Version: 2.0

Quatrix
User Guide

February 2018
Author: Maytech

maytech
GLOBAL DATA TRANSFER

Contents

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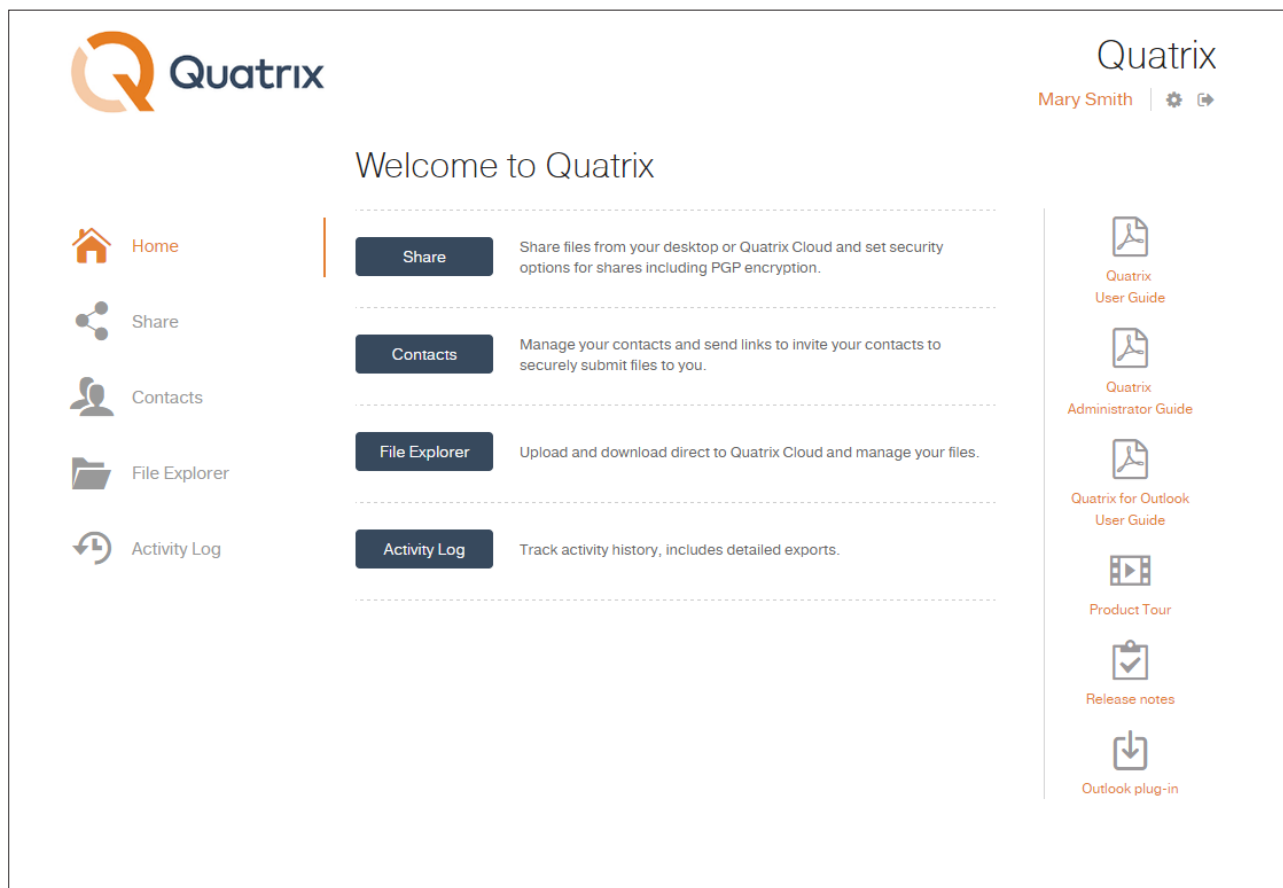Quatrix User Guide
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This guide describes the basics of Quatrix® file sharing and covers features and functions which are available to Quatrix users and administrators.

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® Outlook plug-in, Quatrix guides and link to the latest release notes. Besides you can take our product tour and have a look inside main features of Quatrix.

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 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.

⟩ 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.

⟩ 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.

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⊗ 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 share with PIN users should tick the Security PIN check box. 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 share is sent.

⊗ 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.

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 and Mozilla Firefox.

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 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.
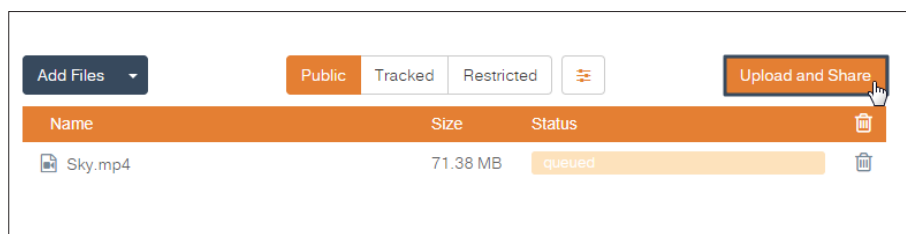
3. File Management

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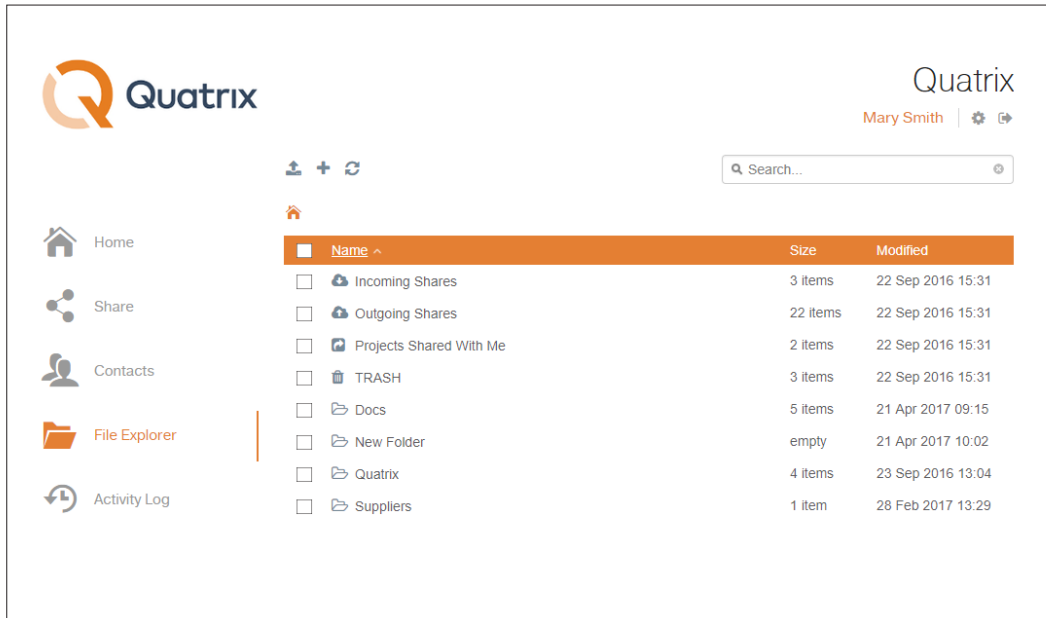
3.1. Managing Files and Folders

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:
>> 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 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.

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 chosen folder.
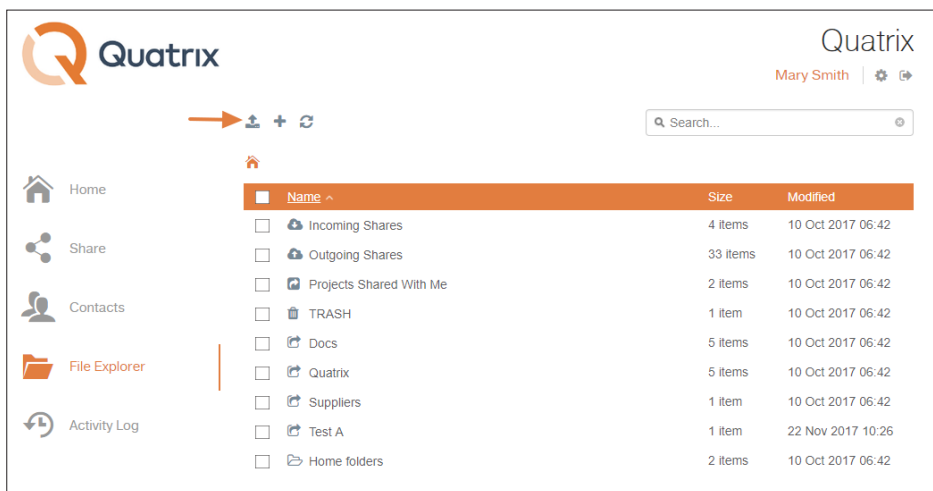
There are 2 types of file uploaders :

⊘   Basic uploader - upload of one file at a time.

⊘   Uploader - upload of multiple files and folders.
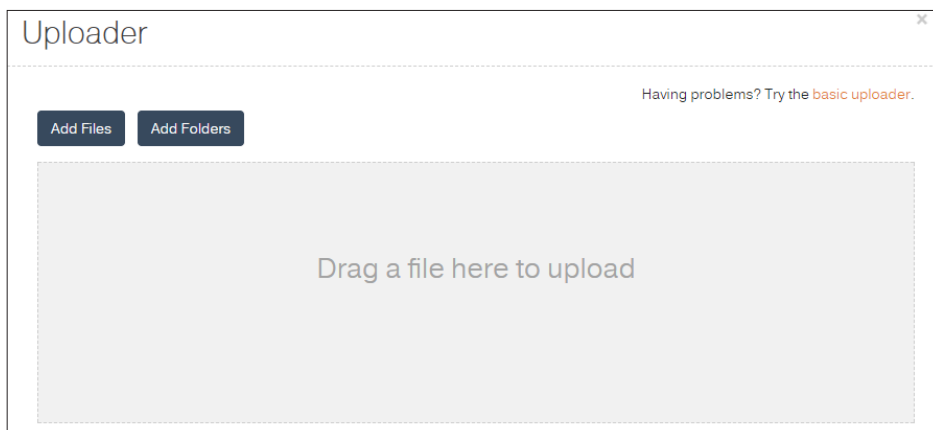
3.3. Sharing Files

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.
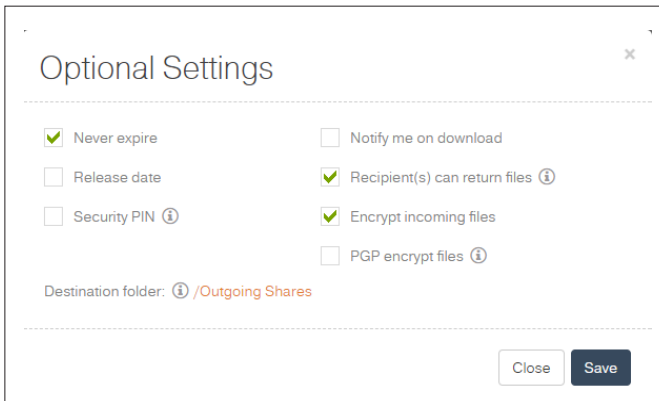
3.4. Requesting Files

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.

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. See more in PGP.

As soon as your contact uploads files you will receive an email notification.

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. Activity Log

Quatrix® traffic is logged, click on the Activity Log tab to explore your outgoing and incoming shares. There are records when files were shared, requested, revoked, uploaded, downloaded, moved and deleted. Also, you can track shares that were done with a Quatrix Outlook plugin.

All shares are displayed in reverse chronological order, to have the most recent shares on top.

User can choose custom date range for activity log export.

The Action information window contains a history of shares with their types (public, tracked or restricted); subjects; recipients; date and time when a share was created, released and its expiration date; status of a share (active or revoked); a download link; number of downloads and size of shared files.

To see whether your share is active or revoked, check the Status field.

If your revoke (disable) the shared file, it becomes grayed out in the list of files and the user won't be able to access it.

Note: It is not possible to undo the revocation of files!

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.
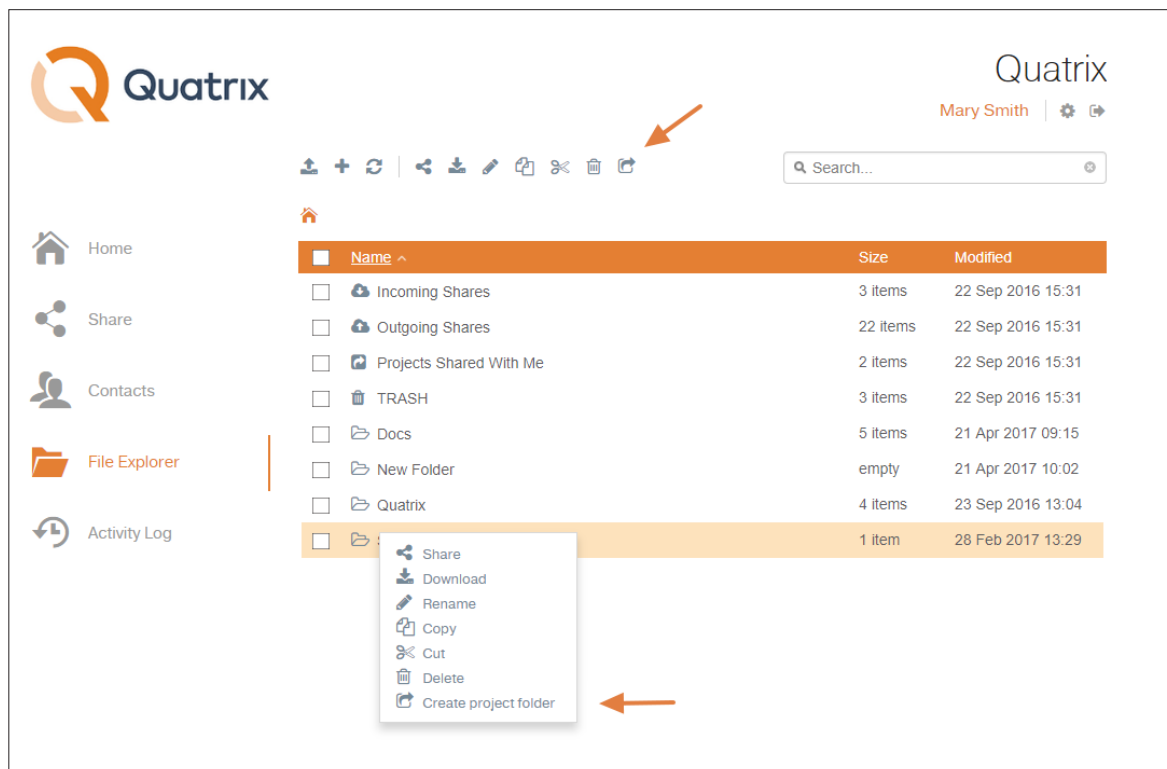
2. Select the user(s) you want to create a shared project with from the drop-down list, set the permission and tick the box to subscribe the user to upload notifications.

   To stay aware of changes (upload/rename actions) in the Shared Projects, you can turn on Projects Shared With Me notifications once you are creating or editing a Project Folder.

   Every time a file is uploaded, renamed or deleted, all Project Folder users will receive email notifications, except the person who owns the Project Folder. Note, that notifications are sent on a user log out.

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Project folder permissions

	List only	List and Read	Read and Write	Full and Share
Permitted actions	see folder structure	copy preview (files) download	copy preview (files) download	copy preview (files) download rename cut delete
			Plus: rename cut delete	Plus: add new users to the project folder change permissions of the existing users

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

3. Click Save to make your change take effect.

Note: Folders that are presented in the Projects Shared With Me folder do not reduce users storage quota, only the quote of the account owner.

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.

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.

5.3. 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.

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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 on the gear icon at the top right of the account.
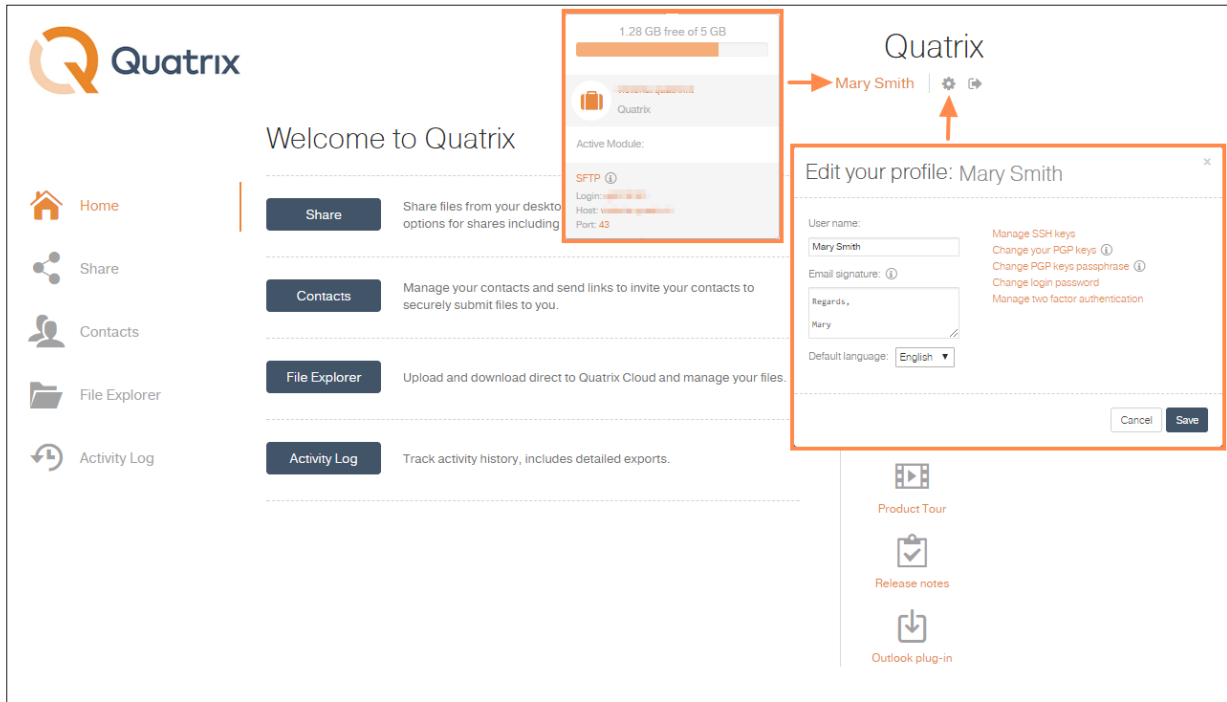
After clicking the Edit profile icon you can change your name, generate or change PGP keys and change your login password.
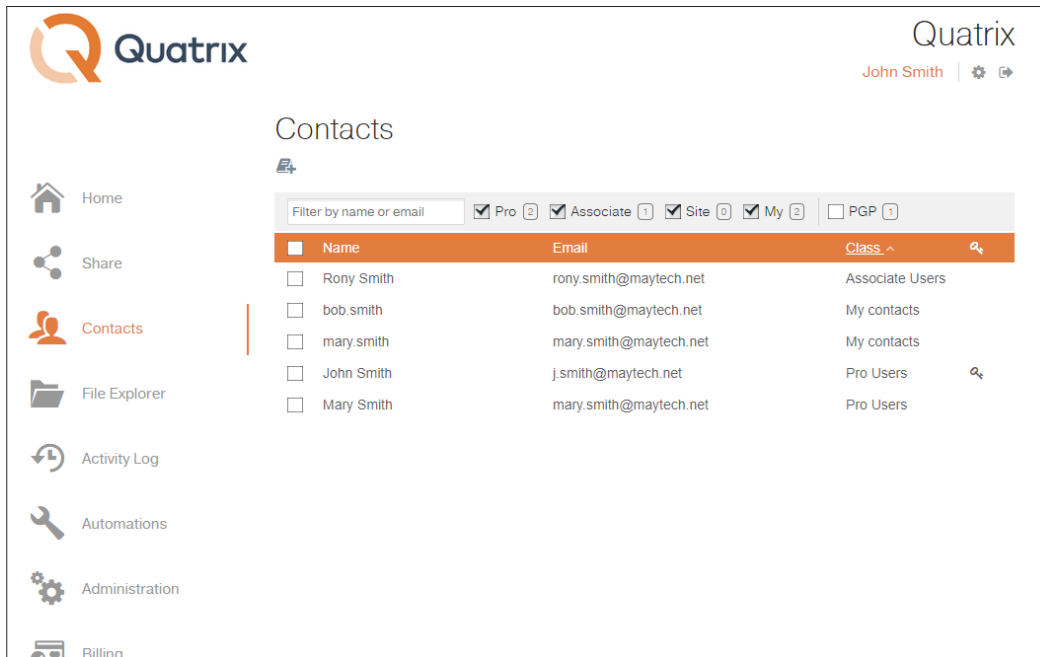
> Only administrator can change emails of their users.

You can change your language preferences without affecting the Quatrix default language settings.

7. Contact Management

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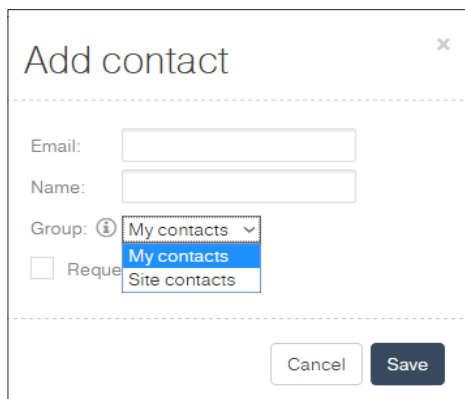

7.1. Managing Personal and Site Contacts

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.

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7.2. Requesting Files from Contacts or Users

With the help of the Request icon you can request files from your contacts or users. For more info see File Management.

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.

7.3. Sharing Files with Contacts or Users

The Share icon allows you to send files to your contacts or users. After selecting the appropriate user or contact and clicking on this icon you are redirected to the Share tab where you can share files or folders. See more info on File Sharing.
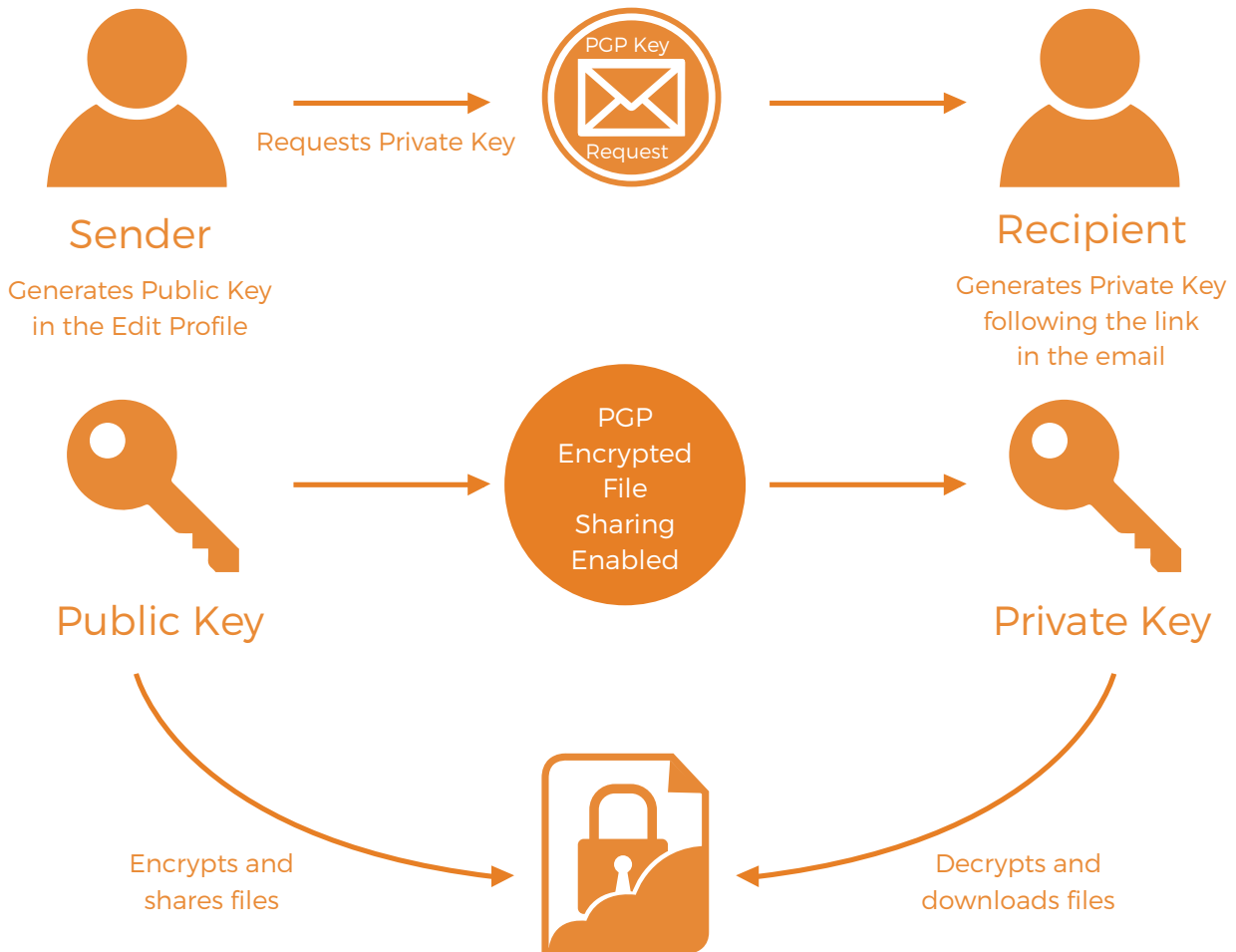
8. PGP in Quatrix

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
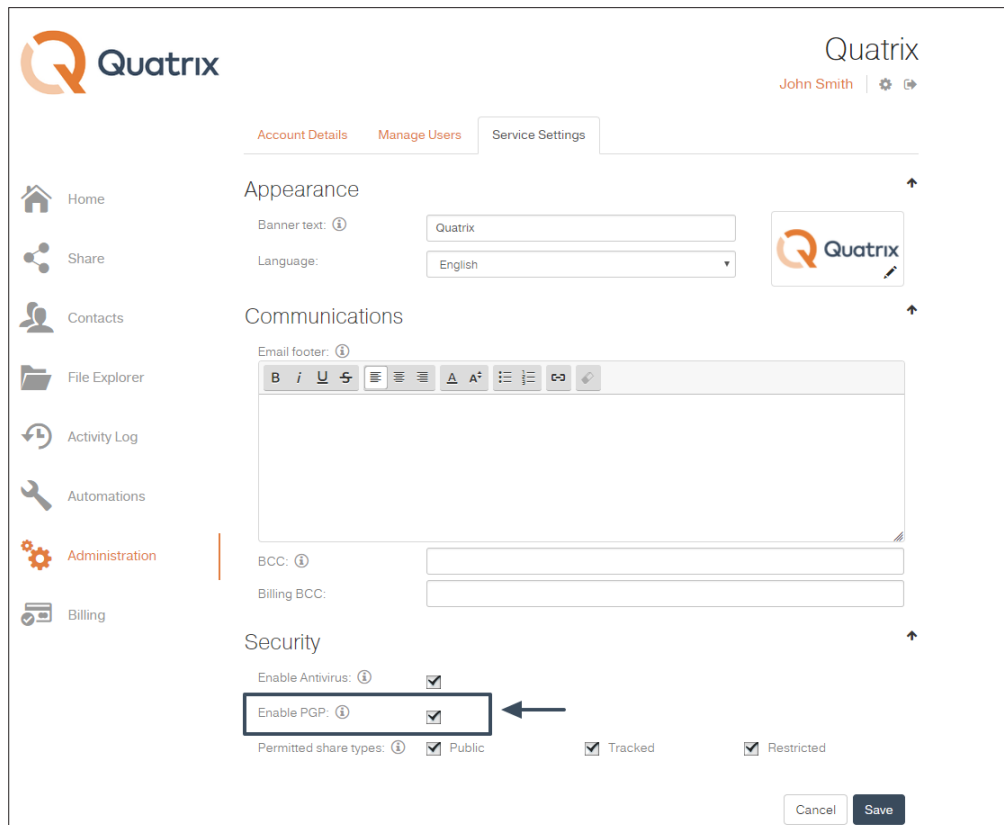downloads files

Secure File Sharing

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.

Admin can enable/disable PGP for all users on the Administration tab.

8.3. Who Can Share PGP Files?

Any Quatrix® user can send PGP encrypted files to other users within one Quatrix account.
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.

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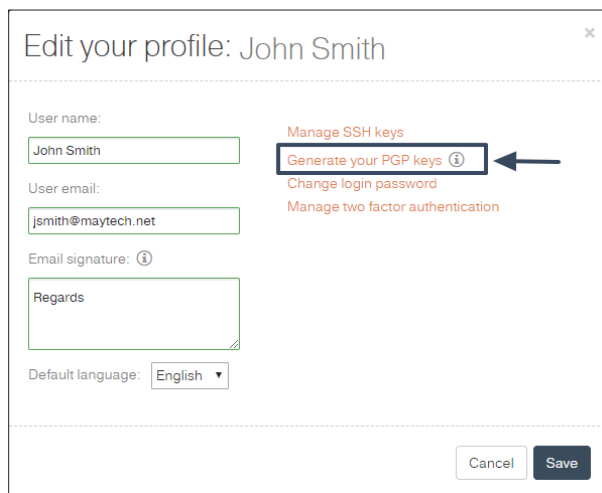February 2018 | Author: Maytech | Version: 2.0

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.
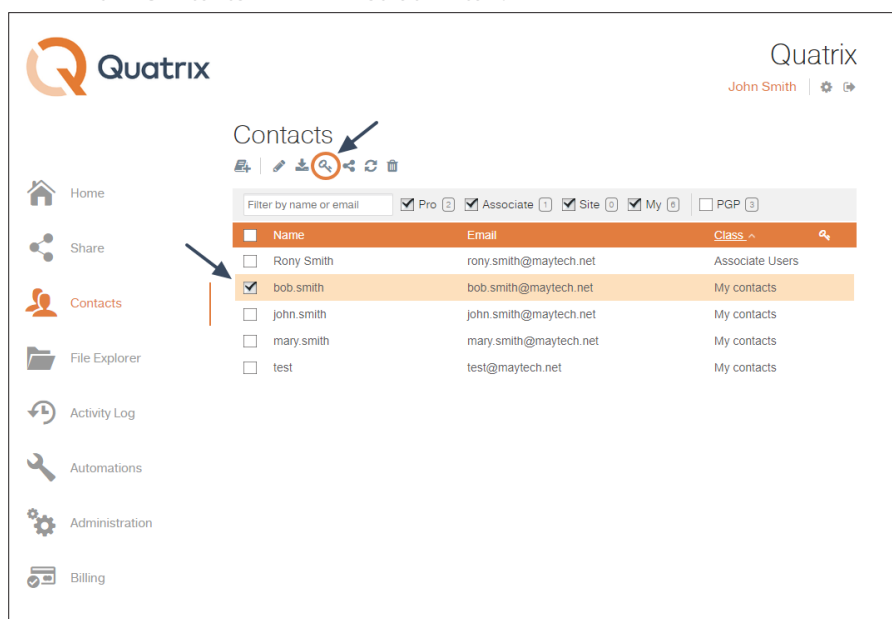
8.5. Public Key Generation

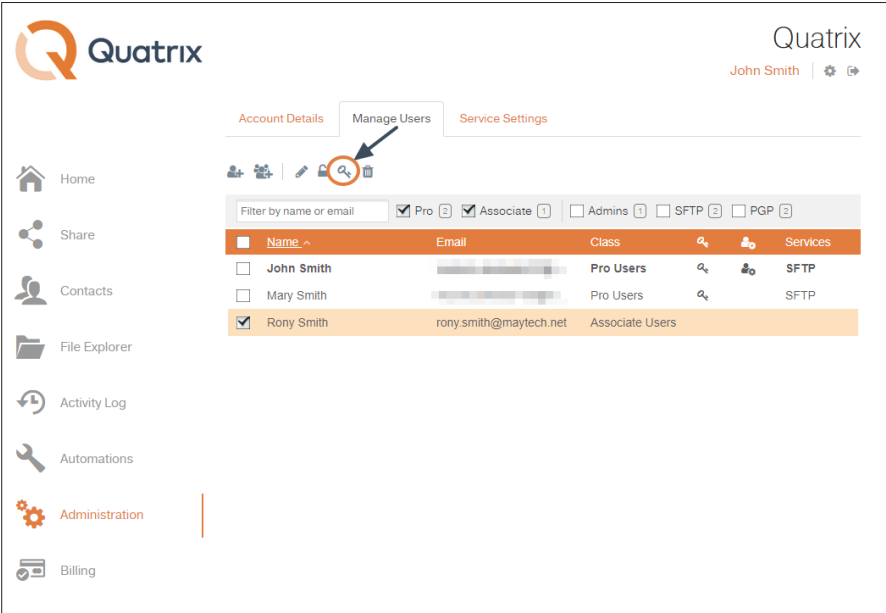The admin or user should generate PGP keys (in the Edit Profile) at first

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 or Administration tab.
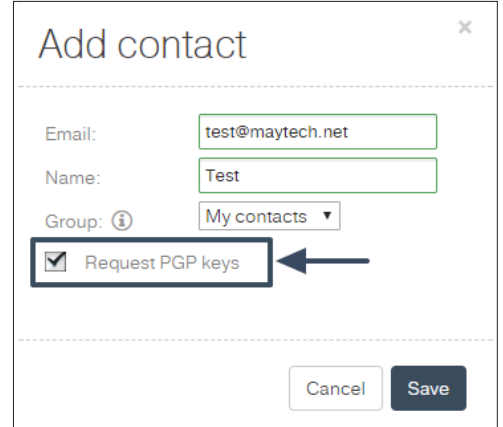

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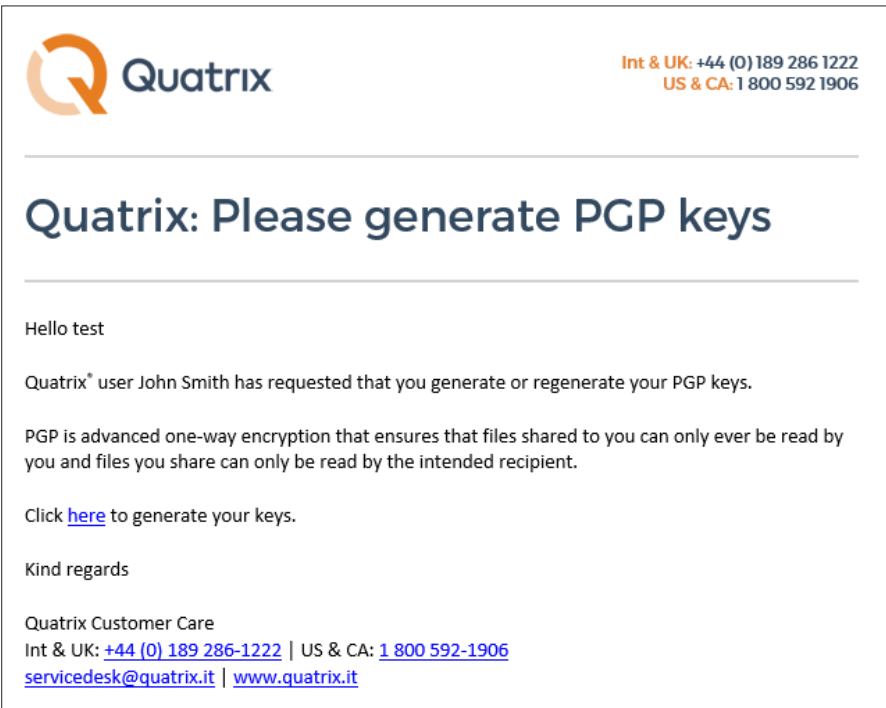## 8.6. Private Key Generation

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.

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PGP key generator

Test

Your Quatrix administrator has requested that you generate or regenerate your PGP keys.

PGP is advanced one-way encryption that ensures that files shared to you can only ever be read by you and files you share can only be read by the intended recipient.

For additional security your PGP key should be password protected. It's important you remember your password since files shared to you encrypted using your key can not be decrypted without it.

Passphrase:

· · · · · · ·

Generate

PGP key generator

Test

You have successfully generated your PGP keys.

Files uploaded to you can be encrypted using your public key.

No one can read encrypted files shared with you until you decrypt with your password protected private key.

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Quatrix: PGP key response

Hello John Smith

Test has completed PGP setup. You can now share files with additional advanced security - just ensure that you select the PGP Encrypt Files check box when you share or request files.

PGP is advanced one-way encryption that ensures that files you share, or files shared to you can only ever be read by the intended recipient.

Kind regards

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servicedesk@quatrix.it | www.quatrix.it

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

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.
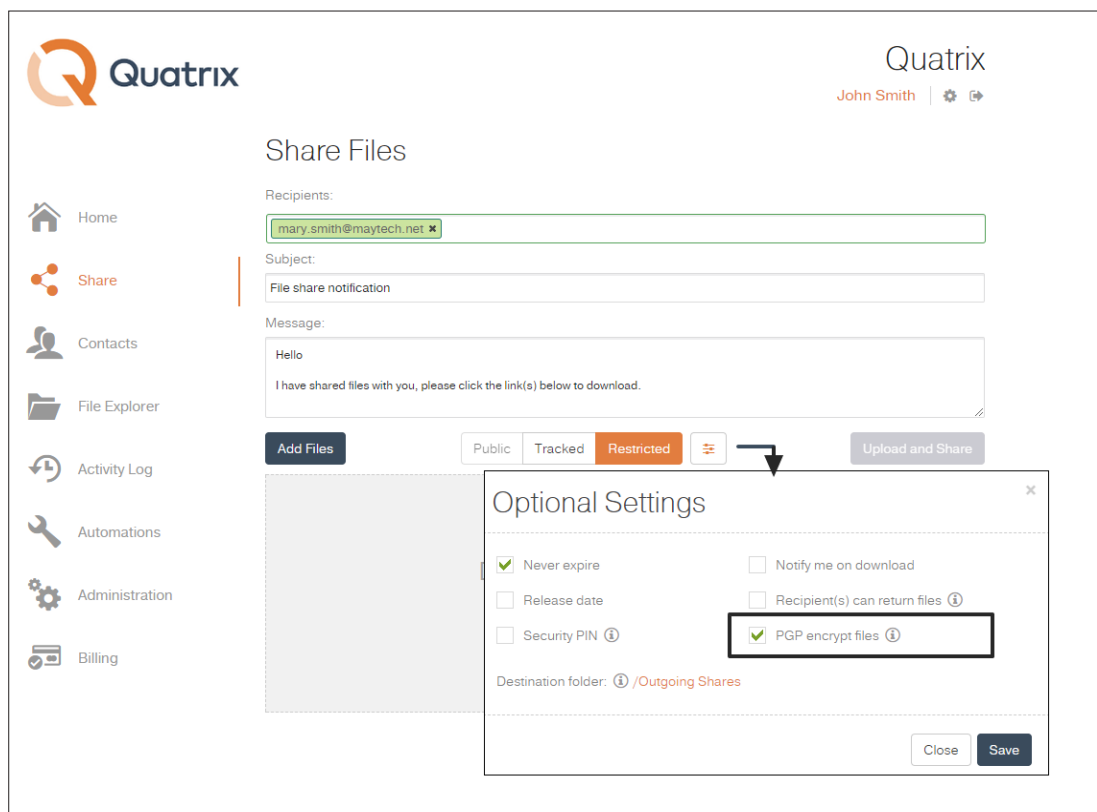
Note: If your recipient hasn't generated PGP keys, you will get an error message.

To decrypt files, go through these steps:

1. Follow the download link in the email.

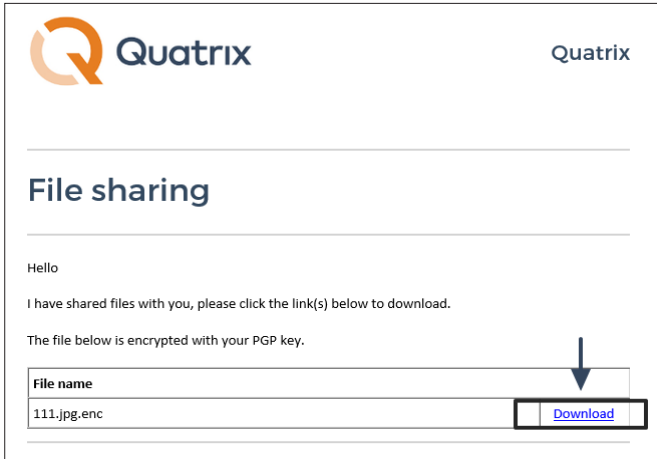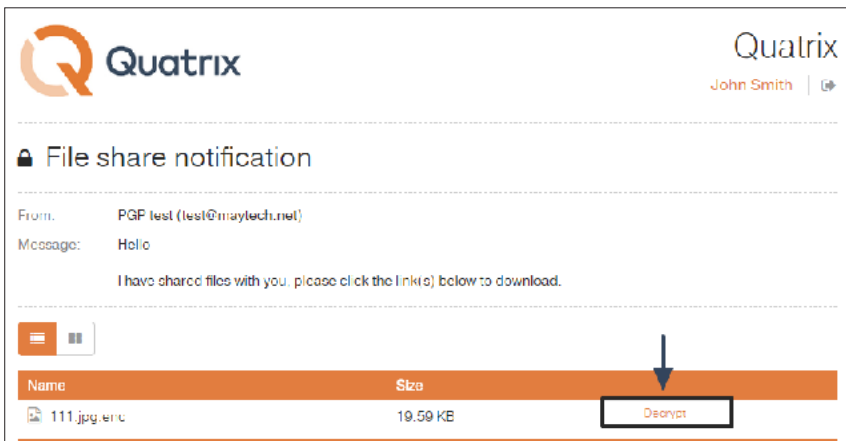2. Click the Decrypt link.
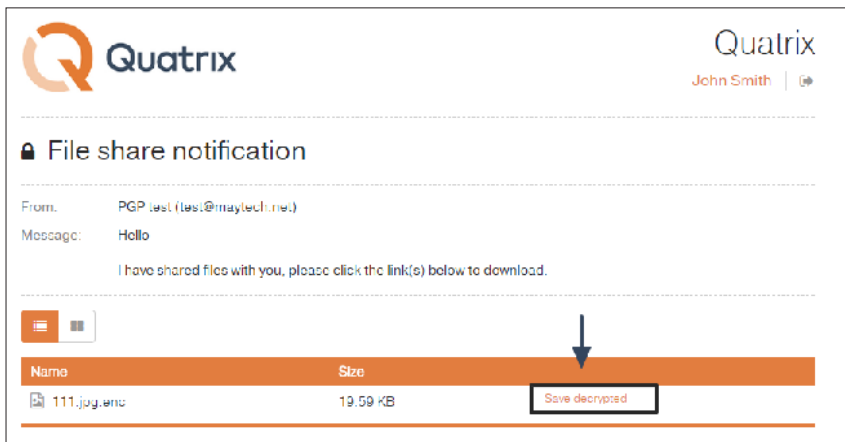

3. Enter passphrase and hit Decrypt.

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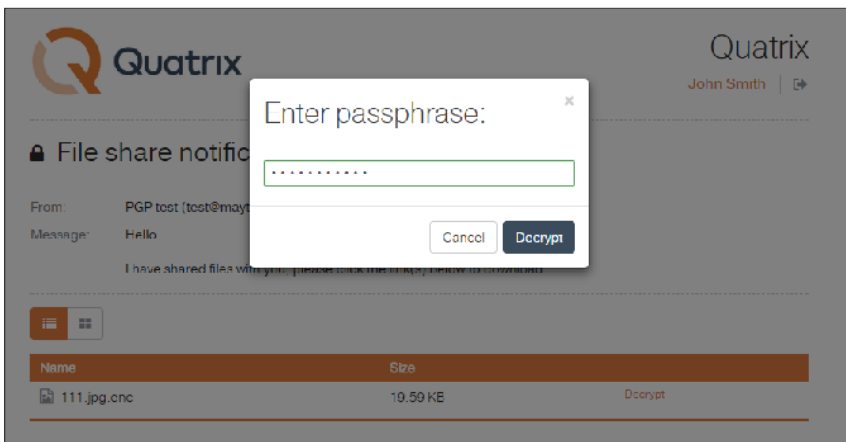
4. Then you can save decrypted files.


9. SFTP Module in Quatrix

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 SFTP enabled email.

9.1. Configuration of SFTP client

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

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

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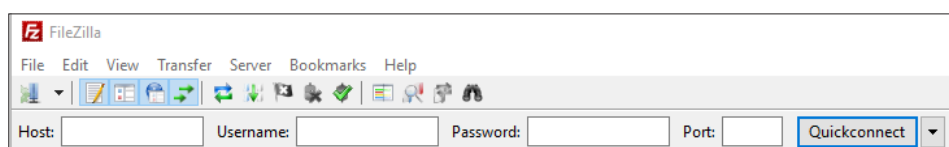
If you would like to log in to the SFTP client using the password, you need to specify the following information on the Quickconnect bar:

- **Host:** type in your site (e.g. sftp://yoursite.quatrix.it)
- **Username:** enter your SFTP login. You can get your host and username by clicking on the link with your name at the top right of your Quatrix account.
- **Password:** type in your password. You can access SFTP client with your account password.

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SSH public key authentication

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

Follow these steps to access your server:

1. Click on the File, and select the Site Manager option.
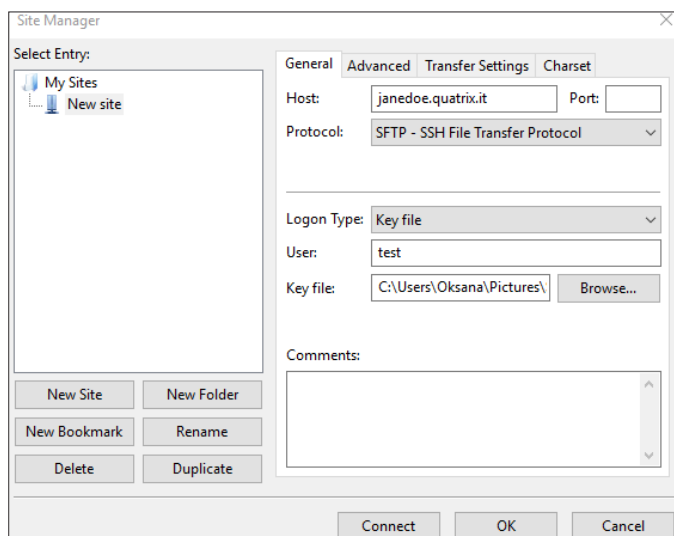
2. Click on the New site and type in your site.

3. Go to the General tab on the right-hand pane and specify additional settings:

    · Host: type in your site (e.g. sftp://yoursite.quatrix.it)

    · Port: 43

    · Protocol: Protocol: SFTP - SSH File Transfer Protocol

    · Logon Type: Key file

    · User: enter your SFTP login

    · Key file: browse and open the file with your previously generated SSH public key

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

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

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

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9.2. Transferring Files with SFTP

If your administrator enabled SFTP for you, SFTP credentials will be displayed in your Quatrix® account. You can view them by clicking on the link with your name at the top right.
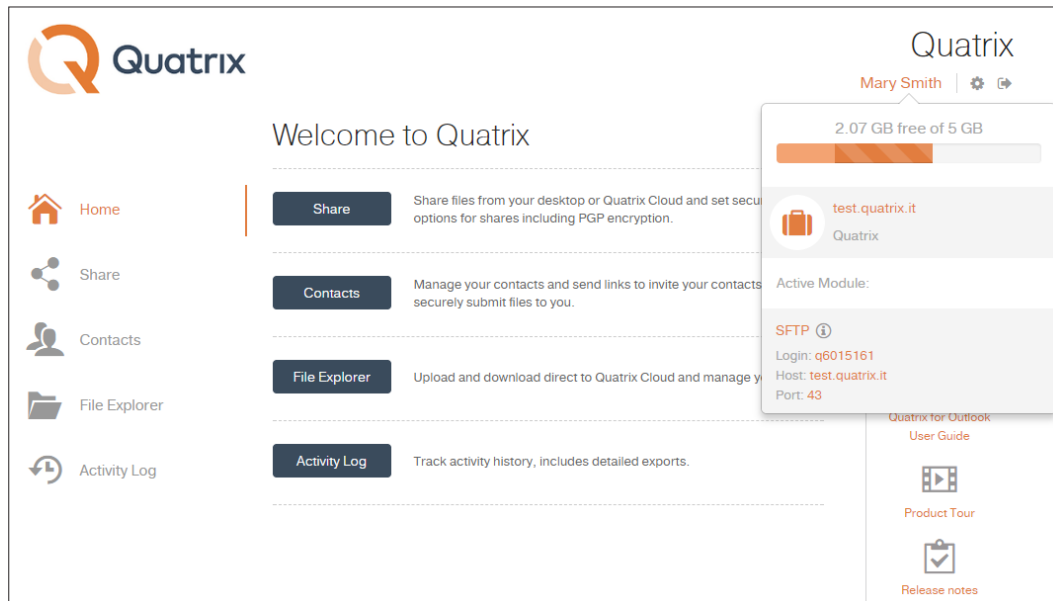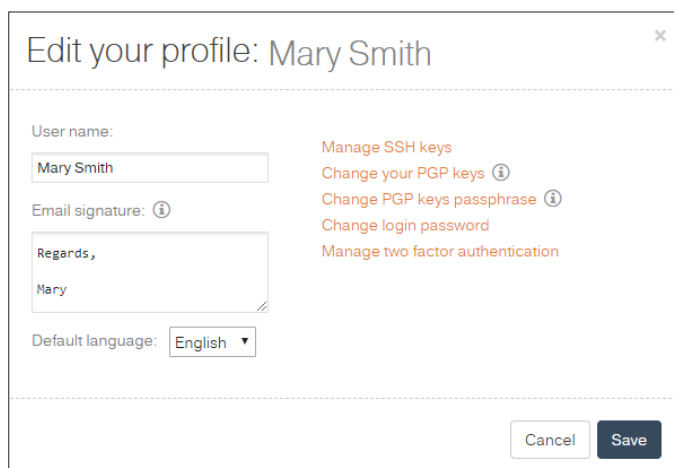

To exchange your local files with the ones you store in Quatrix you need to open SFTP client and connect to the server using your password or previously generated SSH public key.
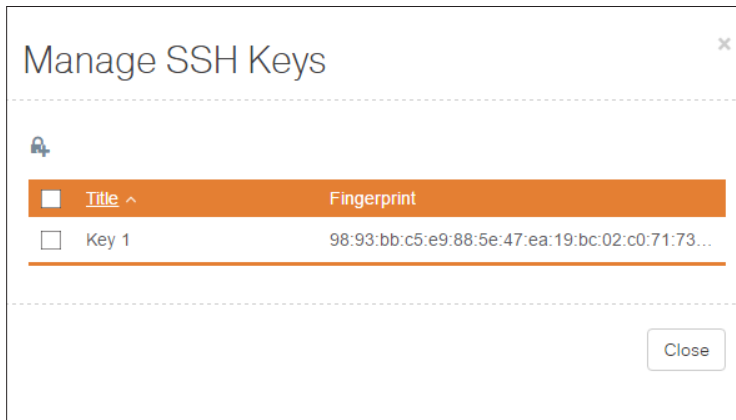
You can access SFTP client with your account password.

If you would like to connect to SFTP with SSH keys, you need to add your previously generated SSH public key to Quatrix.

1. Go to Edit your profile dialog box (Edit profile icon at the top right) and click on the Manage SSH keys link.

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For more information see www.maytech.net
Or call us: International & UK +44 (0) 189 286 1222 | USA & Canada 1 800 592 1906

Quatrix User Guide
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2. Insert your Public SSH key and save it.

After saving you won't be able to edit it's contents but rather only the title. Make sure that your SSH key is copied correctly, it should start with "ssh-rsa" and contain no comment.

You can use SFTP in Quatrix® to transfer sensitive data in the most secure and reliable manner.

10. Two-factor authentication

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

Here's how it works:

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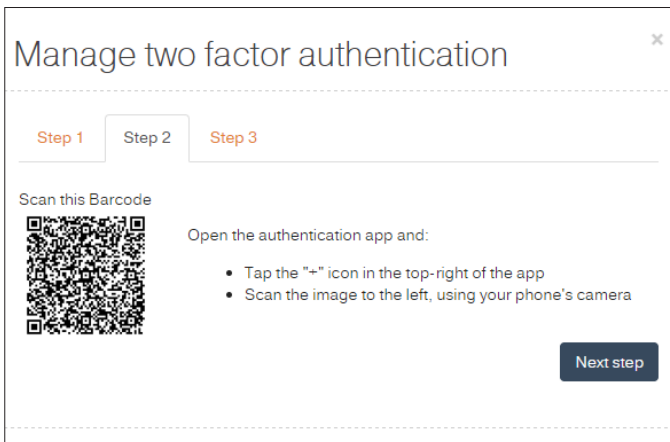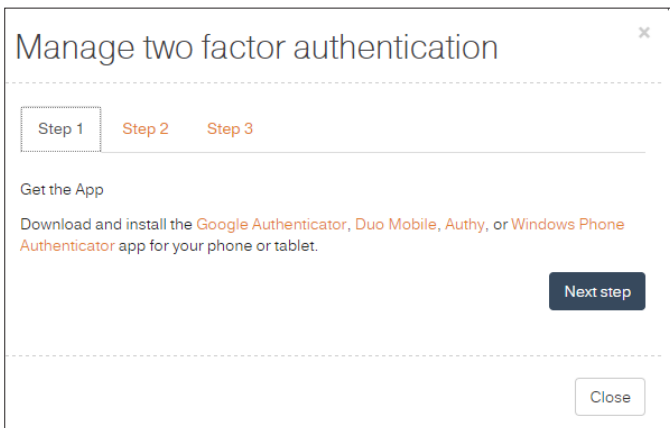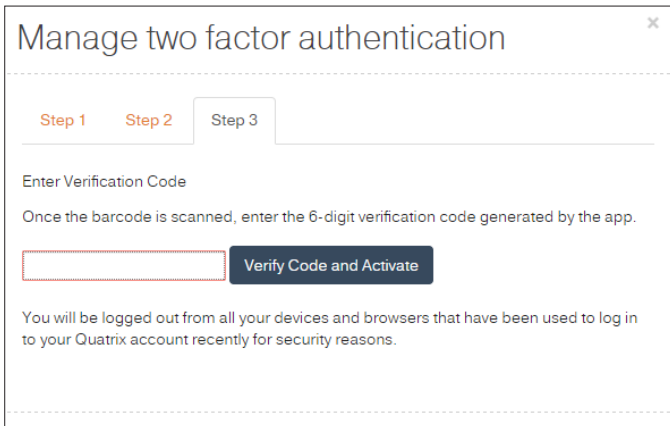
10.1. Enabling 2FA

1. Log into your Quatrix account.
2. Click on Edit profile icon ("gear wheel") at the right up corner on Quatrix web page.
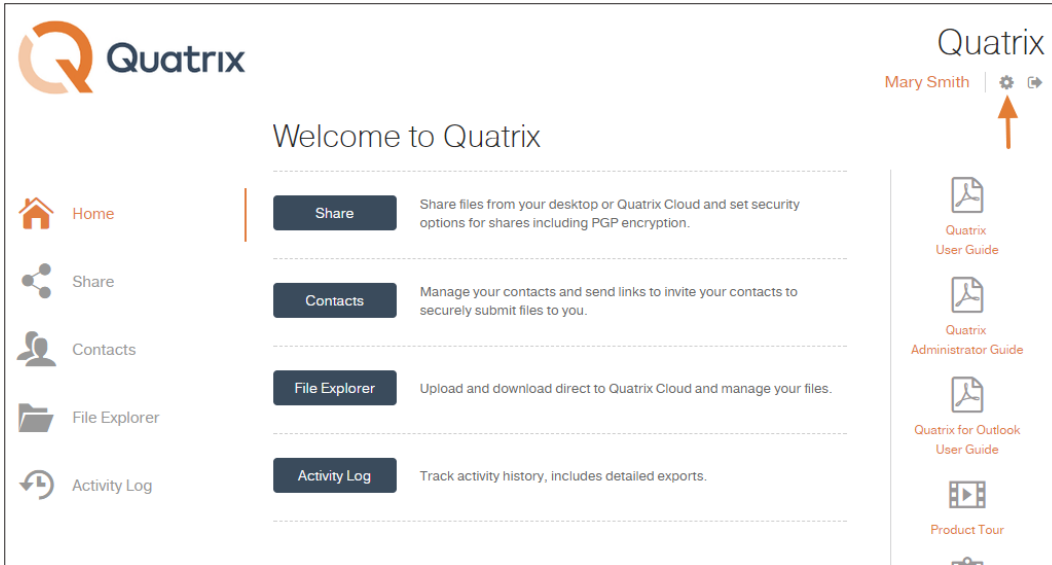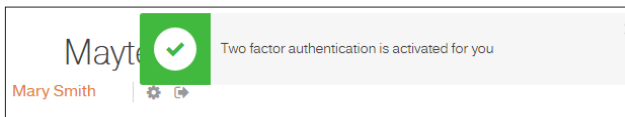
3. In pop-up window please choose "Manage two-factor authentication".

4. Please follow 3 steps to activate 2FA for your account.

When 2FA is activated properly you will see pop-up confirmation.

Note: You can set up 2FA on multiple devices at the same time scanning the same (!) QR code.

10.2. 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.

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