.

### 3.2. Central Administration

#### ➤ Simple access controls

Take control of your company's file sharing infrastructure. At Maytech, our file-sharing networks allow for detailed management of user provisioning and access to your site via SFTP or HTTPS.

You can set up shared folders for project teams, selectively granting rights such as upload, download, delete, overwrite, and more.

In addition to dedicated private logins, Maytech also allows you to enable Public access folders and make files available for general download – for example brochures, PDFs, price lists, policy documents, tender documents, specifications, manuals and brand guidelines.

#### ➤ Tracking of your shares

Keep track of your shared files as well as file transfers of your users.



### 3.3. Branding

Quatrix® domains can be configured to reflect a brand to employees, customers and business partners. Administrators can customize the access URL, header logos and footers.

#### ➤ Customise the look

Upload the company logo for Quatrix domain pages.

#### ➤ Tailor the domain name

It is easy to provide users with a familiar URL to access the company's Quatrix domain. Quatrix enables administrators to specify a fully-qualified domain.

### 3.4. Search

#### ➤ Quickly search through large amounts of files

Quatrix has powerful search capabilities, allowing users to quickly find and retrieve any file based on a wide-variety of search techniques, such as keywords, find similar files and file name match.

#### ➤ Keyword, file name and tag search

Find files based on automatically extracted and indexed keywords or file names.

### 3.5. Customer Support

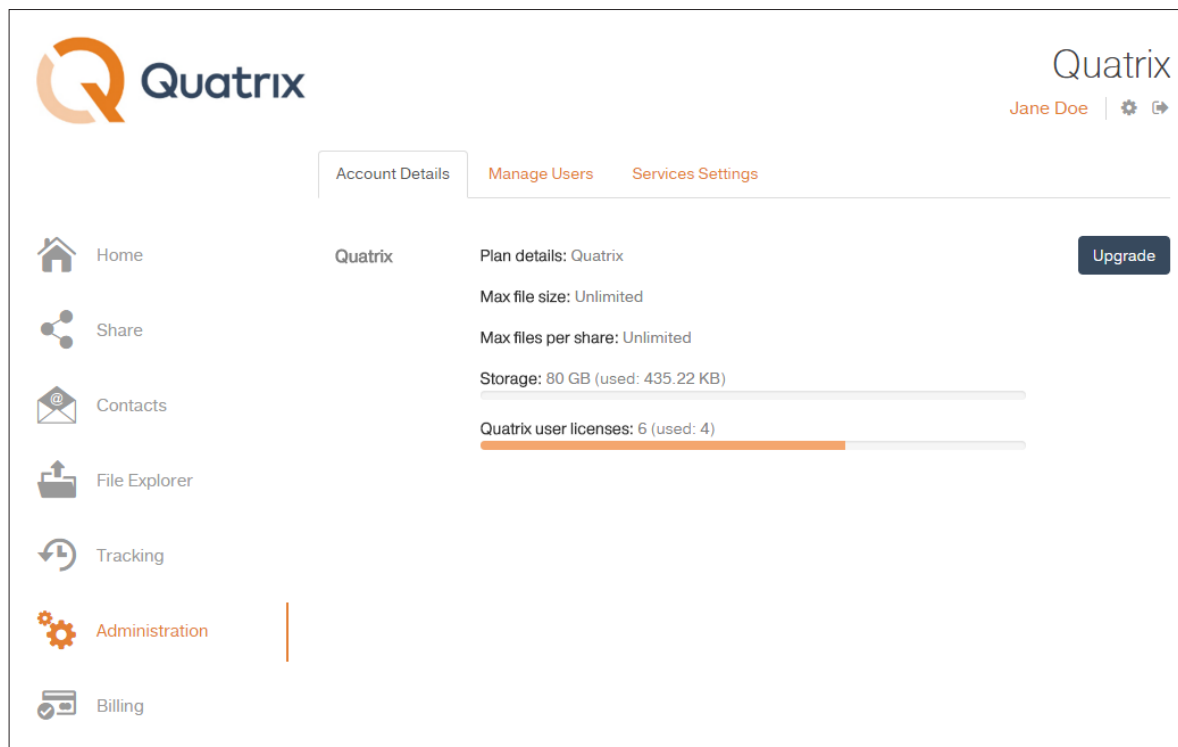
Maytech provides world-class customer support at no additional charge. Contact our knowledgeable support team 24x7 via email [support@maytech.net](mailto:support@maytech.net) or phone: **International & UK +44 (0) 189 286 1222 and USA & Canada 1 800 592 1906.**



## 4. Account Management

Your account information is displayed on the Account Details sub-tab of the Administration tab. It contains plan details, storage amount, number of users allowed for this account, maximum file size and maximum files per share.

This information cannot be changed by the administrator, but rather by the Maytech support team on request.



### 4.1. Account Upgrade/Downgrade

If you would like to increase/decrease the number of users in your account:

1. Go to the Account Details sub-tab of the Administration tab.
2. Click the Upgrade button.
3. Specify the upgrade/downgrade details.
4. Click the Pay button.

As soon as the payment is received, your account will be upgraded. The account downgrade is performed immediately.



## 4.2. Account Suspension

### ⊗ 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](mailto:servicedesk@quatrix.it).

### ⊗ Quatrix

When you take Quatrix account on our website, or upgrade your free trial account, you can specify how often you are going to pay for your account - annually or monthly. If your account is not upgraded by the end of the expiry date, it will be suspended. You can unsuspend your account during 21-day period after the expiry date, otherwise the account as well as all your data will be deleted. To unsuspend your Quatrix account, go to the Billing tab and pay an outstanding invoice. Your account will be unsuspended, when the payment is received.

## 4.3. Manage Your Storage

The status bar on the Edit Profile dialogue box displays the amount of used and free space in your account. You can manage your account quota as well as your user quotas within your account quota limit.

The table below shows the account quota example depending on the chosen plan.

Plan	User Amount	Storage per Account, GB	Storage per User, GB
Quatrix Free Trial	5	5	-
Quatrix	2 and more*	50	5

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

Maximum number of users: 200 (upgrade on the Billing tab of your account). To request more users contact our Quatrix Customer Care ([servicedesk@quatrix.it](mailto:servicedesk@quatrix.it)) or call one of the numbers below.



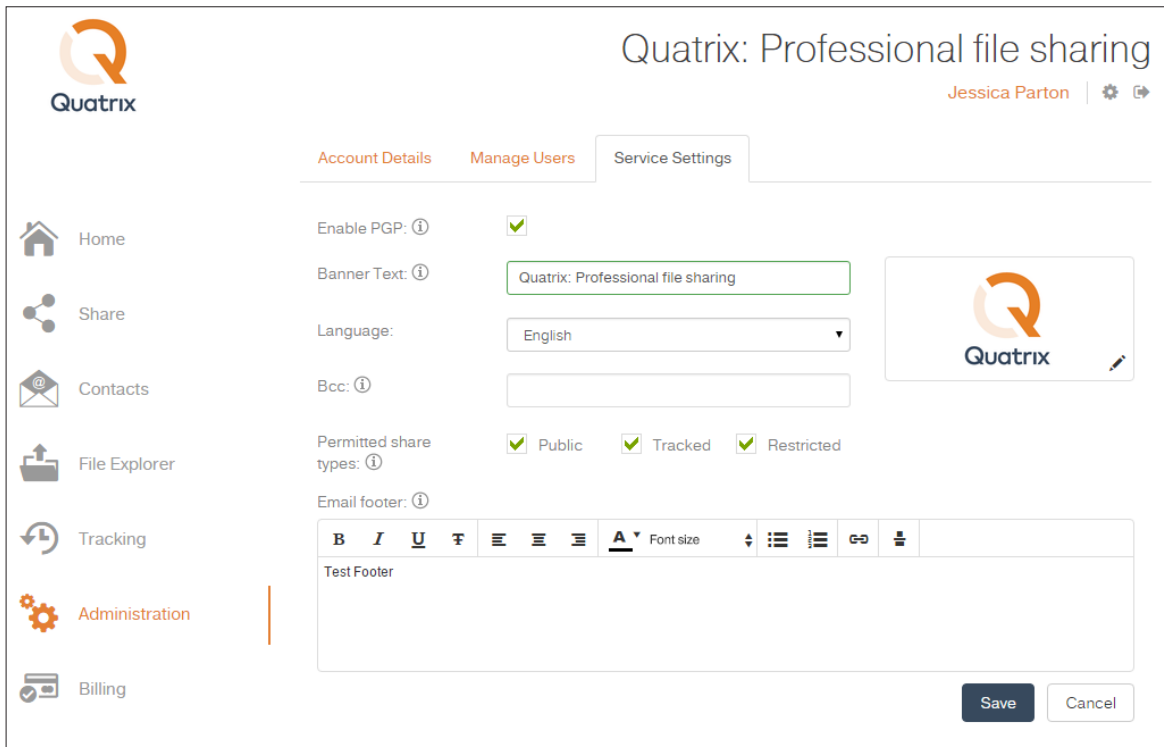
## 4.4. Set Your Corporate Branding

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 of the Administration tab and edit the default settings with your corporate banner, logo and email footer.

## 4.5. Enable Encrypted File Sharing

You can enable encrypted file sharing for your account which adds extra security for your shares. For more information about PGP in Quatrix see Quatrix User Guide.

To enable PGP go to the Service Settings sub-tab of the Administration tab and select the Enable PGP check box.



The screenshot shows the Quatrix Administration interface for a user named Jessica Parton. The 'Service Settings' tab is active. The 'Enable PGP' checkbox is checked. The 'Banner Text' field contains 'Quatrix: Professional file sharing'. The 'Language' dropdown is set to 'English'. The 'Bcc' field is empty. The 'Permitted share types' section has checkboxes for 'Public', 'Tracked', and 'Restricted', all of which are checked. The 'Email footer' field contains 'Test Footer' and has a rich text editor toolbar above it. The 'Administration' tab is highlighted in the left sidebar.





## 4.6. Set Permitted Share Types Site-wide

You can adjust security levels for your shares site-wide that determines what types of shares are permitted within your Quatrix® account.

There are 3 types of shares:

- **Public** - anyone with the link can download 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.

To adjust the permitted share types, go to the Service Settings sub-tab of the Administration tab and select corresponding check boxes from the Permitted share types.

## 4.7. Add Multiple Admins to Your Account

The Multiple Admins feature allows you to add multiple admins to your Quatrix account. It is helpful if you have several departments within a company and want to assign the department management to a certain user.

The user with the Administrator role can:

- manage internal and external users (change their name, email, quota, group, enable or disable file sharing, activate or deactivate them, send password reset link or the link to set PGP keys)
- assign Administrator role to other users of the account
- access files of added users
- manage site contacts
- enable/disable PGP for the account
- set/change the banner text, Bcc, logo, language and email footer
- set/change permitted share types for the account



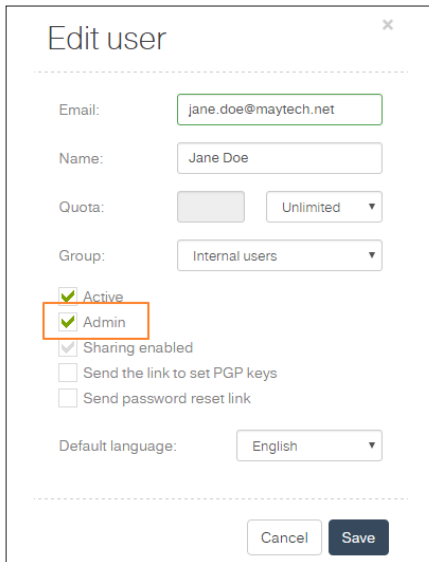
The user with the Administrator role cannot:

- upgrade and downgrade the account
- delete the account's owner
- track and pay invoices

### How to assign the Administrator role

If you are the account owner, you can promote your users to help you manage Quatrix® account by assigning the Administrator role to them.

1. Go to the Administration tab, Manage Users sub-tab and select the user you would like to assign the Admin role.
2. Click on the Edit icon from the menu which opens the Edit User dialog box.
3. Select the Admin check box and click on the Save button.



The screenshot shows the 'Edit user' dialog box with the following fields and options:

- Email: jane.doe@maytech.net
- Name: Jane Doe
- Quota: Unlimited
- Group: Internal users
- Active:
- Admin:  (highlighted with a red box)
- Sharing enabled:
- Send the link to set PGP keys:
- Send password reset link:
- Default language: English

Buttons: Cancel, Save

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

**Note:** 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.



## 4.8. Transfer Files with SFTP

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.

This module can be enabled on request sent to Quatrix Customer Care ([servicedesk@quatrix.it](mailto:servicedesk@quatrix.it)). Every added SFTP user has a unique login that is used to log in to SFTP client.

If you would like to transfer files using SFTP and you have this module enabled for your account, you need to perform the following adjustments:

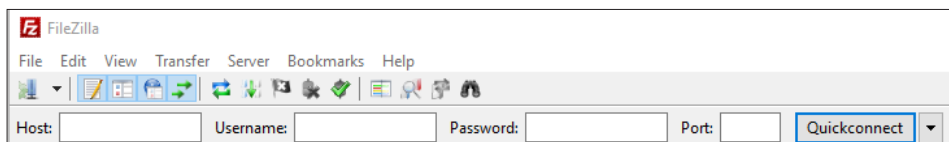
- Set up SFTP client
- Adjust settings on your Quatrix account

### 4.8.1 Configuration of SFTP client

There are many SFTP clients that you can download and use. We'll use FileZilla, a free and open-source SFTP client for Windows, Mac OS X and Linux, as an example.

First you need to download and install the latest version of FileZilla. When it is installed, open the application and connect to the SFTP server. There are two ways of connecting to the server: using your password or SSH public key.

#### Password authentication



If you would like to log in to the SFTP client using the password, you need to specify the following information on the Quickconnect bar:

- **Host:** type in your site (e.g. `sftp://yoursite.quatrix.it`)
- **Username:** enter your SFTP login
- **Password:** type in your password. You can access SFTP client with your account password.
- **Port:** 22

**Note:** You can get your host and username by clicking on the link with your name at the top right of your Quatrix account.

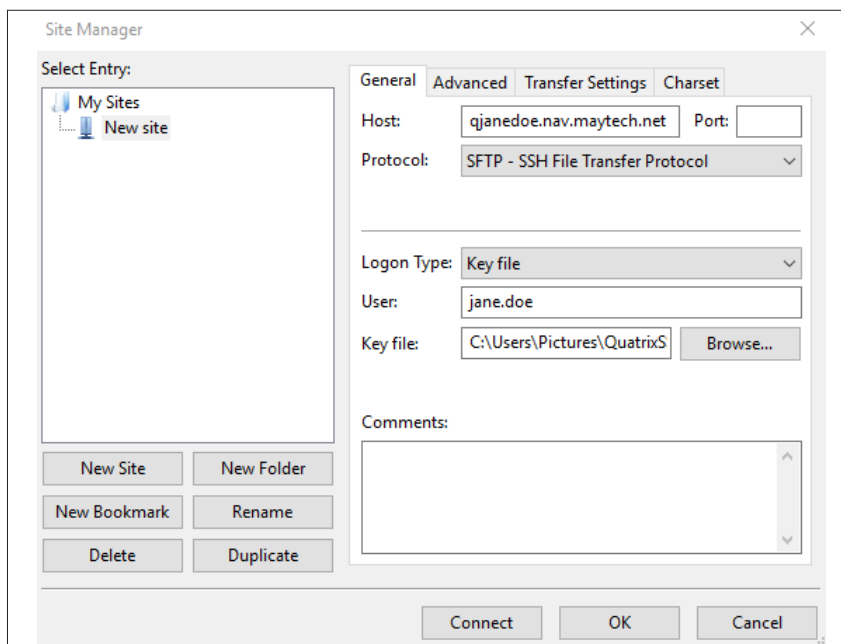
Having specified the information above, click on the Quickconnect button or press Enter and you'll be connected to the required server.



## SSH public key authentication

You can connect to the SFTP server using SSH keys. SSH client and server authenticate each other using the public and private key pair. It allows multiple users to log in as the same system user without having to share a single password between them. Follow these steps to access your server:

1. Click on the File, and select the Site manager option
2. Click on the New site and type in your site
3. Go to the General tab on the right-hand pane and specify additional settings:



- **Host:** type in your site (e.g. sftp://yoursite.quatrix.it)
  - **Port:** 22
  - **Protocol:** Protocol: SFTP - SSH File Transfer Protocol
  - **Logon Type:** Key file
  - **User:** enter your SFTP login
  - **Key file:** browse and open the file with your previously generated SSH public key
4. Connect to the server by clicking on the Connect button.

Once a successful connection has been established, FileZilla will open up. The left-hand pane of the window displays the local system, whilst the contents of the remote server will be displayed on the right-hand pane.

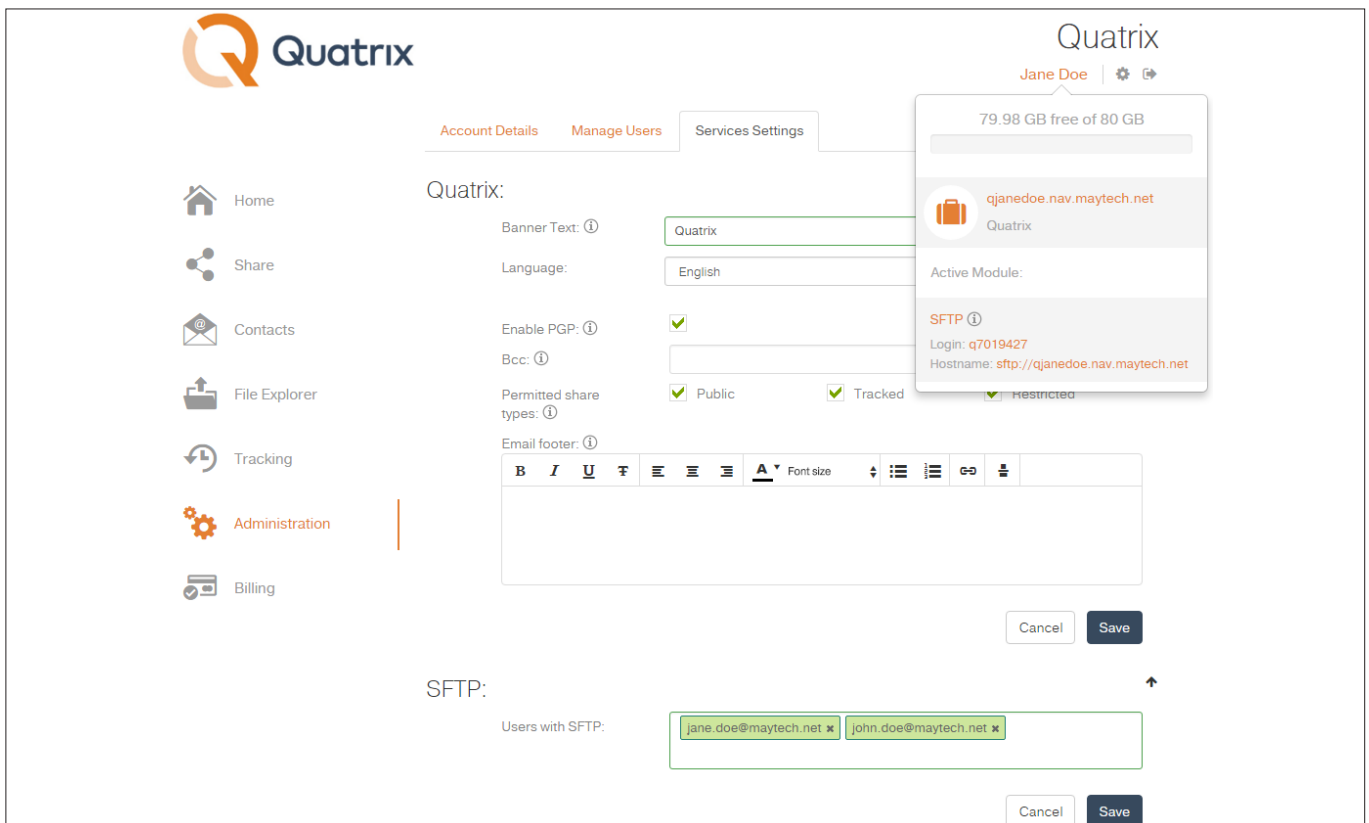
**Note:** Passwords are easy to use but we would recommend to use SSH keys as this method is more secure.



## 4.8.2 Setting up SFTP in Quatrix

If you would like to connect to your Quatrix site using SFTP, you will need the following:

1. Ensure that the SFTP module is enabled for the account (SFTP option appears on your Account Details and Service Settings sub-tabs)
2. Add SFTP users on the Service Settings sub-tab of the Administration tab
3. Get your SFTP details (host name and login = user name) by clicking on the link with your name at the top right of the account



The screenshot shows the Quatrix Administration interface. The user is logged in as Jane Doe. The interface is divided into several sections:

- Account Details:** Shows account information like "79.98 GB free of 80 GB".
- Services Settings:** Contains configuration options for the Quatrix service, such as Banner Text, Language, Enable PGP, Bcc, Permitted share types, and Email footer.
- SFTP:** A section for managing SFTP users, showing a list of users with email addresses like "jane.doe@maytech.net" and "john.doe@maytech.net".
- Profile Pop-up:** A small window showing the user's profile, including their name, email address, and SFTP details (Login: q7019427, Hostname: sftp://qjanedoe.nav.maytech.net).

4. Connect to SFTP client using your password or SSH keys

**Note:** You can access SFTP client with your account password.

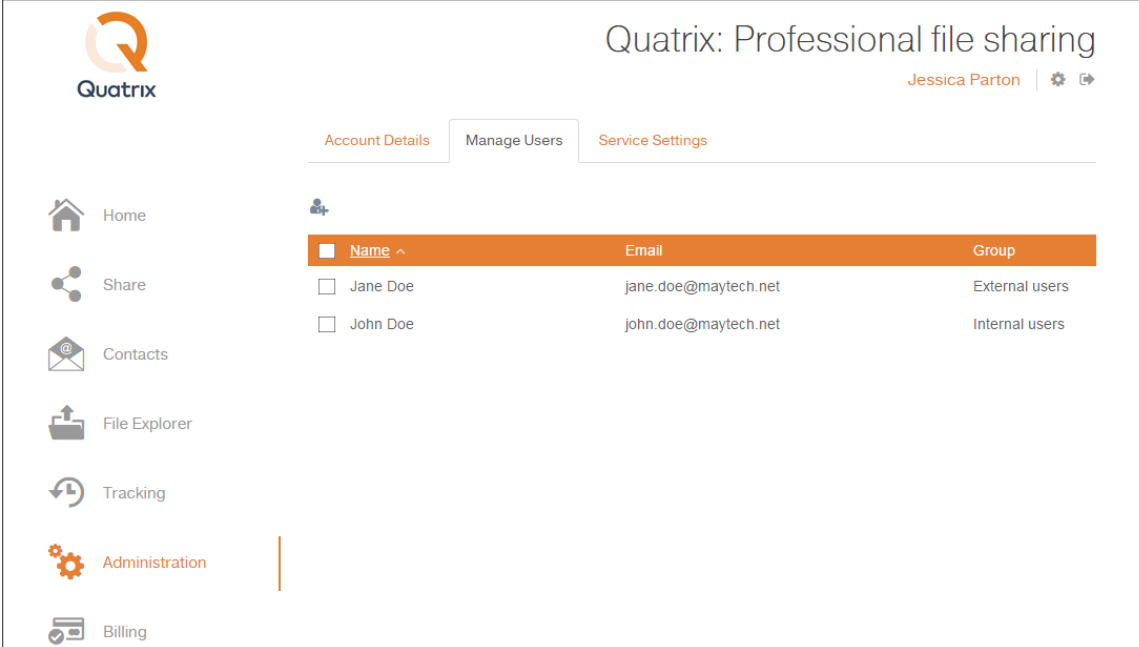
If you would like to connect to SFTP with SSH keys, you need to add your previously generated SSH public key to Quatrix. Go to Edit your profile dialog box, click on the Manage SSH keys link, insert your Public SSH key and save it. After saving you won't be able to edit it's contents but rather only the title. Make sure that your SSH key is copied correctly, it should start with "ssh-rsa" and contain no comment.

When a secure connection is established, you can exchange your local files with the ones on the remote server.



## 5. User Management

A user is a person who can use Quatrix® for sharing files and folders. You can add, edit or delete your users on the Manage Users sub-tab of the Administration tab.



Quatrix: Professional file sharing

Jessica Parton | ⚙️ ↗️

Account Details | **Manage Users** | Service Settings

Name ^	Email	Group
<input type="checkbox"/> Jane Doe	jane.doe@maytech.net	External users
<input type="checkbox"/> John Doe	john.doe@maytech.net	Internal users

### 5.1. Roles and Permissions

A user role is a set of permissions that you assign to specific users in specific contexts.

There are currently the following roles available in Quatrix:

- **Owner** is the top administrator of the account that has access to all Quatrix features and can purchase more users for the account.
- **Admin** has the same rights as the account owner with the exception of tracking and paying invoices for the account.
- **Internal user** can view and share files with other users (owner, admins, external and internal users) and site contacts. Besides the internal user can create a list of own personal contacts invisible to the owner and administrators.
- **External user** can view and share files with only internal users, admins and the owner. Sharing to the outside world is not allowed.
- **Personal/ site contacts** can only download and return files.
- **Anonymous user** can only download files sent using the public share privacy option.



The tables below provide details of permissions depending on the role.

### Account and Profile Management

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
View account details	+	+			
Change profile's email	+				
Change profile's name	+	+	+	+	

### Contact and User Management

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
Manage users	+	+			
Assign Administrator role to users of the account	+				
Activate or deactivate users	+	+			
Set/change user quota	+	+			
Manage user sharing permissions	+	+			
Organise users in groups	+	+			
View internal and external users	+	+	+		
Convert a contact to a user	+	+			
View site contacts	+	+	+		
Manage site contacts	+	+			
Manage personal contacts	+	+	+		

### File Sharing

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
Share files/ folders	+	+	+	+	
Return files and folders	+	+	+	+	+
Download files	+	+	+	+	+



For more information see [www.maytech.net](http://www.maytech.net)

Or call us: International & UK +44 (0) 189 286 1222 | USA & Canada 1 800 592 1906

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### File Tracking

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
Tracking of own transfers	+	+	+	+	
Tracking of user transfers	+	+			

### File Management

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
View own files and folders	+	+	+	+	
Manage files and folders of account users	+				
Manage files and folders of added users	+	+			
Create and manage project folders	+	+	+	+	

### Billing Management

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
Track and pay invoices	+				
Upgrade and downgrade the account	+				

### PGP

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
Enable/ disable PGP	+	+	+	+	
Generate PGP key	+				+
Encrypt files	+	+	+	+	
Decrypt files	+	+	+	+	+
Send PGP key requests to users/contacts	+	+	+	+	





## Service Settings

	Owner	Administrator	Internal User	External User	Personal/ Site Contact
Set banner text, language, email footer, Bcc and logo	+	+			
Retain a copy of all Quatrix® shared data	+	+			
Set/change permitted share types for the account	+	+			

## 5.2. Adding Users

To create a new user go through the following steps:

1. Click on the Add user icon on the Manage users sub-tab.
2. Enter user email and name, specify user quota, select an appropriate group and adjust sharing permissions in the Add user dialog box.
3. Choose a default language.
4. Click the Save button.

A new user appears in the list of users and receives a Welcome to Quatrix email with the special one-time link for setting the password. When the password is set, the user can follow the second link from the email to log in to their Quatrix account.

## 5.3. Editing Users

If you want to edit a user:

1. Select the check box next to the user you would like to edit and click on the Edit icon from the top 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.

## 5.4. Deleting Users

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.



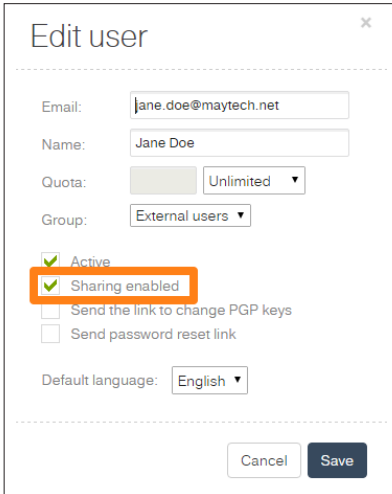
## 5.5. Activating or Deactivating Users

You can set login permissions for your users while adding or editing them. If you select the Active check box, the user can log in and use their Quatrix account. If this check box is not selected, the user won't be able to log in.

## 5.6. Managing Sharing Permissions of Users

You can manage sharing permissions of your users. A newly added user gets a sharing permission by default. However you can disable file sharing for a desired user while adding or editing them by clearing the Sharing enabled check box.

Users with the disabled file sharing option have access only to the Home and File Explorer tabs.



The screenshot shows the 'Edit user' dialog box with the following fields and options:

- Email:
- Name:
- Quota:  Unlimited
- Group:  External users
- Active
- Sharing enabled (highlighted with a red box)
- Send the link to change PGP keys
- Send password reset link
- Default language:  English

Buttons: Cancel, Save



## 5.7. Organising Users and Contacts in Groups

All your users and contacts are arranged in groups that makes it easier to control the access to your account.

Quatrix® users are classified as **Internal** and **External** users with appropriate sharing and access permissions. You can assign the desired group while adding or editing them. All existing users are automatically converted to internal users.

- Internal users can view and share files with other internal users, external users and site contacts. Besides they can create a list of their own personal contacts that is invisible to you as the administrator.
- External users can view only internal 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.

Your contacts are now organised in two groups: **Personal** and **Site** contacts. The existing list of contacts is converted to personal contacts.

- Personal contacts are only visible to you as the account administrator. Besides your internal users can manage their own personal contacts.
- Site contacts are created and managed by the administrator and contain a global contact list which is available to all your internal users.



## 6. Invoice Payment

You can easily view and pay invoices on the Billing tab of your Quatrix® account.



Quatrix

John Doe | ⚙️ ↗️

Invoices Upgrade

No.	Description	Invoice date	Due date	Total	Status
<input type="checkbox"/> 2343	Quatrix upgrade	19 Jan 2016	18 Feb 2016	\$1,080.00	unpaid
<input type="checkbox"/> 2325	Quatrix renewal	19 Jan 2016	21 Feb 2016	\$54.00	unpaid
2313	Quatrix renewal	19 Jan 2016	21 Jan 2016	\$54.00	paid

Home | Share | Contacts | File Explorer | Tracking | Administration | **Billing**

To pay an invoice, follow these steps:

1. Go to the Billing tab.
2. Select the check box next to the invoice you want to pay.

**Note:** You can pay several invoices at once by selecting check boxes next to the required invoices and clicking the Pay button. Invoices in different currencies should be paid separately.

3. Click the Pay button.
4. Enter card details on the Payment Details dialog box.
5. Click the Pay button.

When the invoice has successfully been paid, it will be displayed with the Paid status in the invoice list and you will receive an email that notifies of a successful invoice payment.

For information on sharing and requesting files, tracking shares, file and folder management, encrypted file sharing see Quatrix User Guide.

