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Quatrix Administrator Guide

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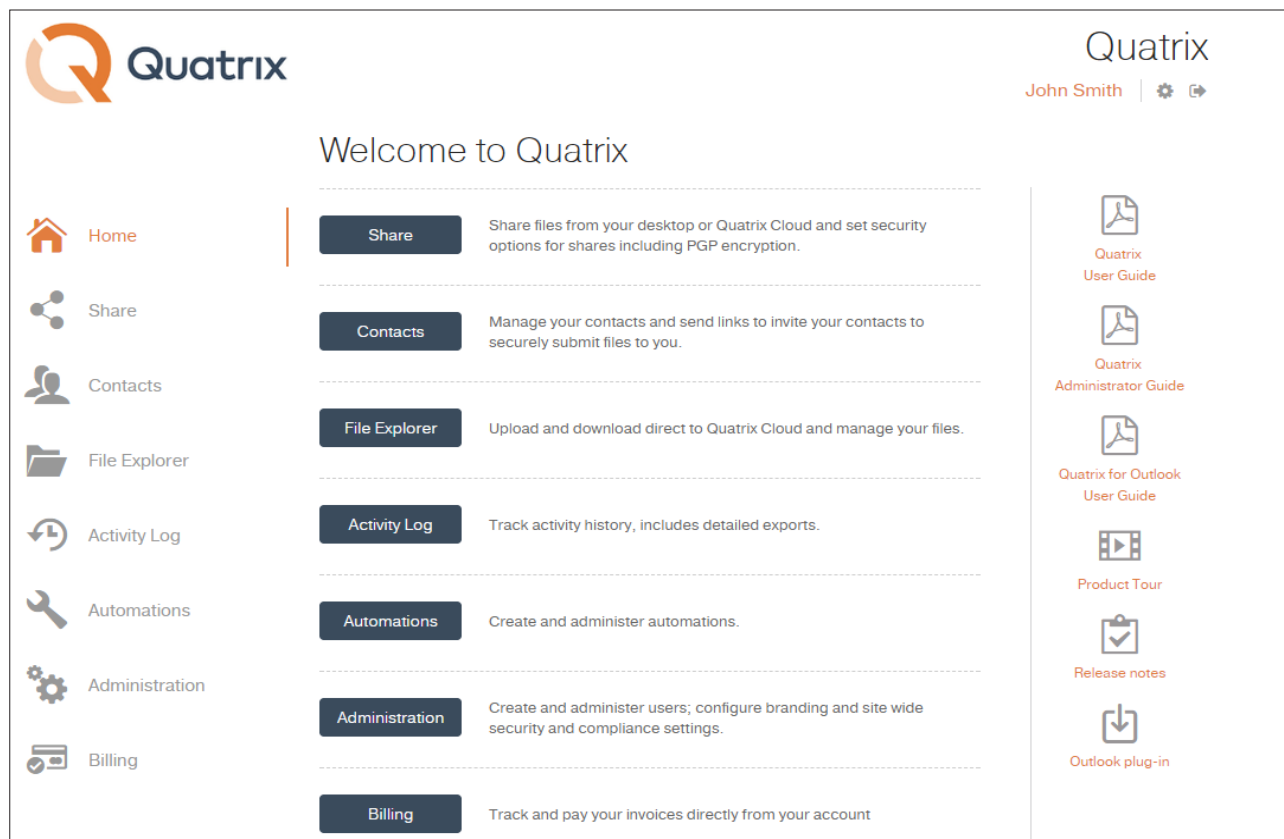
1. Quatrix Overview

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.



The screenshot shows the Quatrix administrator interface. At the top left is the Quatrix logo. At the top right, the user name 'John Smith' is displayed with settings and help icons. The main content area is titled 'Welcome to Quatrix' and features a central column of buttons for various functions, each with a brief description:

- Share**: Share files from your desktop or Quatrix Cloud and set security options for shares including PGP encryption.
- Contacts**: Manage your contacts and send links to invite your contacts to securely submit files to you.
- File Explorer**: Upload and download direct to Quatrix Cloud and manage your files.
- Activity Log**: Track activity history, includes detailed exports.
- Automations**: Create and administer automations.
- Administration**: Create and administer users; configure branding and site wide security and compliance settings.
- Billing**: Track and pay your invoices directly from your account.

On the left side, there is a navigation menu with icons and labels for: Home, Share, Contacts, File Explorer, Activity Log, Automations, Administration, and Billing. On the right side, there is a vertical list of links with document icons: Quatrix User Guide, Quatrix Administrator Guide, Quatrix for Outlook User Guide, Product Tour, Release notes, and Outlook plug-in.



3. Security and Privacy

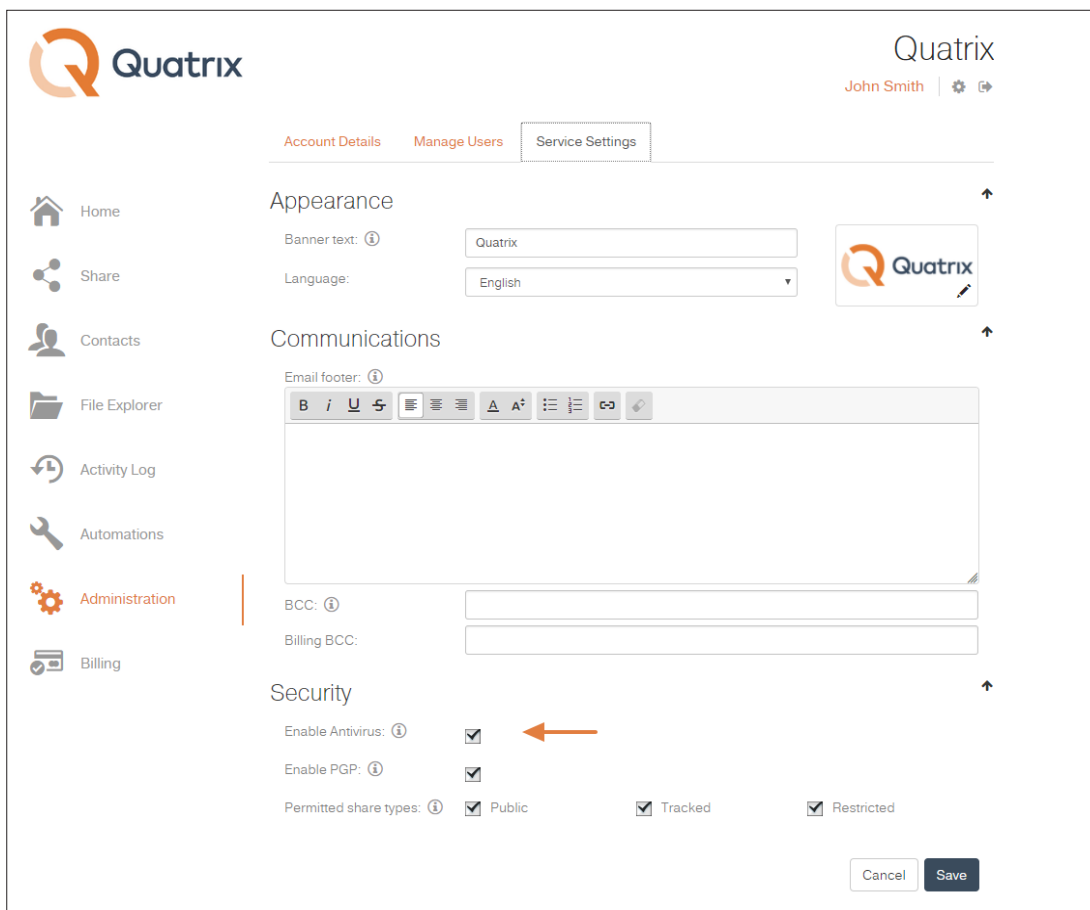
3.1. Antivirus

We are responsible for the security of your data that you store or send with Quatrix®.

All uploads are scanned for malware on the server side and email alerts are sent to the Quatrix owner.

To Add or Remove virus protection for all users of your Quatrix account do the following:

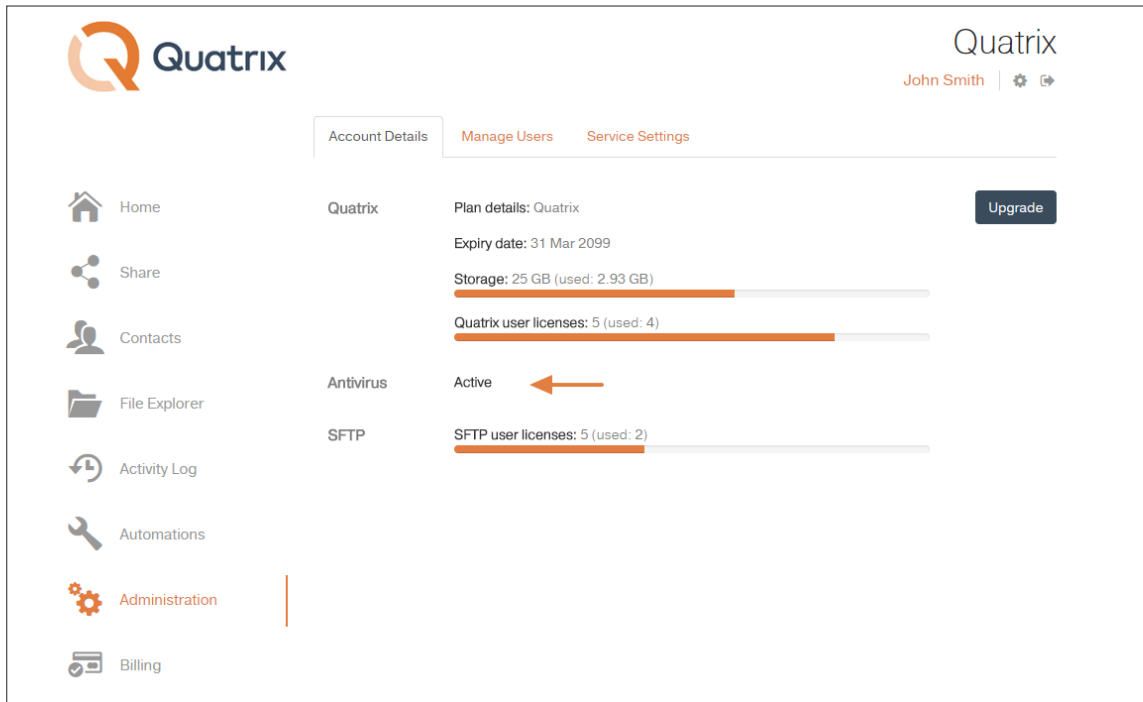
1. Click Administration.
2. Go to the Service Settings tab.
3. Tick the box to Enable Antivirus under the Security field.



The screenshot shows the Quatrix administration interface. The 'Service Settings' tab is active. Under the 'Security' section, the 'Enable Antivirus' checkbox is checked, with a red arrow pointing to it. Other options include 'Enable PGP' (checked), and 'Permitted share types' with 'Public', 'Tracked', and 'Restricted' all checked. The 'Appearance' section shows 'Banner text' as 'Quatrix' and 'Language' as 'English'. The 'Communications' section has an empty 'Email footer' text area. 'BCC' and 'Billing BCC' fields are also empty. 'Cancel' and 'Save' buttons are at the bottom right.

Once the virus protection is enabled, it would be displayed on the Account Details sub-tab of the Administration tab as Active.





Note: Antivirus is free forever.

3.2. Intrusion Detection and Prevention

Multiple incorrect login attempts may trigger a lockout. Enter the captcha code to unlock.



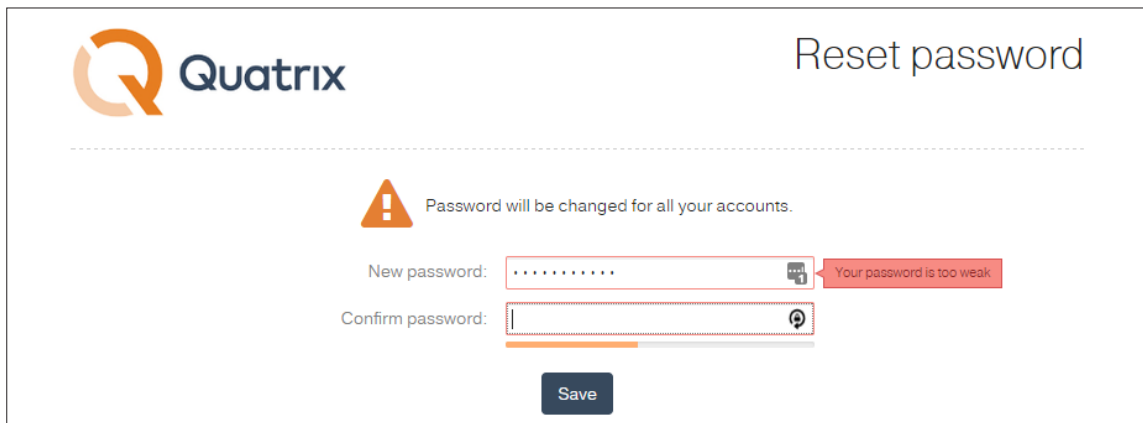

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3.3. Password Strengthening

Password must meet complexity requirements. Complexity requirements are enforced when passwords are changed or created.

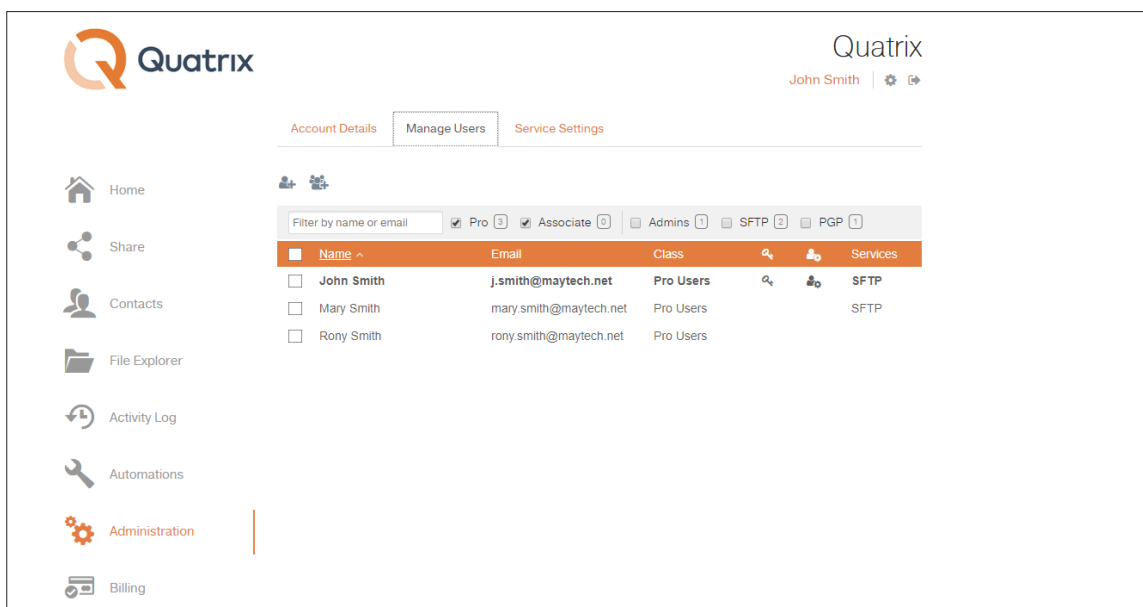
Passwords length should be equal or more than 8 characters, include symbols, numbers, lowercase and uppercase characters.



3.4. Two-Factor Authentication

You can add an extra layer of security to your Quatrix[®] account by turning on two-factor authentication (2FA). This requires you to have access to your phone when you log in. This means even if your password is compromised or stolen, only you can log in to your account.

The Administrator can turn off 2FA for all users on the Administration tab.



Name	Email	Class	Services
<input type="checkbox"/> John Smith	j.smith@maytech.net	Pro Users	SFTP
<input type="checkbox"/> Mary Smith	mary.smith@maytech.net	Pro Users	SFTP
<input type="checkbox"/> Rony Smith	rony.smith@maytech.net	Pro Users	SFTP



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4. Quatrix Features

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

4.1. 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.

⊗ Antivirus

All uploads are scanned for malware on the server side and email alerts are sent to the Quatrix owner.

4.2. 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.



4.3. 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.

4.4. 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.

4.5. Customer Support

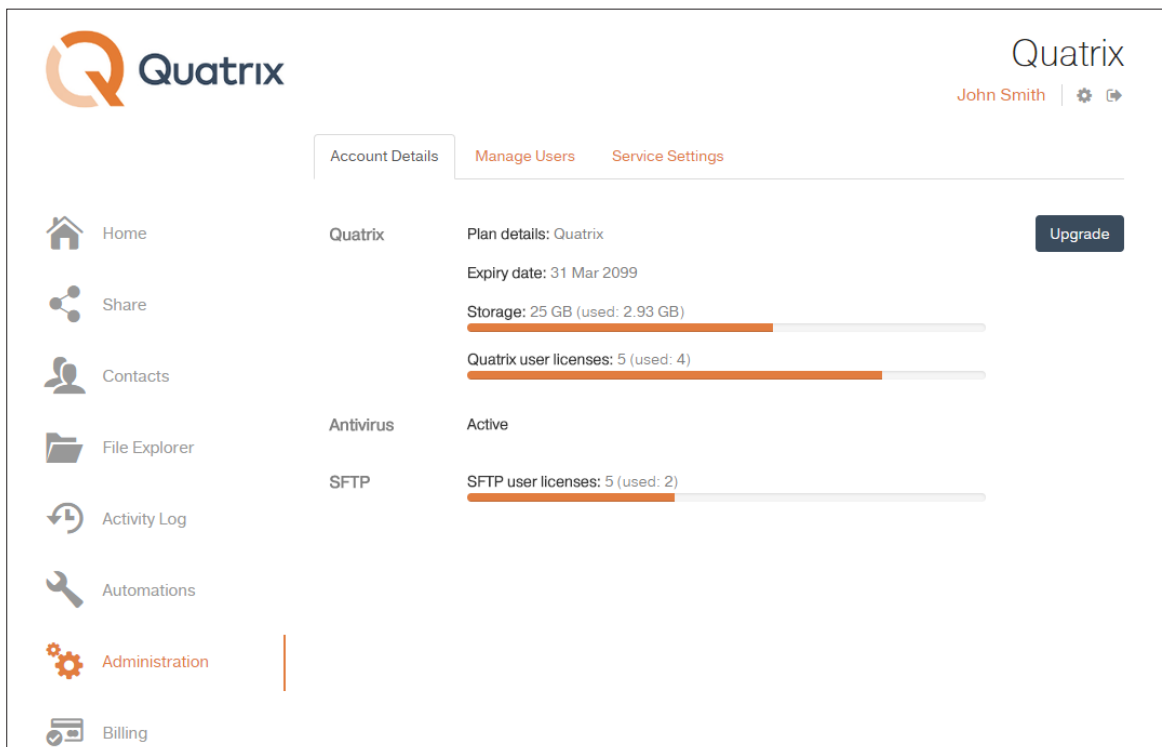
Maytech provides world-class customer support at no additional charge. Contact our knowledgeable support team 24x7 via email support@maytech.net or phone: International & UK +44 (0) 189 286 1222 and USA & Canada 1 800 592 1906.



5. Account Management

You can manage your Quatrix® account on the Administration tab.

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, number of SFTP user licenses and the status of Antivirus (active or inactive). This information cannot be changed by the Administrator (except Antivirus that is managed by the Admin of account in the Service Settings sub-tab), but rather by the Maytech support team on request.



The screenshot shows the Quatrix Administration interface. The top navigation bar includes the Quatrix logo, the user name 'John Smith', and settings icons. The main content area is divided into three tabs: 'Account Details' (selected), 'Manage Users', and 'Service Settings'. On the left, there is a sidebar with navigation options: Home, Share, Contacts, File Explorer, Activity Log, Automations, Administration (highlighted), and Billing. The 'Account Details' section displays the following information:

Category	Details	Action
Quatrix	Plan details: Quatrix Expiry date: 31 Mar 2099 Storage: 25 GB (used: 2.93 GB) Quatrix user licenses: 5 (used: 4)	Upgrade
Antivirus	Active	
SFTP	SFTP user licenses: 5 (used: 2)	

5.1. 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.



5.2. 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.

➤ 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.

5.3. 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.



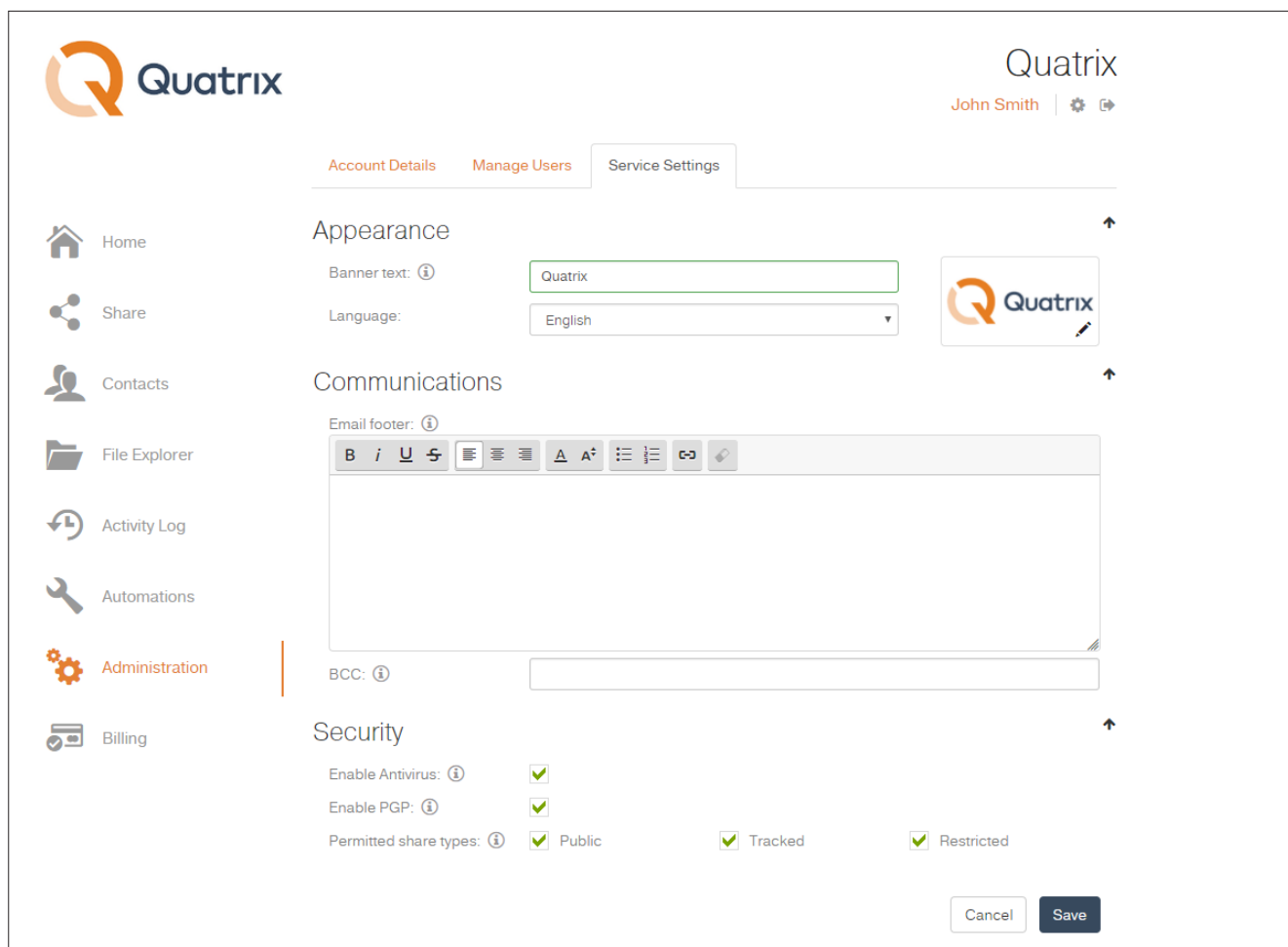
5.4. Set Your Corporate Branding

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.


5.5. 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. The user is logged in as John Smith. The 'Service Settings' sub-tab is active. The interface is divided into three main sections:

- Appearance:**
 - Banner text:
 - Language:
 - Logo: 
- Communications:**
 - Email footer:
 - BCC:
- Security:**
 - Enable Antivirus:
 - Enable PGP:
 - Permitted share types: Public Tracked Restricted

Buttons for 'Cancel' and 'Save' are located at the bottom right of the settings area.



5.6. 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.

5.7. 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 Pro and Associate users (change their name, email, quota, group, activate or deactivate them, send the password reset link or the link to set PGP keys)
- assign the Administrator role to other users of the account
- track activity of all users
- manage site contacts
- enable/disable PGP for the account
- set/change the banner text, language, email footer, BCC
- set/change Antivirus, PGP, permitted share types for the account



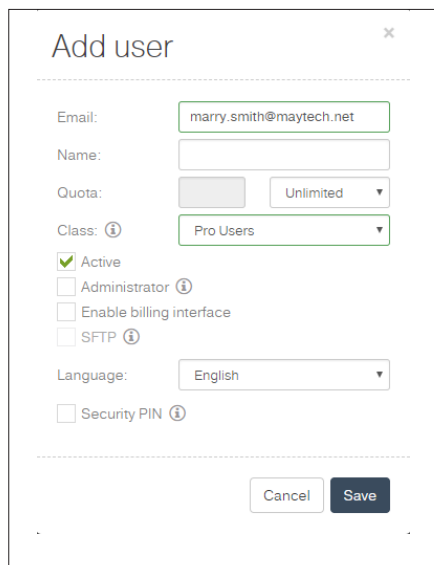
The user with the Administrator role cannot:

- 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.



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.



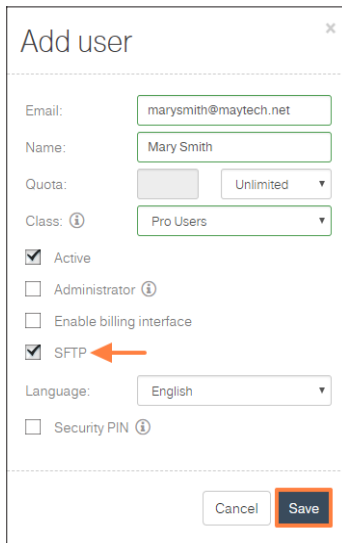
5.8. Transfer Files with SFTP

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). Every added SFTP user has a unique login that is used to log in to SFTP client.

5.8.1. Assigning SFTP Login ID to a User


If you would like to grant access to SFTP for your users, you need to enable SFTP at user creation.



The screenshot shows the 'Add user' form with the following fields and options:

- Email: marysmith@maytech.net
- Name: Mary Smith
- Quota: Unlimited
- Class: Pro Users
- Active
- Administrator
- Enable billing interface
- SFTP (highlighted with a red arrow)
- Language: English
- Security PIN

Your user will get an email notification as soon as SFTP is enabled for his/her login.



The email notification contains the following text:

SFTP access to test.quatrix.it

Hello Test

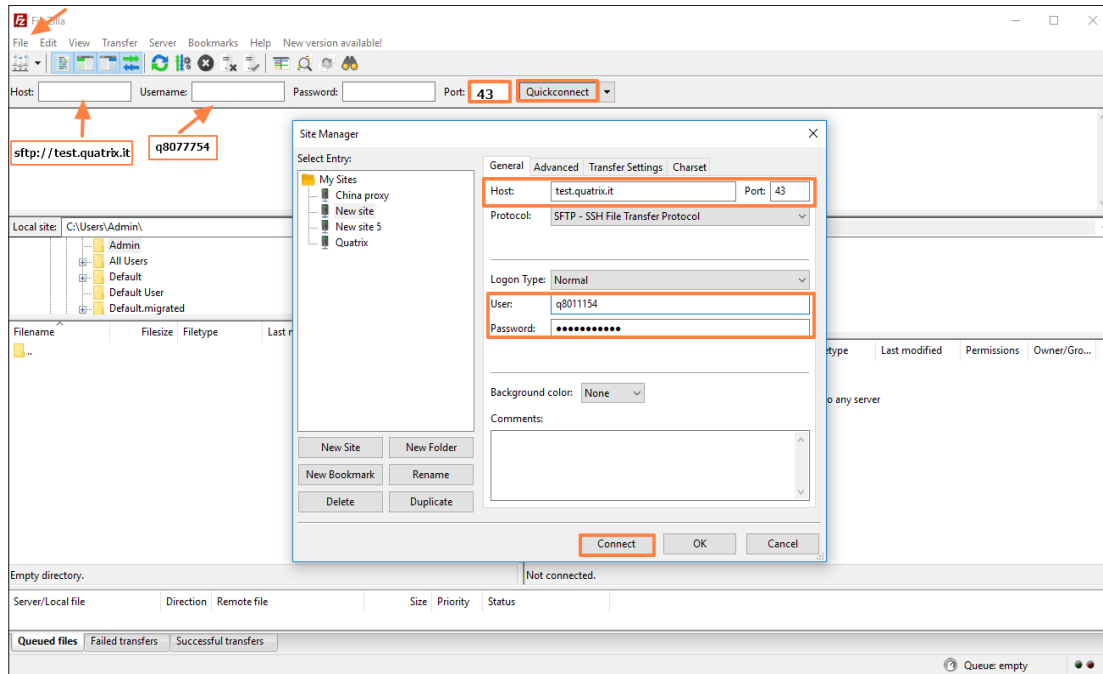
Your Quatrix® administrator has enabled SFTP access for your account at test.quatrix.it. You can now access your site using any SFTP client software. Note your SFTP user ID: q8011154, you must login with this ID instead of your email address - use your existing password.

You may prefer to authenticate using SSH keys. To install and manage your public keys go to test.quatrix.it, login using your email address and password, click on your name (top right) to edit your profile to add/manage public keys.

Regards
John Smith



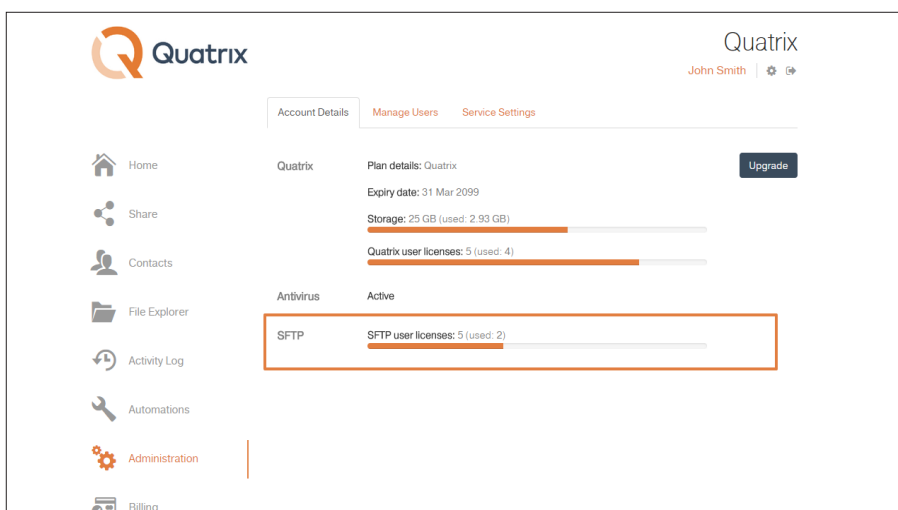
Now your users can access your Quatrix® site using any SFTP client software. They must log in with their ID instead of their email address and use their existing account password.



5.8.2. Payment for SFTP Module

If you would like to grant access to SFTP for your users, you need to enable SFTP at user creation. If you would like to use SFTP or grant access to SFTP for your users, you need to purchase SFTP user licenses.

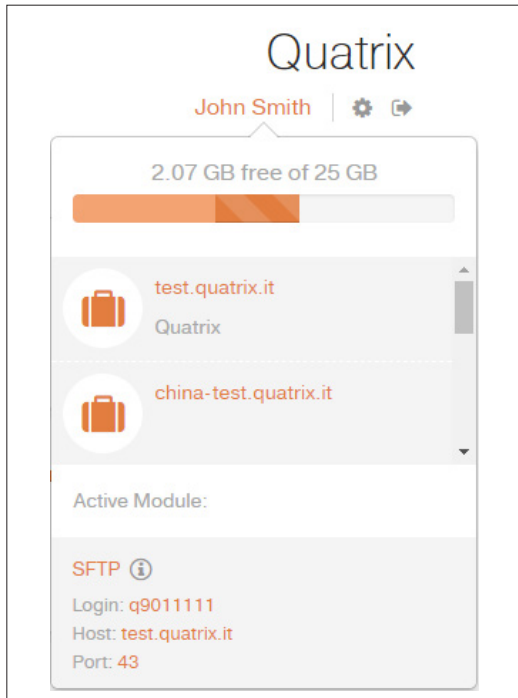
1. Go to the Account details sub-tab of the Administration tab and click on the Upgrade button.
2. Specify the number of licenses you want to buy in the SFTP user licenses field, enter your card details and click on the Pay button.



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You can find your SFTP credentials by clicking on your Name near the gear sign.



5.8.3. SFTP Licence Management

Note: Only your users can be granted access to SFTP. If you wish your contact to get SFTP, this contact should be converted to the user at first (on the Contacts tab) and then you can enable SFTP access.

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

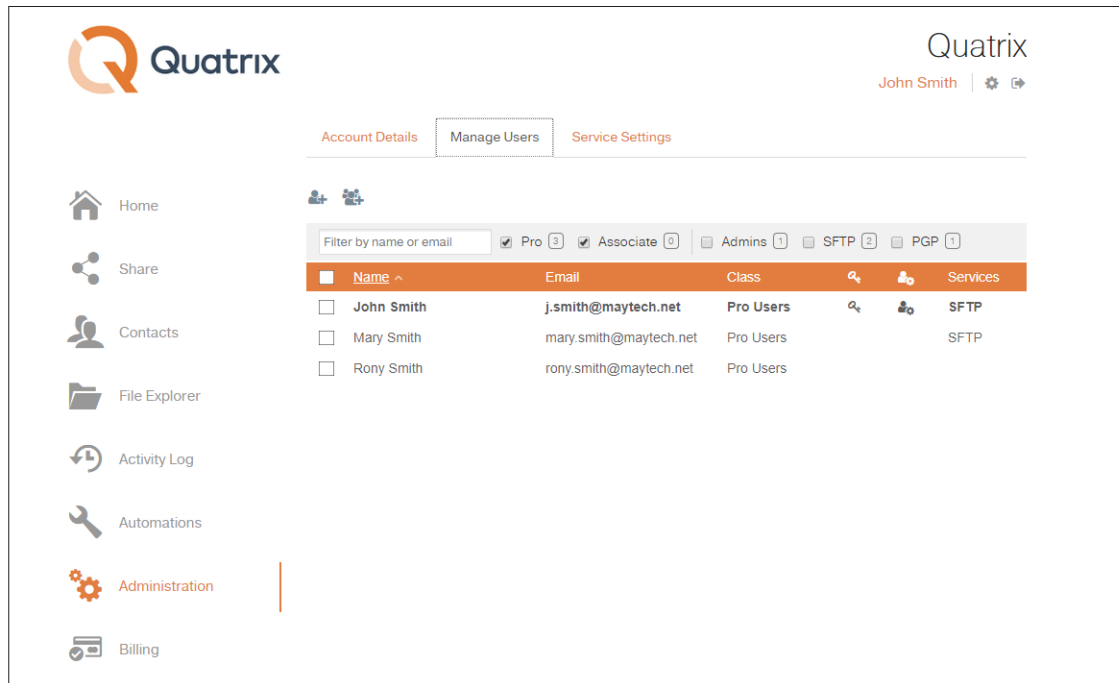
You can get your SFTP credentials by clicking on the link with your name at the top right of the account.

Learn more how to transfer files using SFTP in Quatrix® User Guide.



6. 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.



6.1. 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.
- **Pro user** can view and share files with other users (owner, admins, Associate and Pro users) and site contacts. Besides the Pro user can create a list of own personal contacts invisible to the owner and administrators.
- **Associate user** can view and share files with only Pro users, admins and the owner. Sharing to the outside world is not allowed.
- **Personal/Site contact** 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	Pro User	Associate User	Personal/Site Contact
View account details	+	+			
Change profile's email	+				
Change profile's name	+	+	+	+	

Contact and User Management

	Owner	Administrator	Pro User	Associate 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 Pro and Associate users	+	+	+		
Convert a contact to a user	+	+			
View site contacts	+	+	+		
Manage site contacts	+	+			
Manage personal contacts	+	+	+		

File Sharing

	Owner	Administrator	Pro User	Associate User	Personal/Site Contact
Share files/ folders	+	+	+	+	
Return files and folders	+	+	+	+	+*
Download files	+	+	+	+	+

*Only if *Recipient(s) can return files* is enabled



File Tracking

	Owner	Administrator	Pro User	Associate User	Personal/Site Contact
Tracking of own transfers	+	+	+	+	
Tracking of user transfers	+	+			

File Management

	Owner	Administrator	Pro User	Associate 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	Pro User	Associate User	Personal/Site Contact
Track and pay invoices	+	+*	+*	+*	
Upgrade and downgrade the account	+	+*	+*	+*	

*Only if *Billing* interface is enabled

PGP

	Owner	Administrator	Pro User	Associate 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	Pro User	Associate 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	+	+			

6.2. 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.

6.3. 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.



6.4. 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.

6.5. 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.

6.6. 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 **Pro** and **Associate** users with appropriate sharing and access permissions. You can assign the desired group while adding or editing them.

- 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 Pro contacts that is 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.


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 Pro 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 Pro users.



7. Invoice Payment

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



Quatrix
John Smith | ⚙️ 📄

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 | Activity Log | Automations | 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.

