Quatrix User Guide

Version 4.0

February 2021

maytech
GLOBAL DATA TRANSFER

Contents

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This guide describes the basics of Quatrix® file sharing and covers features and functions which are available to Quatrix users.

1 Getting Started

Quatrix may be provisioned for you by your site administrator or you may sign up to the Quatrix Network, in either case you will receive a welcome email containing a one-time link to set your password and a link to your Quatrix site where you will log in to share files with your customers and partners. You should add this link to your bookmarks / favorites.

Quatrix opens on the home screen where you can take our quick tour to learn core features of Quatrix, find User and Admin Guides or download Quatrix Outlook plug-in and Quatrix Express desktop applications (Mac and Windows).
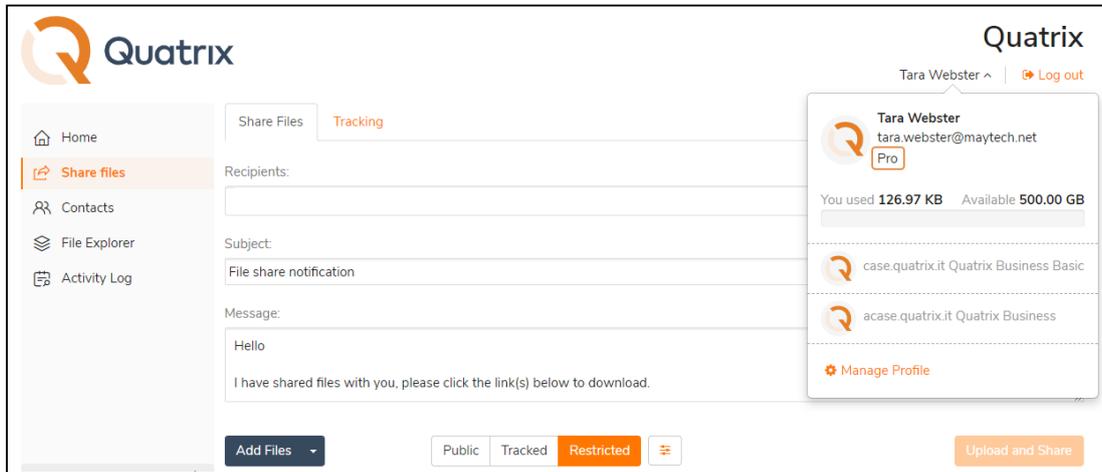
Learn more about new features, improvements and fixes in our latest release notes.

2 User Classes

Quatrix users are classified as **Pro, Associate and Jailed Users** with appropriate sharing and access permissions. Your administrator assigns an appropriate class while adding you to Quatrix account.

- **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.

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To see what class of users you are assigned, click on the link with your name at the top right.

The administrator may assign you the permission to manage Quatrix account and users by granting user administration rights or the permission to manage invoices/payments by adding the billing administrator rights. For details see Administration guide.

What can **Jailed** users do?

It is envisaged that the **Jailed** user participates in a defined workflow where they either:

- Receive / process / download files in folders shared to them via Project Folders.
- Upload files to Project Folders to share out to project members.

Users in Jailed class are therefore jailed to the /Projects Shared With Me/ folder. This folder is the mount point for incoming shared folders, and is not writable.

The Jailed user is not able to use the Share Form or otherwise share files outside of the designated workflow.

The table below illustrates what operations the jailed user can do depending on the assigned permissions in the Project Folder (PF).

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	Permitted actions	List only	List and Read	Read and Write	Full and Share
Project Folder (PF) operations					
	View shared PFs and their contents	●	●	●	●
	PF info	●	●	●	●
	Download PF		●	●	●
	Copy PF		●	●	●
	Edit PF contents (change permissions of existing users)				●
Folder operations					
	Folder info	●	●	●	●
	Copy		●	●	●
	Rename		●	●	●
	Cut		●	●	●
	Delete		●	●	●
	Upload			●	●
	Add folder inside PF			●	●
	Convert folder to PF				●

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	Permitted actions	List only	List and Read	Read and Write	Full and Share
File operations					
	File info	●	●	●	●
	Preview		●	●	●
	Copy		●	●	●
	Download		●	●	●
	Upload			●	●
	Rename			●	●
	Cut			●	●
	Delete			●	●

Besides the listed above actions within shared PFs, **Jailed** users can change personal or security settings for accessing the account. Read more here.

They could also share encrypted files back to the sender while replying to the share or file sharing request. This requires prior generation of PGP keys. Learn more about PGP.

3 File Sharing

On the **Share files** tab you can instantly share files from your local PC / network or from your Quatrix Cloud storage. Each share uploads files to your Quatrix Cloud storage and generates an email message to the recipients with links to download files.

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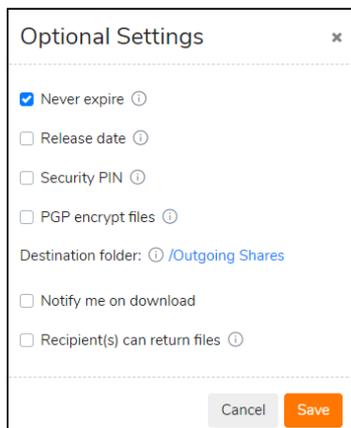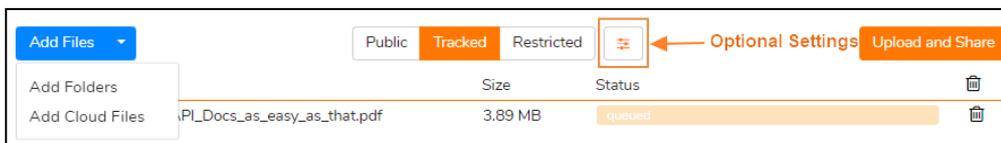Author: Maytech

Message Composition

You can type in as many email addresses as you like to add recipients in the **Recipients** text field. If the address exists in your contacts it will autocomplete, new recipient addresses will be added to your contacts and will autocomplete next time. You can type the subject and the massage text in the message composition area.
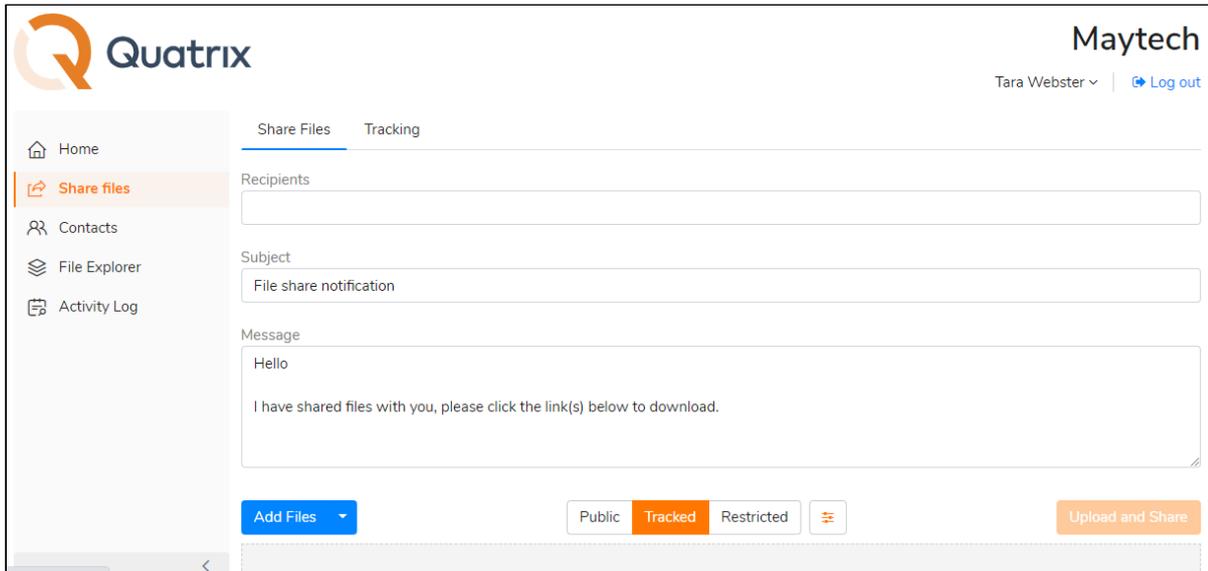
Emails are sent individually to each recipient - the recipient list is hidden.

3.1 Optional Settings

You can specify additional options for your share in the **Optional Settings** window that can be opened by clicking on the icon next to share privacy types. To select the option, tick the check box next to it.

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- **Never expire** - shared links never expire but to set an expiry date clear the check box, click on the calendar icon and choose an expiry date and time. Download links are permanently inactive when they expire.

- **Release date** - use the same method to set a date and time to release your files. You can upload your files and send out the links but download links are inactive until the chosen time.

- **Security PIN** - Optional PIN the user must enter to access shared files. The PIN can be set for all types of shares. In order to protect your share with PIN users should tick the Security PIN check box (see screenshot above). The system will then generate a random five-digit code which you should inform your recipient(s) about. Please note that the PIN cannot be restored or reset after the share is sent.

- **PGP encrypt files** - if PGP is enabled for your account and if your contact(s) has/have generated PGP keys you can select this check box for the additional protection. For more info see PGP in Quatrix.

- **Notify me on download** - select this check box to receive a notification email when the files are downloaded.

- **Recipient(s) can return files** - if selected, the notification email will contain a link to a page where your contacts or users can send files back to you. It is possible to disable obligatory registration for your contact if you send a Public Share.

- **Force registration prior to returning files** - appears when Recipient(s) can return files is selected. The recipient should log in or create a free Quatrix account in order to return files.

- **Encrypt incoming files** - appears when Recipient(s) can return files is selected. This option enables the user to get encrypted files from the contact. Files will be encrypted by user's (not contact's) key. This option is disabled if user doesn't have a PGP key.

- **Destination folder** - shows the path to the uploaded files.

- **Choose your share privacy** - set the share security level, there are three types of links:

  - *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.

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3.2 Uploading and Sharing Files

Quatrix allows you to share your local files and folders as well as share from your Quatrix Cloud storage.

Click on the **Add Files** or **Add Folders** button to select files to upload and share. Use Shift+click or Ctrl +click to select multiple files. Or, if supported by your browser you will see a drop zone to drag files or folders from your your desktop or file browser. If you drag a folder, all folder contents will be queued for upload.

Click on the **Upload and Share** button to complete the share, a progress bar indicates the status of local file uploads. A pop-up window indicates completion of the share, you can dismiss the pop-up window retaining or clearing the content of the form fields.

> The folder upload is supported in all browsers except IE 11.

4 Tracking Shares and Activity History

Quatrix provides an important feature of tracking your shares as well as your actions. This feature is built-in to the account and it doesn't require a paid upgrade.

The Tracking sub-tab allows you to monitor shares, quick links, file requests and returns. The Activity log tab enables you to keep track of all your actions performed in Quatrix, including SFTP actions.

4.1 Tracking Shares

You can track your shares, created quick links, file requests and returns on the Tracking sub-tab of the Share files tab.

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The Tracking tab displays a list of shares in the table view with the most recent ones on top. To learn details about the share left-click on the subject of the share which opens the Share information dialog box (see the screenshot below).

It contains information about the type of the share, the share creation date, recipients, subject, release and expiry dates, status (active, expired or revoked) and the download link. If you click on the file name under the Files section, you can get details of the recipients with their IP addresses and the time when they downloaded files.

The Share information dialog box displays recipient emails and IP addresses in case of tracked and restricted shares, but only IP addresses in case of public shares.

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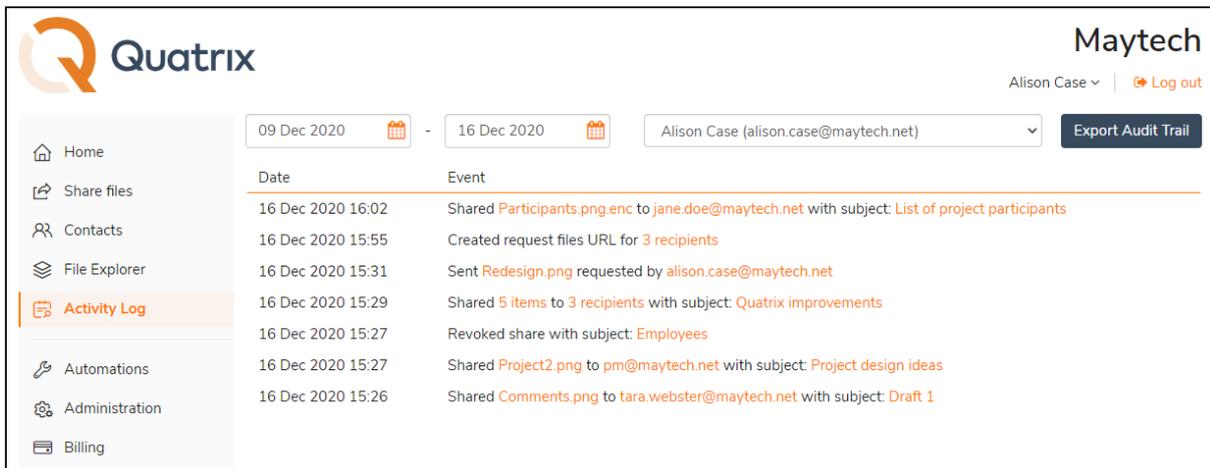### 4.1.1 Revoking Access to a Share

You may revoke access to the shared files, quick links, file requests or returns by clicking on the Revoke share icon on the Tracking tab. You can revoke only one share at a time.

If your recipient has already downloaded your shared file from Quatrix, it will remain on the recipient's computer, even if you revoke the access to it later. The main purpose of revocation is to prevent a recipient from performing future file downloads.

> It is not possible to undo the revocation of shares.

4.2 Tracking Activity History

The Activity log tab allows you to get visibility and insight into what actions you performed in the account. It displays your recent sharing activity in a one-week time frame (by default). You can choose any time frame for the display of your history. Besides file sharing actions, the list contains SFTP actions (e.g. file creation, deletion and transfer).

To learn more details about the action, left-click on it which opens the Action information dialog box.

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Action information

Details:

Type:	Restricted
Date:	16 Dec 2020 16:02
Recipients:	jane.doe@maytech.net
Subject:	List of project participants
Release date:	16 Dec 2020 16:02
Expiry date:	Never expire
Destination folder:	/Outgoing Shares
Status:	Active
Download link:	https://case.quatrix.it/download/fe6940aa-5aa7-4a59-944b-f1b23d3edcda

Files:

| Name	Size	Downloads
Participants.png.enc	12.41 KB	0

Revoke   Close

It provides the following additional information:

- Type: set sharing security level - public, tracked or restricted
- Date: creation date of the share
- Recipients: specified recipients
- Subject
- Release date: set date when you files were released
- Expiry date: set date when your files expired
- Destination folder: specified location of the shared files
- Status: active, revoked, expired
- Download link
- File details: name, size and number of downloads. If you click on the file name, you can retrieve more download details.

Revocation of your sharing actions

If you click on the Revoke button on this dialog box, the access to the share will be disabled.

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5 Managing Files and Folders

You can manage your Quatrix® cloud files and folders on the **File Explorer** tab.
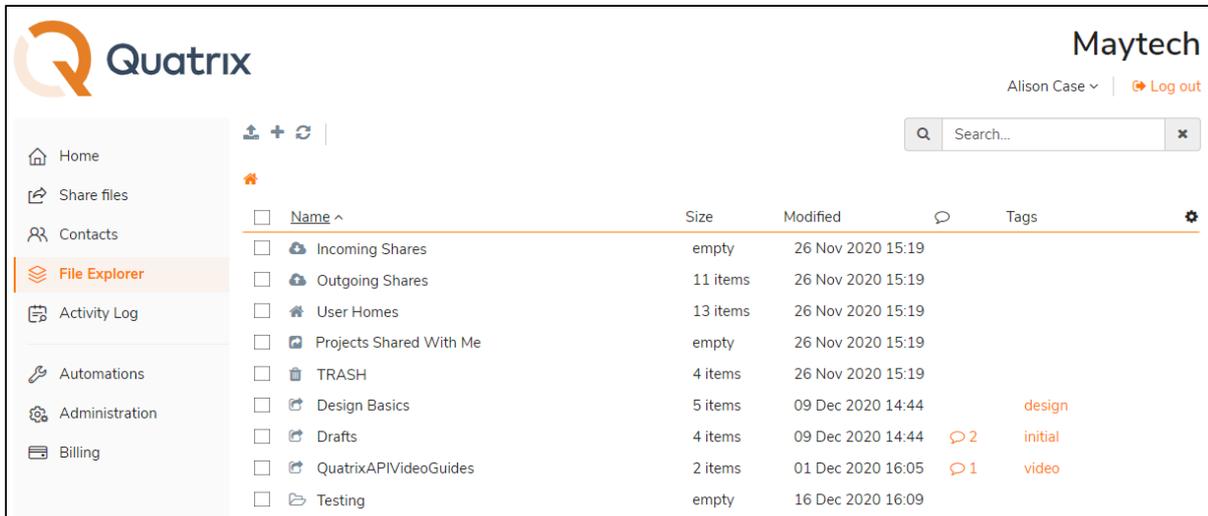
All files and folders contain icons before their names and are organised in the following way:

- System folders are always displayed in the same order and cannot be deleted:
  - Incoming Shares - contains all your received files.
  - Outgoing Shares - contains all your shared files.
  - User Homes - accessible to the admin only and contains all files and folders of your users.
  - Projects Shared With Me - contains project folders that your Quatrix users shared you.
  - TRASH - contains all deleted files.
- Project folders - folders that you shared with your Quatrix users.
- Folders
- Files
- Encrypted files

If you would like to rename, delete, copy, move, or preview file(s), tick the check boxes for one or more files and choose the desired action from the top menu or right-click menu.

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> **Info for Admin**
>
> Besides own files and folders the administrator can see **User homes** folder of their users which is empty by default. The administrator cannot delete files and folders from the **User Homes** folder. This is possible only when the admin deletes the user.

If you need to refresh the file listing, click the **Refresh** icon.
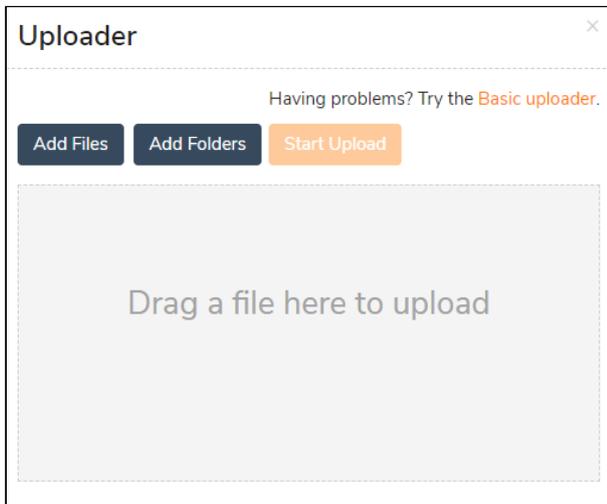
5.1 File Management

5.1.1 Uploading Files

You can upload files to your Quatrix storage from your computer by clicking the **Upload** icon from the top menu which opens the **Uploader** window. You can add local files or folders by either clicking appropriate buttons or you can just drag-and-drop files/folders from your desktop to the **Uploader**.

There are 2 types of file uploaders:

- Uploader
- Basic uploader

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You can't upload the file more than 2 GB using Basic uploader.

5.1.2 Sharing Files

To share files you should tick the check boxes for the files you wish to share and click the **Share** icon. This loads the **Share** form with the file listing populated with files you want to share. See more File Sharing.

Share quick links if you want to send files without future collaboration, for informative purpose. They can even be mass distributed, making download available for a wide audience.
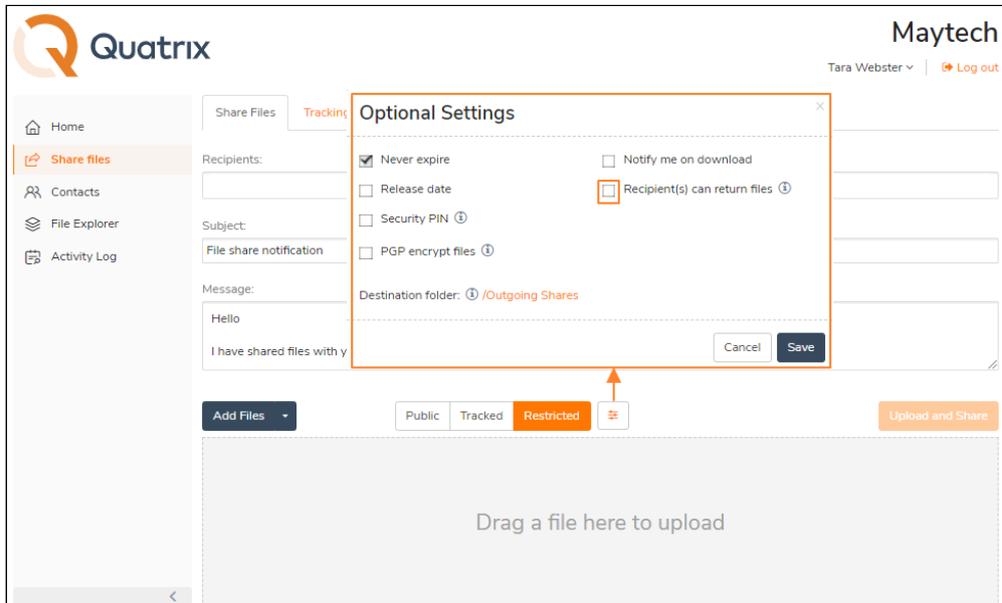
5.1.3 Requesting Files

Quatrix is a great tool for acquiring files from your contacts or users with the assurance of security, detailed tracking and PGP encryption (if enabled for your account).

You can send a request for sharing files using the **Share files** or **Contacts** tab.

To request files on the **Share files** tab:

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1. Select Recipient(s) can return files check box in the Optional Settings section.

2. Add, upload and share files. For more info see File Sharing.
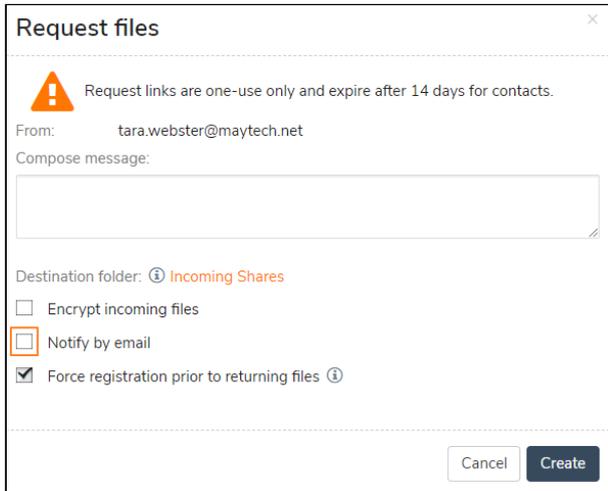3. Your contact or user receives the email with the **Return** link to send files back to you.

To request files on the **Contacts** tab:

1. Select the contact or user you want to get files from and click on the Request icon from the above menu.
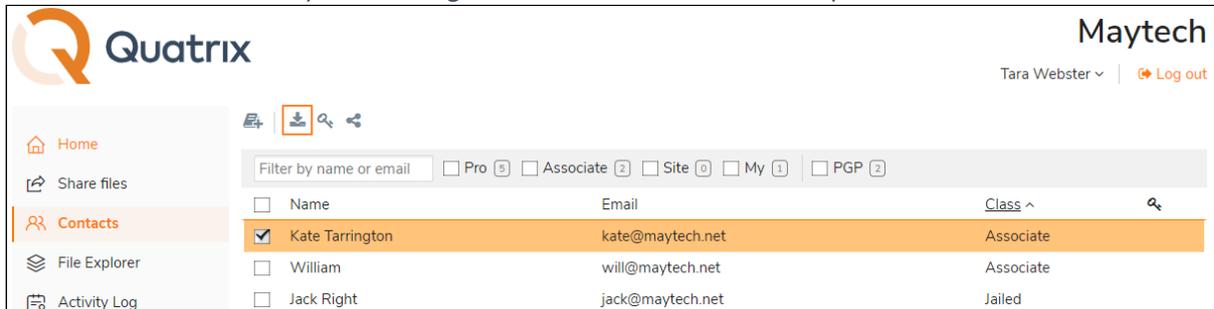
2. Type in the message and click on the **Create** button. The link to return files will be generated and displayed at the top right of your account.
3. Click on the **Copy link** button on the notification and share it as you wish.

While creating the file request you can specify the destination folder for your returned files by clicking on the **Incoming Shares** link. If you haven't found the folder you want to store returned files, create the new one there. You can also control whether your Contact or User will be forced to login/register prior to responding to your file request by ticking the corresponding check box. Besides sharing file request links, you can send the request by email, tick the **Notify by email** check box.

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Request files ✕

⚠ Request links are one-use only and expire after 14 days for contacts.

From: tara.webster@maytech.net

Compose message:

Destination folder: ⓘ Incoming Shares

☐ Encrypt incoming files

☐ Notify by email

☑ Force registration prior to returning files ⓘ

Cancel   Create

The links uniquely point to a form to securely send files to you. Your contacts/users cannot edit the recipient address so the facility cannot be misused for general file sharing.

If PGP is enabled for your account you can ensure that files shared to you are encrypted using your public key. The files are automatically encrypted as they are queued for upload and this requires no additional skills or actions from your contacts/users. See more PGP encrypted file transfer.

As soon as your contact/user uploads files you will receive an email notification with the requested files.

Contacts can use request files links only once, as soon as some files were uploaded, the link will expire!

Contacts can't open Request files links after 14 days!

You have to either send the request at least every 2 weeks or convert your contact to paid Quatrix user.

There is no expiration set for paid users and links are available forever.

When you send requests, emails are sent individually to each recipient - the recipient list is hidden.

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Searching Files

You can search for files using the search box in the upper right. Files can be found based on the following properties:

- file name
- creation and modification date
- recipient and sender
- tag

5.2 Folder Management

Folders allow files to be sorted into groups (e.g. junk, personal) to make storing and locating files easier.

5.2.1 Creating Folders

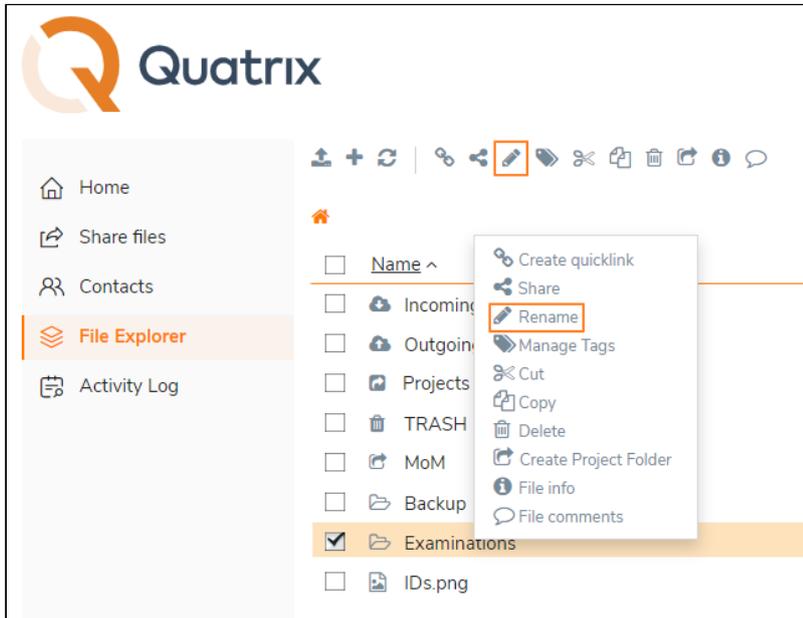If you would like to create a new folder, follow these steps:

1. Go to the **File Explorer** tab and click on the **Plus** icon from the top menu.
2. Specify the folder name on the **Create Folder** window and save it.

Your created folder will appear in the list below system folders. Folders are automatically ordered alphabetically.

5.2.2 Renaming Folders

The folder name can be easily changed by ticking the check box next to the folder and selecting an appropriate icon from the top menu or by right-clicking on the folder and selecting the **Rename** option from menu.

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5.2.3 Deleting Folders

If you need to delete the folder, tick the check box next to it and either click on the **Delete** icon from the top menu, or select an appropriate option form the right-click menu. All your deleted folders are moved to **Trash** and are stored there for 30 days.

> If you delete the folder, its containing sub-folders will be deleted as well.

To restore the deleted folder, go to the **Trash** folder, tick the appropriate folder and select the **Cut** or **Copy** options. Then go to the place you would like to restore your folder and click on the **Paste** button form the top menu. If you restore the folder with containing sub-folders, the inner folder structure will be kept the same.

5.2.4 Reordering Folders

You can easily organise any structure of your folders that allows you to keep your files and folders organised. Nested folders generally make it easier to find specific files later, because you don't have to sift through all your files at once.

To move your folder to a different location, follow these steps:

1. Tick the check box next to the folder and select the **Copy** or **Cut** menu option.
2. Select an appropriate location and click on the **Paste** option.

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5.2.5 Converting Folders to Project Folders

If you wish to share the folder with your users assigning them different permissions, convert your folder to a project folder by ticking the check box next to the folder and selecting the **Create project folder** option.
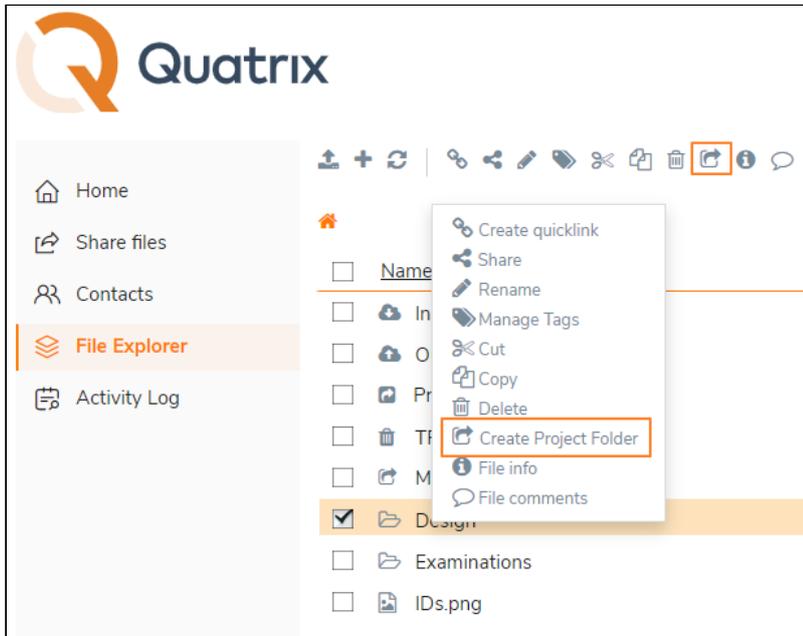
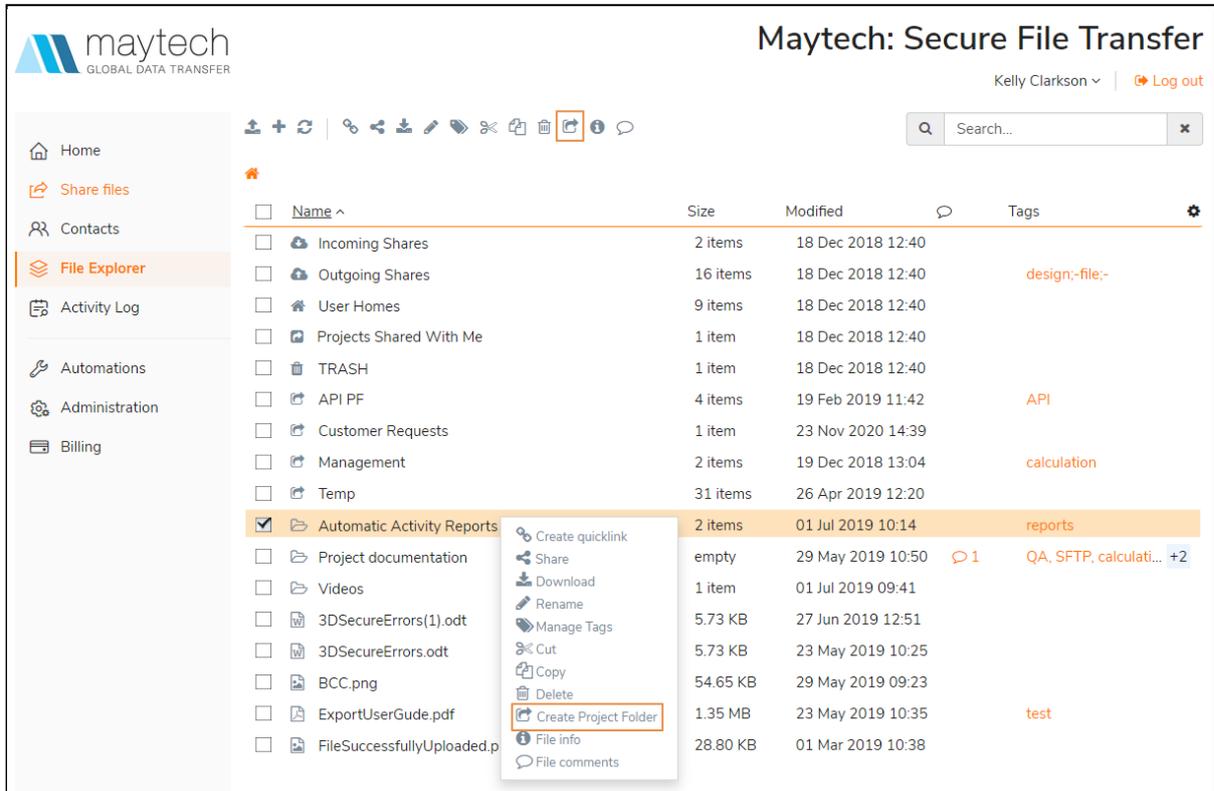Learn details on creation, modification and deletion of project folders on Project Folder Management.

5.3 Project Folder Management

You can share files and folders inside Quatrix account using shared Project Folders. This allows you to easily collaborate with your users and take control of their actions within your shared folder.

5.3.1 Creating a Project Folder

To create a project folder, follow these steps:

1. Go to the File Explorer tab and check the folder you would like to share (or you can create a new one that you intend to share by clicking on the Add folder icon from the above menu).
2. Click on the Create a Project Folder icon from the above menu or choose an appropriate option form the right-click menu.

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3. Select users from the list and specify their permissions. For details on permissions see the table below.

   Besides you can check the Notify box next to the user you would like to subscribe to upload notifications.

4. Click on the Save button.

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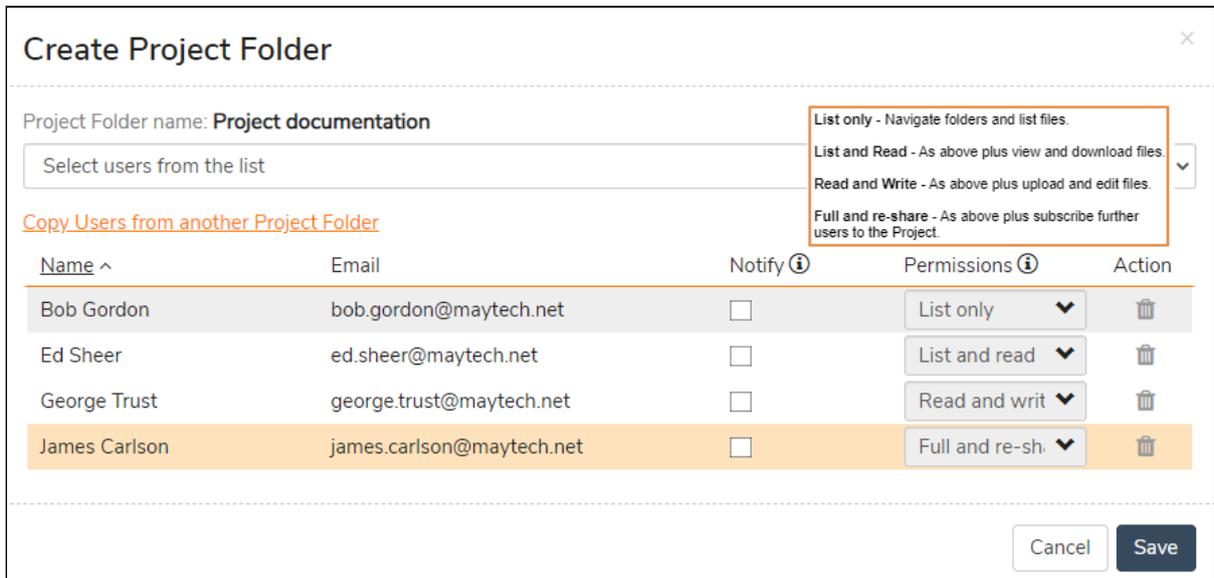
As soon as your project folder is created, you will be notified and your users will get emails with details where to find the shared project folder. All your shared projects are stored in the Projects Shared With Me folder of your users.

Predefined Project Folder Permissions

Permitted actions	List only	List and read	Read and write	Full and reshare
View folder structure	●	●	●	●
Copy		●	●	●
Preview		●	●	●
Download		●	●	●
Cut			●	●
Rename			●	●
Delete			●	●
Add new users				●
Change user permissions				●
Write comments				●

For the convenience of adjusting specific permissions that match your own criteria, click on the Advanced link below the predefined permissions and tick the check boxes with permissions that you would like to assign to the user. Don't forget to save your adjustments.

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You can copy users with assigned permissions from the existing Project Folder by clicking on the Copy Users from another Project Folder link (see the screenshot above).

> Folders inside the Projects Shared With Me folder do not reduce user storage quota, only the quota of the project folder's owner.

5.3.2 Editing a Project Folder

If you want to update users or change their permissions, go through the following steps:

1. Select the project folder on the File Explorer tab and click the Edit Project Folder icon from the top menu or right-click and select this option from the drop-down list.
2. Add or delete users and update their permissions.
3. Click the Save button to save all changes.

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Edit Project Folder   ×

Project Folder name: **Project documentation**   Creation date: 29 May 2019 10:50

| Select users from the list | | | | ⌄ |

Name ^	Email	Notify ⓘ	Permissions ⓘ	Action
Bob Gordon	bob.gordon@maytech.net	☐	List only ∧	🗑
Ed Sheeran	ed.sheeran@maytech.net	☐	PREDEFINED	🗑
George Trust	george.trust@maytech.net	☐	☑ List only	🗑
James Carlson	james.carlson@maytech.net	☐	☐ List and read	🗑
Kelly Clarkson	kelly.clarkson@maytech.net	☑	☐ Read and write	

☐ Full and re-share
ADVANCED ⚙

[Delete Project Folder]   [Cancel]   [Save]

Renaming of the project folder is only possible for its creator. To change the name, go to the File Explorer tab, select the folder and choose the Rename icon from the top menu. Your project folder will be renamed, but it will be displayed with the original name for other shared project folder users.

> Every time a file is uploaded, renamed or deleted, all Project Folder users will receive email notifications (if Notify is checked), except the person who uploaded/renamed/deleted. Note, that notifications are sent on a user log out and only if you're using Project Folders via web.

5.3.3 Deleting a Project Folder

To delete a project folder, follow these steps:

1. Go to the File Explorer tab and check the folder you want to delete.
2. Click on the Delete icon from the above menu or select an appropriate option from the right-click menu.
3. Confirm the deletion.

Your project folder will be deleted.

> If you delete the project folder from the Edit Project Folder dialog, it won't be deleted but rather transformed to a regular folder and it won't be either visible or accessible to your users.

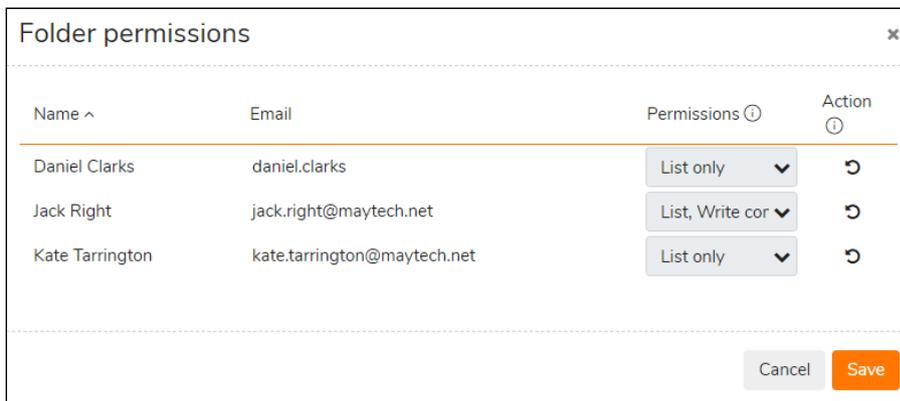## 5.3.4 Managing Subfolder Permissions within a Project Folder

When you have different collaborators on the project, e.g. either your employees, or business partners, you might need to control the level of access each of them will have to your folders. Quatrix provides a possibility to manage the level of access to subfolders inside your desired project folder. If you are the owner of the project

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folder, administrator or user with Full and reshare permissions, follow the steps below to manage subfolder permissions:

1. Tick the check box next to the subfolder and select Folder permissions from the top or right-click menu.
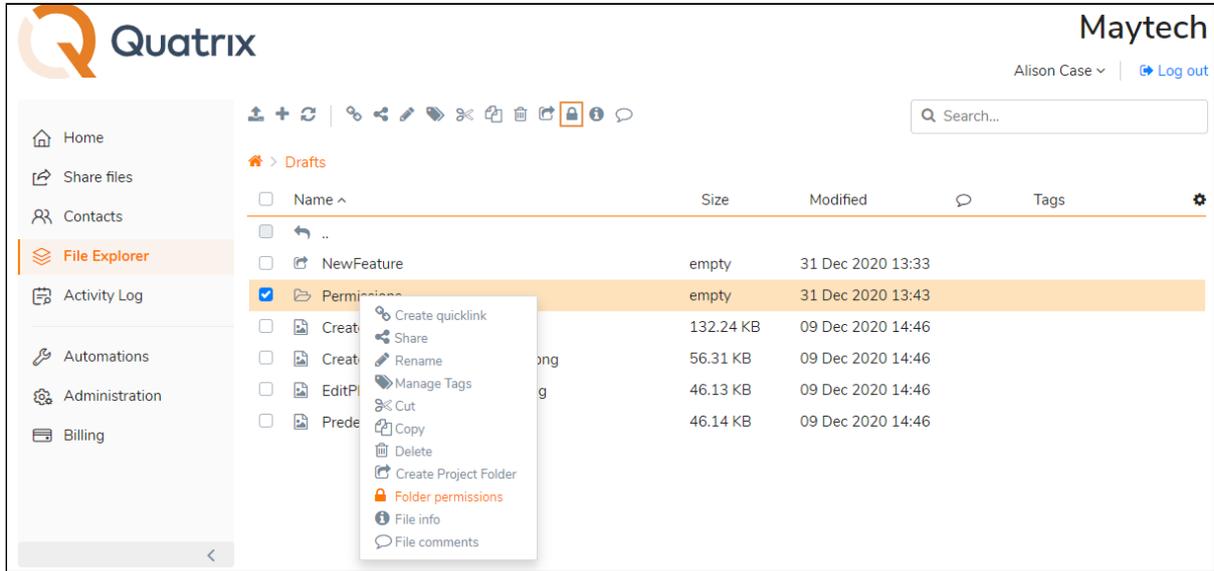
2. Update desired permissions and save changes.

Subfolder Permissions

When you share a folder with your users, they will automatically receive the same level of access to all containing subfolders. However, you can change the access to a specific subfolder by managing permissions at the subfolder level.

You should think twice before assigning Full and reshare permissions to your users, as their deletion of contents inside the project folder cannot be restored. It is only possible to restore your originally set permissions to subfolder users by clicking on Reset to default icon.

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To add more users to this subfolder, you need to update the PF and add users from the list on the Edit Project Folder form. This automatically adds users to all subfolders.

> **For owners and admins**
>
> If you would like to share the access to subfolder with your contact, convert it to the user at first. Learn how to do this here.

5.4 Tags and Comments

Besides organising your files in folders, you can collaborate on the content stored in Quatrix by providing more details using tags or adding your thoughts in comments.

Tags are keywords that you assign to files or folders e.g. design, project, finance, etc. Tagging provides a flexible tool for adding extra information to files without dealing with endless layers of folders.

To add a tag:

1. Go to the File Explorer tab, select the file or folder and click on the Manage tags icon from the above menu, or right-click on the file or folder and select an appropriate menu option.

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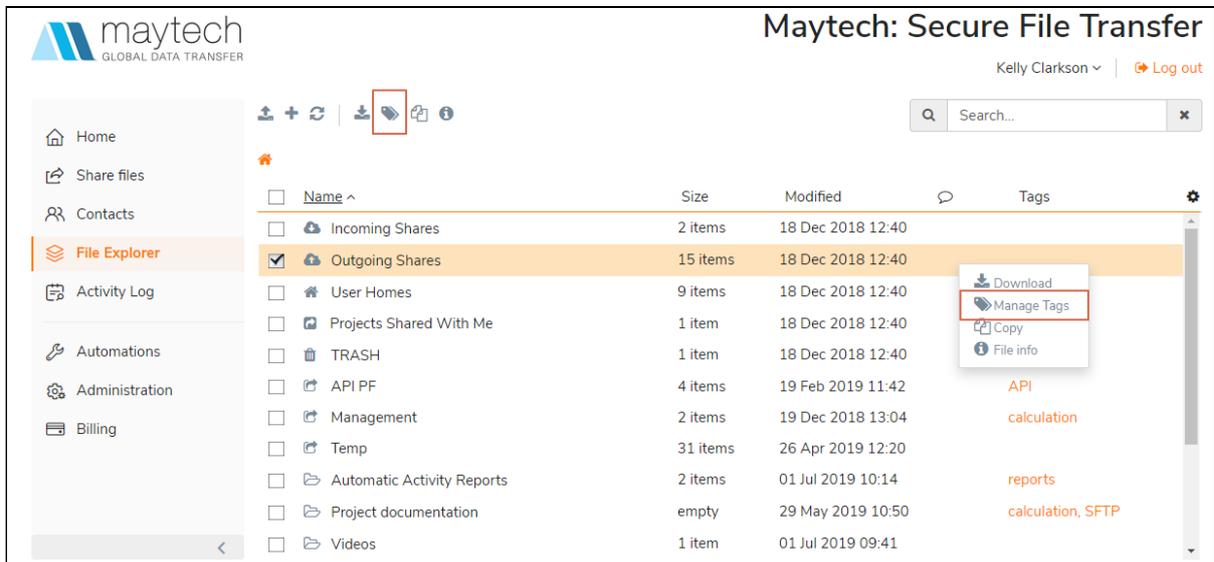
2. Enter a tag on the Manage tags window and save it.
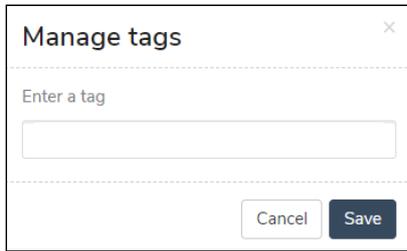
Your added tags are displayed in the Tags column next to your selected file or folder. You can have as many tags as you wish.

The Tags column width allows to display 3 or 4 tags, in case of more - you will see '+ number' indicating the quantity of hidden tags. You can view all available tags added to a file either on the Manage tags window, or by clicking on the File info icon from the top menu.

To find items that you tagged, select Tags in the Search and enter the tag you want to find.

To edit a tag:

1. Select the file or folder and open the Manage tags window by clicking on the appropriate icon form the menu.
2. Update your tag and save it.

You can easily remove tags on the Manage tags window by clicking on the remove sign X at the end of the tag or using the Backspace.

All tag operations are written to the log that the administrator can generate on the Activity log tab.

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Comments enable users to add or edit remarks related to certain files or folders that makes the communication on the content much easier.

To add a comment, select the file or folder and click on the File comments icon form the top or right-click menu.
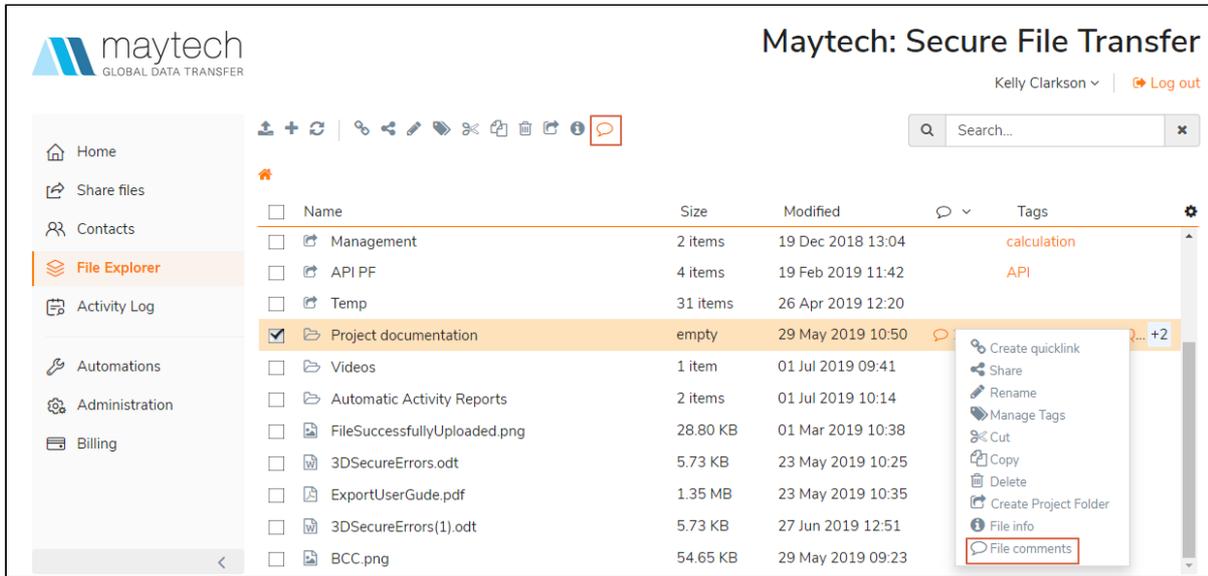
This opens the Comments window where you can collaborate with your users. Your comments can be copied, edited or deleted by clicking on 3 dots at the end of the comment.

6 Profile Management

If you would like to view or update your profile information, click on your name at the top right of your Quatrix account. It opens the form displaying your name and email, user class in Quatrix (pro, associate or jailed), used and available storage and all Quatrix accounts with the active one on top.

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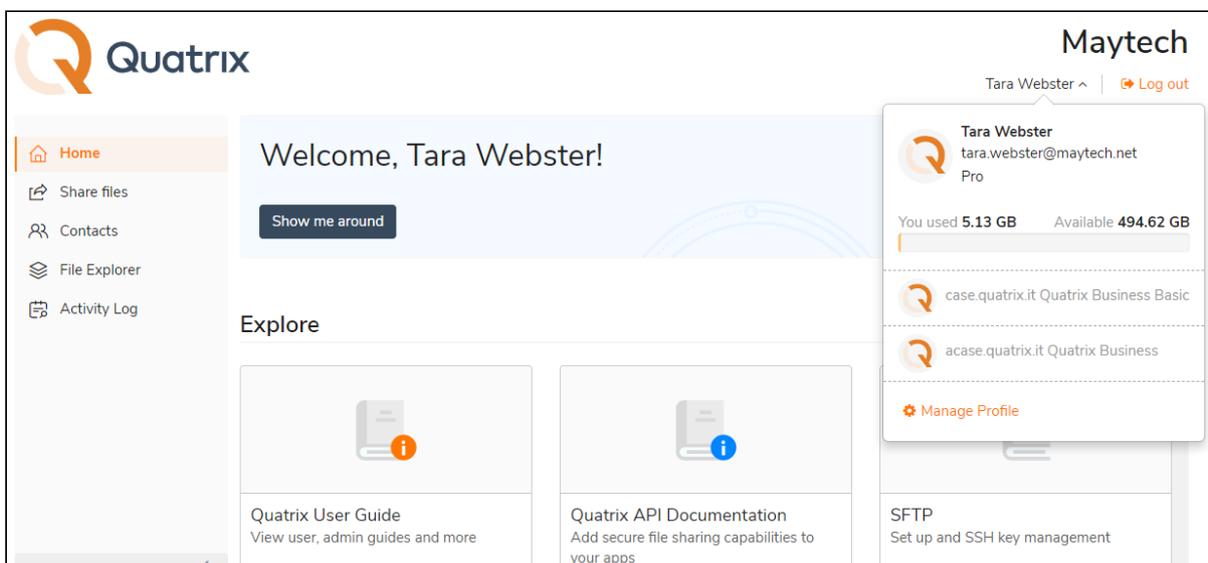
By clicking on the **Manage Profile** link below the list of accounts you'll see the following tabs: **General**, **Security**, **API keys** and **SFTP** (if enabled for account).

6.1 General Settings

The General tab allows you to update your personal information (name, language, email signature), except the email that can only be changed by your administrator or the account owner.

Language Options

Quatrix is available in two languages: English and Chinese. Users can make language adjustments on the **General** tab (see the screenshot above) that will apply only to their interfaces. Being the user with administrator's permission allows you to adjust the language based on user preference (while adding or editing the user) or you can switch the language for the account (on the **Administration** tab).

> Only the account owner can change the email for Quatrix account. With the change of the account email, the owner agrees to hand over all rights to the new owner of the email address.

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6.2 Security Settings

The Security tab allows you to adjust security settings: password, two-factor authentication and PGP keys.
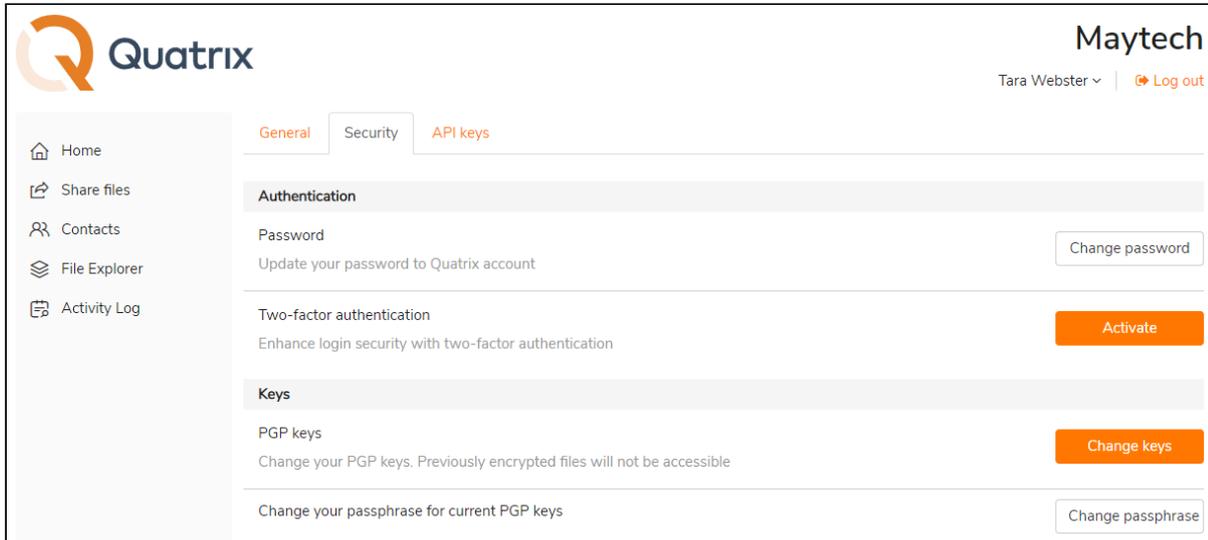
If you would like to keep your passwords secure, try to change them regularly and never repeat previously used passwords.

Follow these steps to **change your password**:

1. Click on the Change passwords button on the Security sub-tab (see the screenshot above).
2. Type in your current password and then generate a new one.
3. Save your password.

> If you have access to multiple Quatrix accounts, remember the password change applies to all.

If you forgot your password, follow the Forgot password link on the Log in form and follow the instructions sent by email to reset the password.

Besides you can enhance the login security with 2FA by clicking on the Activate button under Two-factor authentication section. Learn more about secure passwords and 2FA.

The Security section allows you to manage your PGP keys. Read more here.

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6.3 API Keys

This tab is the place where you can manage your API keys that are required for authentication of your requests with Quatrix.

To generate a new API key follow these steps:

1. Click on Add new API key button
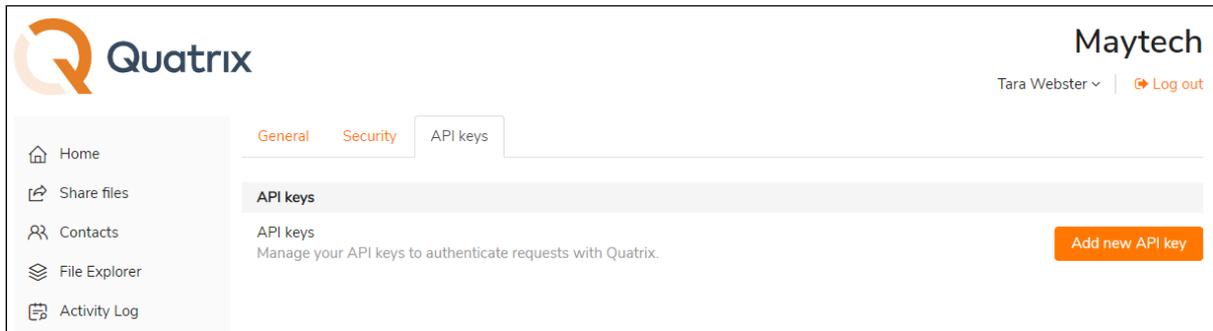
2. Type in the title and click on the Generate key button.

> Give your key an informative title so that you can easily tell which key is used for which integration.

3. Copy and save an already generated API key.

> This API key will never be displayed again (only the key's title will be shown), make sure you copied and stored it securely.

Your newly generated API key is added to the list where you can edit only its title or delete it. For more information on how to use API keys to authenticate requests see Quatrix API.

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6.4 SFTP

This tab is visible if SFTP is enabled for the account. It provides SFTP login information and allows you to manage SSH keys. Learn about SFTP module.

7 Contact Management

The display of the **Contacts** tab depends on the user class you are assigned to. Pro-users can see emails of all file sharing participants with assigned groups.

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Associate users cannot view or share to the outside world that's why the **Contacts** tab displays only Pro-users in the list.

Either pro-, or associate users can request files or PGP keys, and share files on this tab.

To **request files** you need to choose the user/s or contact/s by ticking the check box next to them and selecting an appropriate icon or menu option. For more info see File Management/ Requesting Files.

You can also control whether your contact or user will be forced to log in/register prior to responding to your file request.
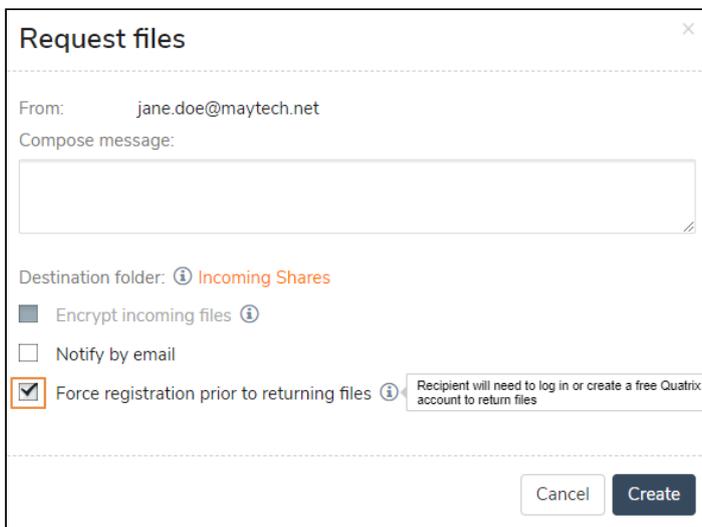
Request files ×

From: jane.doe@maytech.net
Compose message:

Destination folder: ⓘ Incoming Shares
☐ Encrypt incoming files ⓘ
☐ Notify by email
☑ Force registration prior to returning files ⓘ ◁ Recipient will need to log in or create a free Quatrix account to return files

Cancel   **Create**

To **request PGP keys** select the user or contact and click on 🔑 icon from the top menu or right-click menu that automatically sends an email to your recipients where they can generate the paraphrase to PGP keys.

After clicking on the **Share files** icon you are automatically directed to the tab where you can easily send files with your preferred security options.

Only Pro-users are allowed to add, edit and delete contacts

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7.1 Adding a contact

You can easily add your contact by clicking on the **Add contact** icon from the top menu. Then you need to specify your contact's name and email, select an appropriate group and click on the **Save** button.
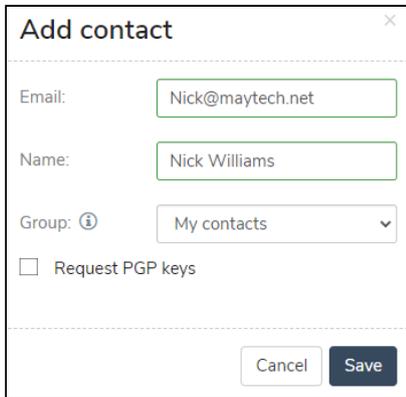

Contacts are grouped into two categories:

- My contacts - your personal contacts that are only visible to you.
- Site contacts are created and managed by the account owner or administrator and contain a global contact list which is available to all Pro users.

If you shared files with the recipient that is new in the account, the email will be automatically added to the list as My contact.

7.2 Editing a contact

If you wish to edit a contact, select the check box next to the required contact and click on the **Edit** icon which opens the **Edit Contact** dialog box where you can make all necessary changes.
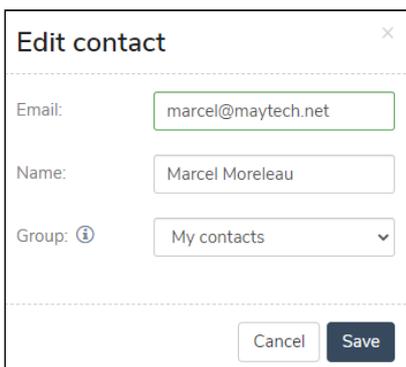
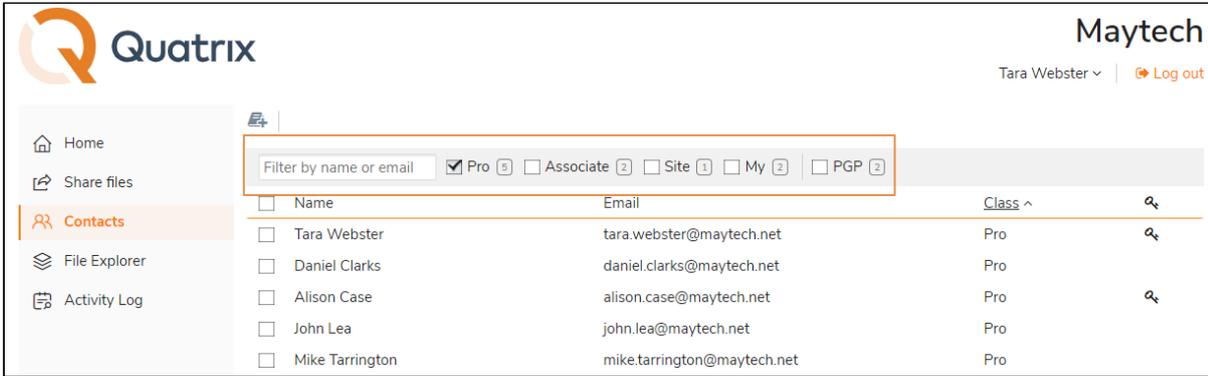## 7.3 Deleting a contact

Only My contacts can be deleted by clicking on the **Delete** icon. You cannot restore the deletion of your contact. Site contacts can be deleted only by administrators

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7.4 Sorting your contacts

All your added contacts can be filtered by the name or email, just specify them in the search field. It is possible to sort your contacts by sharing participants: Pro, Associate, Jailed, My or Site contact. Tick the check box next to the required one/ones and the list will display your desired contacts.
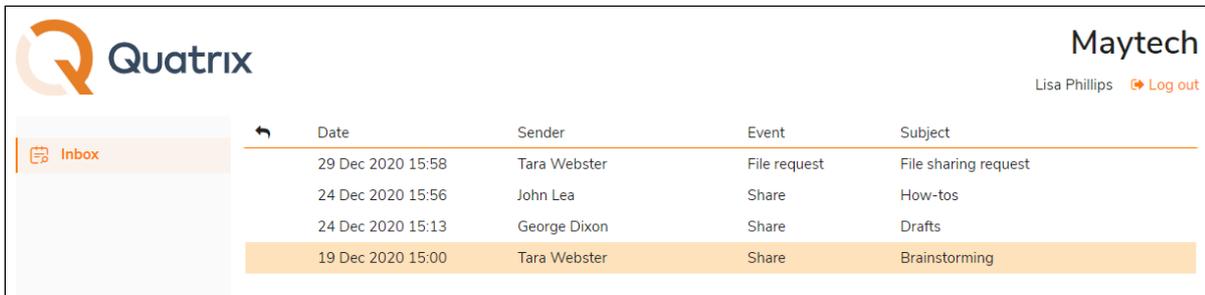

7.5 Contact's Home page

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.

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.

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8 Security and Privacy Options

The security of your data is our top priority. We care for your privacy, your account and your files.

The following security and privacy options are available for our Quatrix users:

- SFTP hosting service,
- Strong encryption,
- Secure passwords and 2FA,
- Antivirus scanning,
- Intrusion detection and prevention,
- PIN code file access.

Learn more about security and privacy options available for account owners and admins in the Administration guide.

8.1 SFTP

SFTP is a reliable method of sharing sensitive data. If SFTP module is enabled, you can securely exchange files. To establish a secure SFTP connection you should have SFTP client configured and get SFTP credentials either on your Quatrix account, or from the email.

8.1.1 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
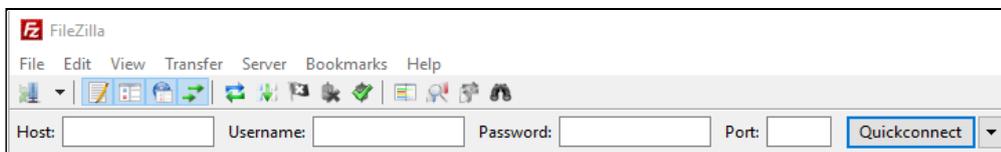
 If you would like to log in to the SFTP client using the password, you need to specify the following information on the Quickconnect bar:

- Host: type in your site (e.g. sftp://sftp43.**yoursite**.quatrix.it).
- Username: enter your SFTP login.

> You can get your host and username by clicking on the link with your name at the top right of your Quatrix account, then go to **Manage Profile** and select the **SFTP** sub-tab.

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- Password: type in your password.

> You can access SFTP client with your account password.

- Port: 22 or 43.

> Please note that port 43 makes use of our uncongested network, whereas 22 will go over public internet and could be slower if files are larger.
>
> We advise using port 43 for accelerated file transfers.

SSH public key authentication

You can connect to the SFTP server using SSH keys. It allows multiple users to log in as the same system user without having to share a single password between them.
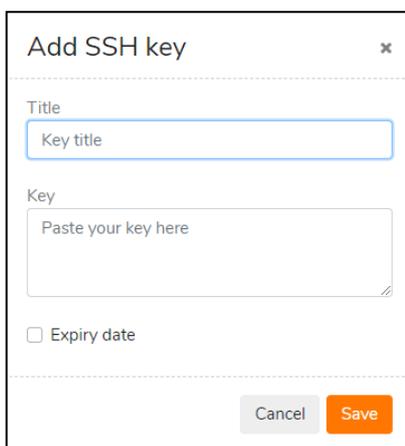
SSH keys serve as a safe and secure way of establishing connection with the remote server. SSH keys are generated in pairs. A key pair contains one public and one private key. The private key is stored locally and should not be exposed to anyone, whilst the public key is placed in the remote location and can be freely shared with others. If one of the keys is missing, you won't be able to establish a secure SFTP connection.

SSH keys can be generated using any shareware tools from the Internet. We'll use PuTTYgen to generate public and private keys. You need to download and launch the program. Then click on the Generate button and save your keys by clicking the Save public key and Save private key buttons.

The top of the window displays the Public key for pasting into OpenSSH authorized_keys file field, where you should copy all the text (make sure it ends with "= rsa-key-date") and paste it directly to Quatrix or save it locally.

Then add your previously generated SSH public key to Quatrix:

1. Click on the link with your name at the top right, go to **Manage Profile** and click on **Add SSH Key** button on **SFTP** sub-tab.
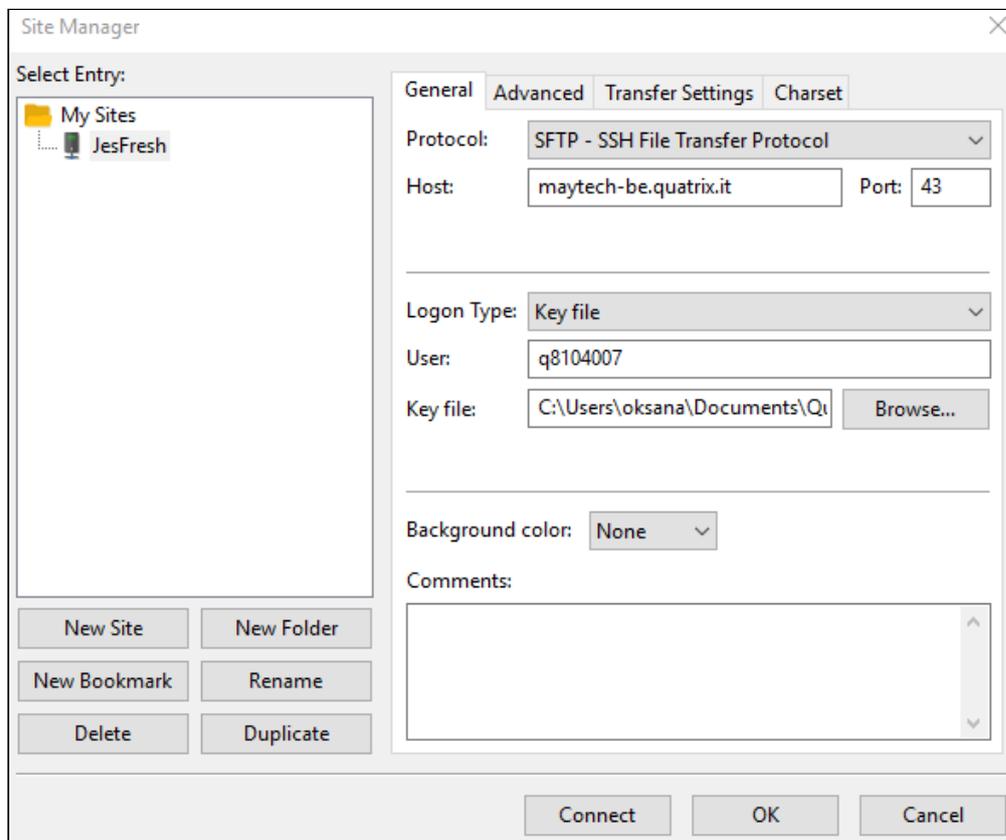2. Insert your previously generated public SSH key and save it.

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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.

> You can set the expiry date for your SSH key by ticking the check box while adding or editing the key.

Follow these steps to access your server using SSH keys:

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://sftp43.yoursite.quatrix.it)
- Port: 22 or 43
- Protocol: SFTP - SSH File Transfer Protocol
- Logon Type: Key file
- User: enter your SFTP login (SFTP module details in your Quatrix account)
- Key file: browse and open the file with your previously generated public SSH key

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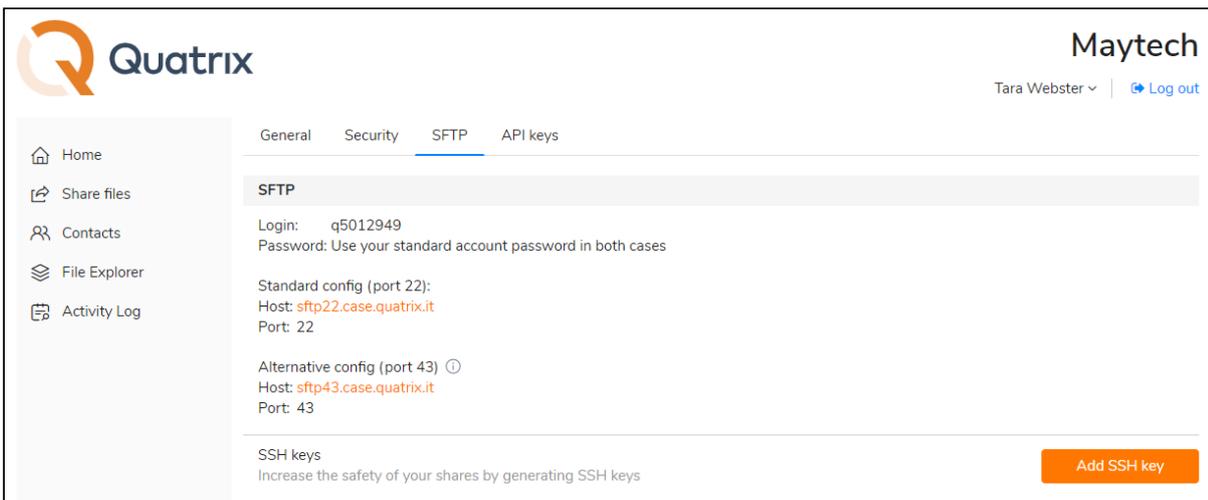
4. Connect to the server by clicking on the **Connect** button.

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 (your Quatrix files and folders) will be displayed on the right-hand pane.

> Passwords are easy to use but we would recommend to use SSH keys as this method of connecting to the server is more secure.
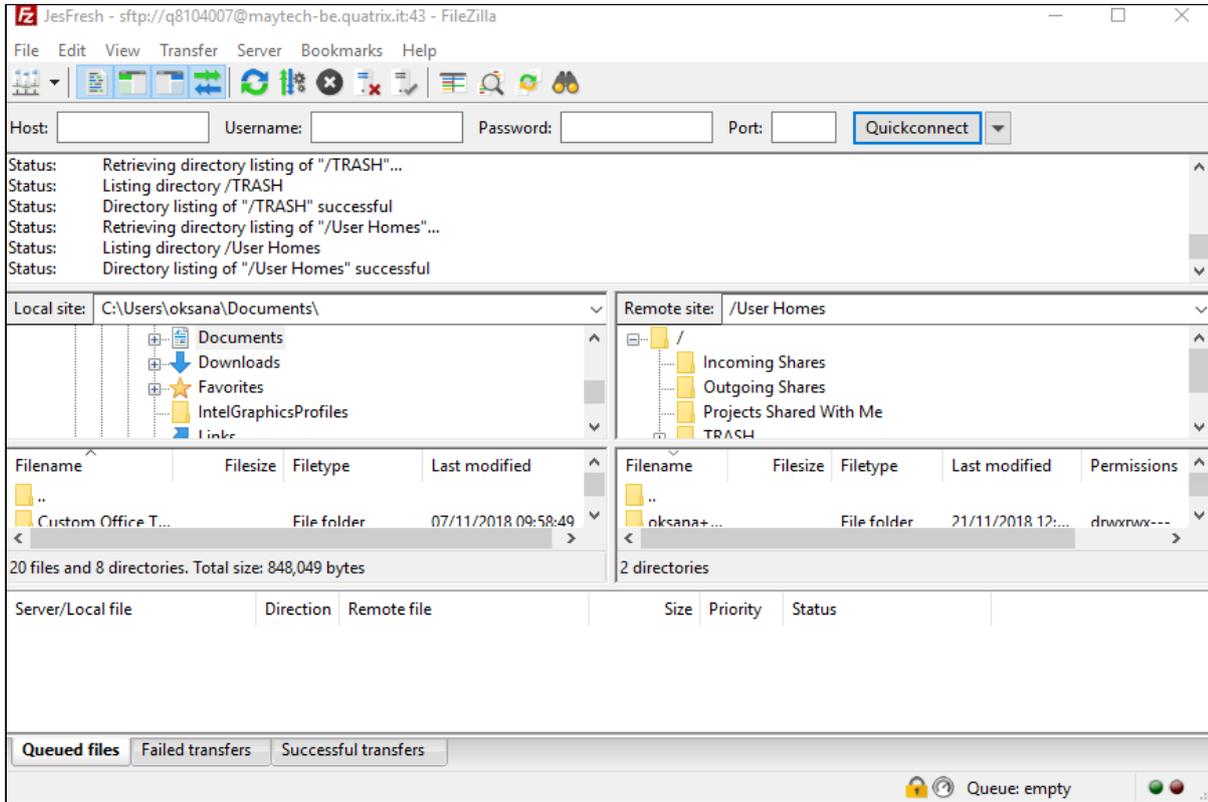
8.1.2 Transferring Files with SFTP

The account admin explicitly enables SFTP for account users. Please ask your account admin if you don't see SFTP credentials on **SFTP** sub-tab (click on your name at the top right corner and go to **Manage Profile**). You will get email notification as soon as SFTP is enabled for you.

To exchange your local files with the ones you store in Quatrix you need to open SFTP client and connect to the server using your password or previously generated SSH public key. Once a successful connection is established, you will see the window displaying your Quatrix files and folders at the right-hand pane. You can easily move any file - just drag-and-drop the file from the origin folder to your destination folder.

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Custom SFTP Login

If you would like to use your custom SFTP login for accessing Quatrix files or folders via SFTP, send a request to your administrator. As soon as your custom SFTP login is added, it will be displayed in your profile under SFTP section.

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8.2 Strong PGP Encryption

All our Quatrix users can share encrypted files that provides the absolute assurance that the only person able to open a confidential shared file is the intended recipient.

To share encrypted files through Quatrix you should follow 4 steps:

1. Have PGP enabled for your Account

    Contact your administrator to enable PGP for the account.

2. Generate your private PGP keys

    You can generate your PGP keys on the **Security** sub-tab (click on the link with your name, follow the **Manage Profile** link and open the **Security** sub-tab). Click on the **Generate keys** button and enter the passphrase. As soon as your keys are generated you'll be notified at the top right of your screen.
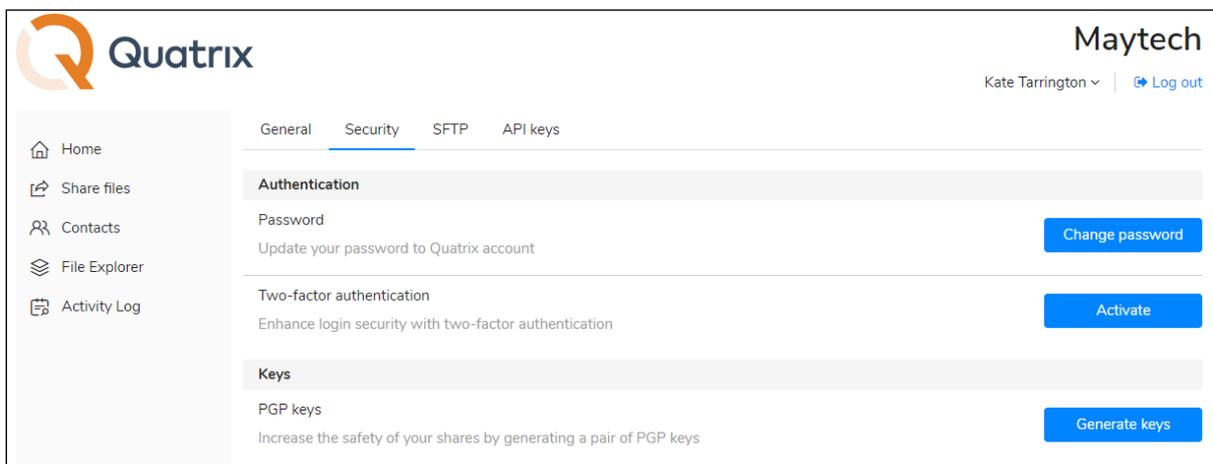
> If you noticed that your passphrase was compromised, you can simply change the passphrase here by clicking on the **Change passphrase** button. This preserves you the right to decrypt all previously encrypted files. But in case you forgot the passphrase, you need to generate new PGP keys by clicking on the **Change Keys** button which makes further decryption of previously encrypted files impossible.

3. Get public PGP keys from your recipients

    Go to the **Contacts** tab and select the ones you would like to share encrypted files and request PGP keys by ticking them and clicking on the **Request PGP keys** from the top or right-click menu that automatically sends an email to your recipients where they can generate the paraphrase to public PGP keys.

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4. Share encrypted files

   If private and public PGP keys are generated, you can share encrypted files securely.

   Go to the **Share files** tab, specify the recipients who have generated PGP keys, select the **PGP encrypt files** checkbox in the **Optional Settings** section, upload and share files. That's it. Your files are securely sent to your recipients.

   To decrypt files the recipient should enter the passphrase.

Folders and cloud files cannot be encrypted with PGP. You should upload files from your computer to use PGP encryption.

If you would like to learn more about PGP in Quatrix, read our Administration guide.

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8.3   Secure Passwords and 2FA

In order to send and receive information completely safely, secure passwords are essential. Your administrator may insist upon creating the strongest and unhackable password to log in to Quatrix account in such a way keeping the network safe.

One of our future releases will introduce the password policy feature that will enable admins or owners to set specific rules that enforce colleagues and connections to only create strong passwords: e.g. length, letter combinations, characters and numbers, password expiry dates.

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.
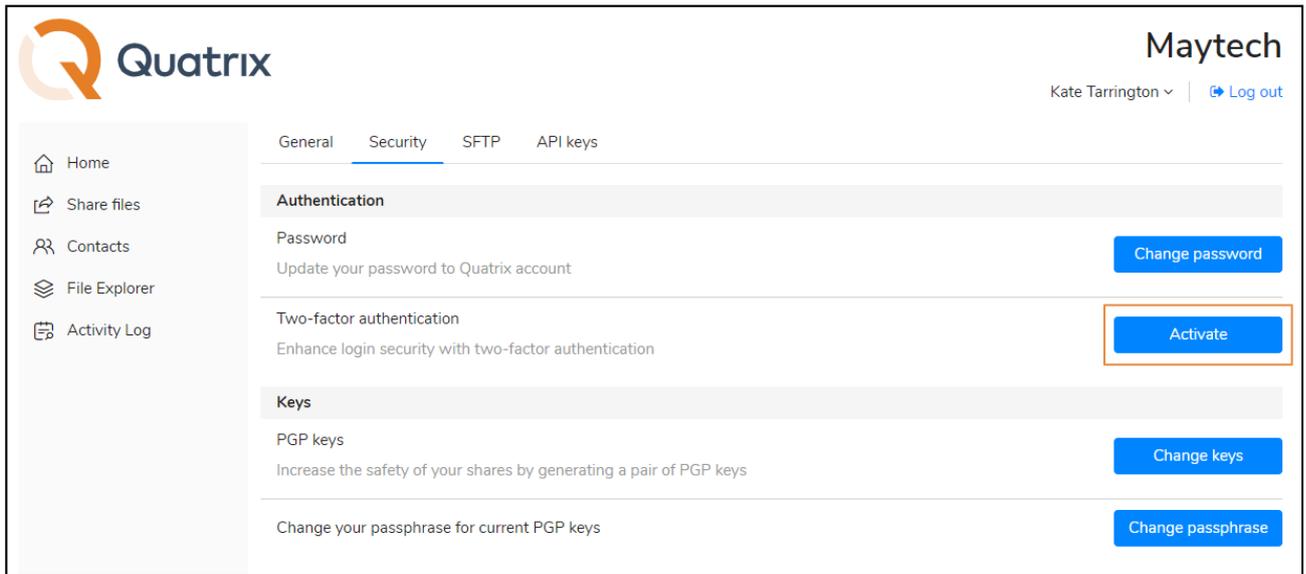
Here's how it works:

- Every time you log in to Quatrix, you'll be asked to enter a verification code along with your password.
- You'll receive a verification code from an authentication app on your mobile phone.
- Enter the code in Quatrix and you're done — you'll be logged in to Quatrix, but with added peace of mind.
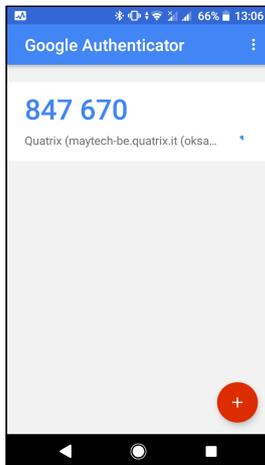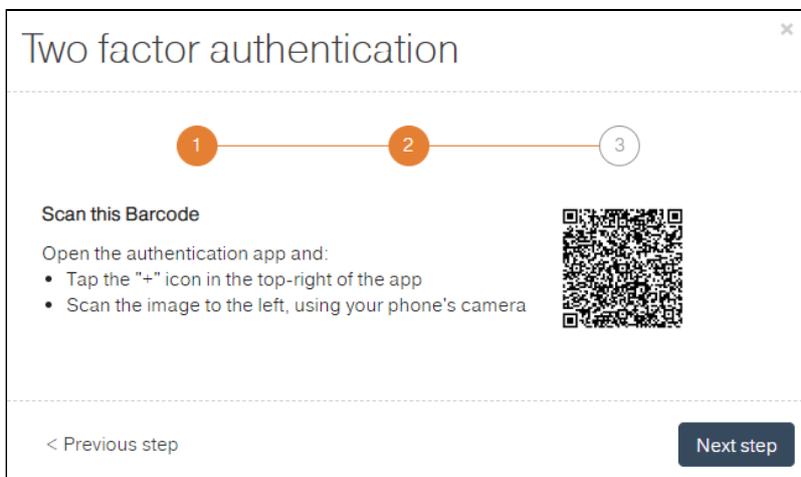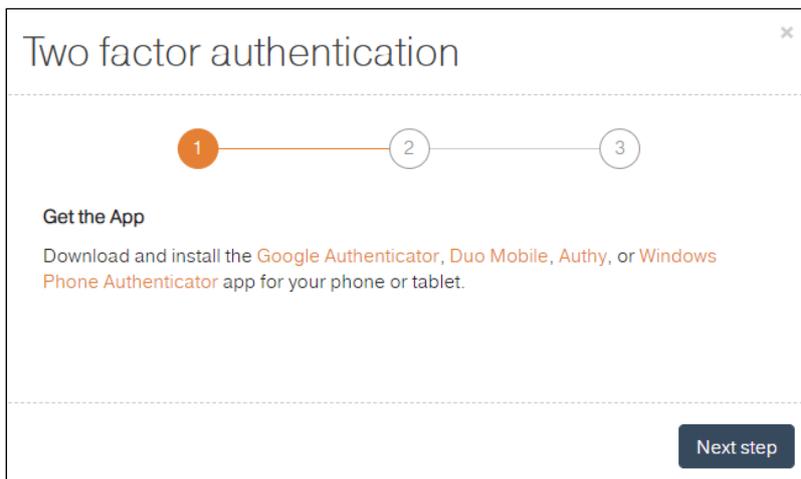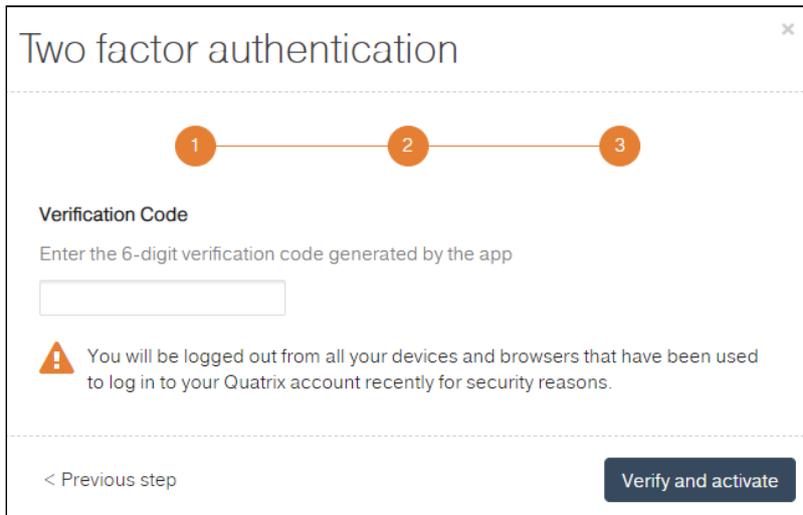
Enabling 2FA

1.   Log in to your Quatrix account.
2.   Click on the link with your name at the top right, then go to **Manage Profile** and open **Security** sub-tab.

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3. Click on the **Activate** button and follow 3 simple steps according to instructions.

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As soon as 2 FA is activated you will see the notification at the top right of your Quatrix account.

> You can set up 2FA on multiple devices at the same time scanning **the same (!)** QR code

> Time based one-time password (TOTP) is supported by the SFTP protocol and clients such as WinSCP and Filezilla. However it's not widely used as SFTP already offers two authentication factors:
>
> - login/password;
>
> - SSH key.
>
> TOTP can be enabled on request.

Disabling 2FA

If you lost your 2FA enabled device, you can ask your administrator to turn off 2FA so that you can log in and reset it.

> You can switch accounts on unsuccessful 2FA code entry, if there are more than one.

For more information see www.maytech.net
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