Quatrix

Quatrix User Guide

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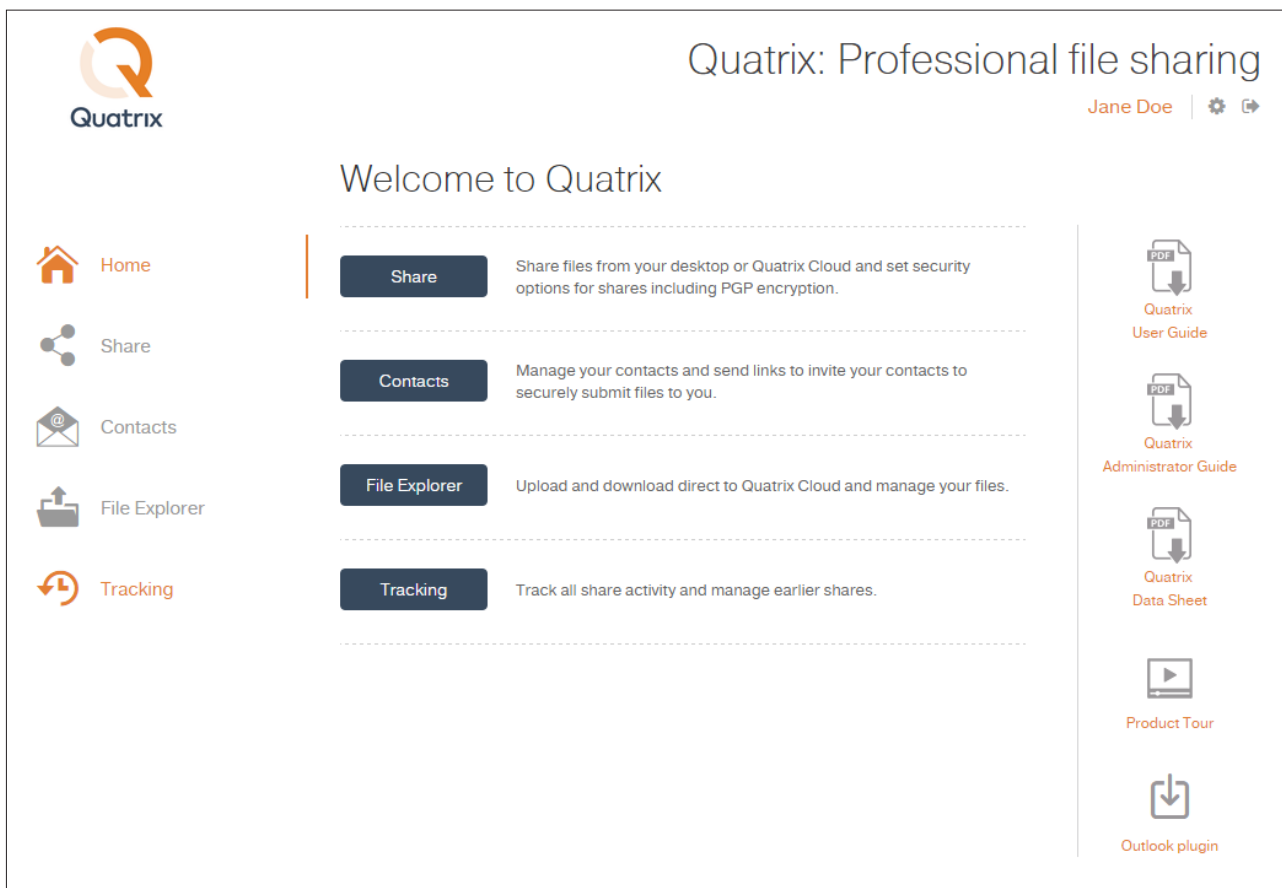
Contents

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 / favourites.

Quatrix opens on the home screen with links to Quatrix pages where you can:
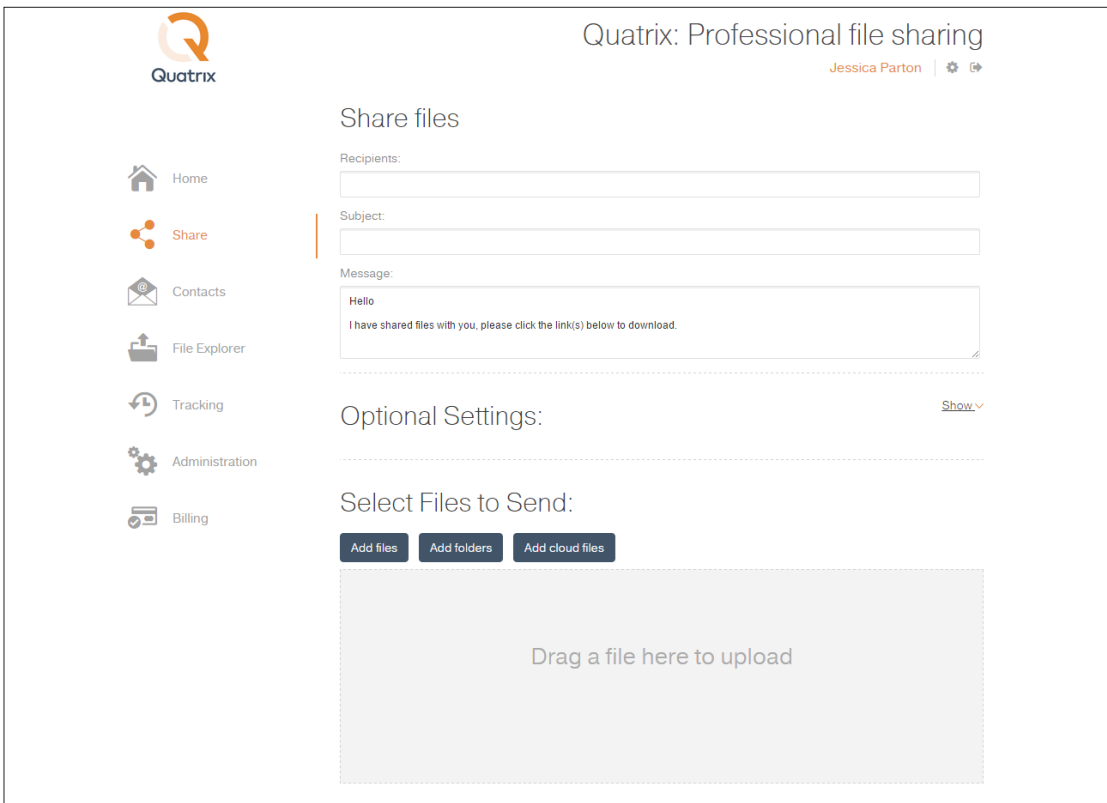
- Share files and folders.
- Upload to your Quatrix storage and manage files and folders.
- Track your historic activity.

On the Home page you'll also find links to download the Quatrix helper apps and the user guides.
Besides you can take our product tour and have a look inside main features of Quatrix.

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2. File Sharing

On the Share 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.

2.1. 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.

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

2.2. Optional Settings

You can specify additional options for your share in the Optional Settings area. To select the option, tick the check box next to it.

> Expiry date - 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.

> 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.

> 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'll be encrypted by user's (not contact's) key. This option is disabled if user doesn't have a PGP key.

> PGP Encrypt Files - if PGP is enabled for your account and if your user(s) or contact(s) has/have generated PGP keys you can select the PGP check box for the additional protection. For more info see PGP in Quatrix.

> 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.

⊚ Message Signature - enter your signature, this appears below the file listing in the notification message and is followed by any footer / disclaimer text set by your administrator. You only need to do this once, signatures are remembered until overwritten. Images are not supported in message signatures.

2.3. Uploading and Sharing Files

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

Note: Folder upload is supported only in Chrome.

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.

3. File Management

You can manage your Quatrix® cloud files and folders on the File Explorer tab.
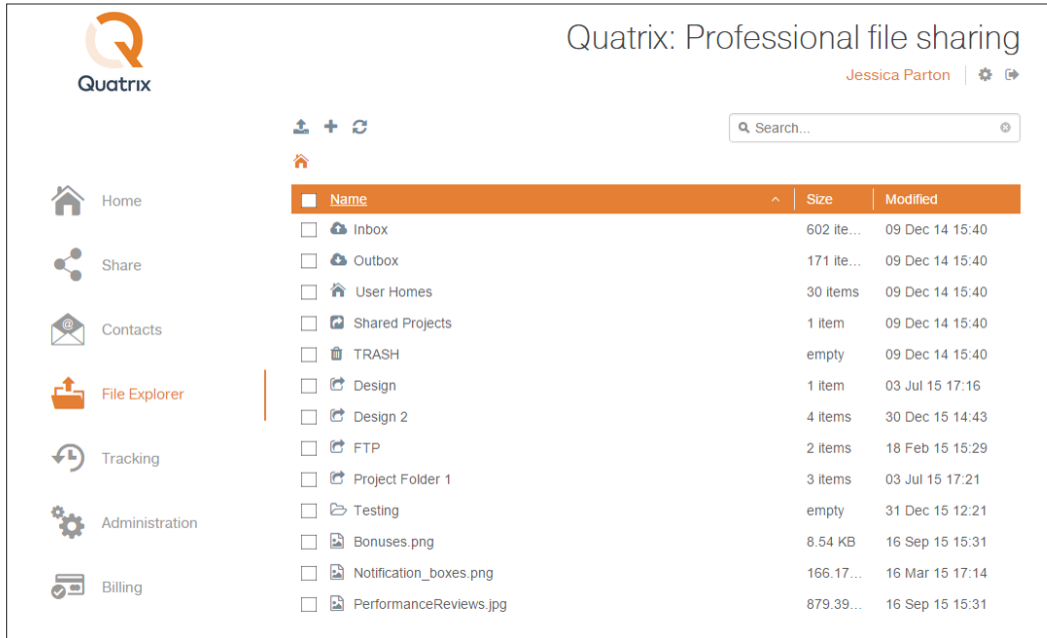
3.1. Managing Files and Folders

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:
>> Inbox - contains all your received files.
>> Outbox - contains all your shared files.
>> User Homes - accessible to the admin only and contains all files and folders of your users.
>> Shared Projects - contains 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.

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.

3.2. Uploading Files

You can upload files to your Quatrix® storage from your computer by either clicking the Upload icon on the top menu and selecting local files, or you can just drag files and folders from your desktop to the file manager. The files / folders are uploaded to your current folder. To upload to a different folder you should first navigate there.

You can upload files using any of the following uploaders:

- ⊘ Basic uploader - upload of one file at a time.
- ⊘ HTML5 uploader - upload of multiple files and folders.
- ⊘ Flash uploader - flash upload of multiple files and images.

If the user has problems with one type of uploader, another one is offered on the right side of the Uploader dialog box.
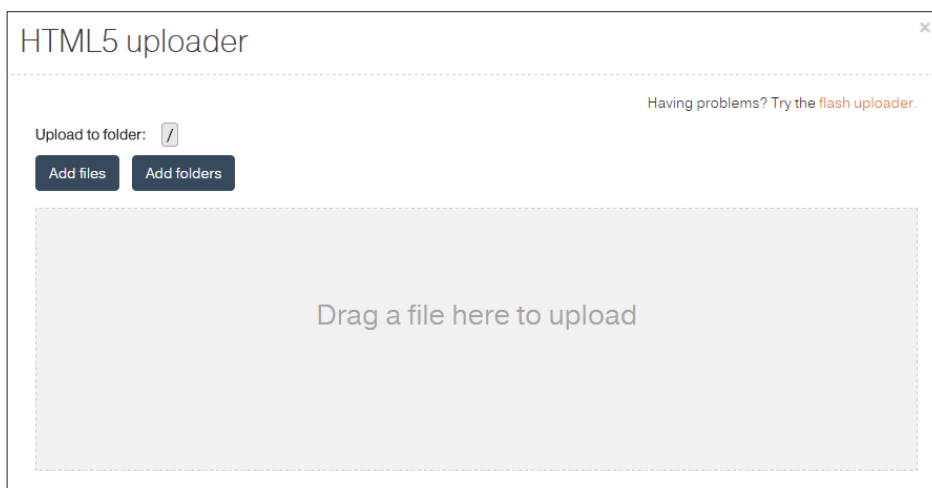
3.3. Sharing Files

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 in File Sharing.

3.4. 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 or Contacts tab.

To request files on the Share tab:

1. Select Recipient(s) can return files check box in the Optional Settings section on the Share form
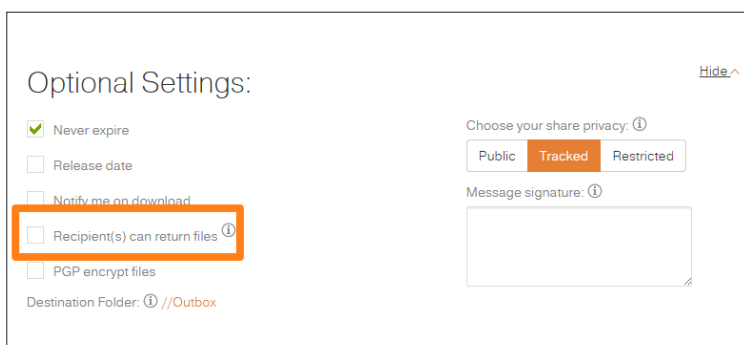
2. Add, upload and share files. For more info see File Sharing.
3. Your contact or user receives the email with the Return button to send files back to you.

To request files on the Contacts tab:

1. Select the check box next to the contact you want to get files from and click on the Request icon from the menu.
2. Type in the message and send the request.

You can view the link that will be sent to the contact by clicking the down arrow on the Send button and selecting the Show link option. The Open in mail client option allows you to edit the default text of the request using your mail client.
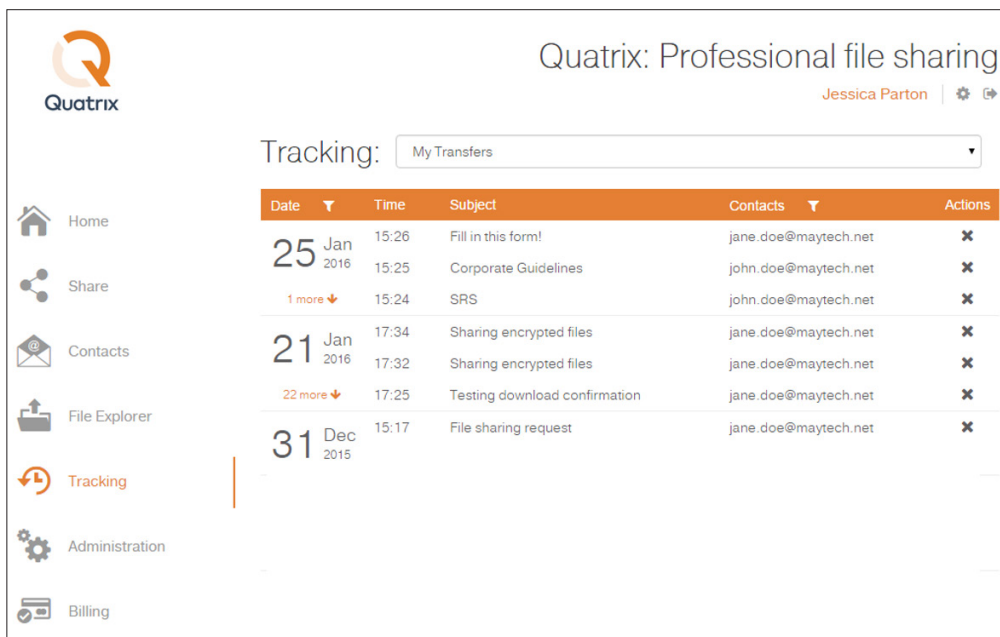
3.5. Searching Files

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

4. Tracking File Transfers

Quatrix® traffic is logged, click on the Tracking tab to explore your outgoing and incoming shares.

All shares are displayed in reverse chronological order, to have the most recent shares on top.
You can sort shares by date or email.

Info for Admin
The administrator can track shares of their users by selecting an appropriate user from the drop-down list.

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5. Project Folder Management

You can share folders without sending emails on the File Explorer tab. To share a folder with your users you should convert a simple folder to a project one i.e. create a project folder and select users you would like to share it with.

5.1. Creating a Project Folder

To create a project folder, follow these steps:

1. Click on the folder and select the Create a Project Folder icon from the menu.
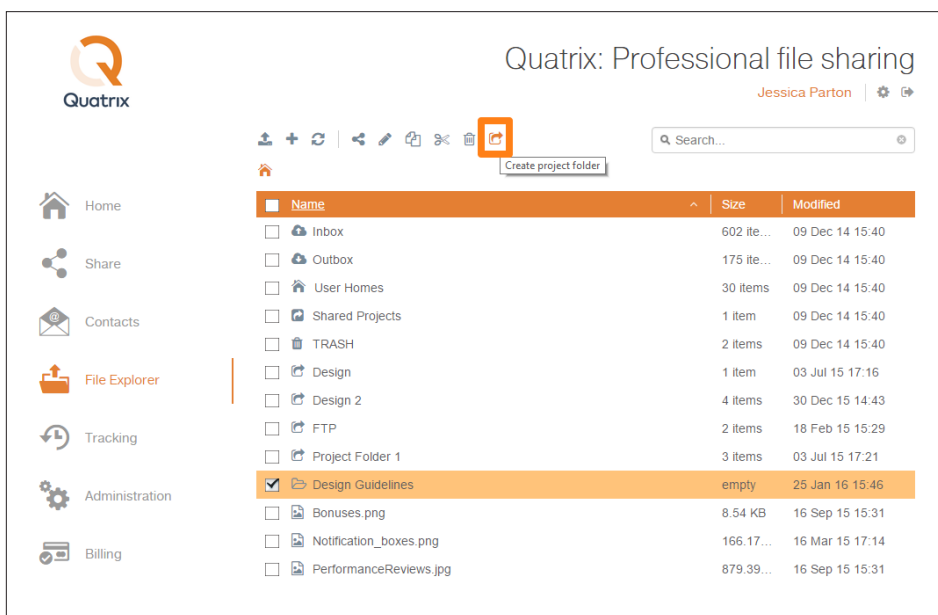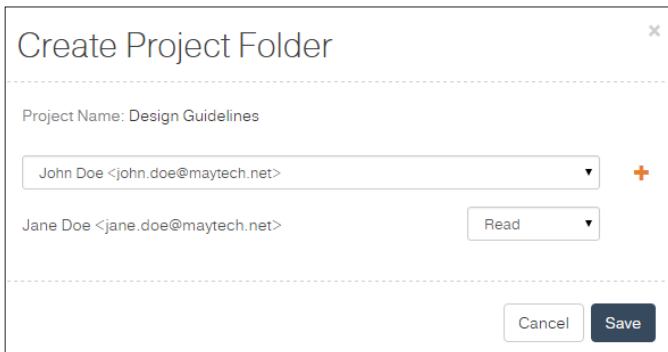
2. Select the user(s) you want to create a shared project with from the drop-down list and set the permission.

Project folder permissions

Permission	Read	Write	Share
Permitted actions	read copy delete rename	read copy delete rename Plus: edit folder contents	read copy delete rename edit folder contents Plus: share view the members of the shared folder and their permissions change permissions of other members

3. Click the Plus sign to add a user.

Note: You can add as many users as you want to the shared project folder.

4. Click the Save button.

To change the name of the project folder, 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.

5.2. Editing a Project Folder

If you want to add more users or change permissions, go through the following steps:

1. Select the project folder and click the Edit Project folder icon from the top menu or right-click and select this option from the drop-down list.
2. Change the user or permissions.
3. Click the Save button to save all changes in the project folder.

5.3. Deleting a Project Folder

To delete a project folder, follow these steps:

1. Select the project folder you want to delete.
2. Click the Delete icon from the top menu or right-click and select this option from the drop-down list.
3. Confirm the deletion.

Your project folder will be deleted.

Note: 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.

6. Profile Management

All your Quatrix® accounts are displayed with the active account on top of the list.
You can edit your profile by clicking the Edit Profile icon at the top right of the account.
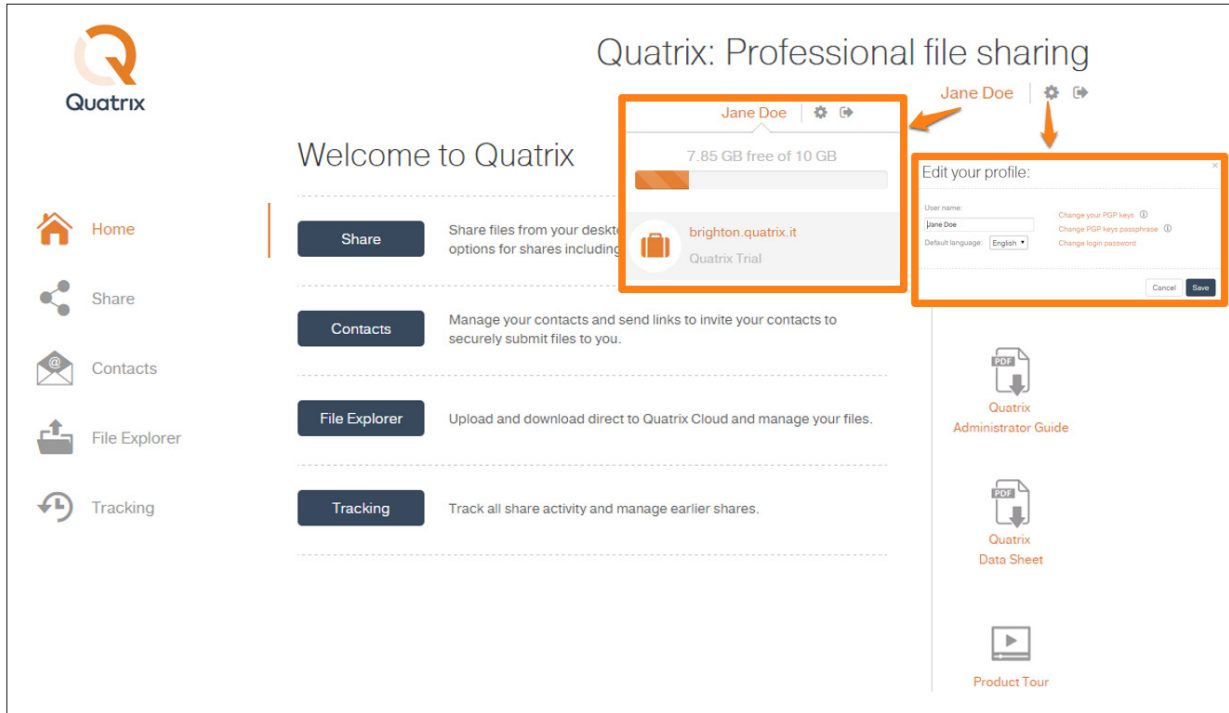
After clicking the Edit profile link you can change your profile details, generate or change PGP keys and change your login password.
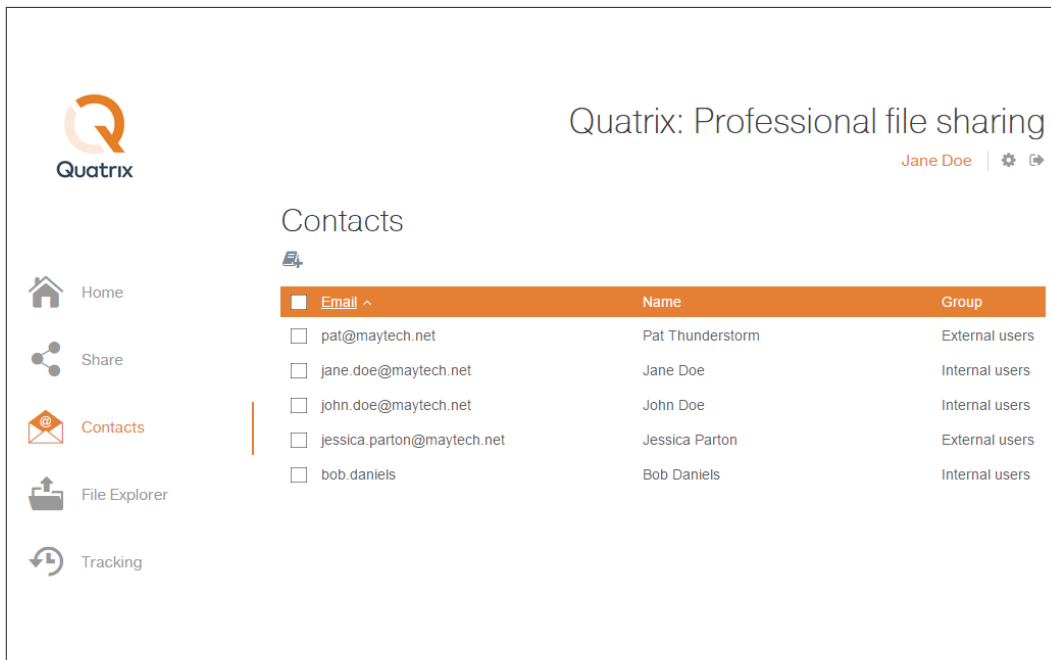
Info for Admin
Only administrator can change emails of their users.

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7. Contact Management

You can view emails of all file sharing participants with assigned groups on the Contacts tab.

7.1. Managing personal and site contacts

All your personal and site contacts are displayed in the list where you can add, edit or delete them.

To add a contact, enter your contact's name and email and click the Save button. All your added contacts are displayed in the Contacts list.

If you wish to edit a contact, simply click on the contact which opens the Edit Contact dialog box where you can make all necessary changes.

Contacts can be deleted by clicking the Delete icon.

7.2. Requesting files from a contact

With the help of the Request icon you can request files from the contact. For more info see File Management/ Requesting Files.

7.3. Sharing files with a contact

The Share icon allows you to send files to your contact. After clicking on this icon you are redirected to the Share tab. See more info on File Sharing.

Info for Admin

Converting a contact to a user
On login as the administrator you can easily convert your contact to the user
by clicking on the Convert icon from the menu.

A newly created user is displayed as internal user in the list on the Contacts and Administration tabs.
If you would like to convert internal to external user, click on the user and edit the assigned group.
After clicking the Save button, your user will inherit permissions of external users.

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8. PGP in Quatrix

PGP (Pretty Good Privacy) is a higher level of encryption that ensures that no one but the intended recipient is able to access your data, making it suitable if you're sharing highly sensitive data. It uses one key to encrypt the file (the public key) and another to decrypt (the private key) which traditionally makes it much more cumbersome to use than standard levels of encryption.

8.1. Quatrix PGP Scheme

1. Preconditions:
   Enable PGP Encryption on the Administration tab

2. Both Public and Private Keys should be generated

Sender

Requests Private Key

PGP Key Request

Recipient

Generates Public Key in the Edit Profile

Generates Private Key following the link in the email

Public Key

PGP Encrypted File Sharing Enabled

Private Key

Encrypts and shares files

Decrypts and downloads files

Secure File Sharing

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8.2. Preconditions for PGP

There are the following two preconditions for PGP encrypted file sharing:

1. The Admin should enable PGP Encryption on the Service Settings sub-tab of the Administration tab.
2. PGP keys (Private and Public) should be generated.

8.3. Who can share PGP files?

Any Quatrix® user can send PGP encrypted files to other users within one Quatrix account.
When the administrator enabled PGP, all their users can share encrypted files after PGP key generation.
The administrator and user can share PGP encrypted files with contacts, whilst contacts can only decrypt, download and return encrypted files.

8.4. PGP Key Generation

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

Key Security

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

8.5. Public Key Generation

The admin or user should generate PGP keys (in the Edit Profile) at first and then request another pair of keys from the intended recipient - send PGP key generation request.
You can send a request to a user or contact while adding or editing them or by selecting the Request PGP Keys icon on the Contacts tab.

8.6. Private Key Generation

When the sender selects the Request PGP Keys check box, the recipient gets an email with the link to generate PGP keys. The recipient follows the link and generates PGP keys.

Warning!

If you forget your passphrase, you won't be able to share encrypted files anymore!

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8.7. Encrypting and Decrypting Files

Encrypting folders and files is a way to protect them from unwanted access. There are a few simple steps to share and acquire files with advanced PGP security in Quatrix®.
To share encrypted files you should select the PGP encrypt files check box on the Optional Settings section while sharing files.

Note: The PGP encrypt files check box is disabled, if the sender or recipient hasn't generated PGP keys.

To decrypt files, go through these steps:

1. Follow the download link in the email.
2. Click the Decrypt link.
3. Enter passphrase or previously generated PGP keys.
4. Open and save decrypted files or folders.