

Quatrix User Guide

Version 6.0

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

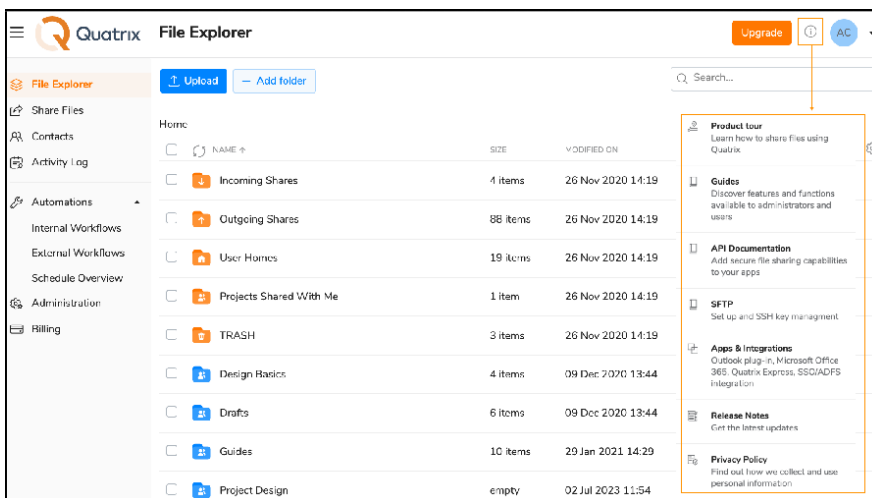
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1 Getting Started

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 File Explorer tab where you can access all your cloud files and folders.

You can take our quick tour to learn the basics of Quatrix, discover useful features and functions available for administrators and users and find other useful links on the information box at the top panel.



Learn more about new features, improvements and fixes in our [latest release notes](#).

2 User Groups

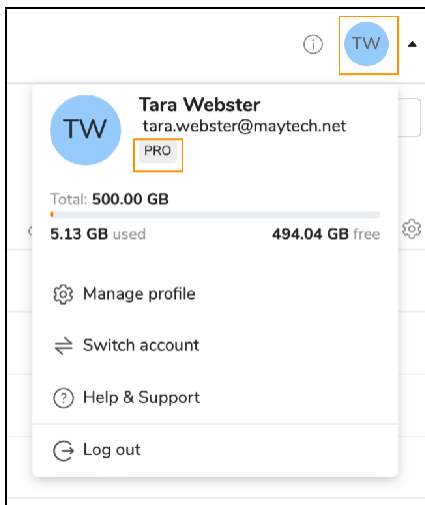
Quatrix users are grouped based on appropriate sharing and access permissions. Your administrator assigns an appropriate group while adding you to Quatrix account.

The following 3 predefined user groups are created by default:

- **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.

Permissions of default user groups can be easily updated by your administrator to match required needs.

To see what group of users you are assigned, click on the letters from your name in the circle located at the top right. This will open the form containing your assigned group below the name and email.



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).

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				•
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](#).

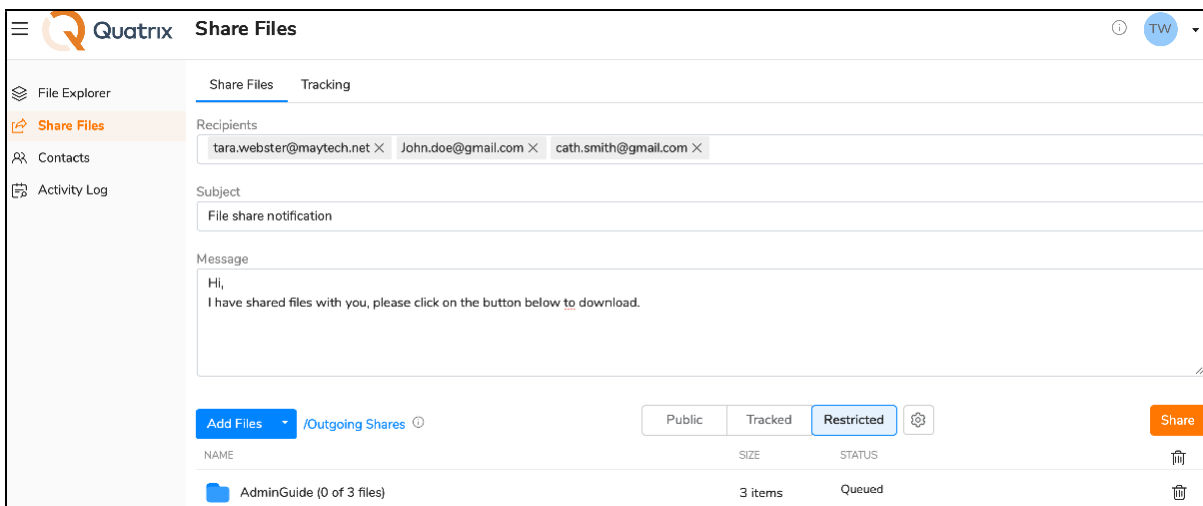
They could also share encrypted files back to the sender while replying to the share or file sharing request. This requires prior generation of PGP keys. Learn more about [PGP](#).

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 recipient(s) with links to download files.



Video guide: <https://vimeo.com/405039323>



Follow the steps below to share files in a secure and reliable way:

1. Recipients - type in as many email addresses as you like in the Recipients text field. If the address already exists in your contacts, it will autocomplete. New recipient addresses will be added to your contacts and will autocomplete next time.

Emails are sent individually to each recipient - the recipient list is hidden.

2. Subject - specify the subject or leave it as default - 'File share notification'.

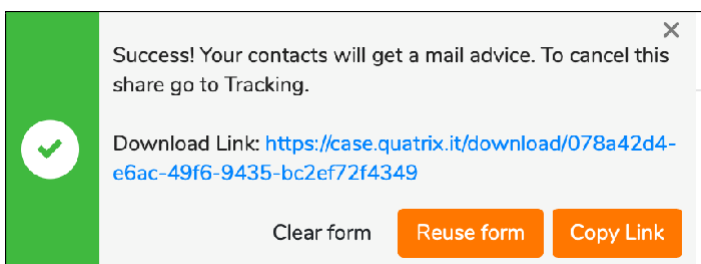
3. Message - compose your own message or leave the default one.
4. Upload files or folders - click on the Add files button to add your local files. Use Shift+click or Ctrl+click to select multiple files. Or, if supported by your browser you will see a drop zone to drag files or folders from your your desktop or file browser. If you drag a folder, all folder contents will be queued for upload. If you want to upload folders or cloud files, click on the arrow next to the Add files button. All your uploaded files/ folders are displayed in the list below the Add files button where you can see the size and upload

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

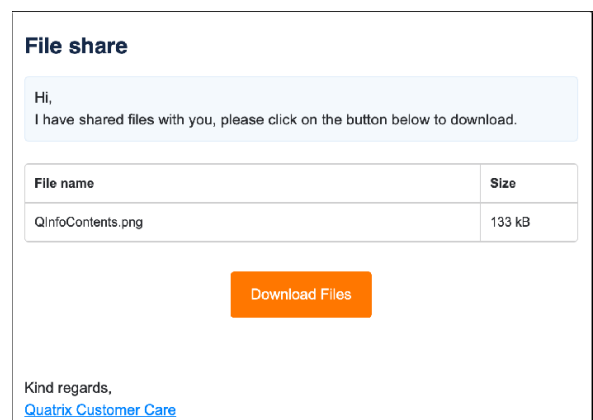
status as well as delete some if necessary.

5. Share privacy level - set the share security level, there are three types of links:
 1. **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.
 2. **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.
 3. **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.
6. Share your files.

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. This window contains the download link that you can share with your recipients in any suitable way.



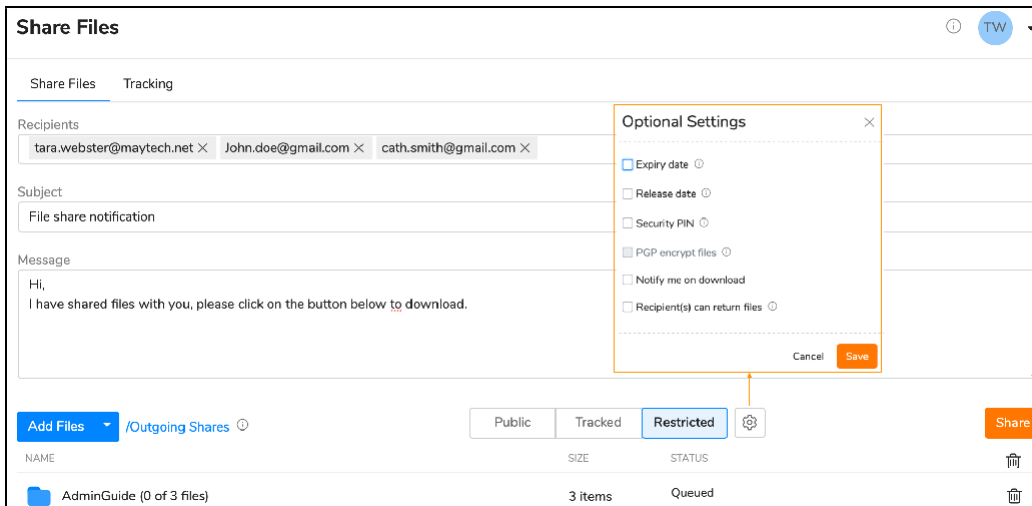
Each share uploads files to your Quatrix Cloud storage and generates an email message to the recipient(s) with links to download files.



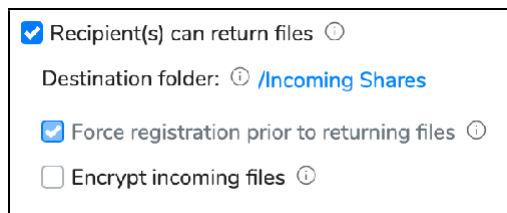
Besides you can share files from the File Explorer tab, first you need to select files or folders and then click on the Share icon that will lead you to the Share Files tab. Your selected files will be added to the list for the upload. Complete the steps described above to complete the share.

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.



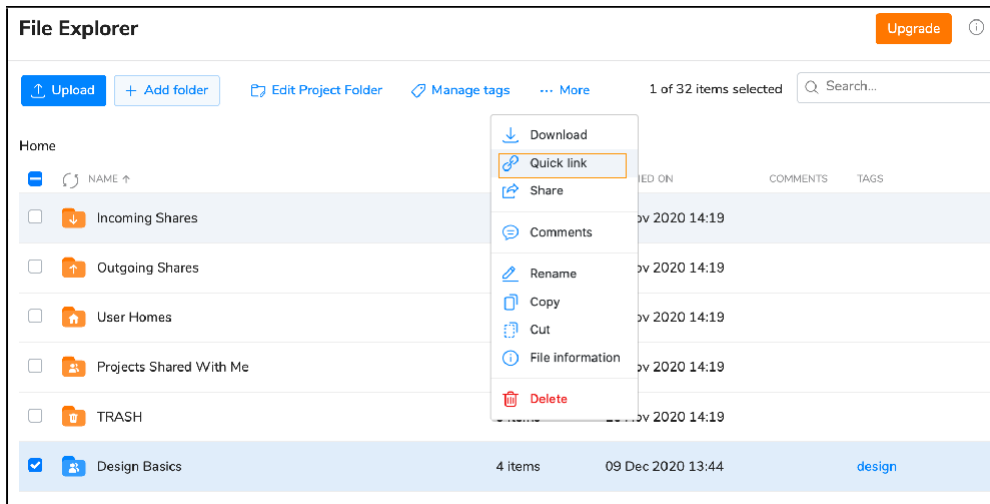
- Expiry date - set the date when your uploaded files expire. Download links are permanently inactive when they expire.
- Release date - set the date when your files become available for download. You can upload your files and send out the links but download links are inactive until the chosen time.
- Security PIN - optional PIN the user must enter to access shared files. The PIN can be set for all types of shares. 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.



- Destination folder - shows the path to the uploaded files. Incoming Shares by default, but you can change it by clicking on the link.
- 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.

3.2 Quick Links



To create a quick link to your files or folders:

1. Navigate to the File Explorer tab and select the desired file or folder.
2. Click on Create quick link icon from the top or right-click menu.
3. Share your quick link in any suitable way.

Quick links are valid for 7 days. Once a quick link is expired, it cannot be used again.

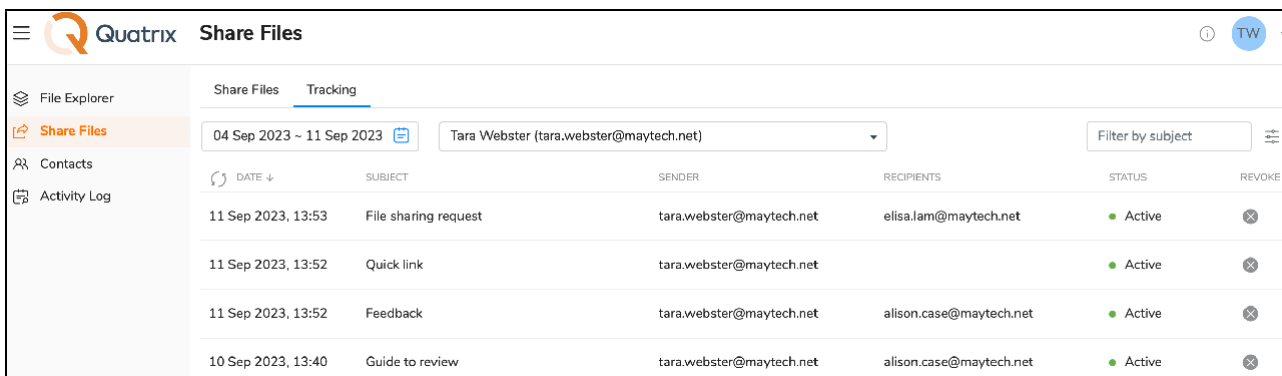
4 Tracking Shares and Activity History

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.



DATE ↓	SUBJECT	SENDER	RECIPIENTS	STATUS	REVOKE
11 Sep 2023, 13:53	File sharing request	tara.webster@maytech.net	elisa.lam@maytech.net	Active	✕
11 Sep 2023, 13:52	Quick link	tara.webster@maytech.net		Active	✕
11 Sep 2023, 13:52	Feedback	tara.webster@maytech.net	alison.case@maytech.net	Active	✕
10 Sep 2023, 13:40	Guide to review	tara.webster@maytech.net	alison.case@maytech.net	Active	✕

The Tracking tab displays a list of shares in the table view for the last 7 days. You can change the time frame by clicking on the calendar icon. The table can be filtered by the subject of the share. To learn details about the share left-click on 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.



NAME	SIZE	DOWNLOADS
Guide.png	99.64 KB	0

4.1.1 Revoking access to a share

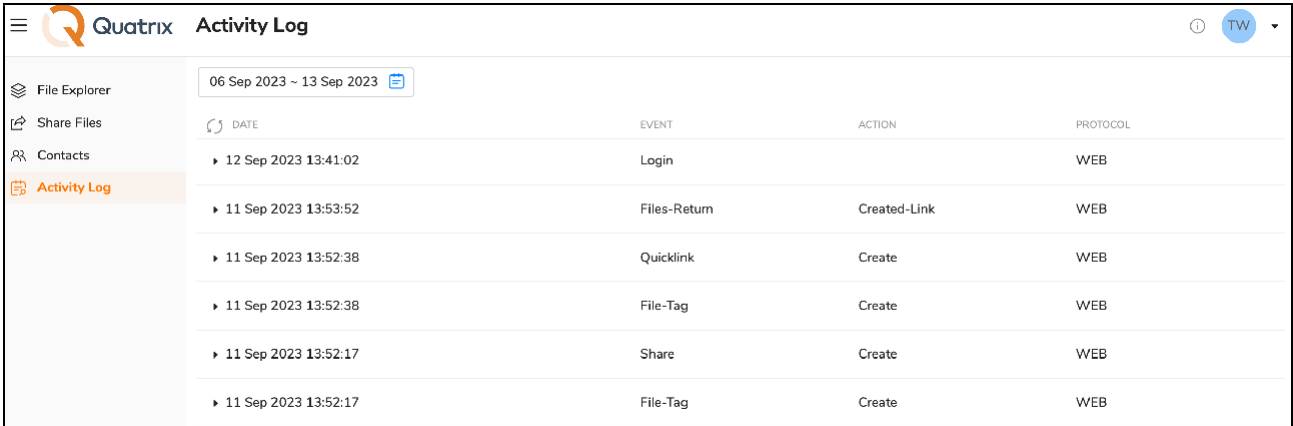
You may revoke access to the shared files, quick links, file requests or returns by clicking on the Revoke share icon on the Tracking tab. You can revoke only one share at a time.

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.

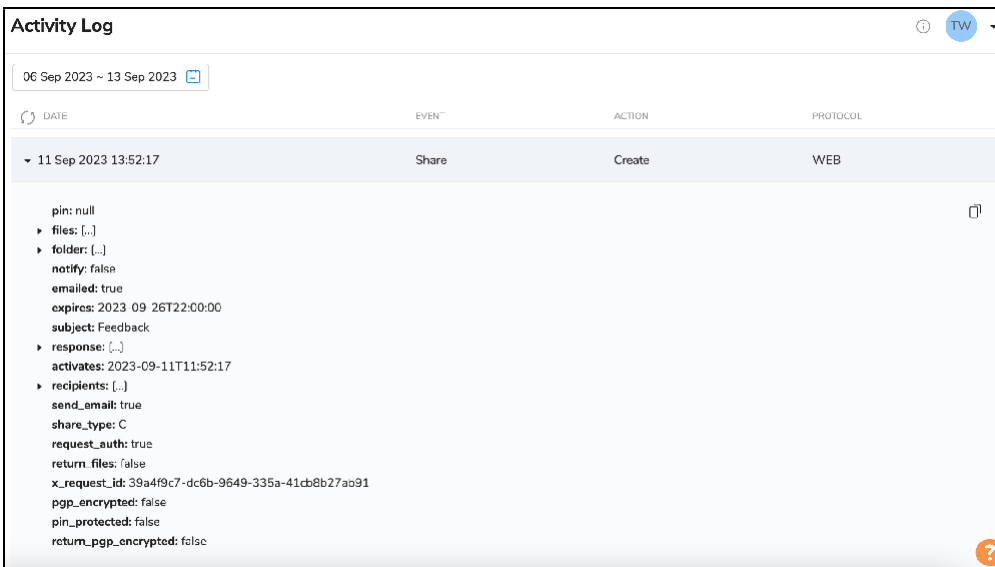
4.2 Tracking Activity History

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).



DATE	EVENT	ACTION	PROTOCOL
12 Sep 2023 13:41:02	Login		WEB
11 Sep 2023 13:53:52	Files-Return	Created-Link	WEB
11 Sep 2023 13:52:38	Quicklink	Create	WEB
11 Sep 2023 13:52:38	File-Tag	Create	WEB
11 Sep 2023 13:52:17	Share	Create	WEB
11 Sep 2023 13:52:17	File-Tag	Create	WEB

To learn more details about the action, left-click on it which expands and provides further information.



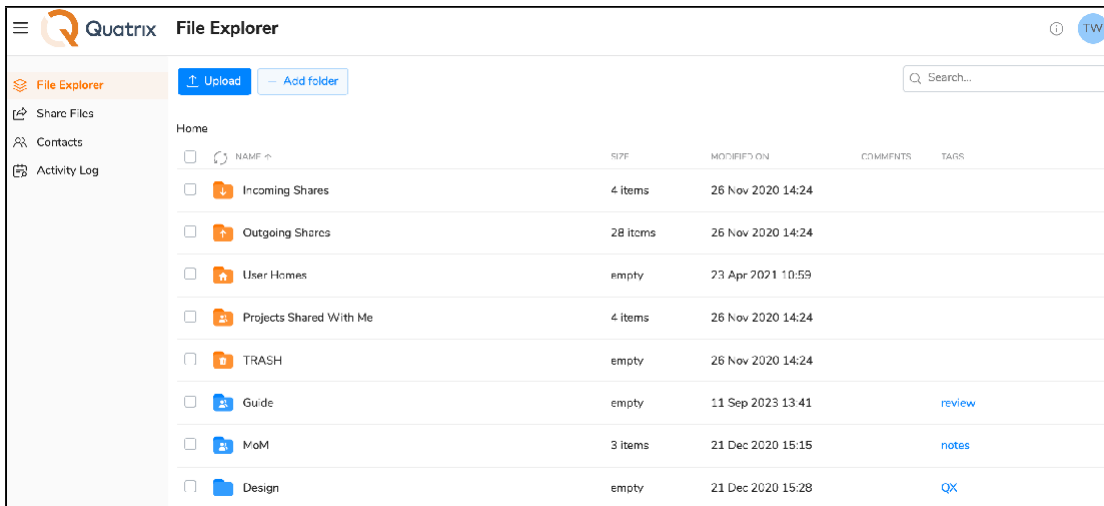
DATE	EVENT	ACTION	PROTOCOL
11 Sep 2023 13:52:17	Share	Create	WEB

```

pin: null
files: [...]
folder: [...]
notify: false
emailed: true
expires: 2023-09-26T22:00:00
subject: Feedback
response: [...]
activates: 2023-09-11T11:52:17
recipients: [...]
send_email: true
share_type: C
request_auth: true
return_files: false
x_request_id: 39a4f9c7-dc6b-9649-335a-41cb8b27ab91
pgp_encrypted: false
pin_protected: false
return_pgp_encrypted: false
  
```

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 with 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.

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 can delete files and folders from the User Homes folder.

If you need to refresh the file listing, click the Refresh icon.

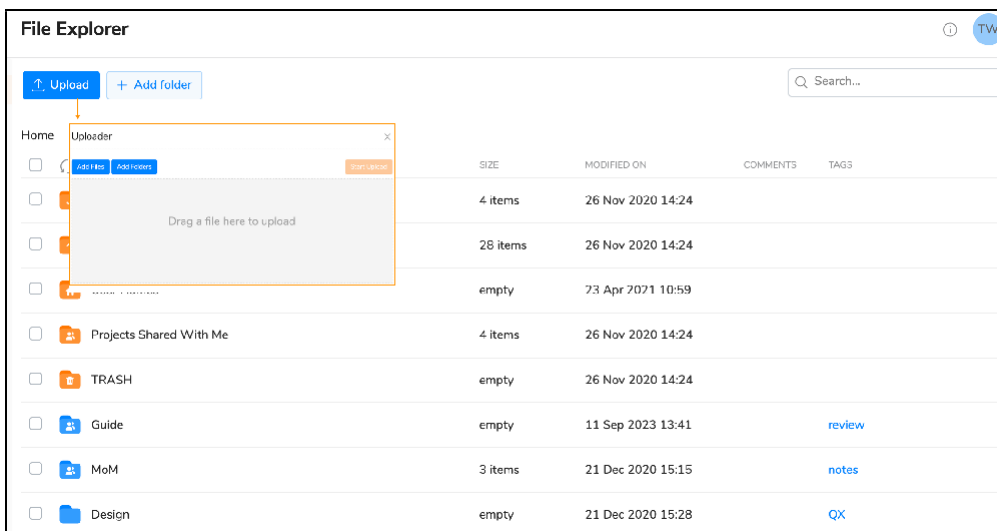
5.1 File Management

5.1.1 Uploading Files



Video guide: <https://vimeo.com/405036786>

You can upload files to your Quatrix storage from your computer by clicking the Upload button 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.



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 files button. 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. [Learn more](#) about quick links.

Quick links are valid for 7 days. Once a quick link is expired, it cannot be used again.



Video guide: <https://vimeo.com/405037180>

5.1.3 Requesting Files

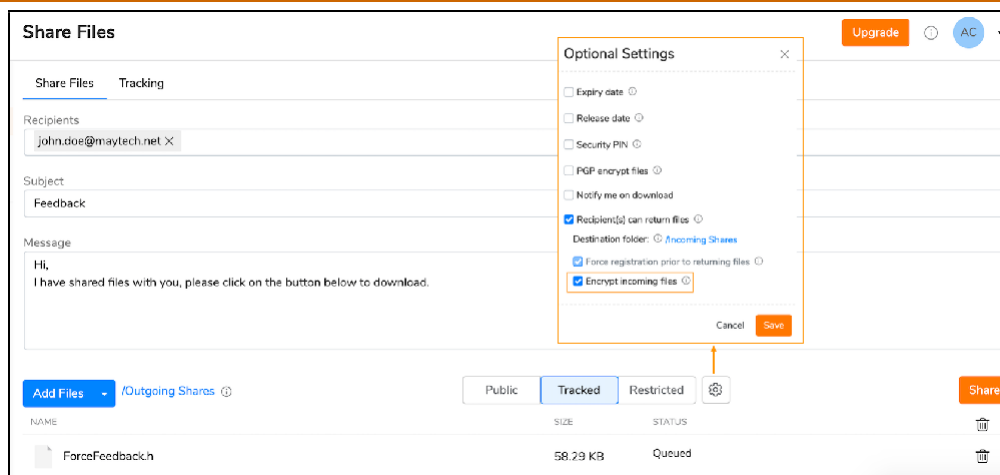
Quatrix is a great tool for acquiring files from your contacts or users with the assurance of security, detailed tracking and PGP encryption (if enabled for your account).

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

To request files on the Share Files tab:

1. Select Recipient(s) can return files check box in the Optional Settings section.
 - Force registration prior to returning files option is checked by default. This means that your recipients will need to login or create a free Quatrix account in order to return files.
 - Encrypt incoming files - tick if you want to get your files encrypted.

To be able to share and get back encrypted files, you need to have a pair of PGP keys - a private key generated by you and a public key generated by your recipient. [Learn more](#) how to share encrypted files.



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 files icon from the above menu or select an appropriate option from the right-click menu.
2. Type in the message, tick corresponding check boxes if you want to get encrypted files or receive an email notification and click on the Create button.

You can also control whether your contact or user will be forced to log in/register prior to responding to your file request by ticking Force registration prior to returning files check box.

3. The link to return files will be generated and displayed at the top right of your account.
4. Click on the Copy link button on the notification and share it as you wish.

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.

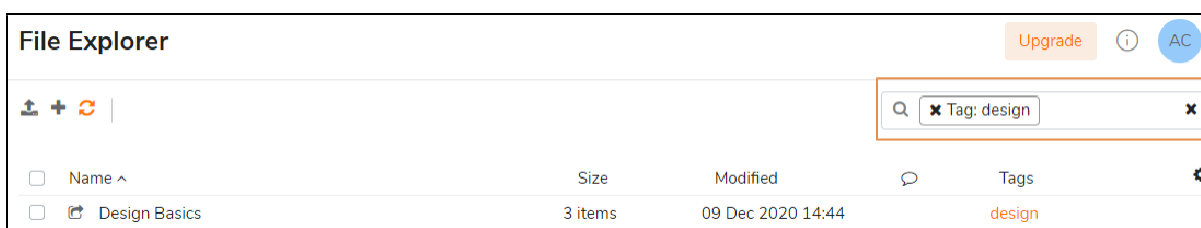


Video guide: <https://vimeo.com/405037110>

5.1.4 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](#)



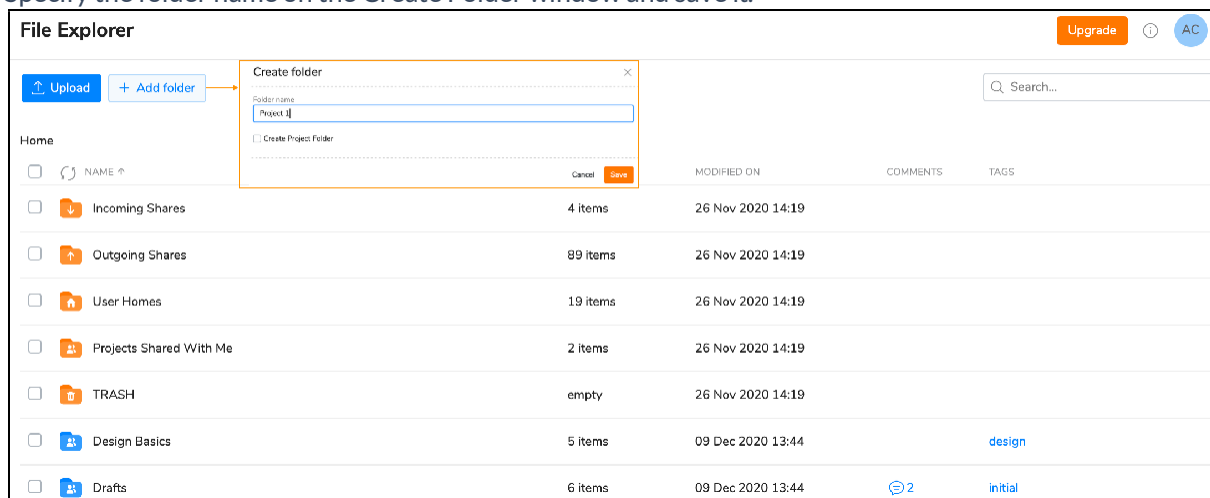
5.2 Folder Management

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:

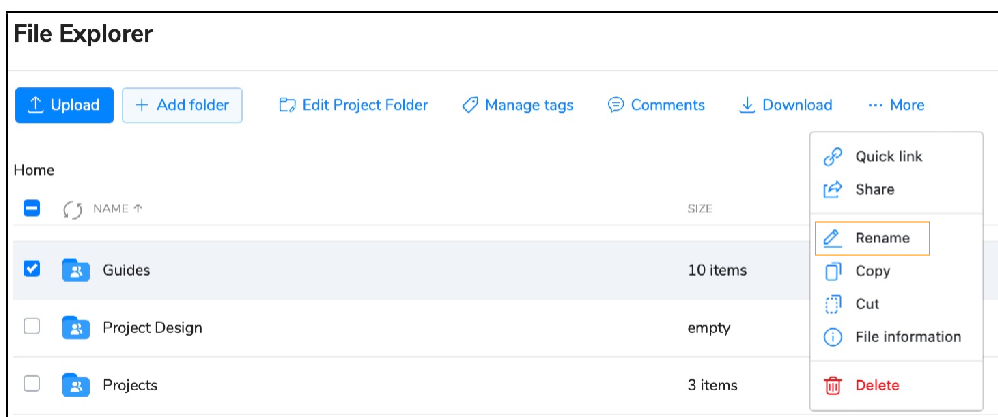
1. Go to the File Explorer tab and click on Add folder button from the top menu.
2. Specify the folder name on the Create Folder window and save it.



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 option from the top menu or by right-clicking on the folder and selecting the Rename option from menu.



Deleting Folders

If you need to delete the folder, tick the check box next to it and either click on the Delete option from the top menu, or select an appropriate option from 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 option from the top menu. If you restore the folder with containing sub-folders, the inner folder structure will be kept the same.

5.2.3 Reordering Folders

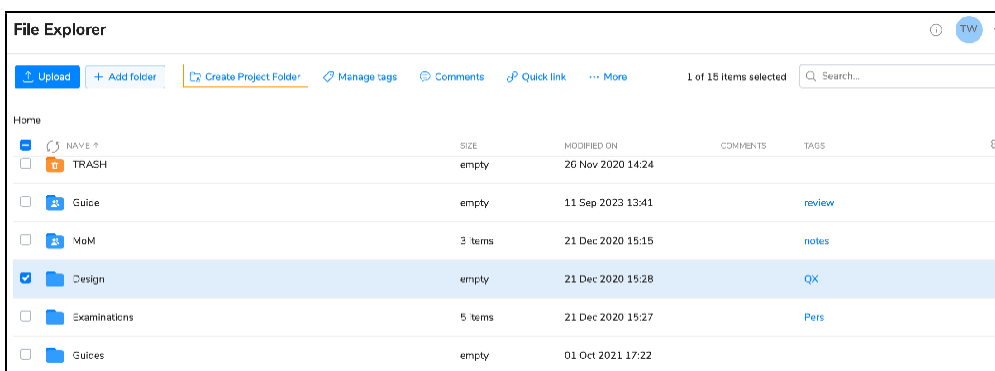
You can easily organise any structure of your folders that allows you to keep your files and folders organised. Nested folders generally make it easier to find specific files later, because you don't have to sift through all your files at once.

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.

5.2.4 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 create secure data rooms to 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.

The [video](#) below displays the basics of project folder management.

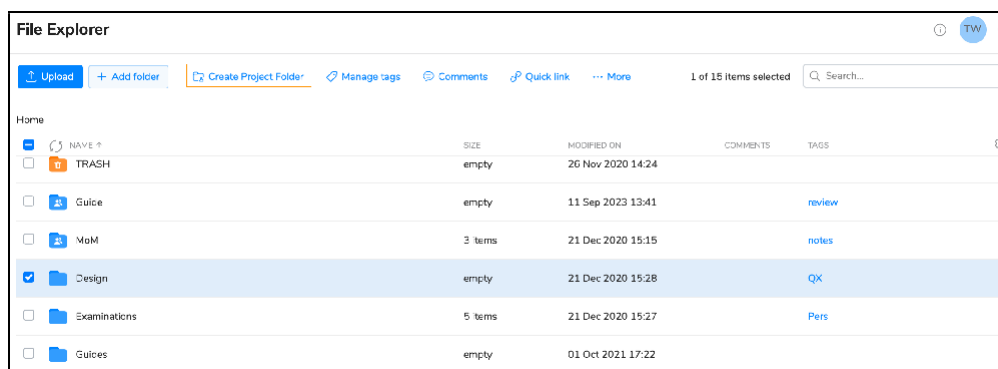


Video guide: <https://vimeo.com/405036867>

5.3.1 Creating a Project Folder

To create a project folder, follow these steps:

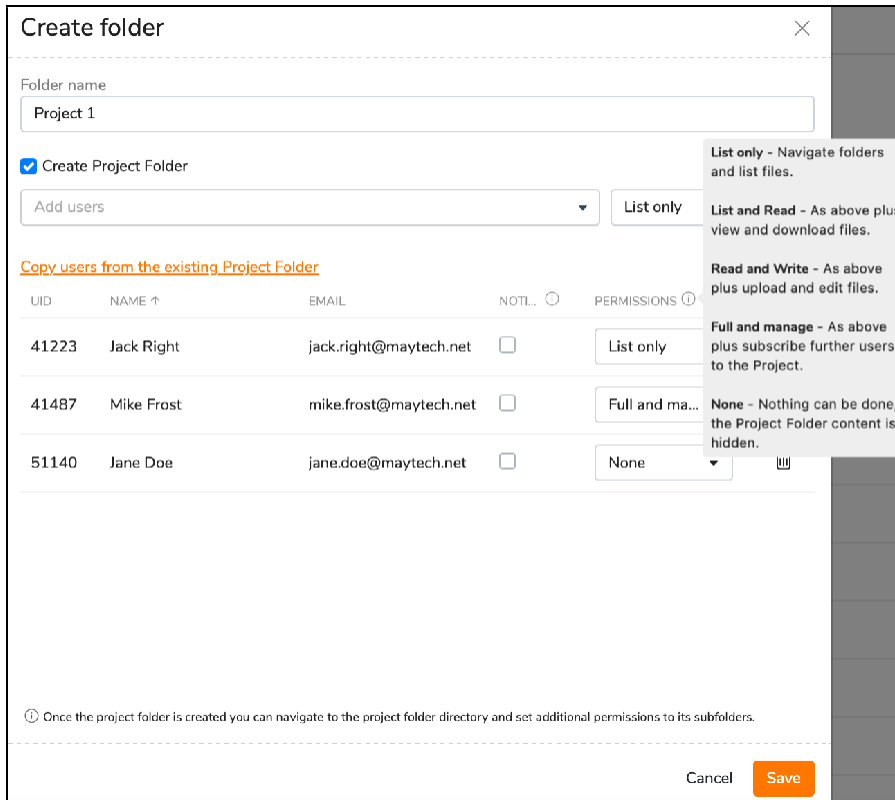
1. Go to the File Explorer tab and check the folder you would like to share (or you can create a new one that you intend to share by clicking on the Add folder button from the above menu and checking Create Project Folder box).
2. Click on the Create a Project Folder button from the above menu or choose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



3. Select users from the list (or you can copy users with assigned permissions from the existing Project Folder by clicking the corresponding link) and specify their permissions.

For details on permissions see the table **Predefined Project Folder Permissions** below.

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



Create folder [X]

Folder name
Project 1

Create Project Folder

Add users [v] [List only]

[Copy users from the existing Project Folder](#)

UID	NAME ↑	EMAIL	NOTL. [i]	PERMISSIONS [i]
41223	Jack Right	jack.right@maytech.net	<input type="checkbox"/>	List only
41487	Mike Frost	mike.frost@maytech.net	<input type="checkbox"/>	Full and ma...
51140	Jane Doe	jane.doe@maytech.net	<input type="checkbox"/>	None [v]

[i] Once the project folder is created you can navigate to the project folder directory and set additional permissions to its subfolders.

Cancel [Save]

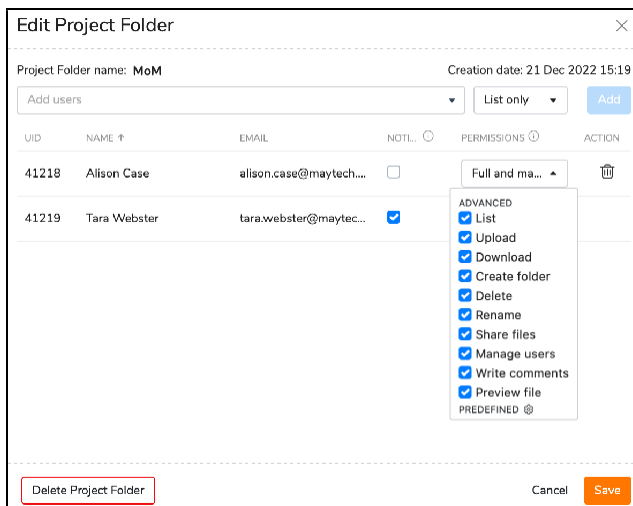
4. Click on the Save button.

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.

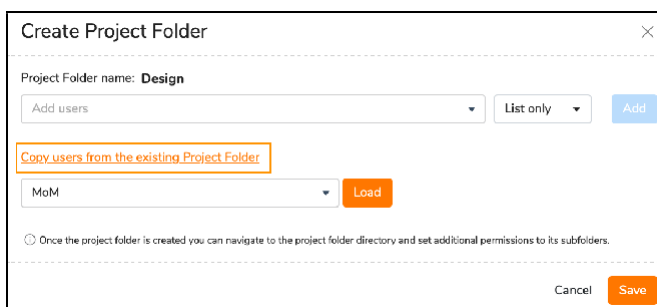
Predefined Project Folder Permissions

Permitted actions	List only	List and read	Read and write	Full and manage	None
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 permission that you set to the user and select Advanced option. Then tick the check boxes with permissions that you would like to assign to this user and save your adjustments.



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



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 button 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.

To change the name, go to the File Explorer tab, select the folder and choose the Rename option from the top menu. Your project folder will be renamed, but it will be displayed with a new 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 option 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.

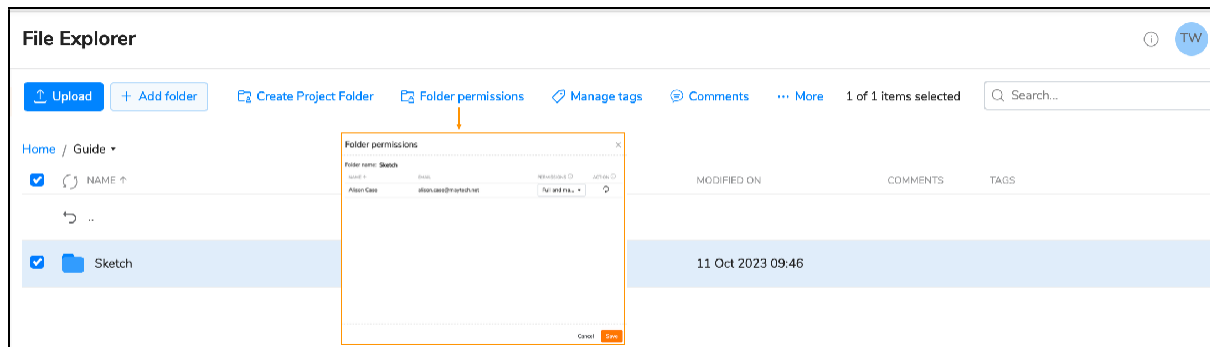
5.3.4 Managing Subfolder Permissions within a Project Folder



Video guide: <https://vimeo.com/519529574>

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 folder, administrator or user with Full and manage 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 manage 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.

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

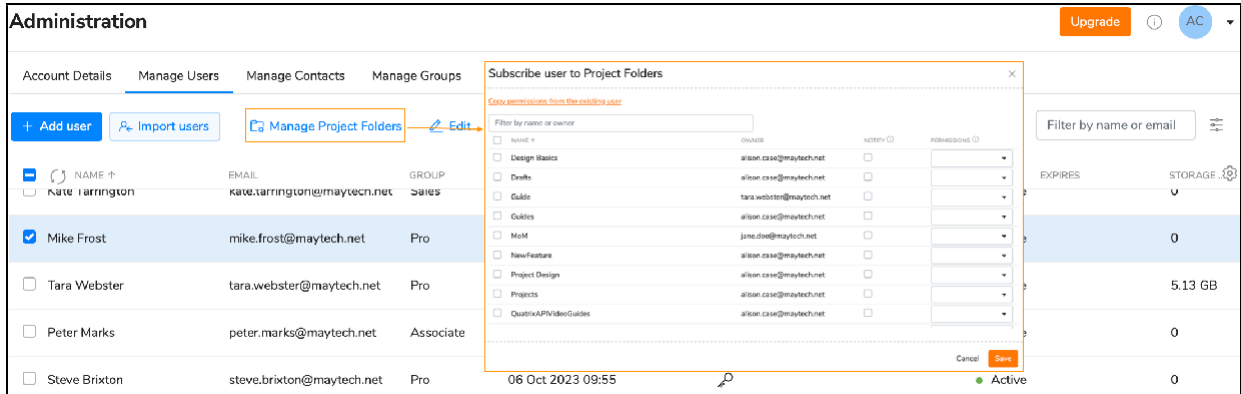
If you would like to share the access to subfolder with your contact, convert it to the user at first. Learn how to do this [here](#).

5.3.5 Managing user permissions to PFs

This feature is available only to account owners and administrators.

The main intention is to assist management of user permissions to existing Project Folders. It provides a possibility to have a bird's-eye view of Project Folders shared with every user.

1. Go to Administration → Manage users.
2. Select the user and click on the Manage Project Folders icon from the top menu.
3. The form for subscribing your selected user to Project Folders opens where you can manage permissions.



Administration Upgrade ⓘ AC

Account Details **Manage Users** Manage Contacts Manage Groups

[+ Add user](#) [Import users](#) [Manage Project Folders](#) [Edit](#)

Subscribe user to Project Folders

Copy permissions from the existing user

Filter by name or owner

NAME	OWNER	NOTIFY	PERMISSIONS
<input type="checkbox"/> Design Basics	alison.case@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> Drafts	alison.case@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> Guide	tara.webster@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> Guides	alison.case@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> Mail	jane.dow@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> New Features	alison.case@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> Project Design	alison.case@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> Projects	alison.case@maytech.net	<input type="checkbox"/>	
<input type="checkbox"/> QuatrixAPP/VideoGuides	alison.case@maytech.net	<input type="checkbox"/>	

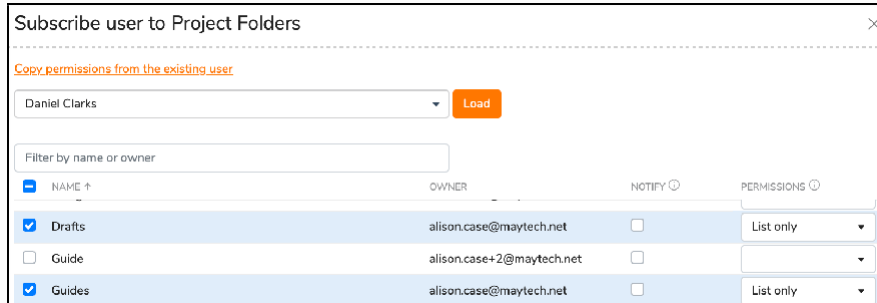
Expires: 0, Storage: 5.13 GB

06 Oct 2023 09:55 Active

- Name - displays the list of available Project Folders. Tick the Project Folder to make it active and update permissions;
- Owner - creator of the Project Folder;
- Notify - allows to subscribe the user for upload notifications.
- Permissions - select a desired permission. For details on permissions, see the table above in the section Creating a Project Folder.

Copy Permissions from existing user allows you to assign Project Folder permissions based on the existing user. Just select the user from the list and load his assigned permissions. Quatrix adds new permissions but doesn't overwrite the existing ones.

Loaded permissions will be added to the table where you can update them.



Subscribe user to Project Folders

Copy permissions from the existing user

Daniel Clarks Load

Filter by name or owner

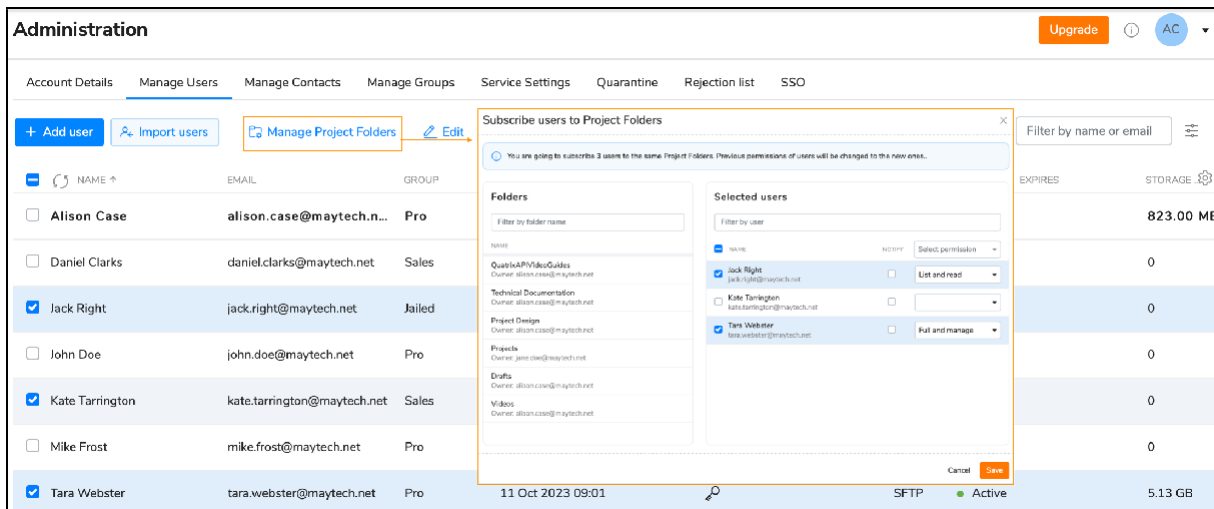
NAME	OWNER	NOTIFY	PERMISSIONS
<input checked="" type="checkbox"/> Drafts	alison.case@maytech.net	<input type="checkbox"/>	List only
<input type="checkbox"/> Guide	alison.case+2@maytech.net	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Guides	alison.case@maytech.net	<input type="checkbox"/>	List only

4. Click Save.

5.3.5.1 Bulk management of user permissions to several PFs

Besides management of each user permission to Project Folders, you can manage permissions of several users to the selected Project Folders.

1. Open Manage Users sub-tab of the Administration tab.
2. Select users whose permissions you would like to update and click on Manage Project Folders button from the top menu.



3. The Subscribe users to Project Folders form opens where you can make required changes. This form displays folders at the left-hand side and users at the right-hand side. You can filter your folders and select any user with the help of appropriate filters.
4. Save your updates.

5.4 Tags and Comments

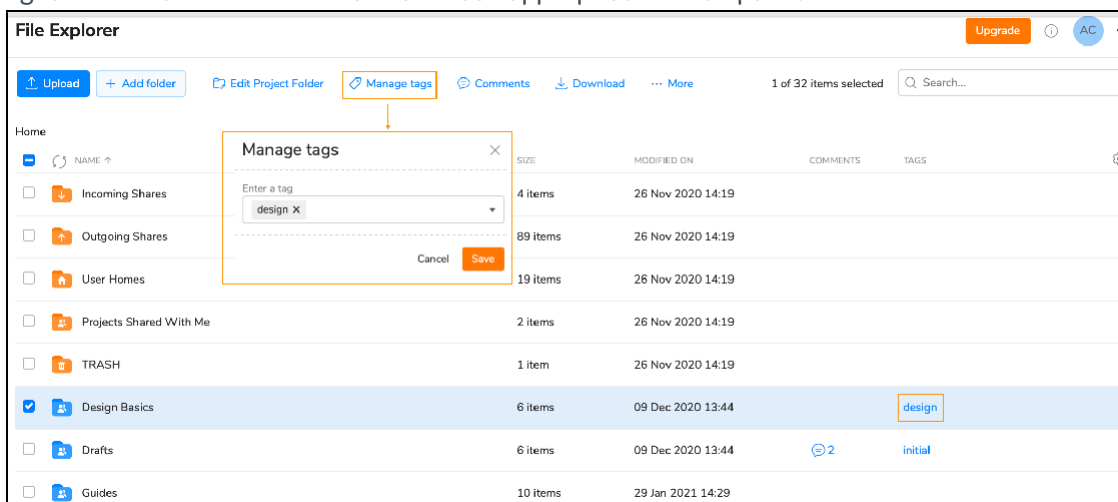
Besides organising your files in folders, you can collaborate on the content stored in Quatrix by providing more details using tags or adding your thoughts in comments.

5.4.1 Tag your files

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 from the above menu, or right-click on the file or folder and select an appropriate menu option.

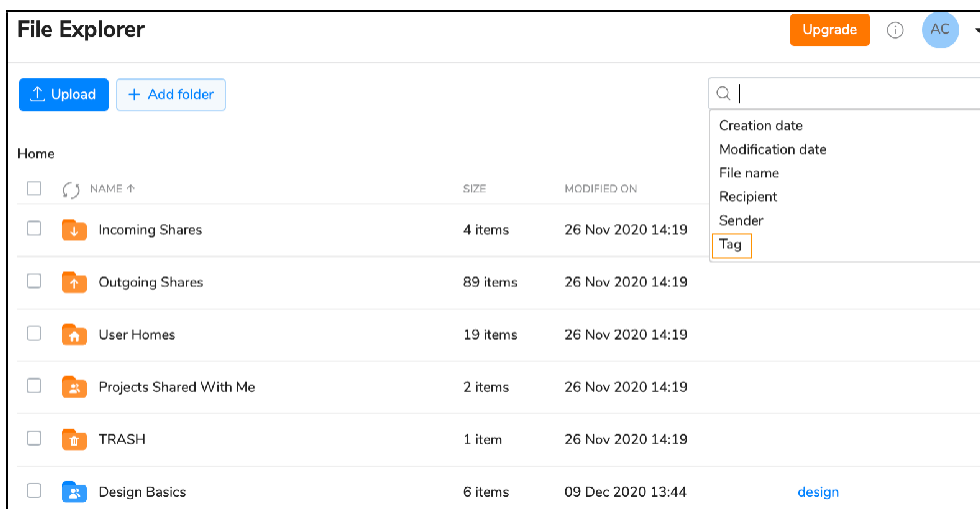


2. Enter a tag on the Manage tags window and save it.

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 Tag 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 option from the menu.
2. Update the tag and save it.

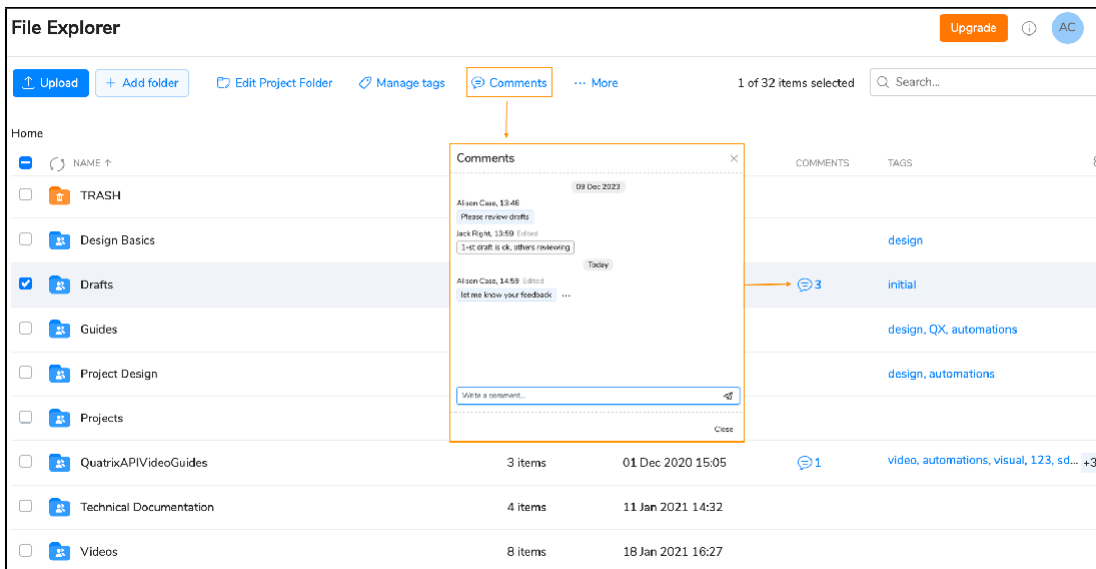
You can easily remove tags on the Manage tags window by clicking on the remove sign X at the end of the tag or using the Backspace.

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

5.4.2 Add comments to files

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

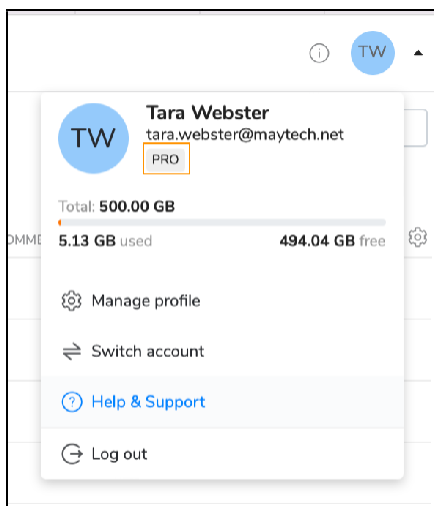
To add a comment, select the file or folder and click on the File comments option from the top or right-click menu.



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

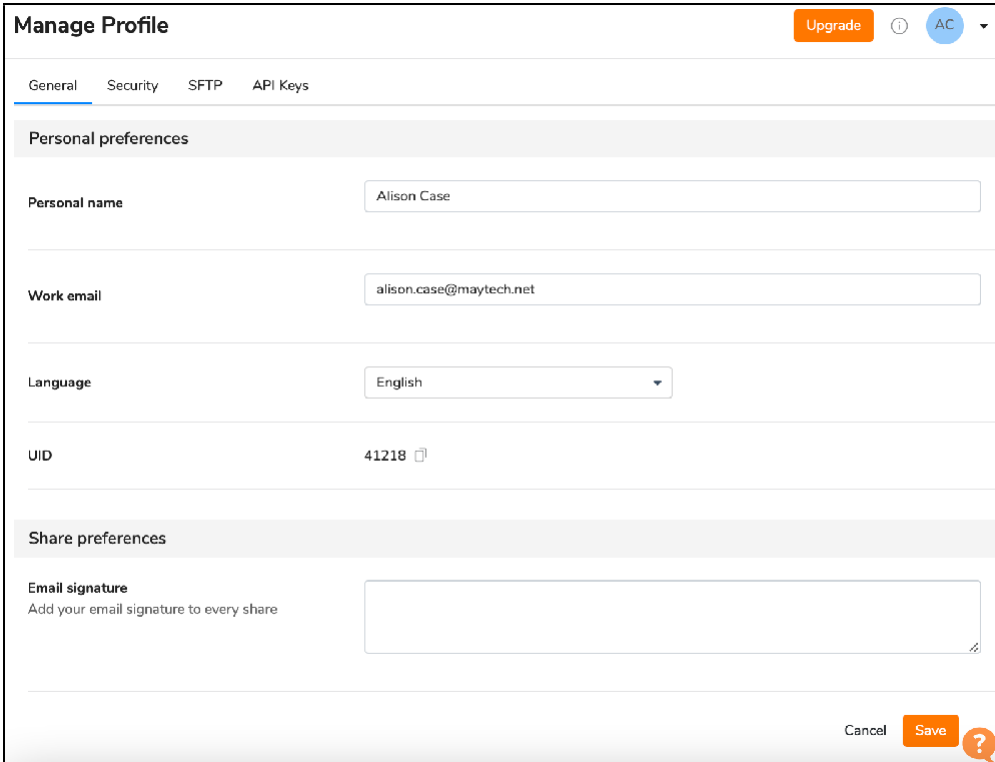
If you would like to view or update your profile information, click on your name initials at the top right of your Quatrix account. It opens the form displaying your name and email, assigned class in Quatrix ([pro](#), [associate](#), [jailed](#) or custom class), used and available storage, link to the profile management, switch account option (if you have more than one account), help & support link and log out option.



Follow the Manage profile link if you would like to make any changes to your profile e.g. update personal information, set up security options, get SFTP credentials (if enabled for account) or manage SSH and API keys.

6.1 General Settings

The General tab allows you to update your personal information - i.e. your name or email (except the email that can only be changed by your administrator or the account owner), set up a language for the account, get and copy UID (unique identifier) and add your email signature that will be added to every share.



The screenshot shows the 'Manage Profile' interface with the 'General' tab selected. The interface includes a top navigation bar with 'Upgrade', a user icon 'AC', and a dropdown arrow. Below the navigation are tabs for 'General', 'Security', 'SFTP', and 'API Keys'. The 'Personal preferences' section contains fields for 'Personal name' (Alison Case), 'Work email' (alison.case@maytech.net), 'Language' (English), and 'UID' (41218). The 'Share preferences' section includes an 'Email signature' field with a text area and a note: 'Add your email signature to every share'. At the bottom right, there are 'Cancel', 'Save', and a help icon.

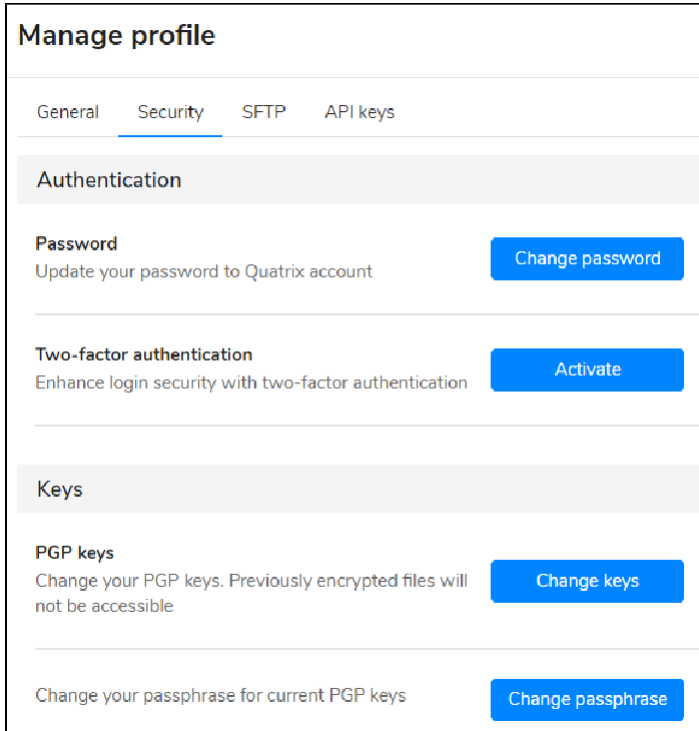
Language Options

Quatrix is available in the following languages: English, German 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](#)).

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.

6.2 Security Settings

The Security tab allows you to adjust security settings: password, two-factor authentication and PGP keys.



Manage profile

General **Security** SFTP API keys

Authentication

Password
Update your password to Quatrix account [Change password](#)

Two-factor authentication
Enhance login security with two-factor authentication [Activate](#)

Keys

PGP keys
Change your PGP keys. Previously encrypted files will not be accessible [Change keys](#)

Change your passphrase for current PGP keys [Change passphrase](#)

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.

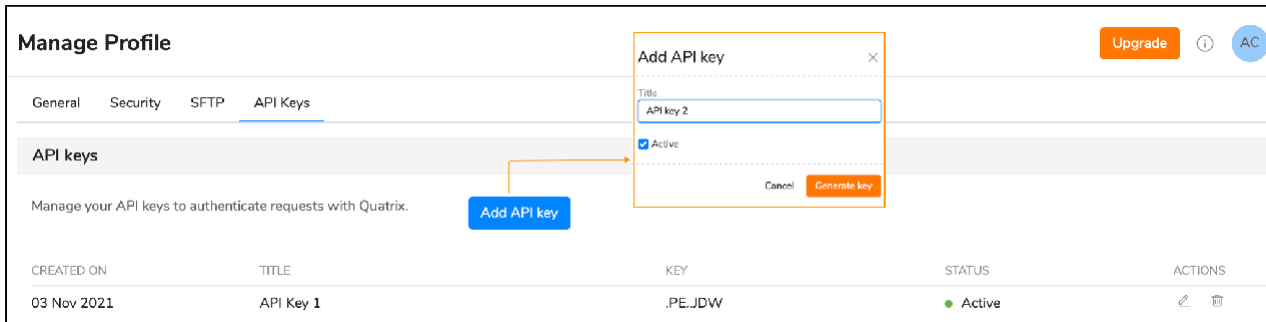
If you forgot your password, follow the Forgot password link on the Log in form and follow the instructions sent by email to reset the password.

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.](#)

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 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.

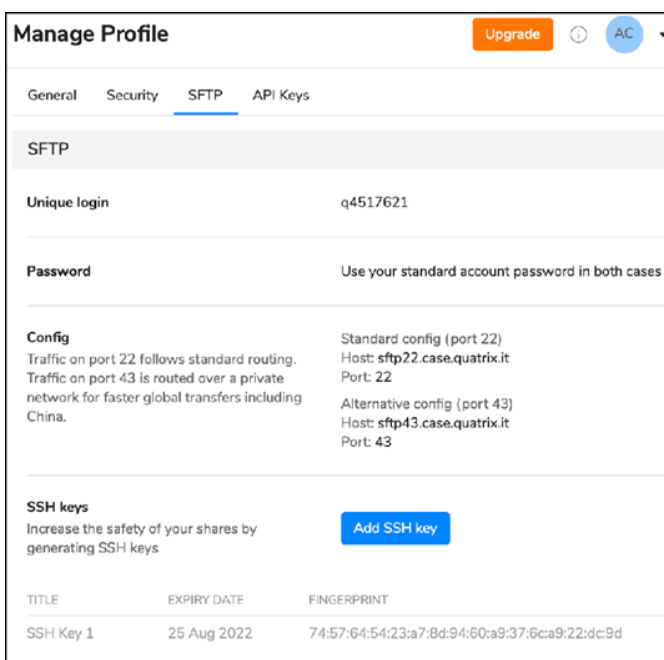
3. Copy and save an already generated API key.

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](#).

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.

Contacts							
<input type="checkbox"/> + Add contact <input type="checkbox"/> Request files <input type="checkbox"/> Share files <input type="checkbox"/> Request PGP keys 1 of 9 items selected Filter by name, email, notes							
<input type="checkbox"/>	NAME	EMAIL	GROUP ↑	CREATED ON	PGP KEY	NOTES	
<input type="checkbox"/>	John Doe	john.doe@maytech.net	Associate	15 Dec 2020			
<input type="checkbox"/>	Jack Right	jack.right@maytech.net	Jailed	26 Nov 2020			
<input type="checkbox"/>	Jane Doe	jane.doe@maytech.net	My contacts	23 Oct 2023			
<input type="checkbox"/>	Tara Webster	tara.webster@maytech.net	Pro	26 Nov 2020			
<input type="checkbox"/>	Alison Case	alison.case@maytech.net	Pro	26 Nov 2020			
<input type="checkbox"/>	John Brighton	john.brighton@maytech.net	Sales	01 Dec 2020			
<input type="checkbox"/>	Mike Frost	mike.frost@maytech.net	Ext	07 Dec 2020			
<input type="checkbox"/>	Melissa Wix	melissa.wix@maytech.net	Sales	17 Sep 2021			
<input type="checkbox"/>	Elisa Lam	elisa.lam@maytech.net	Site contacts	22 Feb 2021			

Pro-users can see emails of all file sharing participants with assigned groups.

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.

Users of your custom classes can view and perform actions according to adjusted permissions.

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 option from the top or right-click menu.

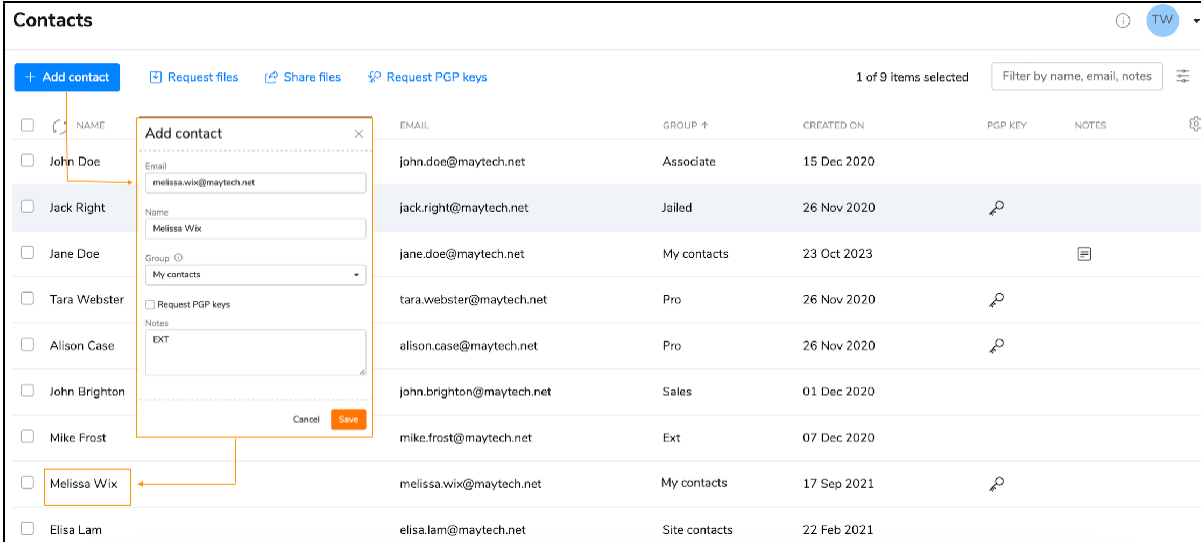
You can also control whether your contact or user will be forced to log in/register prior to responding to your file request. Learn more how to request files [here](#).

To request PGP keys select the user or contact and click on the Request PGP keys button from the top 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 [Share Files](#) tab where you can easily send files with your preferred security options.

7.1 Adding a contact

You can easily add your contact by clicking on the Add contact button 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.



The screenshot shows the 'Contacts' interface with an 'Add contact' dialog box open. The dialog box has fields for 'Email', 'Name', 'Group', and 'Notes'. The 'Email' field contains 'melissa.wix@maytech.net', the 'Name' field contains 'Melissa Wix', and the 'Group' dropdown is set to 'My contacts'. There is a checkbox for 'Request PGP keys' and a 'Notes' field with 'EXT' entered. The 'Add contact' button is highlighted in orange. The background shows a table of contacts with columns for NAME, EMAIL, GROUP, CREATED ON, PGP KEY, and NOTES.

NAME	EMAIL	GROUP	CREATED ON	PGP KEY	NOTES
John Doe	john.doe@maytech.net	Associate	15 Dec 2020		
Jack Right	jack.right@maytech.net	Jailed	26 Nov 2020		
Jane Doe	jane.doe@maytech.net	My contacts	23 Oct 2023		
Tara Webster	tara.webster@maytech.net	Pro	26 Nov 2020		
Alison Case	alison.case@maytech.net	Pro	26 Nov 2020		
John Brighton	john.brighton@maytech.net	Sales	01 Dec 2020		
Mike Frost	mike.frost@maytech.net	Ext	07 Dec 2020		
Melissa Wix	melissa.wix@maytech.net	My contacts	17 Sep 2021		
Elisa Lam	elisa.lam@maytech.net	Site contacts	22 Feb 2021		

This form allows you to send a PGP key generation request by clicking an appropriate check box and write some notes related to your contact.

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 button 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.

7.4 Filtering your contacts

All your added contacts can be filtered by the name, email, notes, contact group or PGP key.

Contacts

+ Add contact

Filter by name, email, notes

<input type="checkbox"/>	NAME	EMAIL	GROUP	CREATED ON	PGP KEY
<input type="checkbox"/>	Kelly Hudson	kelly.hudson@maytech.net	Associate	15 Dec 2020	
<input type="checkbox"/>	Jack Right	jack.right@maytech.net	Jailed	26 Nov 2020	
<input type="checkbox"/>	Amy Smith	amy.smith@maytech.net	My contacts	23 Oct 2023	

FILTER BY GROUP

- Site contacts (1)
- My contacts (3)
- PGP (4)

Clear all

The administrators can filter contacts by contact group or user class. Tick the check box next to the required one/ones and the list will display your desired contacts.

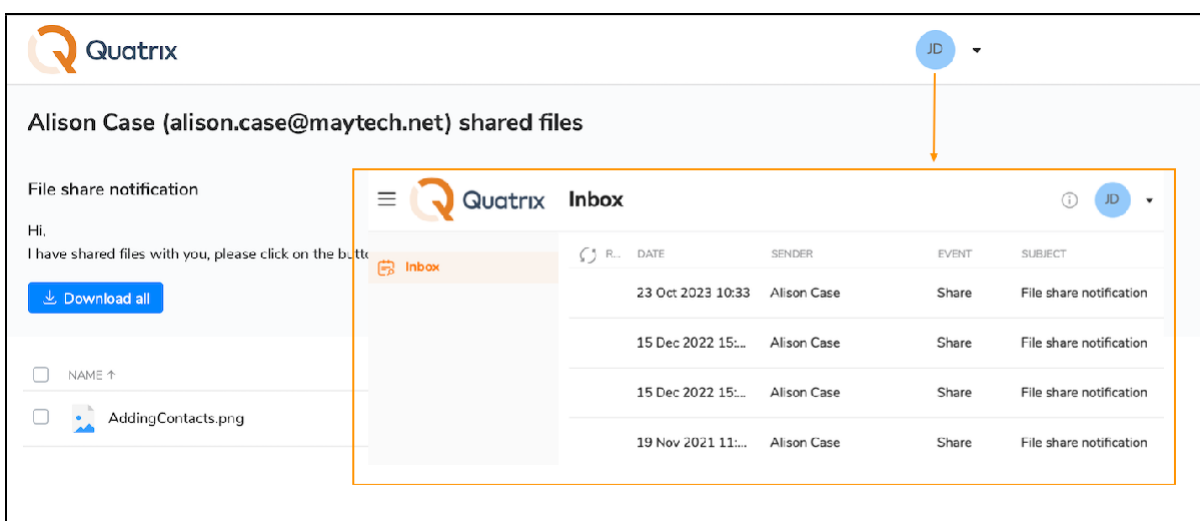
The table with contact list can be adjusted to your needs- just click on the gear icon and tick the columns you would like to view in the table.

SETTINGS

- Name
- Group
- Created on
- PGP key
- Notes

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.



Alison Case (alison.case@maytech.net) shared files

File share notification

Hi,
I have shared files with you, please click on the button

[Download all](#)

NAME ↑

AddingContacts.png

Quatrix Inbox

R...	DATE	SENDER	EVENT	SUBJECT
	23 Oct 2023 10:33	Alison Case	Share	File share notification
	15 Dec 2022 15:...	Alison Case	Share	File share notification
	15 Dec 2022 15:...	Alison Case	Share	File share notification
	19 Nov 2021 11:...	Alison Case	Share	File share notification

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.

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.



Video guide: <https://vimeo.com/405037018>

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 OSX 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.

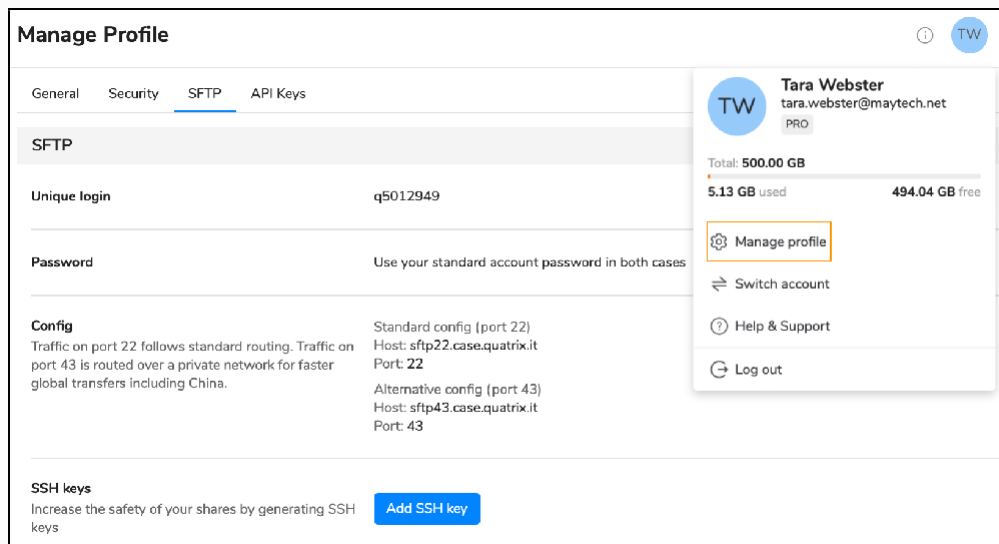
8.1.1.1 Password authentication



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 your name initials at the top right of your Quatrix account, then go to Manage Profile and select the SFTP sub-tab.



- 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.

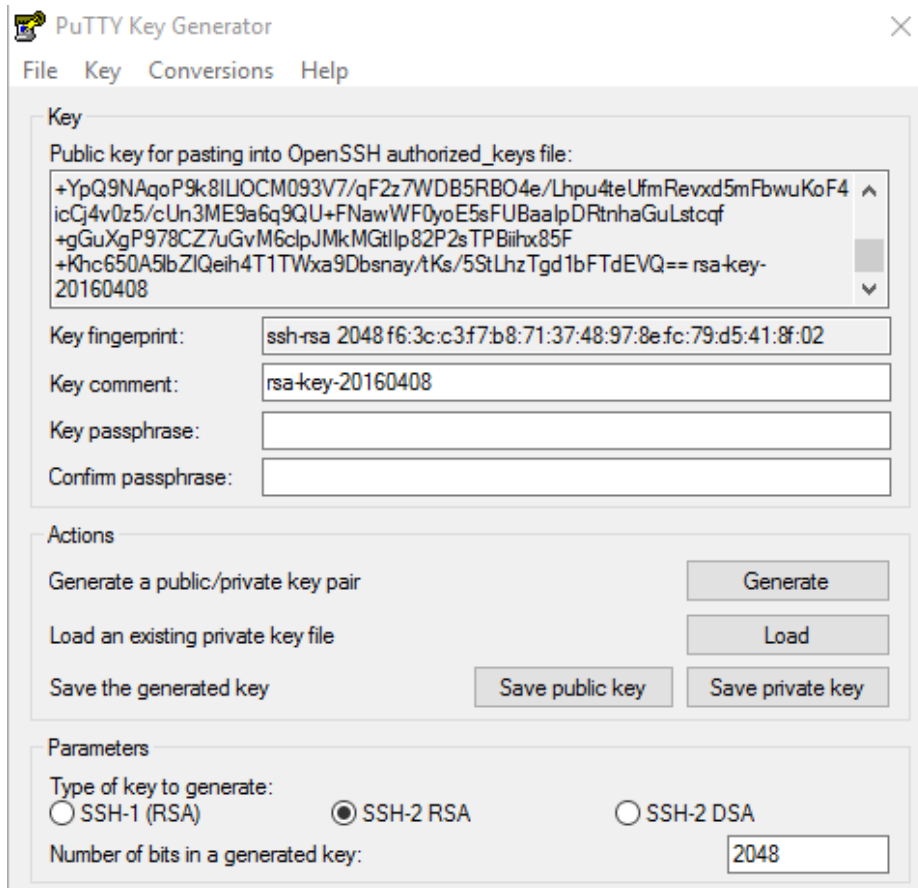
8.1.1.2 SSH public key authentication

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.

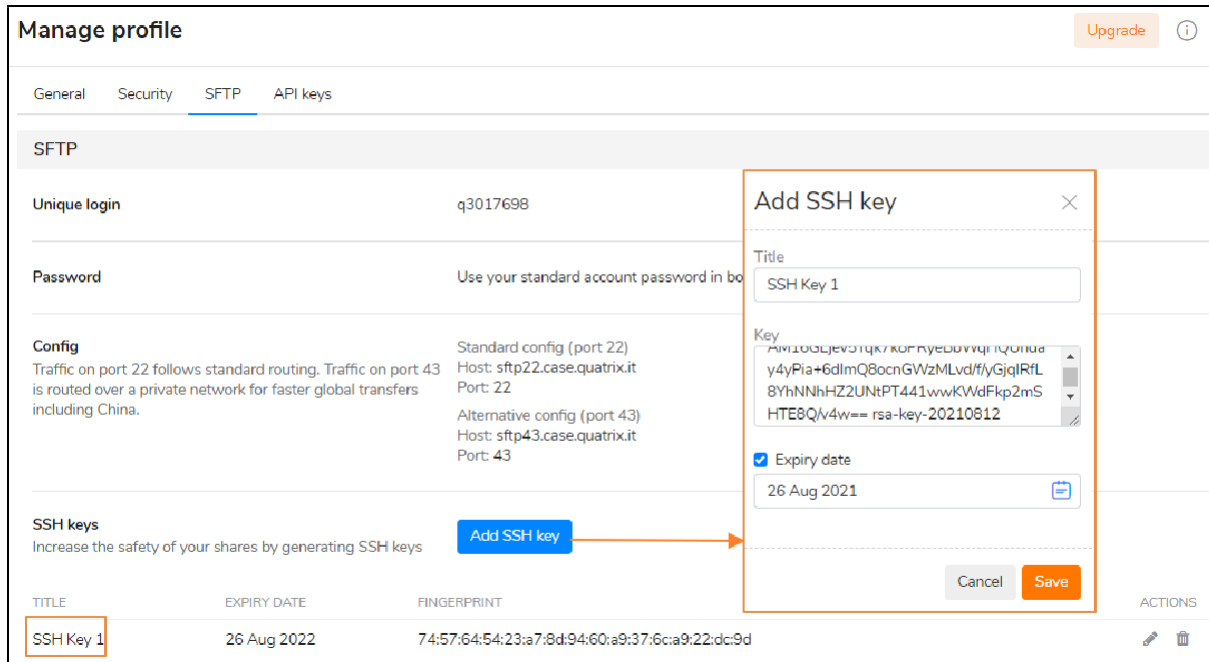


The top of the window displays the Public key for pasting into OpenSSH authorized_keys file field, where you should copy all the text (make sure it ends with "= rsa-key-date") and paste it directly to Quatrix or save it locally.

Then add your previously generated SSH public key to Quatrix:

1. Click on your name initials at the top right, go to Manage Profile → SFTP sub-tab and click on Add SSH Key button.

2. Insert your previously generated public SSH key and save it.



The screenshot shows the 'Manage profile' interface with the 'SFTP' tab selected. A modal dialog titled 'Add SSH key' is open, allowing the user to add a new SSH key. The modal contains the following fields:

- Title:** SSH Key 1
- Key:** A text area containing a public SSH key: `AAA1200JEv31qK7k0rnyeb0vqf1q0n0a y4yPia+6dlmQ8ocnGWzMLvd/fyGjqlRfL 8YhNNhHZ2UNtPT441wwKWdFkp2mS HTE8Q/v4w== rsa-key-20210812`
- Expiry date:** A checked checkbox and a date field set to '26 Aug 2021'.

At the bottom of the modal are 'Cancel' and 'Save' buttons. An arrow points from the 'Add SSH key' button in the main interface to the modal. Below the modal, a table lists the added SSH key:

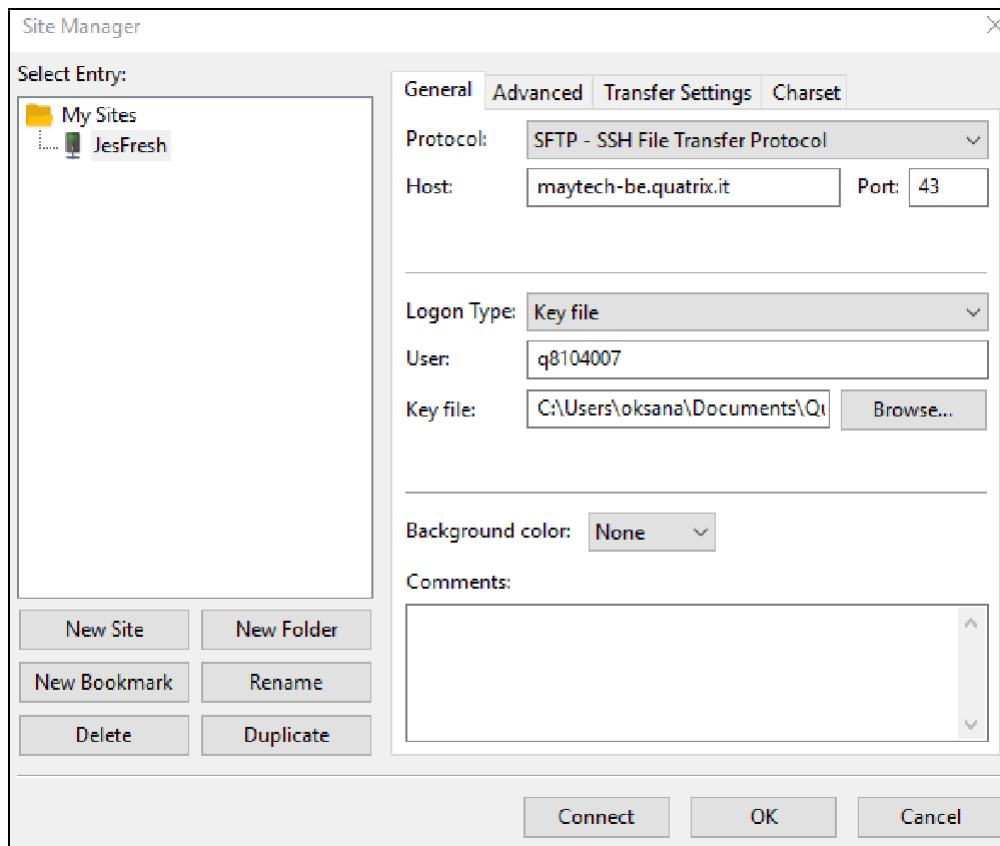
TITLE	EXPIRY DATE	FINGERPRINT
SSH Key 1	26 Aug 2022	74:57:64:54:23:a7:8d:94:60:a9:37:6c:a9:22:dc:9d

After saving you won't be able to edit its 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 Expiry Date 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 private SSH key



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

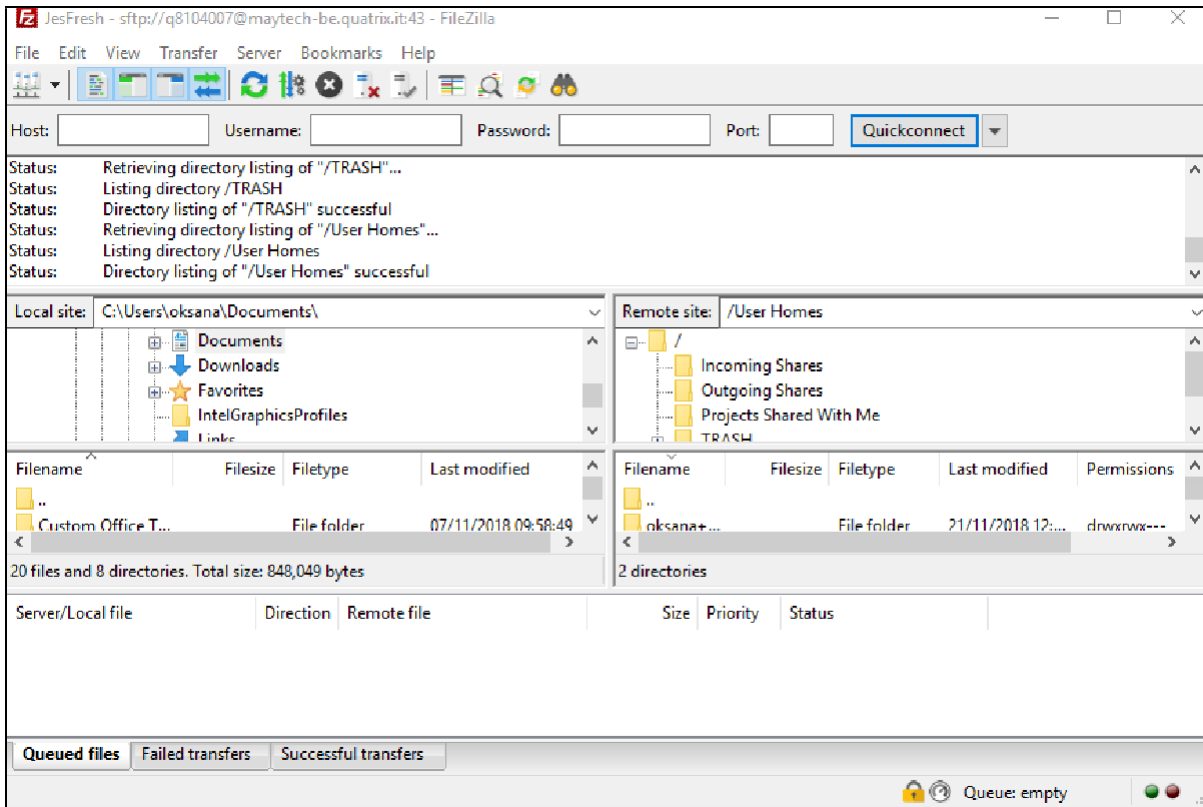
Once a successful connection has been established, FileZilla will open up. The left-hand pane of the window displays the local system, whilst the contents of the remote server (your Quatrix files and folders) will be displayed on the right-hand pane.

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 via SFTP

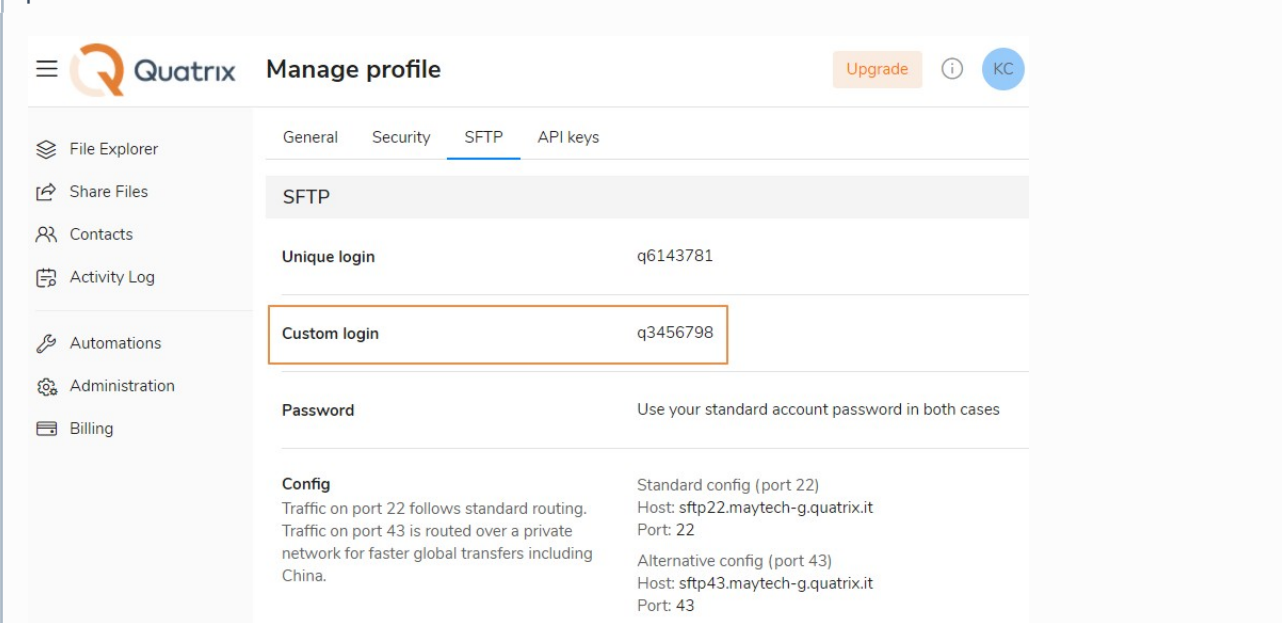
The account admin explicitly enables SFTP for account users. Please ask your account admin if you don't see SFTP credentials on Manage Profile → SFTP sub-tab. You will get email notification as soon as SFTP is enabled for you.

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.



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.



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.

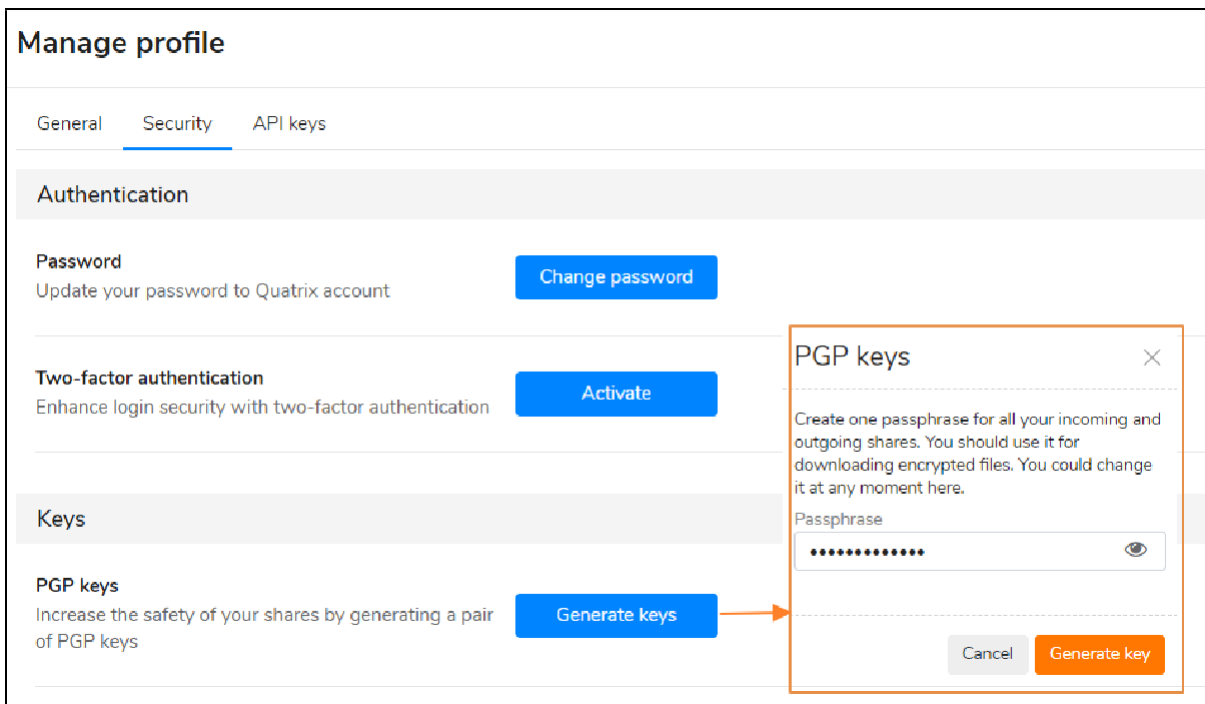
To share encrypted files through Quatrix you should follow 4 steps:

1. Have PGP enabled for your account

Contact your administrator to enable PGP for the account.

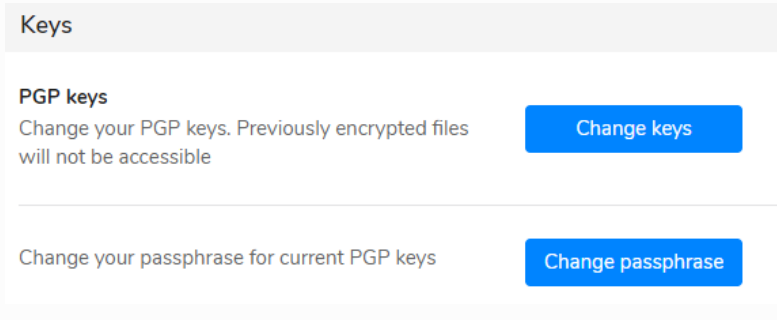
2. Generate your private PGP keys

You can generate your PGP keys on the Security sub-tab (click on your name initials, 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.



The screenshot shows the 'Manage profile' page with the 'Security' tab selected. Under the 'Keys' section, there is a 'PGP keys' option with a 'Generate keys' button. A modal dialog titled 'PGP keys' is open, showing instructions to create a passphrase and a text input field for the passphrase. The 'Generate key' button in the modal is highlighted with an orange box, and an arrow points from the 'Generate keys' button on the page to this modal.

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.



The screenshot shows the 'Keys' section of the profile page. It features two buttons: 'Change keys' and 'Change passphrase'. The 'Change keys' button is associated with the text 'Change your PGP keys. Previously encrypted files will not be accessible'. The 'Change passphrase' button is associated with the text 'Change your passphrase for current PGP keys'.

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 passphrase to public PGP keys.

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](#).



Video guide: <https://vimeo.com/405037270>

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.

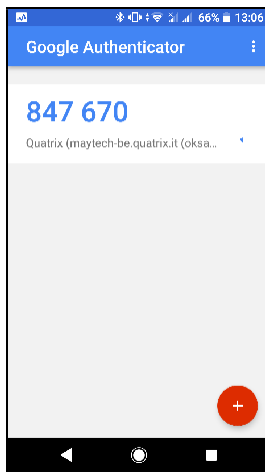
One of our future releases will introduce the password policy feature that will enable admins or owners to set specific rules that enforce colleagues and connections to only create strong passwords: e.g. length, letter combinations, characters and numbers, password expiry dates.

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.

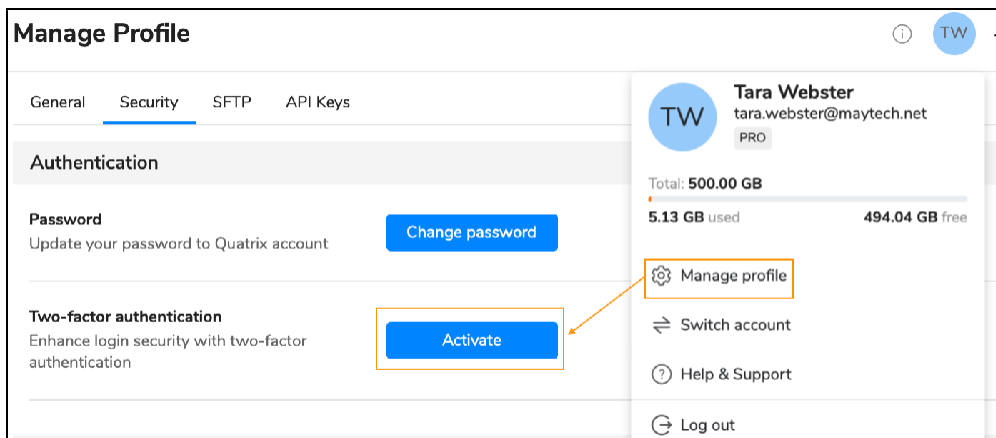
8.3.1 Here's how it works:

- 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.




8.3.2 Enabling 2FA


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




3. Click on the Activate button and follow instructions to set up 2FA.

Two factor authentication ×



1 Scan the QR code using any authentication application on your phone (e.g. [Google Authenticator](#), [Duo Mobile](#), [Authy](#)) or enter the following code:
602HIVNCVVJDMTD4NW5QBULK6LNKUGD 

2 Enter the 6 figure confirmation code shown on the app:

 You will be logged out from all your devices and browsers that have been used to log in to your Quatrix account recently for security reasons.

Cancel Activate

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:

- 1) login/password;
- 2) SSH key.

TOTP can be enabled on request.

8.3.3 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.