Quatrix Administration Guide

Version 8.0
September 2023

Quatrix
Professional, secure and easy-to-use file sharing

Content

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This guide covers features and functions that are available to the account owner and administrator. You will learn how to manage your account and users, control sharing, adjust security options site-wide, track your account activity and automate some of your activities.

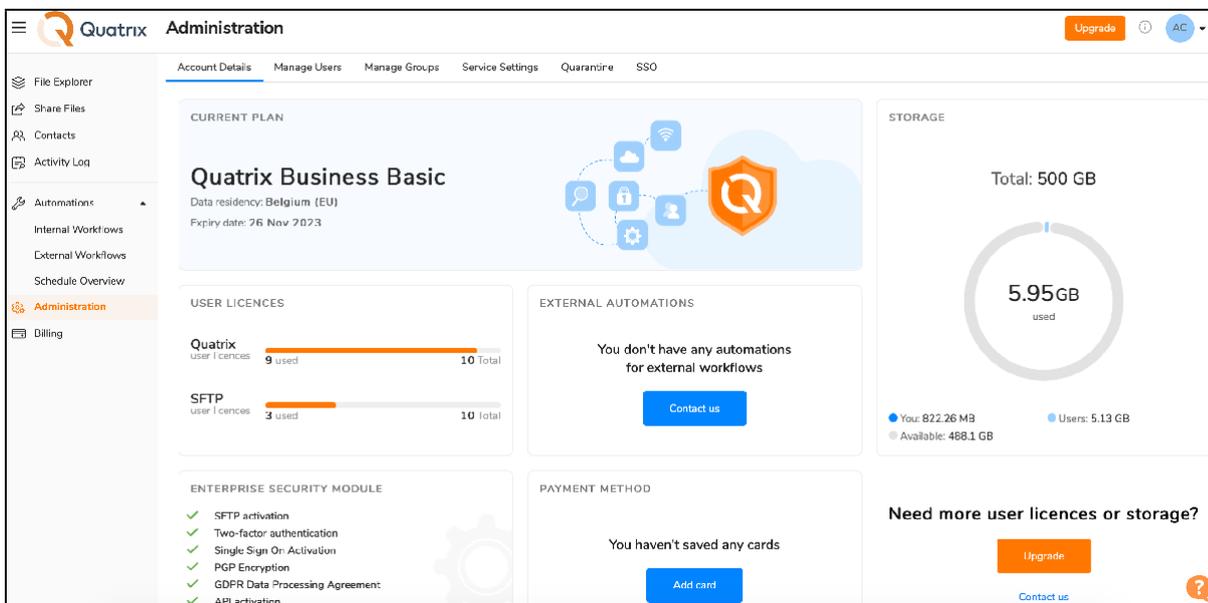Check out available apps and integrations here.

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1 Account Management & Billing

The Administration tab is the central place for management of your account. You can get details of your plan, configure service settings, keep track of your account storage and available external automations, quarantine suspicious files, and manage your users.

1.1 Account details

Your account information is displayed on the Account Details sub-tab of the Administration tab. It contains current plan details, expiry date, data residency, number of available and used Quatrix and SFTP licences, storage amount, external automations and brief details of the payment method.

Setting up your custom domain

If you want your users to connect to a custom hostname (such as hostname.yourdomain.com instead of hostname.quatrix.it.), you need to obtain SSL certificate for continued access to your site.

As a rule, we order a certificate from our trusted vendor and get it installed for the customer. For further details, please contact our Quatrix Customer Care.

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1.1.1 Storage control

Your storage depends what plan you are using. Quatrix free trial gives you 5 GB of the storage for 5 users. After the upgrade your account storage will change depending on the plan you are going to have. Take a look at the table below.

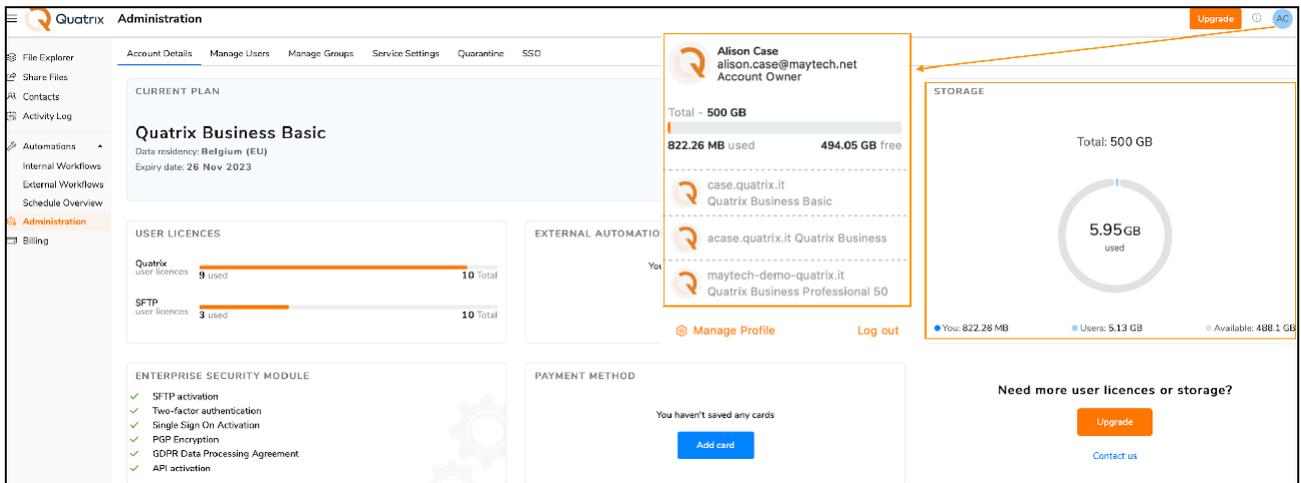| Plan	User Amount	Storage per Account, GB
Quatrix Free Trial	5	5
Quatrix	2 and more*	100 and more

* Minimum number of users: 2 (1 Owner + 1 User).

 Maximum number of users: unlimited (You can upgrade up to 249 users on the Billing or Administration tab of your account. For 250+ contact our Quatrix Customer Care).

1.1.2 Tracking storage

You can track your storage using the diagram on the Account details sub-tab, or using the status bar by clicking on your name initials at the top right of your account.

The diagram as well as the status bar display the amount of used and available storage. Besides the diagram provides a more detailed visualisation of your storage amount displaying not only your storage usage, but also the amount used by your users.


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1.1.3 Control the storage of users

Every new user gets unlimited storage by default that equals to your account storage. You can manage your account quota as well as your user quotas within your account quota limit.

To limit or increase the storage of your user follow these steps:

1. Go to the Administration tab and open the Manage users sub-tab.
2. Select the user and click on the Edit icon.
3. Specify the amount of storage in the Quota field you would like to allow for the user and save changes.
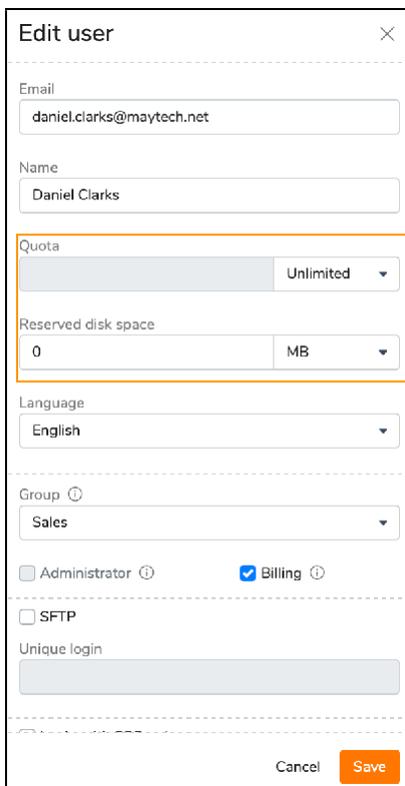
If you would like to increase the storage without adding a new user, contact support.

To reserve storage for a specific user, specify a required amount in the Reserved disc space field which will save the desired storage amount for this user. See the screenshot above.

1.2 Service settings

The Service settings sub-tab of the Administration tab allows you to set your corporate branding, add corporate email footer, specify account language or adjust security settings.

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1.2.1 Corporate branding

Every newly created account has the default Quatrix banner text and logo. If you would like to have your corporate branding on every share, go to the Service settings sub-tab and edit the default settings with your corporate banner, logo and email footer.
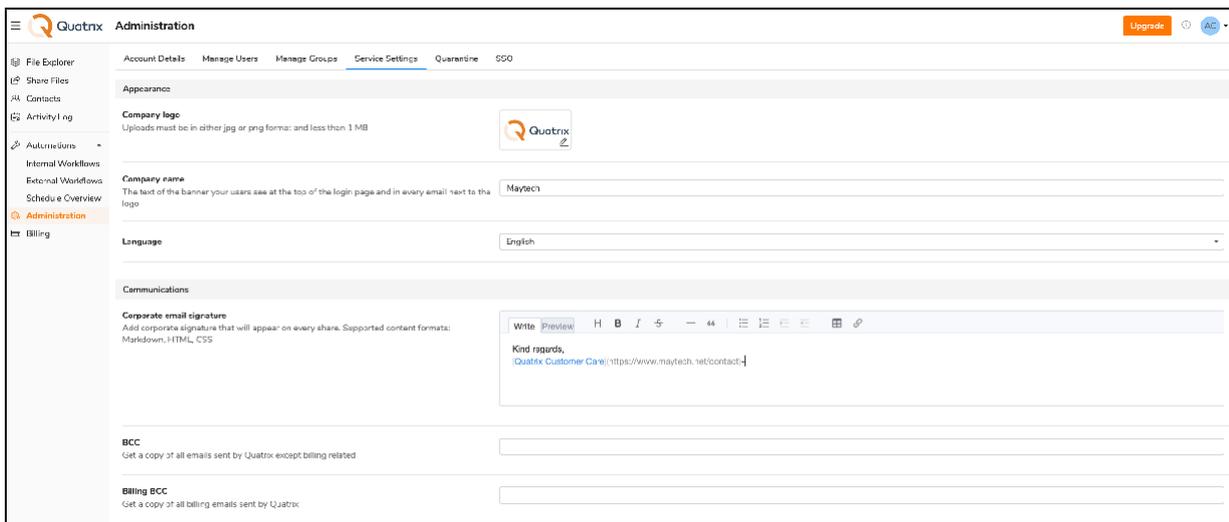
1.2.2 Service language settings

English is adjusted as a default language for the service (e.g. password reset pages) and account. If you would like to switch the service language to German or Chinese, update it under Appearance section. The service language change applies to all users of your account.
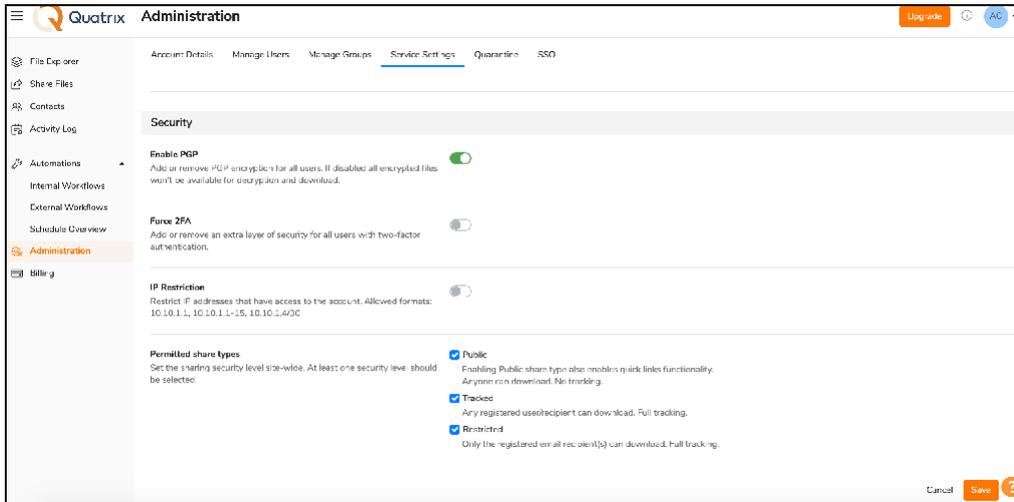
If you would like to update the interface language, go to the Manage Users (of the Administration tab), select users and update the language on the Edit profile form. However, every user can change the language for personal display while managing the profile in the General sub-tab.

1.2.3 Security settings

You can adjust security options for your shares site-wide:

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- Enable encrypted file sharing (PGP) for all users,
- Add extra layer of security with two-factor authentication (2FA),
- Restrict IP addresses to have access to your account,
- Set permitted share types (public, tracked, restricted)
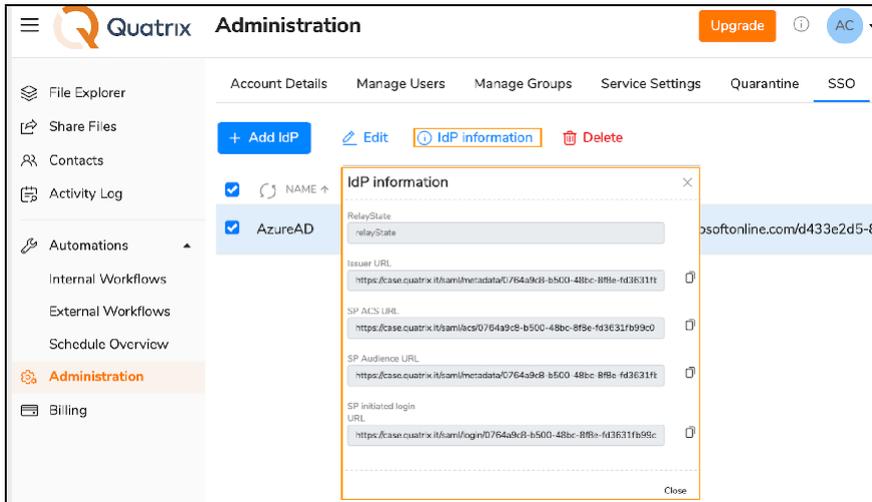
  Read details about share types

  - **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.

Learn more about security and privacy for your account here.

1.3 SSO

Single sign-on (SSO) allows your users to easily and securely log in to their accounts with just one set of credentials, rather than having to set up multiple usernames and passwords across different platforms.

Account owners or administrators can set up and manage their identity providers on the SSO sub-tab of the Administration tab.

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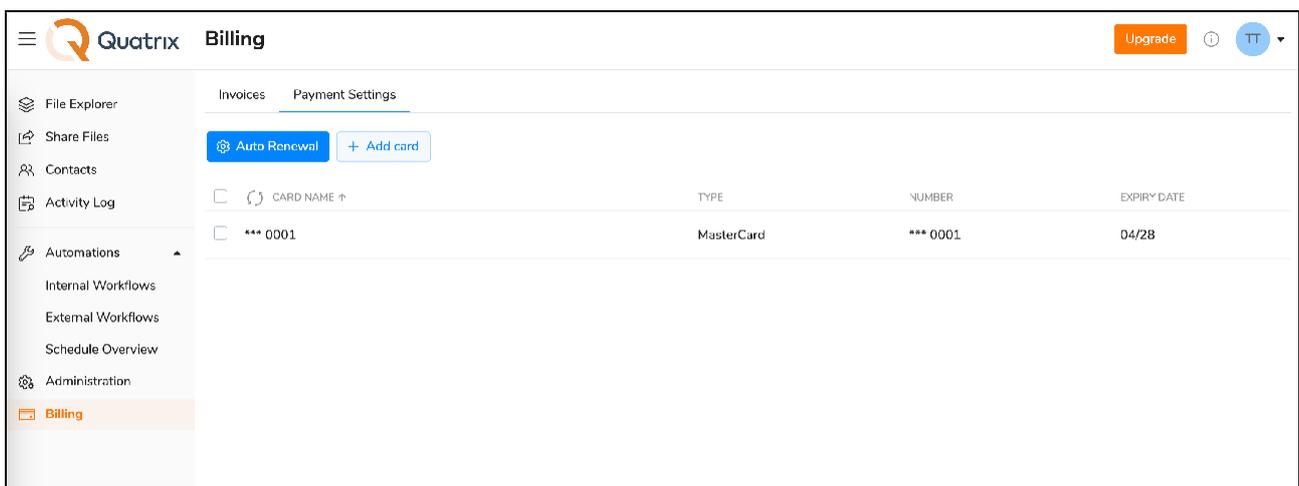Learn more about available SSO integrations here.

1.4 Billing

The Billing tab is the central place for your billing needs. The account owner or any user with Billing rights can update billing information, check renewal dates, upgrade or downgrade the billing plan, track and view invoices on the Billing tab.

If you would like to delegate Billing to your user, read more here.

1.4.1 Update your billing info

You can access your billing information on the Payment settings sub-tab of the Billing tab. It provides the ability to add credit cards and update their info.

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Click on Add credit card icon, specify your credit card details and save it. All your saved cards are displayed in the list. To update details, select the card and click on the Edit icon from the top menu.

> You can edit only the credit card name.

To delete the card, tick the check box next to it, and select an appropriate option from the top menu.

You can turn on the auto-renew feature for your account by clicking on the Auto Renewal button above the list of credit cards.

To enable automatic billing, tick the Active check box on the Auto Renewal form, select the card and save. As soon as automatic account renewal is activated, you will be notified of it. To disable it, uncheck the Active box.

1.4.2 Upgrade or downgrade your billing plan

Details of your billing plan can be retrieved from the last paid invoice on the Billing tab.

You can change your plan either on the Billing tab, or on the Administration tab by clicking on the Upgrade button.

When upgrading your plan to a higher package e.g. increase a number of users or storage amount, or add Enterprise Security Module, changes will be made immediately after the payment. You will be issued a pro-rated refund for your previous plan and charged for a new one. In this case the billing cycle dates will be changed.

When downgrading your plan, no refund is issued. Changes take effect immediately and your billing plan is changed.

1.4.3 Available billing cycles

You can adjust a monthly or annual billing cycle for your Quatrix account. The subscription will be renewed at the end of each billing cycle as soon as the payment is received. To learn the billing due date information, go to the Account details sub-tab of the Administration tab or to the Billing tab.

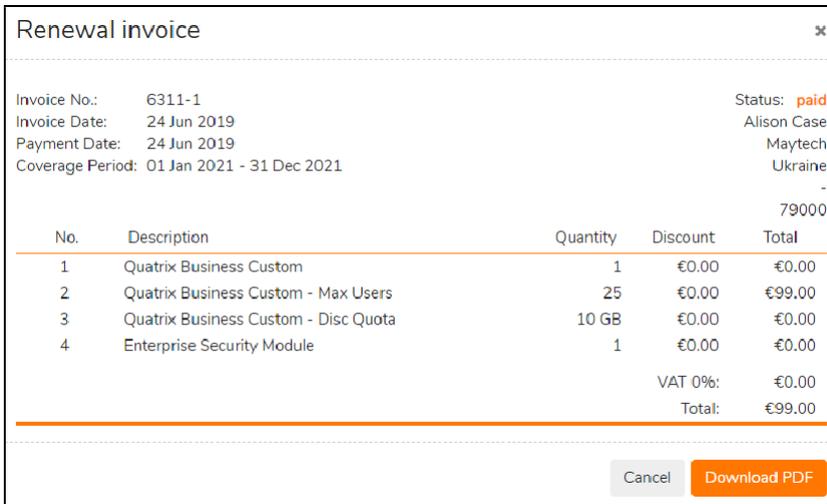You can save up to 15 % (2 free months) if you pay annually compared to paying monthly.

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1.4.4 Track and pay invoices

 All your paid and unpaid invoices are displayed on the Invoices sub-tab of the Billing tab.
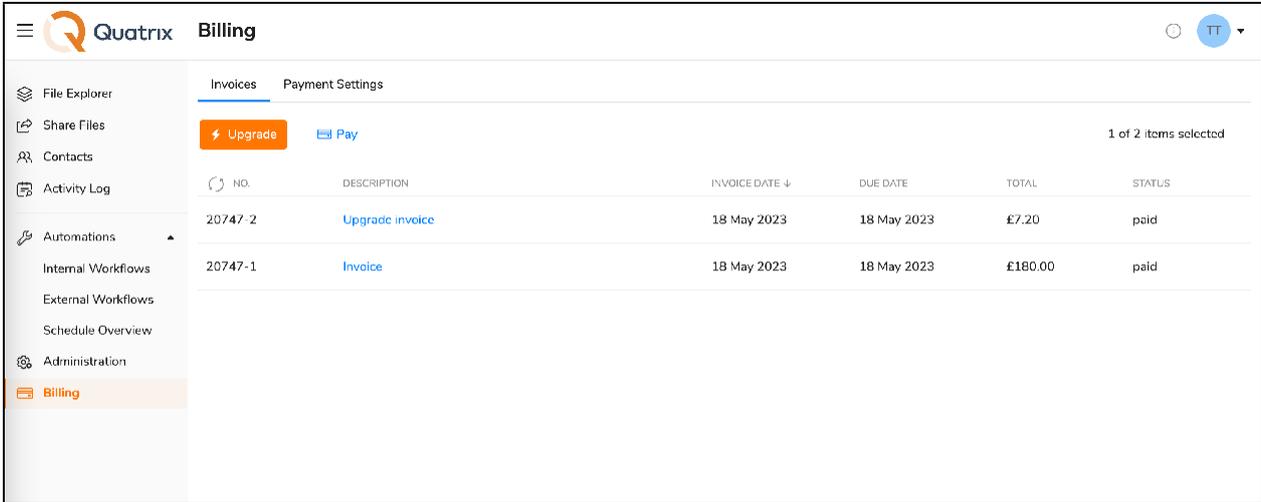
Invoices are displayed with the status - paid or unpaid, invoice creation and due date, and the total amount. To view the invoice contents, double-click on it. The invoice will be displayed in this way:

You can view the invoice in pdf format by clicking on the Download PDF button.

To pay an outstanding invoice, follow these steps:

1. Open the invoice, view the details and click on the Pay button.
2. Provide payment information or confirm the existing payment method on the Payment Details dialog.

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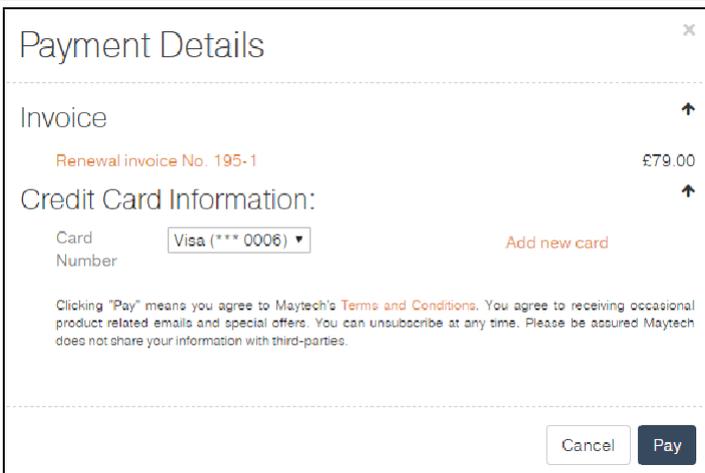
3. Confirm your payment by clicking on the Pay button.

As soon as your online payment is processed, you will be notified of it in the email.

If you have any questions about billing transactions, feel free to contact our Billing team.

1.4.5 Account suspension and deletion

Quatrix Free Trial

You get a 14-day free trial account when you register on our website. You can upgrade to a paid account during this trial period. If your account is not upgraded by the end of the trial period, your trial account will be suspended. On suspension, you still have 14 days after suspension to upgrade your account. If it is not done, your account and all your data on Quatrix will be deleted. To unsuspend your Quatrix Free Trial account contact servicedesk@quatrix.it.

Quatrix Paid Plan

When you purchase Quatrix account on our website, or upgrade your free trial account, you can specify the billing frequency - annually or monthly. Besides you can adjust auto renewal of your account depending on your billing cycle.

If your account is not renewed,

- the account will be suspended in 7 days after the expiry date and all users won't be able to access it.
- the account as well as all your files and data will be deleted in 28 days after expiry date and can't be restored.

You can unsuspend your account anytime until it is deleted. To unsuspend your Quatrix account, go to the Billing tab and pay an outstanding invoice (see the steps above). Your account will be unsuspended, when the payment is received.

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Enterprise Security Module

The given module includes the following security features:

- SFTP activation
- Two-factor authentication
- SSO (single sign-on) activation
- PGP encryption
- GDPR data processing agreement
- API activation

The free trial includes Enterprise Security Module.

The **Automation Module** allows you to enable no code automated workflows between Quatrix and major cloud services / internal applications. Learn more here.

For details on pricing for paid plans, contact sales@maytech.net.

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1.5 User with billing permission

If you would like to grant someone permission to manage invoices for your Quatrix account, you should keep in mind what user group your future billing manager belongs to. In case you want to have the administrator that tracks and manages payments, besides administration rights there will be Billing tab available for invoice management. Pro or associate users can cover invoices together with their permissions. The table below could assist you to make a decision what user to choose as a billing administrator.

	Jailed	Associate	Pro	Admin
File sharing	❌	Share with • Pro users	Share with • Pro users • Associate users • Site contacts • Personal contacts	Share with • Pro users • Associate users • Site contacts • Personal contacts • Admins

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	Jailed	Associate	Pro	Admin
File/folder management	❌	View and manage • personal incoming and outgoing files/folders • Projects shared with me folder • shared with Pro users project folders Upload files/folders Create folders and convert them to Project folders	View and manage • personal incoming and outgoing files/folders • Projects shared with me folder • shared with other users project folders Upload files/folders Create folders and convert them to Project folders	View and manage • personal incoming and outgoing files/folders • Projects shared with me folder • shared with other users project folders Upload files/folders Create folders and convert them to Project folders View and manage the User Homes folder (files and folders of users added by the admin)
User/ contact management	❌	View • Pro users	View • Pro users • Associate users • Jailed users • Site contacts Create and manage personal contacts	View, create and manage • Pro users • Associate users • Jailed users • Site contacts • Personal contacts • Admin

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	Jailed	Associate	Pro	Admin
Activity history tracking	❌	Only personal	Only personal	Personal and all users activity tracking
Billing	❌	Invoice management	Invoice management	Invoice management

The table displays the comparison of predefined user groups, in case you have created your own groups with preferred permissions, make your own decision to determine who will be your billing manager.

1.5.1 How to assign a Billing permission

You can grant the access to Billing while adding or editing the user on the Administration tab.

> If you delegated Billing to your users, don't forget to add their emails to the Billing BCC on the Service Settings sub-tab of the Administration tab so that they could receive emails about billing transactions.

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2 Roles and Permissions

A user's role determines what actions can be performed in the account. The table below displays a list of available roles.

Administrative roles	User roles	Contact roles

• Account owner
• Administrator
	Predefined groups:
	
	   • Pro
	   • Associate
	   • Jailed
	
	Your own groups with required permissions
		• Site
		• Personal

Every added user to the account requires additional user licence except contacts (they don't need a licence to receive a file or send files back to you).

2.1 Administrative roles and what they can do

The account is originally set up by the account owner and can be managed by multiple admins.

2.1.1 Account owner

The account owner is the top administrator of the account that has access to all Quatrix features and can purchase more users for the account. They own and manage the account for as long as they are the account owner. At any point, the ownership rights can be transferred to someone else in the account.

Transferring the account ownership

Follow the steps bellow to complete a transfer:

1. Click on your name initials at the top right of the account and follow the Manage profile link.

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2. Go to General sub-tab and change your email and name in the Personal preferences section.
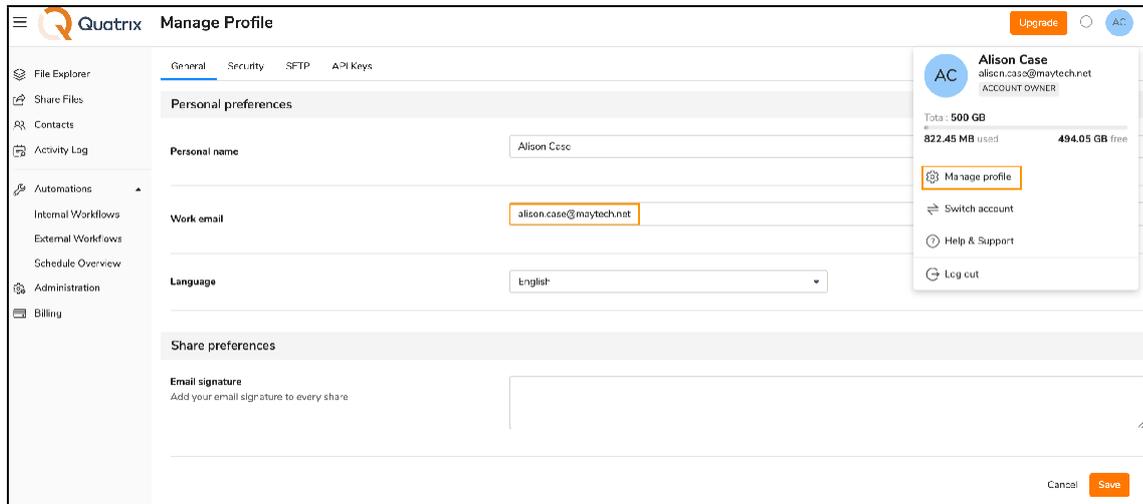
3. Save changes.

Your new account owner will be notified of the transfer in the email.

> If you transfer the ownership rights, you won't be able access the account. Ownership transfers are immediate and can't be undone.

Only the account owner controls invoices for Quatrix account. The Billing rights can be delegated to any user in the account except jailed users and contacts. Read more to determine what user role would be the best to perform invoice management in your account.

2.1.2 Administrator

The account admin can manage users, groups, account storage and access control. Admins can delegate admin rights to other users. Billing is not accessible to admins, but this permission can be granted while editing the admin on the Administration tab.

How to assign an Administrator role?

There are 2 ways to add an administrator to your account: either while adding a new user or editing an existing one. Follow the steps below to create an administrator:

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1. Go to the Administration tab and open Manage users sub-tab.
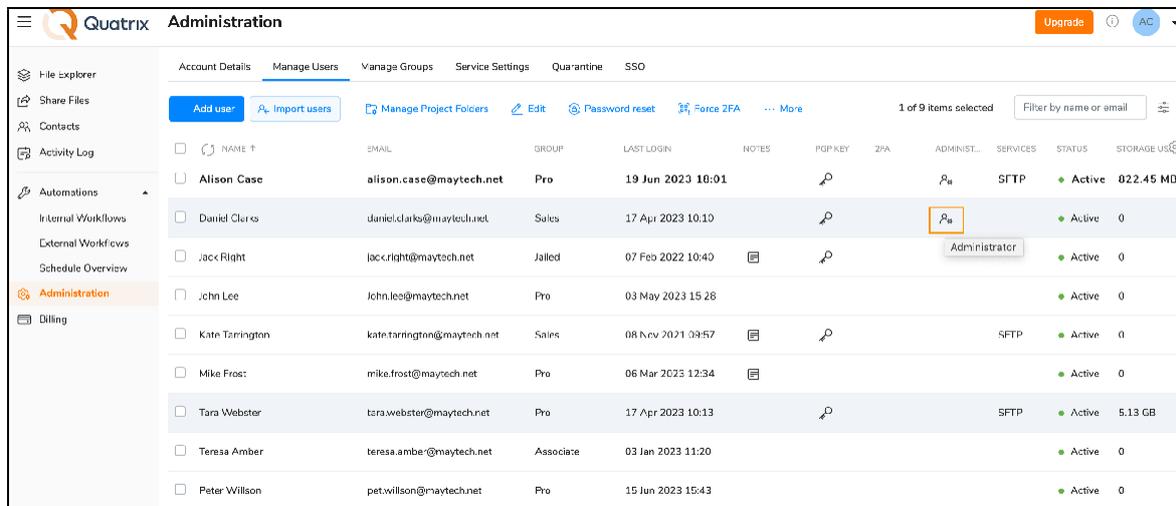
2. Click on the Add user button from the above menu and specify your admin's name and email, (or Select the user you would like to make an administrator and click on the Edit icon).

3. Tick the check box next to the Administrator option and save changes.
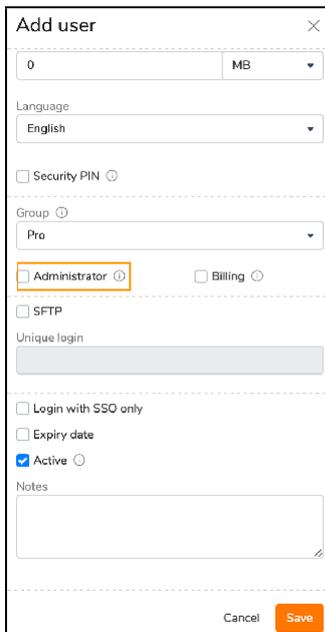
As soon as you administrator is created, you will see the Administrator icon next to your newly created administrator in the list of all users.

If you have several departments in your company, you can add multiple admins to manage their own teams and their sharing.

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You can demote the user with the Administrator role afterwards by clearing the Administrator check box.

> Account owners can promote and demote administrators and other users.
>
> Administrators can promote users and demote other administrators, but they cannot demote the account owner.

Owner vs Admin permissions

	Owner	Admin
Share	✅	✅
Tracking	✅	✅
Contacts	✅	✅
File Explorer	✅	✅
Activity Log	✅	✅
Automations	✅	✅
Administration	✅	✅
Billing	✅	❌
Profile Management	✅ Transfer ownership rights	✅
SFTP	✅ Buy SFTP	✅

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The table above demonstrates that the administrator has almost the same rights as the account owner with the exception of invoice management, transfer of ownership rights and purchase of SFTP module.

2.2 User roles and their permissions

A user is anyone you want to have regular access to your Quatrix service - there are three predefined user groups:

- Pro users can browse folders and share to any of your users or to their personal contacts who don't need a licence to download (normally your employees).
- Associate users can only use your service to share files back to your Pro Users - great for external partners who need to regularly feed data into your organisation.
- Jailed users have access to files from Projects Shared With Me.

The table below displays permissions depending on the role:

	Jailed	Associate	Pro
Sharing	❌	Share with: • Pro users	Share with: • Pro users • Associate users • Site contacts • Personal contacts
Tracking	❌	✅	✅
File/ folder management	❌ No visibility of any files or folders, except the Projects shared with me folder	✅ View and manage: • personal Incoming and Outgoing files/folders • Projects shared with me folder • project folders shared with Pro users Upload files/folders	✅ View and manage: • personal Incoming and Outgoing files/ folders • Projects shared with me folder • project folders shared with other users Upload files/ folders

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	Jailed	Associate	Pro
Project folder management	✅ *	✅	✅
User and contact management	❌	View: • Pro users No contact visibility and management	View: • Pro users • Associate users • Jailed users • Site contacts Create and manage personal contacts
Security options (password, 2FA, PGP**, SFTP**)	✅	✅	✅
Profile management	✅ except personal email	✅ except personal email	✅ except personal email

* - if permissions are granted.

** - if enabled for account.

> Permissions of predefined user groups can be easily updated to match your needs.

Besides you can create your own user groups and assign your users to any group you wish. Learn more user groups.

2.3 Contacts in the account

Contacts are grouped into 2 categories: personal and site. The major difference between them is their visibility by other account users.

- Personal contacts are visible to only their creators. Permissions to have a list of personal contacts are granted to account owners, administrators and Pro users.
- Site contacts are created and managed by the account owners or administrators and are visible to their creators as well as Pro users.

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> If you shared files with someone who is new in Quatrix account, their email will be automatically added as Personal contact to the Contacts list.

As contacts are not licensed in Quatrix, they cannnot log in to Quatrix and share files with other account participants. But they can only get shares and file sharing requests from Quatrix users. In order to make one repository of files and file requests for contacts we released Contact's Home Page. This page displays the Inbox tab with files and file requests from users. To log in to this page the contact should follow the link from the file sharing email and register at first. Having logged in the contact can download or return files.

If the contact receives shares from several Quatrix accounts, there will be different Contact's Home pages displaying shares and file requests of each account separately. The contact can log in to these pages with the same password.

Check out Contact Management to learn more how to add, edit or delete a contact.

How to share encrypted files with your contacts?

If you would like to share encrypted files with your contacts, you need to get PGP keys generated by them. Go to the Contacts tab, select the contact(s) and send PGP key generation request. As soon as your contact generates PGP keys, you can share encrypted files.

How to convert your contact to a user?

Only account owner or admin can convert a contact to a user. The conversion can be performed on the Contacts tab by selecting an appropriate contact and clicking on the Convert button from the top or right-click menu.

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A newly created user is assigned to the Pro group by default. You may change the group while the conversion by selecting any desired one from the drop-down list.
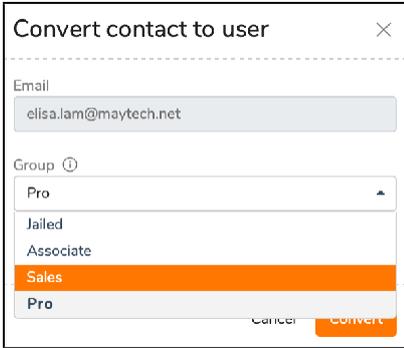
If you convert a contact to a user, you need to purchase an additional licence.

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3 User Management

The owner or user with administration rights can manage account users on the Manage Users sub-tab of the Administration tab.

This tab displays a list of users with their names and emails, assigned group, last login date, notes, PGP keys, 2FA, admin rights, SFTP availability, status and used storage. You can adjust the display of the table to your needs by clicking on the gear icon and selecting necessary columns from the list.

Besides you can download user metadata in CSV format by clicking on the Export to CSV button. See the screenshot below.

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3.1 User groups

User groups are a great way to share your account with multiple users with your desired sharing and access permissions.

As an owner or admin, you can allow users of a specific group to share and request files, to track shares, to manage personal or site contacts, users and automations.

It's quite easier to handle permissions if they are in groups rather than with individual users. When you grant access to Automations for the sales manager and adjust required sharing permissions, it will be a painful and time-consuming job to reset all permissions to another user when a new sales manager joins the company. User groups simplify your work here, all you need to do is to add a new user to the required group.

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 predefined user groups can be updated.

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3.1.1 Adding a user group

1. Go to Administration and open Manage groups sub-tab.
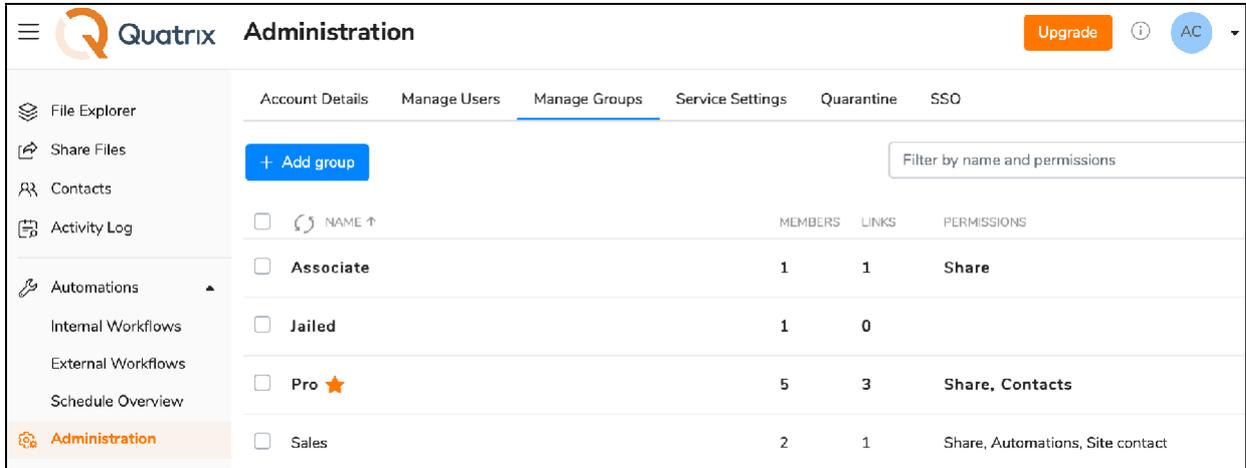
2. Click on Add group button which opens a form for creating your group.
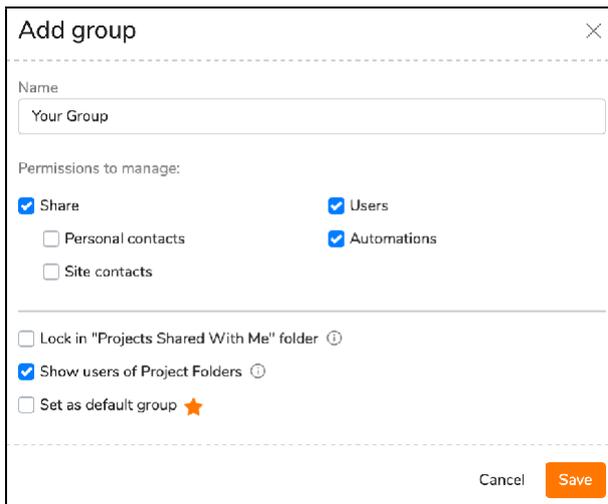
3. Name your group and select permissions for group members:

   1. Share - share and request files; tracking;

   2. Personal contacts - add, edit or delete your personal contacts;

   3. Site contacts - add, edit or delete site contacts;

   4. Users - manage users of the linked groups;

   5. Automations - create, update and delete automations.

4. Tick the check box Lock in Projects Shared With Me folder if you would like to jail your group members only to the folder with the shared PFs.

5. Tick the box Show users of Project Folders if you want to make users of PFs and their permissions visible to group members.

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6. You can make your group a default one by ticking Set as default group. It will be displayed with the orange star in the list of groups.

> When you add a new user and select the default group, it won't be Pro if you updated it to your desired group, but your changed one.
>
>
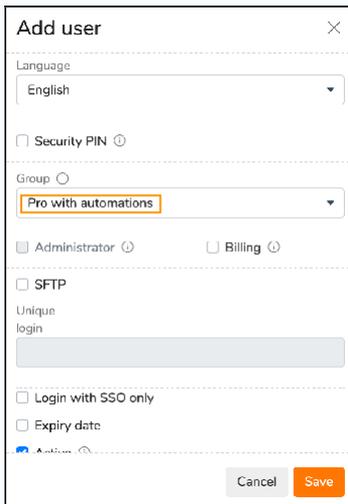
7. Click Save and your group will be added to the list on the Manage Groups sub-tab.

All your created user groups are added to the list on the Manage groups sub-tab and displayed in alphabetical order.

The table with groups displays number of group members, number of linked groups and a brief description of assigned permissions.

You can filter table contents by name or permissions.

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3.1.2 Managing user groups

3.1.2.1 Adding or deleting group members

Once the group is created, you can add group members by clicking on Manage users button from the top menu (or select an appropriate option from the right-click menu).

The form Manage users allows you to add users to the group or move them to the desired group.

> A user can belong to one user group.

Owners or administrators determine permissions allowed for group members and this is under their responsibility to inform the users about any changes in the group.

Users are not automatically notified that they are added or deleted to a specific group. They would be able to perform actions according to allowed permissions.

3.1.2.2 Managing group access

You can manage the access of group members to specific groups, including site contacts, on the Access to form which can be opened by selecting a appropriate option from the top or right-click menu.
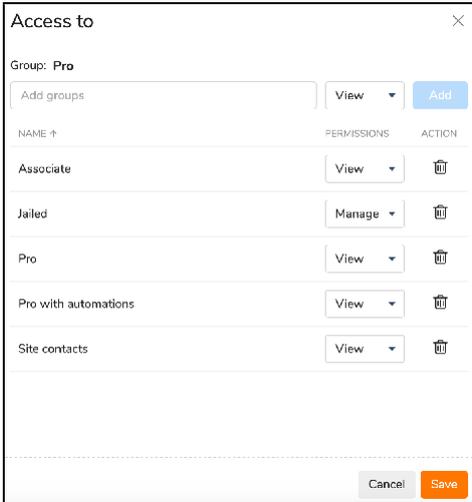
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1. Open the Access to form by clicking on the corresponding button from the top menu.
2. Type the group or select it from the drop-down list.
3. Determine what access type you would like to apply:

   - View - display members of the linked group;
   - Manage - add, edit and delete members of the linked group.

   > The group with less permissions cannot manage the one with more permissions, their members can have only View permission.

4. Add groups and save.

Your added groups are displayed in the list where you can edit permissions or delete some groups from the list.

> If you created a group without adjusting appropriate group access, in other words you didn't link any groups or contacts to your group, you won't be able to perform specific actions in the account e.g. file sharing cannot be performed as there aren't required members in the list.
>
> You can link other groups or contacts to your group on the Access to form as described above.

3.1.3 Editing a user group

You can simply edit your user group by selecting an appropriate option from the top or right-click menu.

> All permissions of predefined groups (pro, associate, jailed), except names, can be edited.

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3.1.4 Deleting a user group

Any group you created can be easily deleted by clicking the Delete icon from the top menu.

> Predefined groups (pro, associate, jailed) cannot be deleted.

The Delete group form allows you to move group members to another group by selecting a appropriate one from the drop-down list.

User groups are intended to help you make your user management easier and more effective.

3.2 Adding a user

If you would like to add a new user to your Quatrix account, follow the steps below:

1. Go to the Administration tab and open Manage users sub-tab.
2. Click on the Add user button from the top menu.

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3. Specify your user details and additional adjustments on the Add user dialog box:
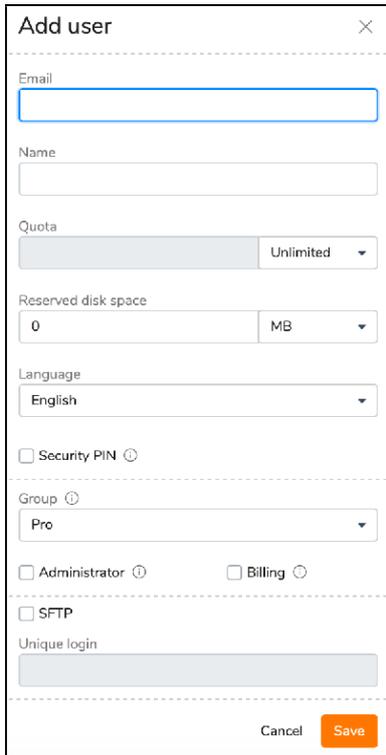
a. user name and email

b. quota - unlimited by default (=account storage), you can specify the storage limit for this user

c. reserved disc space - specify if you wish to reserve specific amount of storage to your desired user

d. language - English, German or Chinese

e. security PIN - optional PIN the user must enter when registering and setting password

f. user group - Pro, Associate or Jailed (predefined) or your own group. Learn more about user roles and their permissions

g. administrator rights - only to pro users

h. billing - permission to manage invoices and payments (only to pro and associate users)

i. unique login - if you wish your user to log in to SFTP using unique login credentials

j. login with SSO only - allows the user to access his account only using SSO

k. SFTP - permission to use SFTP

l. active - activate or deactivate the user. Deactivated users won't be able to log in

m. expiry date - set the time up to which the user can log in and use Quatrix services

n. notes

4. Click on the Save button.

> For additional security, you can adjust a security PIN for the user to enter while registering to Quatrix.

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3.2.1 Adding multiple users at once

In order to save your time for manual adding of multiple users (e.g. 50 or 100), you can use our Import users from CSV file feature. It allows to automatically add your users from previously generated CSV file.

Follow the steps below to add multiple users:

1. Click on Import users button from the top menu on the Manage users sub-tab.

2. Prepare CSV file that should contain the following fields:

    a. user email

    b. user name

    c. status (active or not)

    d. Administrator - - yes or no

    e. user group - pro, associate, jailed (predefined) or any that you created

    f. PIN - learn details on Adjust PIN code user registration access.

3. Click on the Next button, choose your CSV file and click on Import.

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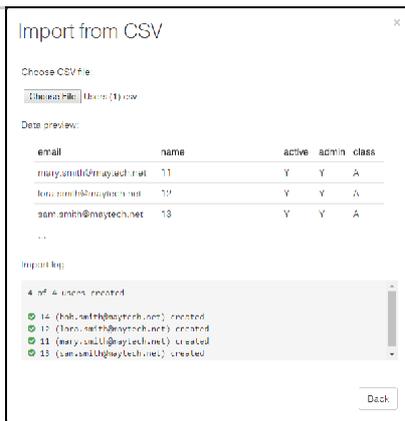
As soon as the import is completed, your users will be automatically added to the account.

> Emails already stored in Quatrix won't be imported. If the format is not corresponding, the import won't be allowed until it is corrected.

> SFTP can't be adjusted while importing. It can be adjusted while editing one or multiple users.

> A CSV file would be rejected if it contains more records than available licences.

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3.3 Getting user info

In order to learn more details about your user, select the check box next to the desired one, click on More from the top menu and select the User information option. This opens the form with details about the user.
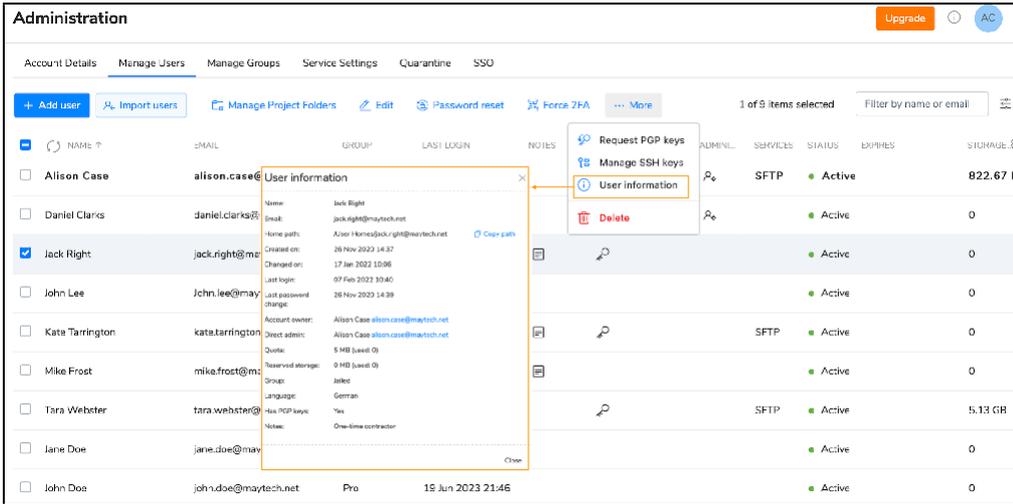
The form displays user's name and email. path to the home folder, dates when the user was created or updated, last logged in and last changed the password, account owner and direct administrator (the admin who created the user), assigned quota limit, reserved storage amount, group, language, PGP keys and notes.

3.4 Editing a user

To change user details or update permissions:

1. Select the check box next to the user you would like to edit and click on the Edit button from the top or right-click menu.

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2. Change user details in the Edit user dialog box.
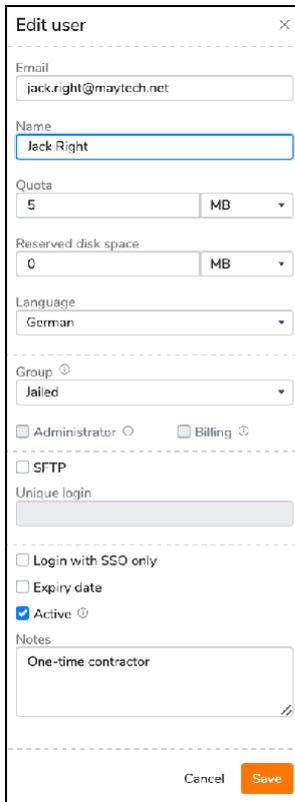

3. Click the Save button.

You get the notification that the user's profile has successfully been edited.

Possible user update cases:

- if you would like to set the limit for user storage, specify the quota amount, reserve some storage;
- user group update allows you to control account access permissions e.g. you can update pro user to jailed user that limits the access to only Projects shared with me folder;
- grant administrative or billing rights if you would like your user to cover account administration or invoice payment;
- enable or disable SFTP;
- activate or deactivate the user - make your account unavailable to access;
- set the expiry date when the service will be unavailable;
- update login methods - unique login or SSO only;
- switch the language of the user: from English to German or Chinese, or vice versa.

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3.5 Deleting a user

To delete a user select the check box next to the user you would like to remove, click on the Delete option from the top menu and confirm the deletion. The deleted user won't be able to access their Quatrix account.
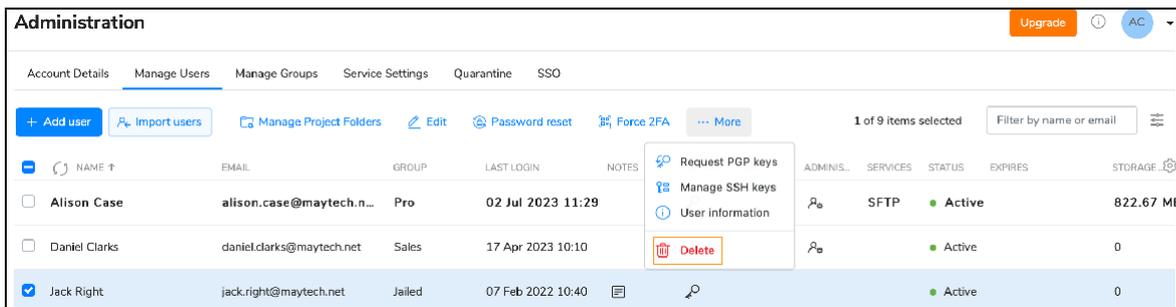
If you tick the Delete Home Folder check box while confirming the deletion, all files of the selected user will be deleted. If not, their home folder will stay in the file system and you will be able to access it.
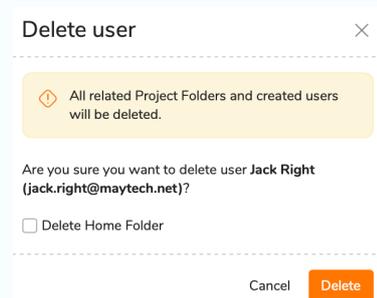
3.6 Converting a contact to a user

If you shared files with someone whose email wasn't used in Quatrix account, this email is automatically written to My Contacts list. You can easily convert your contact (either My or Site) to any user (Pro user - by default) by selecting the contact and clicking on the Convert button on the menu or selecting an appropriate menu option from the right-click menu.

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The conversion of users to contacts is not possible.
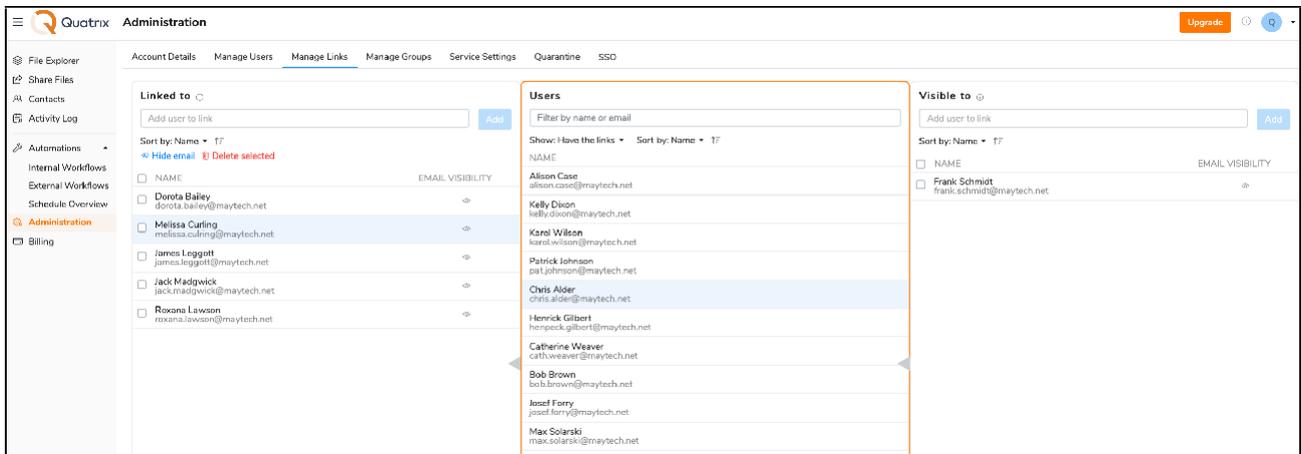
3.7 User visibility management

User visibility module is available on request.

This feature enables account owners and administrators to create and manage user links which provides better user visibility and leads to more accurate user management.
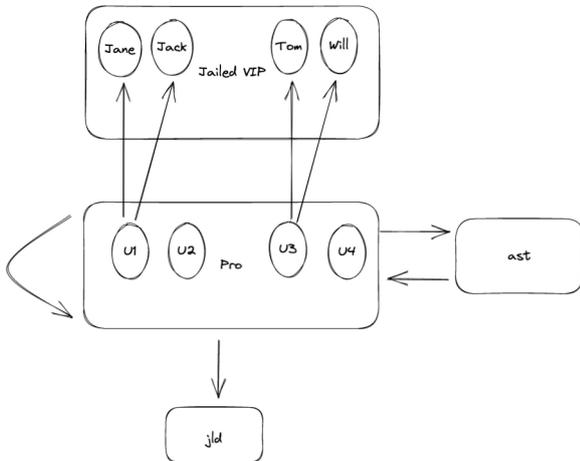
The diagram above illustrates how this feature works. If you created a special group of users called Jailed VIP, and isolated them from other users in the account by setting required permissions, their visibility will be limited. Users of the default Pro group can see all members of the Jailed group by default, but at the same time Pro users cannot access any of the users from the Jailed VIP group. But if you want to dig deeper and manage visibility on the user-to-user basis, e.g. allow the Pro user 1 see only Jane and Jack from the Jailed VIP user group, user-to-user visibility feature is what you need.

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It allows setting a required visibility to individual users of the group rather than assigning required visibility to all group members.

You can manage user links and adjust appropriate user visibility on the Manage links sub-tab of the Administration tab.

1. Select the user in the middle column.

   > This column can be sorted by Name or availability of links which makes your search easier.
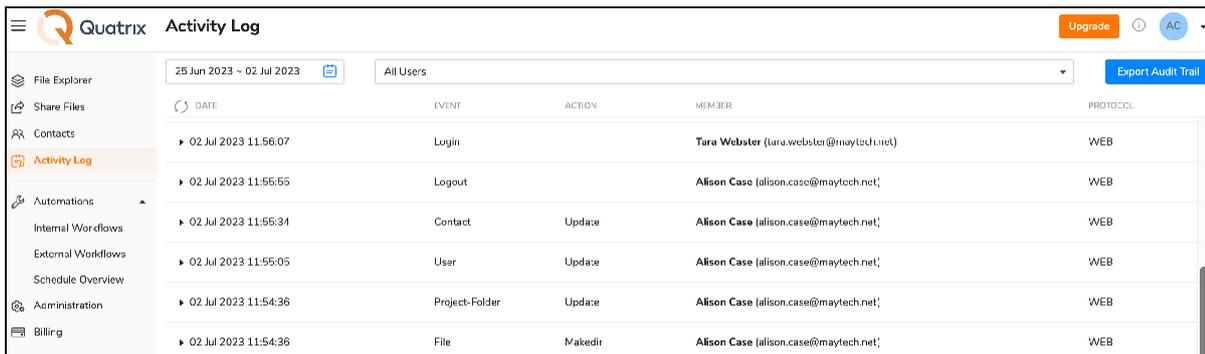
2. Manage users that are linked to this user in the Linked to column.

   1. To add a user, type the email in the Add user to link field and click on Add button.
   2. To delete a user, select the one and click on Delete selected button.
   3. To manage email visibility, click on Hide email which will display only the name.

      > If you select Hide email, only PF sharing will be allowed, as other actions in the account, e.g. file sharing or other actions, require emails for performance.

3. Manage users who can see the selected user in the right column.

   1. To add a user, type the email in the Add user to link field and click on Add button.

4. Save changes.

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4 Account Activity Tracking

Account owners and admins can get a bird's-eye view of account activity from the Activity log tab. This includes recent sharing activities of the account users, revoked shares, created quick links and file requests.
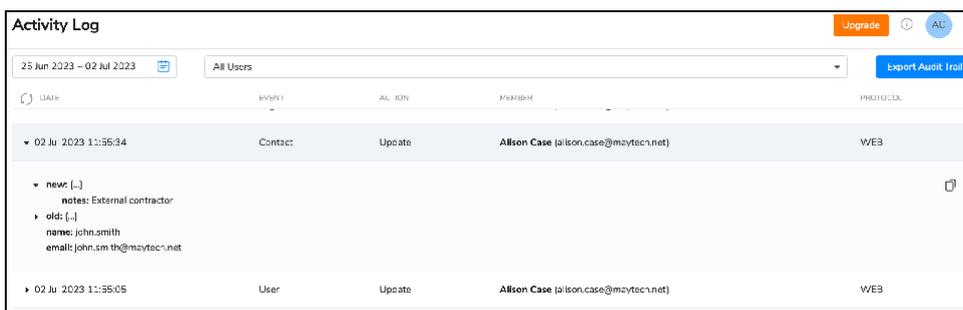

4.1 Activity log display

The Activity log tab allows you to adjust the display of your account activity by selecting a date range and users at the top. The log displays user actions and the date and time these actions were performed.

The default setting of the Activity log is to show your actions for a recent week. If you would like to check all users and their actions, select All users from the drop-down. To dig deeper into each action, you may click on the desired action and learn additional details about it.

Besides you can have details of all possible actions in the account by generating a full report of account activity across your Quatrix account for a specific period by clicking on the Export Audit Trail button in the top right-hand corner. The report will be generated in CSV format and will contain user login activity, password changes, their sharing actions and deletions as well as SFTP actions. See how the report looks like below:

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The Audit trail contains the following records:

- Account actions: account creation and updates;
- Log-in and log-out actions: when the user logs in or fails to log in and logs out of Quatrix;
- User and contact actions: creation, deletion, updates and moves between groups;
- Groups: creation, modification and deletion;
- Automations: details about automatic rules and their updates;
- Share actions: sharing, revoking or downloading files, creating or revoking quick links, requesting files and returning them back;
- Project folder actions: creation, modification and deletion;
- File actions: file upload and download, modification and deletion.
- File tags: creation and deletion.

If you would like to have these reports automatically generated, you can create a rule on the Automation tab. Learn more about automatic generation of Audit Trail reports here.

4.1.1 Revoke the access to shares

You can revoke or disable the access to the share by clicking on the Revoke button from the Share information dialog box. The revocation cannot be reverted that's why the share won't be accessible either to the admin or to the user. The revoked share is grayed out in the list on the Activity log tab.

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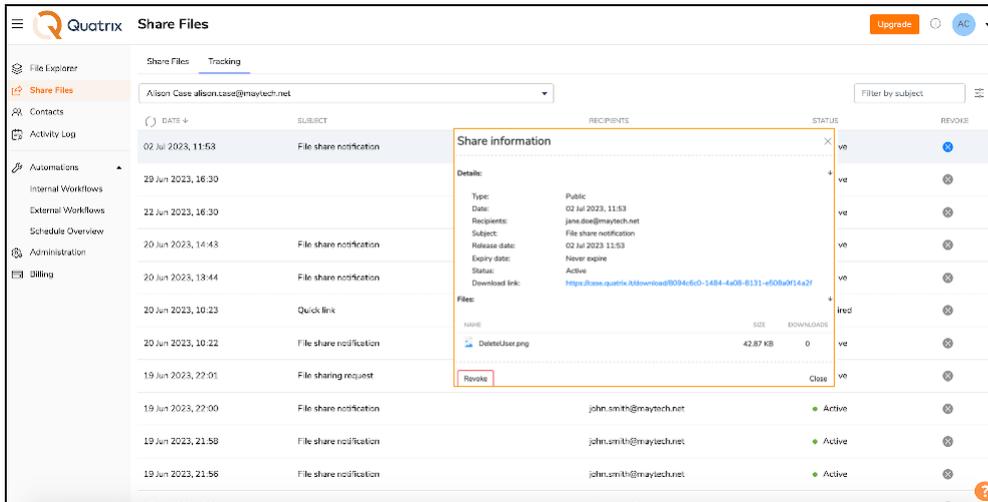
4.2 Track sharing within your account

You can keep track of user sharing activity on the Tracking sub-tab of the Share files tab.
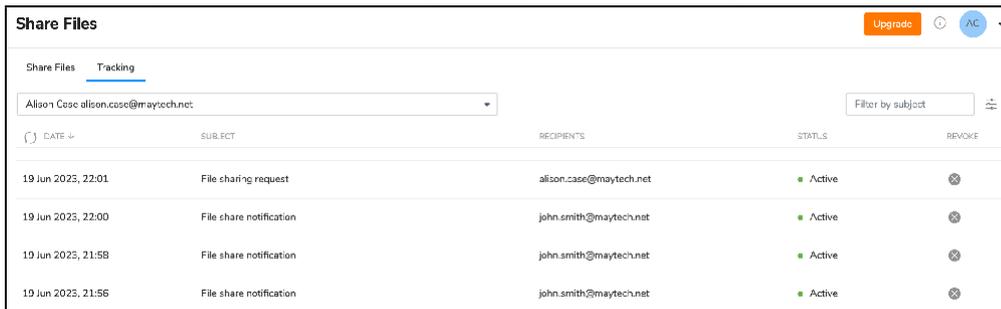
It displays sharing actions of the current user by default. To get details of shares of a certain user, select the one from the drop-down list. The following sharing actions are displayed:

- shared files - with your subject or the default "File sharing notification",
- shared quick link - with the default subject "Quick link",
- requested files - with the default subject "File sharing request",
- returned files - with the default subject "Re: File sharing request",
- revoked shares - grayed out in the list.

Besides the Tracking tab contains date and time the sharing action was performed as well as its recipients.

Every above mentioned sharing action contains additional information on the Share information dialog box which can be opened by left-clicking on it. The Share information displays the share type; date and time it was shared, released or expired; its subject; the status (active, revoked or expired); the download link and the download info with the file size and number of downloads.

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Share information ✕

Details: ↓

Type:	Restricted
Date:	19 Jun 2023, 22:00
Recipients:	john.smith@maytech.net
Subject:	File share notification
Release date:	19 Jun 2023 22:00
Expiry date:	Never expire
Destination folder:	/Incoming Shares
Status:	Active
Download link:	https://case.quatrix.it/download/08d8d311-3e93-47be-9dcd-976a3d007e79
Return files link:	https://case.quatrix.it/files-return/08d8d311-3e93-47be-9dcd-976a3d007e79

Files: ↓

NAME	SIZE	DOWNLOADS
logo_maytech_original_full(2).svg	12.64 KB	0

[Revoke]   Close

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5 Automations

Improve your productivity by automating workflows

Automate your internal and external actions in the account by creating no code automated workflows

Automations allow you to improve your productivity by automating some of your activities in the account. For example, if you would like to save the account storage and avoid chances of your account being overpopulated with junk data, you can add a rule to perform the deletion of files inside your selected folder.

- Internal Workflows
- External Workflows

The schedule overview tab displays all automations that run automatically on the specified schedule.
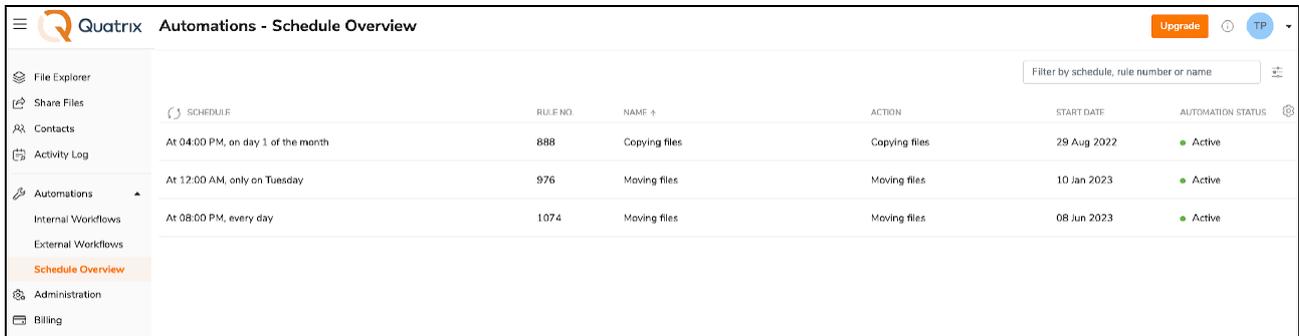
5.1 Internal Workflows

You can automate your actions in the account by setting up automation rules for internal workflows such as moving files to a desired location, tidying up inactive users or contacts, cleaning up unnecessary files.

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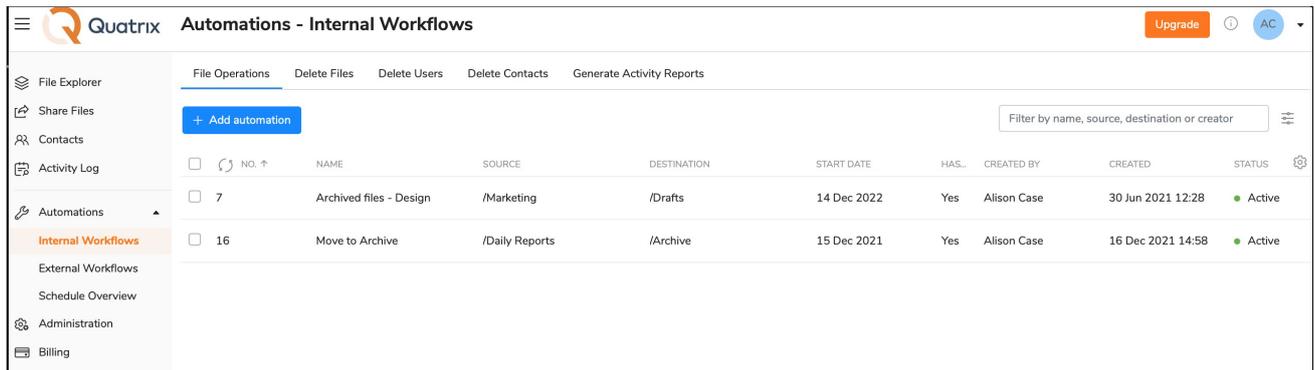
- Automatic file movements
- Automatic deletion of files or folders
- Automatic deletion of inactive users
- Automatic deletion of inactive contacts
- Automatic generation of activity exports

5.1.1 Automatic file movements

This feature is the foundation of automatic file organizing flow. As you use your account to share and upload files, it's easy to become buried in a sea of files with different names. That is the reason why it is important to keep your account tidy and organise your files by creating folders and putting files inside of them. You can automate the process by using automatic file movement feature. It will take a few minutes of your time to set up a rule that will do it for you.

To move files automatically:

1. Navigate to Automations→ Internal Workflows → File operations;
2. Click on the + Add automation button and specify the following:

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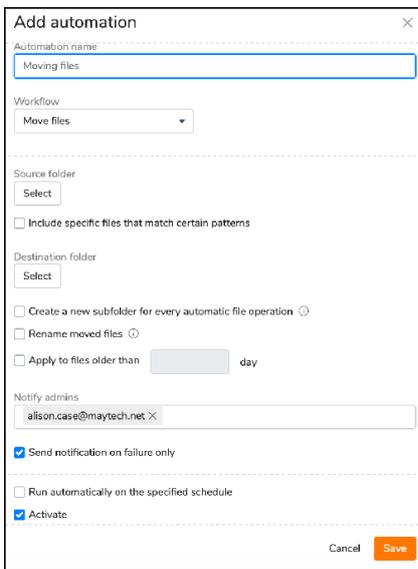
a. Automation name - Moving files by default;

> **Name your automations wisely**
>
> Automation name should be very clear and provide a self-descriptive idea about what file movement should be done e.g. Archived files of Company 1.

b. Workflow - select move or copy files;

c. Source folder - select the folder from where you are going to move your files;

> The Moving of subfolders is supported.

d. Include specific files that match certain patterns - you can specify what files should be moved by typing a desired pattern e.g. *.pdf, *company_name*.

Only Glob patterns are supported

pattern:

{ term }

term:

'*' - matches any sequence of non-Separator characters '?' - matches any single non-Separator character

'[' ['^'] { character-range } ']' - character class (must be non-empty) c - matches character c (c != '*', '?', '\\', '[')

'\\' c - matches character c character-range:

c - matches character c (c != '\\', '-', ']') '\\' c - matches character c

lo '-' hi - matches character c for lo <= c <= hi

e. Destination folder - select the folder to move your files to;

f. Create a new subfolder for every automatic file movement - your files will be added in a separate subfolder with the date in the name;

g. Rename moved files - tick to add the date to every containing file;

h. Apply to files older than - specify the age that the file should reach to be moved;

i. Notify admins - type emails for notifications;

j. Send notification on failure only - ticked by default;

k. Run automatically on specified schedule - - add the frequency

l. Start date - pick the date when to start the rule;

m. Activate - tick to make it active.

3. Click Save.

Quatrix will monitor selected folders and when a file matches your conditions, it will move or copy it automatically according to the created rule.

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5.1.2 Automatic deletion of files or folders

Delete Files sub-tab allows you to adjust the workflow for automatic deletion of files that are older than a specified period of time.

To add a rule for auto-deletion, follow these steps:

1. Go to Automations→ Internal Workflows → Delete Files sub-tab.
2. Click on the + Add automation button and specify settings for the automatic deletion:

   a. Choose folder - click on the Select button at the top right to choose the folder where you would like to activate the deletion. 1 folder for 1 rule!

   b. Delete files older than - specify the time interval the deletion should be performed.

   c. Emails for notifications - type in emails for file deletion notifications (your email is listed by default).

   d. Keep folder structure - tick this check box if you want to save the structure with folders and

   e. delete the contents of these folders.

   f. Skip home folder - tick if you intend to skip files of inactive users.

   g. Skip Project Folders - tick to leave Project Folders.

   h. Remove files permanently without sending them to the Trash.

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i.   Active - tick if you would like to activate the rule.

3.   Save the rule.

> If there is an overlapping of auto-deletion rules, the rule created first will apply.

Your added rules will be displayed in the list and will contain brief information about the adjusted deletion. All your listed rules can be easily managed by ticking the check box next to the rule and selecting an appropriate option from the top menu. You can edit, delete, activate or deactivate auto-deletion rules. The edition of the rule presupposes the change of previously specified settings. If you delete the rule, it won't be either available or applicable. The deletion cannot be restored back.

To make the rule inactive, click on the Deactivate icon and this grays the rule out in the list. Whilst the Activate rule icon allows to turn the rule on again.

5.1.3   Automatic deletion of inactive users

In case where many users share a common account it is always advisable to delete inactive users on a regular basis in order to control the appropriate usage of user licenses.

To automate the process of cleaning up inactive users from your Quatrix account, follow the steps below:

1.   Go to Automations→ Internal Workflows → Delete Users sub-tab.
2.   Add a rule by clicking + Add automation button from the top menu.

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3. Specify the deletion options:
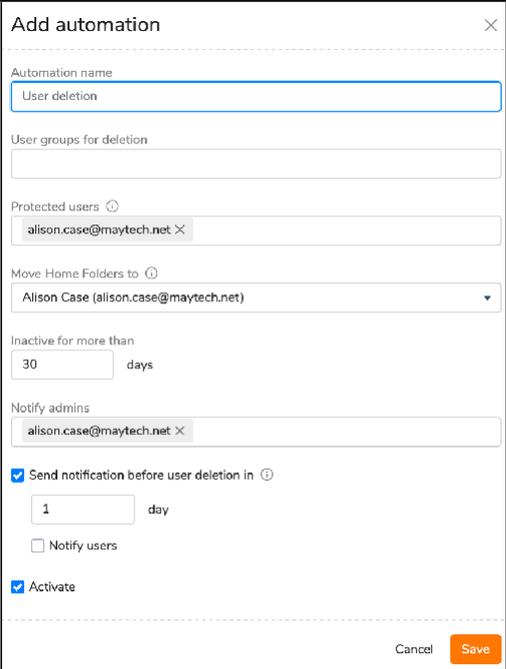
a. Automation name - enter an appropriate name for the automation;

b. User groups for deletion - select user groups for deletion;

c. Protected users - specify users that will be skipped in the process of deletion;

d. Move Home Folder to - select the administrator for moving files and folders of deleted users to a special folder called "Removed User Homes". Each administrator of the system may have such a folder if automated user deletion is targeted to them.

e. This folder is automatically created the first time this operation is run for the specified administrator. You can then further manage the data manually, or automatically using internal workflows features.

f. Inactive for more than .. days - specify the number of days for which users have to be inactive;

g. Notify admins - type emails of administrators for notifications of deletion;

h. Send notification before user deletion ... days - define when to send notifications before user deletion;

i. Notify users - tick if you would like to send notifications to users that will be deleted;

j. Activate - tick to activate the rule.

4. Click Save.

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5.1.4 Automatic deletion of inactive contacts

The more you share with new recipients, the more contacts you have in My Contacts list. Our system automatically creates contacts for every new recipient of the share. It could be overwhelming to have a large amount of contacts in the account. To address this, we would recommend to configure automatic deletion of contacts that would allow you to filter out inactive, outdated or otherwise unnecessary contacts without having to remove them manually.

You can configure automatic contact deletion on the Automations → Internal Workflows → Delete Contacts sub-tab.

1. Open Delete Contacts sub-tab of the Internal Workflows sub-tab.

2. Click on the + Add automation button and specify your desired settings for the deletion:
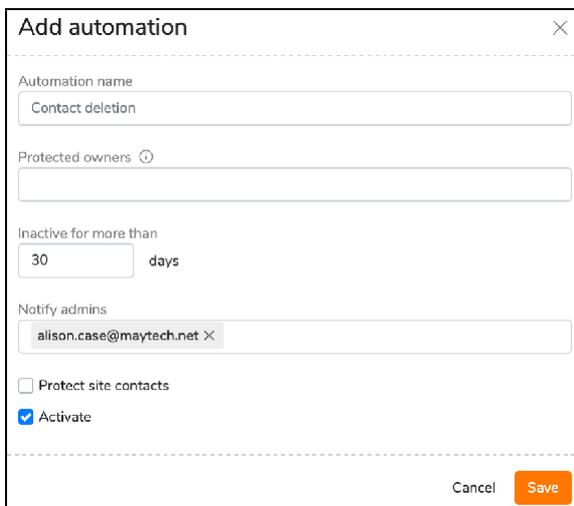
    a. Automation name - specify an appropriate name for the automation rule;

    b. Protected owners - users which contacts won't be deleted;

    c. Inactive for more than .. days - number of days for which contacts have to be inactive;

    d. Notify admins - emails of admins for notifications of deletion;

    e. Protect site contacts - allows you to skip site contacts in the process of deletion;

    f. Activate - tick if you would like to activate the rule.

3. Click Save

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5.1.5 Automatic generation of activity exports

Generate Activity Reports sub-tab provides a possibility to automatically receive logs in CSV format (a comma-separated values file that allows data to be saved in a tabular format) with the account activity on a regular basis.

> The automation rules created by the owners cannot be updated or deleted by the administrators.

To add a rule, follow the steps below:

1. Open Generate Activity Reports sub-tab on the Internal Workflows sub-tab.
2. Click on the + Add automation button and adjust settings for the rule:

   a. Choose folder - select the folder where you would like to store your activity logs;

   b. Emails for notifications - type in emails for automatic activity log notifications;

   c. Start date - pick the start date for the generation of future logs;

   d. Period - choose the frequency of report creation: daily, weekly or monthly.

   e. Active - tick if you would like to activate the rule.

3. Save the rule.

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The logs will be stored in your specified folder in CSV format and sent to the listed recipients in the email notifications.

If you would like to retrieve a log for the past period, go to the Activity Log tab and manually generate a report there. In order to save your time in future, adjust the rule with the above instructions and receive required logs with the specified frequency.

5.2 External Workflows

The Automation Module allows you to enable no code automated workflows between Quatrix and major cloud services / internal applications.

Video guide: https://vimeo.com/637081649

You can easily automate external file workflows such as transferring, copying or syncing files from your Quatrix account to any remote site or vice versa by creating external automation rules that will run with your specified file filters and on the desired schedule.

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Professional, secure and easy-to-use file sharing

> **Quatrix Remote Agent is now available.**
>
> It's a centrally managed client software for creating secure connections between Quatrix and on-premise systems.
>
> You can easily automate file exchange between on-premise networks and Quatrix in a secure and regulatory compliant manner.
>
>
>
> Let us know if you wish to try. Learn more.

Our step-by-step guide below will help you set up automations depending on the workflow.

- Add remote sites
- Set up your workflow

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5.2.1 Add remote sites

Quatrix requires information about your remote sites that should be specified prior to the creation of automation on Remote Sites tab.

1. Go to Automations/External Workflows and open the Remote Sites sub-tab.
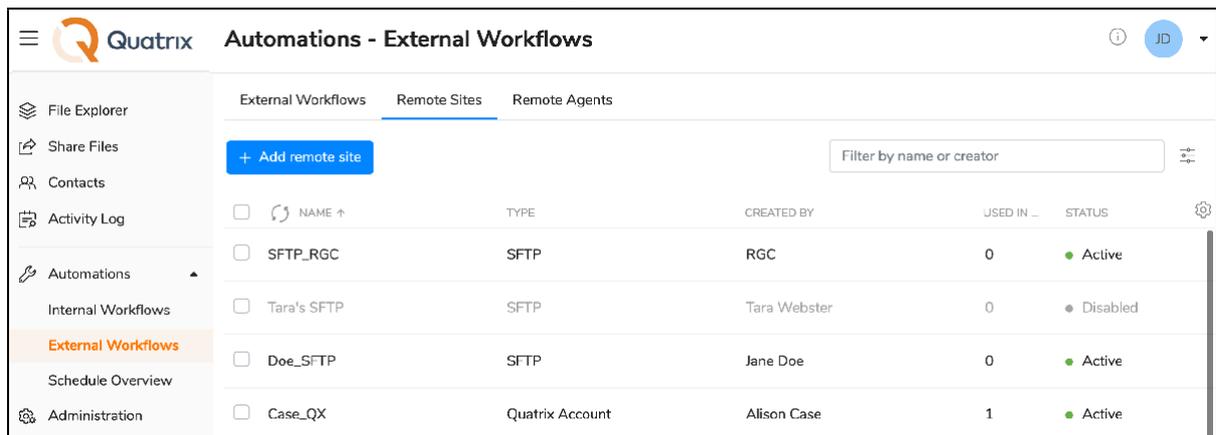
2. Click on + Add remote site button and fill in required fields:

   a. Type - specify the type of the remote site:

   - Quatrix account;
   - SFTP server;
   - S3 (cloud storage provider);
   - Microsoft Azure blob storage;
   - Backblaze;
   - Google Cloud Storage;
   - Microsoft OneDrive/ Sharepoint;
   - Box;
   - Dropbox.

   b. Name - enter the name of your remote account.

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   c. Fill in the required fields depending on the selected type.

3. Activate by ticking the check box and save the settings.

> You can test your connection to the remote site by selecting the desired one from the list and clicking on the Test connection button from the top menu.
>
>
>
> Moreover, you can test the connection while adding or editing the remote site.
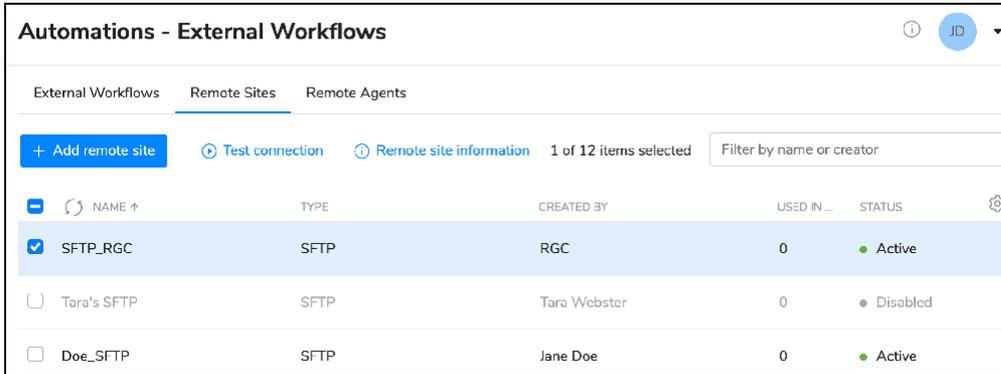
The list of your saved remote sites will be displayed on the Remote Sites tab where you can easily manage them.

5.2.2 Set up your workflow

Follow the steps below to add a rule for automating your desired workflow.

1. Go to Automations and open External workflows.
2. Navigate to the Remote Sites sub-tab, click on + Add remote site button to add your remote sites (see Add remote sites section above). Skip this step if you have already created a required remote site connection.
3. Go to External Workflows sub-tab and click on + Add automation button This opens the form for adding your desired automatic rule.
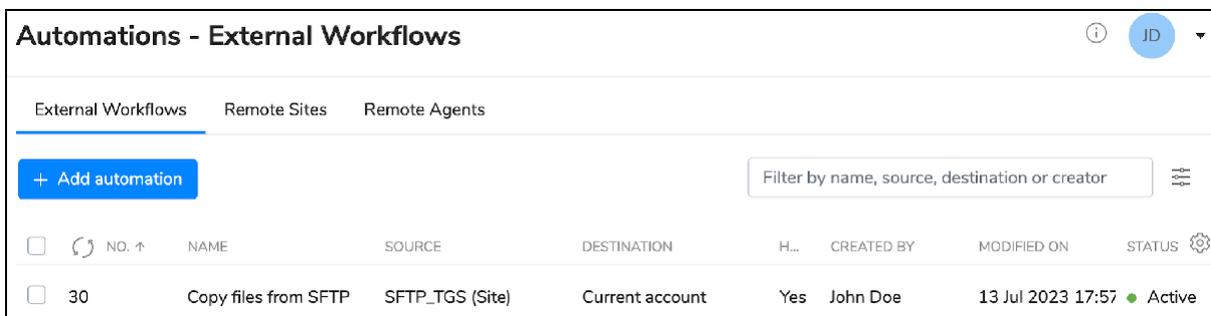
> You can use already existing automations for creating the new ones. Select the desired automation and click on the Duplicate button from the top or right-click menu.

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4. Enter the name for your automation.

5. Select a preferred workflow.

   - Move files - allows you to move files to/from Quatrix and any remote site keeping the same file structure.
   - Sync files - you can keep folders on source and destination synced.
   - Copy files - enables copying desired files form the source location to the destination skipping already coped files.

6. Specify the **source** by selecting the remote site from the list.

7. Choose the folder from where you are going to transfer files.

8. Filter your files for the transfer:

   - Include specific files that match certain patterns - allows you set the pattern that the files should include to be transferred.

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- Delete empty source folders - tick if you want to delete empty folders from the source after file movement.
- Set filters by file size or age - e.g specify the minimum size if you don't want to transfer any file smaller than this size.

9. Specify the **destination** by selecting an appropriate remote site.

10. Remote folder path - enter the path which shows where you want to paste your transferred files, or click on Choose folder button and select the desired folder.

11. Keep source folder structure including empty folders - this option allows you to preserve the same folder structure.

12. Make reserve copy - folders with copies will be created in the selected directory every time the automation runs.

13. Save backup - create a folder with the backup copy. (Backups are not supported for SFTP and Box)

14. Notify admins - specify emails of admins for notifications.

15. Send notification on failure only - tick if you wish to send notifications only in case of failures.

16. Run automatically on the specified schedule - set the time when your automation will run.

17. Pick the start date.

18. Write some notes regarding automation.

19. Tick Activate and save the rule.

As soon as the rule is created, it will be added to the list on the External Workflows tab.

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You can activate your automation rule manually - for a non-scheduled one action performance - by selecting an appropriate rule and clicking on the Run now button.

Supported storage providers

1. S3 Connectors
    - AWS S3
    - Alibaba Cloud (Aliyun) Object Storage System (OSS)
    - Ceph
    - DigitalOcean Spaces
    - Dreamhost
    - IBM COS S3
    - Minio
    - Scaleway
    - StackPath
    - Tencent Cloud Object Storage (COS)
    - Wasabi
2. SFTP
3. Azure Blob Storage
4. Quatrix
5. GCP (Google Cloud Platform)
6. Backblaze
7. Microsoft OneDrive/ Sharepoint
8. Box
9. Dropbox

Storage providers are being added all the time. Let us know if what you need is not supported.

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6 Security & Privacy

We care for the protection of

Privacy policy *

your privacy

02

01

your files

- HTTPS/ SFTP
- PGP encrypted file sharing
- PIN code file access
- Granular permissions to access files/folders
- Set file expiry and release dates
- Data residency
- Free antivirus

Quatrix - secure file sharing

- Secure passwords and 2FA
- IP address restrictions
- Control access to your account by assigning a user class
- PIN code user registration access
- Export audit trail
- Track activity history

your account

03

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GLOBAL DATA TRANSFER

* - Privacy policy

The protection of your files, account and privacy is our top priority. The features listed below are designed to help you make your file sharing easy and secure.

Protect your files	Control account security	Keep your personal information secure
• SFTP Module • PGP encrypted file transfer • PIN code file access • Granular permissions to access files • Data residency • Expiry/ release dates for shares • Revocation of files • Free antivirus	• Secure passwords and 2FA • IP address restrictions • Account access control • Account activity monitoring • PIN code user registration • Get copy of all shares via BCC • Intrusion detection and prevention	Take a look at our privacy policy that was designed to protect you personal information. The privacy notice describes how we collect and use your personal information in accordance to data protection law.

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Quatrix

Professional, secure and easy-to-use file sharing

You can easily manage the security and privacy settings for your Quatrix account: enable SFTP, PGP or 2FA, select share privacy type while sharing files, adjust the security PIN or set the release and expiry dates for your shares, apply IP restrictions to prevent unwanted access etc.

6.1 SFTP module

- Enable SFTP module
- Add SFTP users
- Manage SSH keys of users
- Limit SFTP access for users
- Custom SFTP login

SFTP module introduces secure, interactive and automated data exchange that allows files to be transferred between hosts in a similar way to SCP protocol. It encrypts both commands and data, which means that sensitive data and user passwords can't be intercepted by third parties.

> To enable SFTP access, go to the Administration tab → Manage users → Select user → Edit user → Activate SFTP check box.

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

6.1.1 Enable SFTP module

Our 14-day free trial allows you to try out SFTP (as it is included in our Enterprise security module). To continue using SFTP after the termination of trial, you need to purchase the Enterprise security module.

This module can be enabled by sending the request to Quatrix Customer Care or calling one of the numbers below:

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- International: +44 189 286 1222
- US and Canada: 1 800 592 1906
- UK: 01892 861 222

As soon as the module is activated, you will receive an email with SFTP credentials that are also displayed in the account on the SFTP sub-tab (click on the link with your name, go to Manage Profile and select SFTP sub-tab).

> You can access SFTP client with your account password.

Learn how to configure SFTP client, add or change SSH keys, and transfer files with SFTP in our User Guide.

6.1.2 Add SFTP users

The account owner or administrator can grant SFTP access to any user of the account. To add SFTP users, check if you have enough SFTP licenses purchased on the Account details sub-tab of the Administration tab.
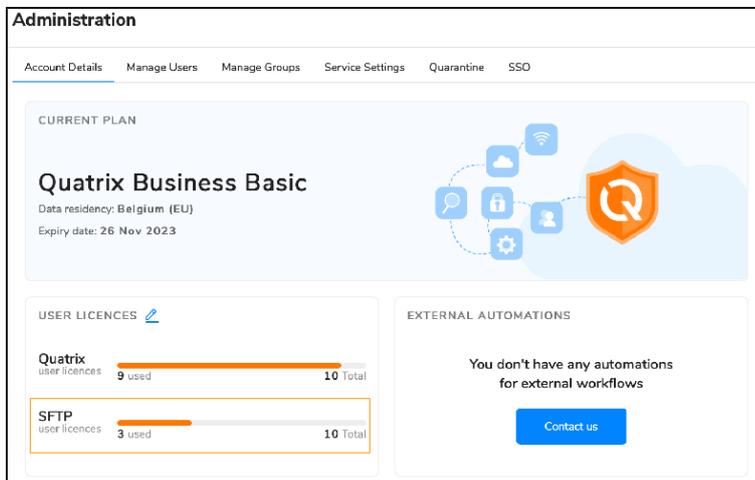
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The screenshot above displays SFTP section with 10 available and 3 used SFTP user licences.

> If you wish to enable SFTP for your contacts, convert them to users at first (on the Contacts tab, see Contact Management) and then activate SFTP by ticking an appropriate check box at user creation or edition.

To add SFTP user, follow these steps:

1. Go to the Administration tab and open the Manage users sub-tab.
2. Select the user from the list or add a new one.
3. Tick SFTP check box and save.
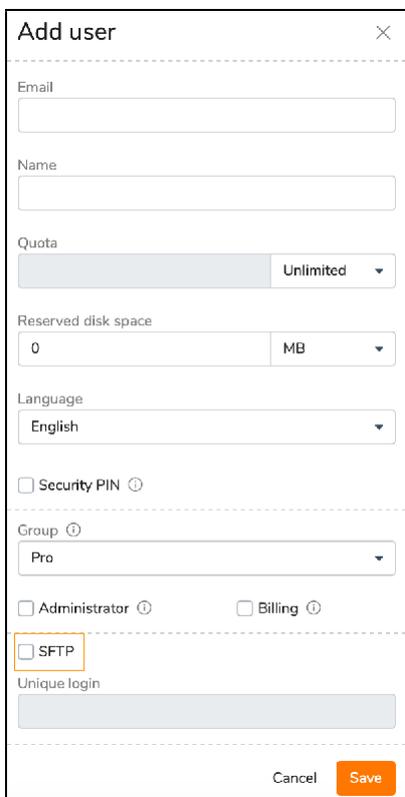
Your user will get an email notification with SFTP credentials as soon as SFTP is enabled.

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

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

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6.1.3 Manage SSH keys of users

You can manage SSH keys of your users on the Manage users sub-tab of the Administration tab. If you would like to add SSH key for your user, follow the steps below:

1. Select the user on the Manage users sub-tab and click on the Manage SSH Keys option from the menu.
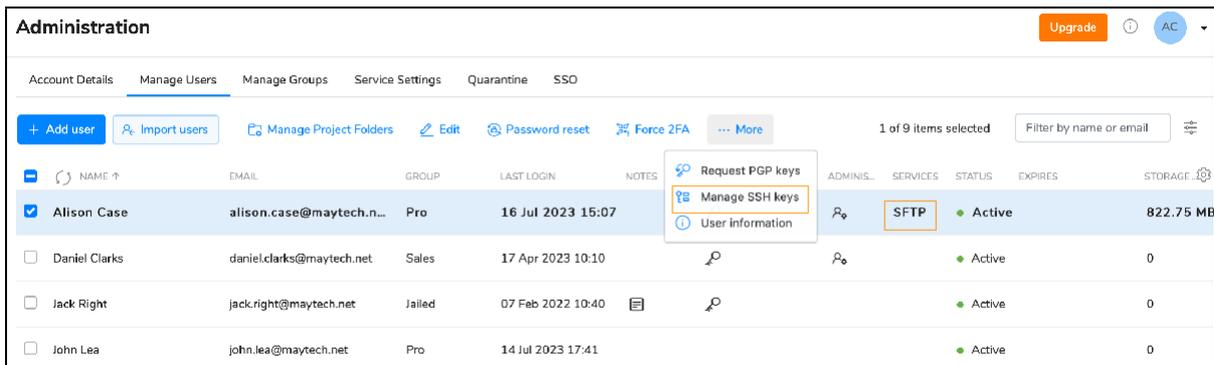
2. Click on the Add SSH Key button on the Manage User's SSH Keys form.
3. Add your previously generated SSH Key. Learn more how to generate SSH keys in our User Guide.
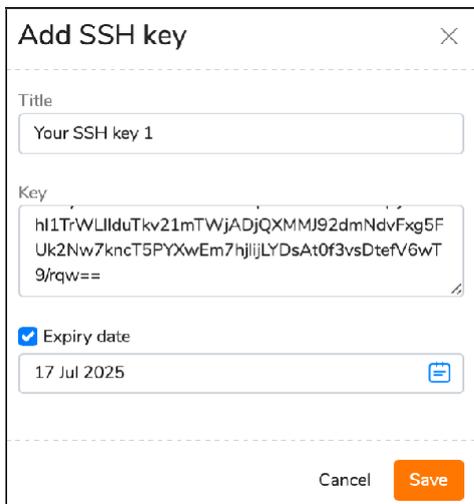
4. Save the key.

All SSH keys that you added for this user will be displayed in the list on the Manage User's SSH Keys Form.

> You cannot edit the key, but only its title.

Your user will be informed about a generated SSH key details in the email.

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6.1.4 Limit SFTP access for users

To limit your users to a specific folder via SFTP, select Jailed Users group while adding or editing them. Then add these Jailed users to a relevant Project Folder. This allows you to limit the access of users to only folders shared with them within the folder Projects Shared With Me. Besides, you may create your own group with preferred permissions.
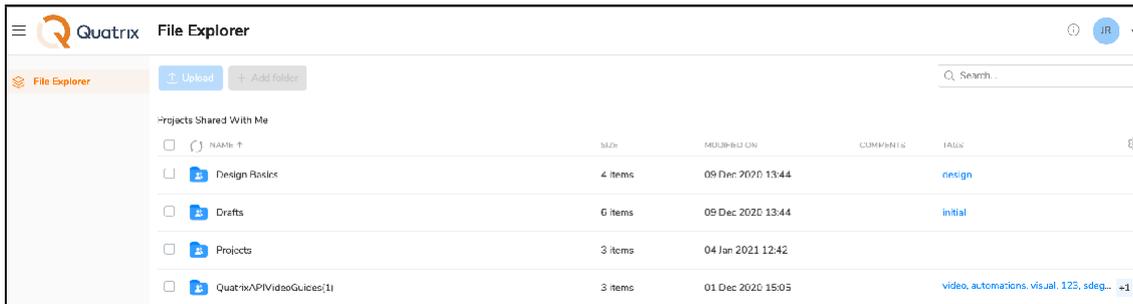
Learn more about project folder management in our User guide.

6.1.5 Custom SFTP login

Connecting to your repository using custom SFTP login can be handy if you would like to use your existing individual SFTP login.

To use a custom SFTP login, follow these steps:

1. Set up a dedicated IP address for your account by sending a request to Support.
2. Update your SFTP details with custom SFTP login on the Administration tab:

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a. Go to Manage Users sub-tab, find yourself in the list and add your custom SFTP login.
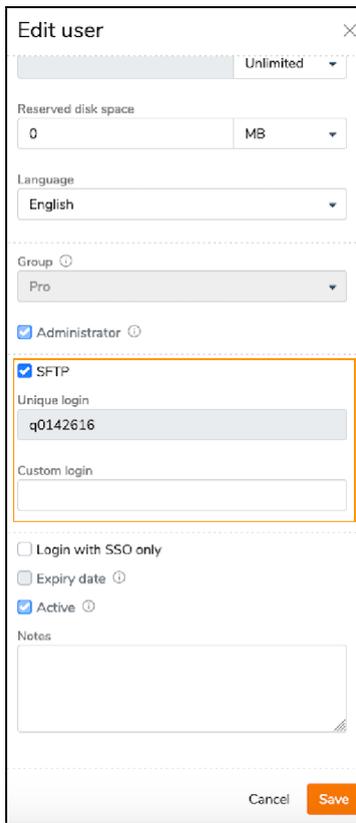
As soon as you saved your custom SFTP login, it will be displayed in the profile under SFTP sub-tab.
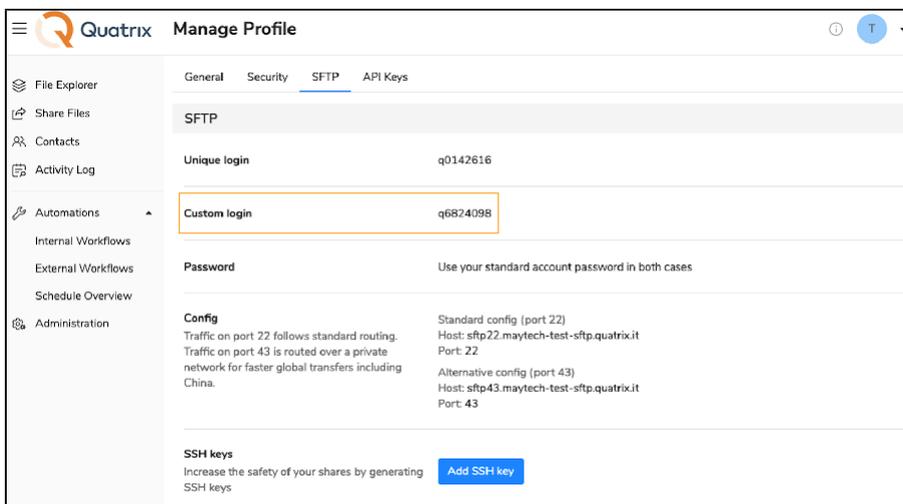
You will also have a possibility to add custom SFTP login to your new or existing users while adding or editing them, as the custom SFTP login is turned on for the account.

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6.2 PGP encrypted file transfer

- PGP Key Generation
  - Public Key Generation
  - Private Key Generation
- Encrypting and Decrypting Files

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

PGP (Pretty Good Privacy) is a protocol that is used for encrypting and decrypting files using a key pair. If you need to be certain that no one (really, no one) except the intended recipient can decrypt your confidential files, you may use PGP encrypted file transfer.

The diagram below displays how PGP works in Quatrix. 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. But despite being cumbersome PGP is still a universally-accepted standard for file encryption.

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Quatrix PGP Scheme

Preconditions:

1. Enable PGP Encryption on the Administration tab
2. Both **Public** and **Private Keys** should be generated

SENDER
Generates Public Key
in the Manage Profile/Security

Requests
Private Key

**PGP Key
Request**

RECIPIENT
Generates Private Key
following the link in the email

PUBLIC KEY

**PGP
Encrypted
File Sharing
Enabled**

PRIVATE KEY

Encrypts and
shares file

Decrypts and
downloads file

SECURE FILE SHARING
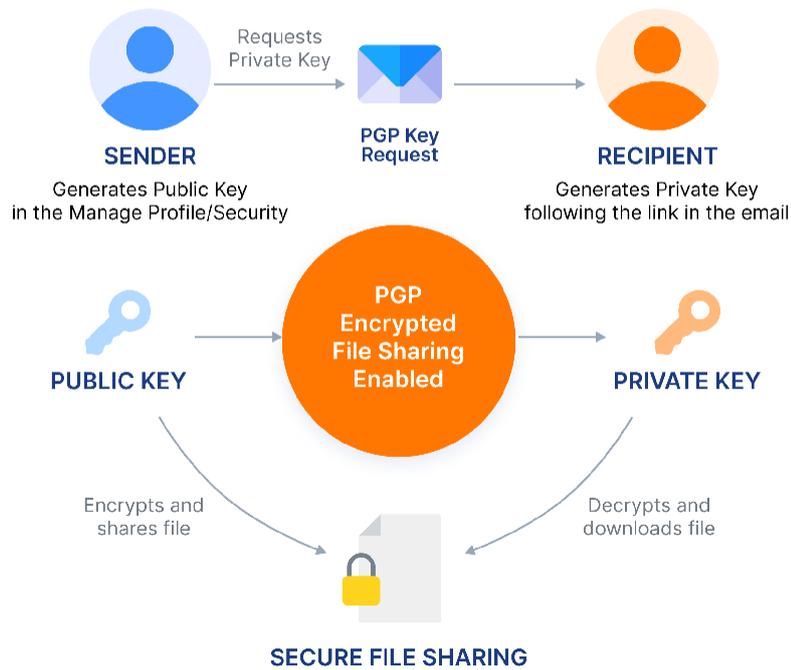
Enable PGP encryption

The account owner or administrator can enable or disable PGP for the account on the Administration tab.

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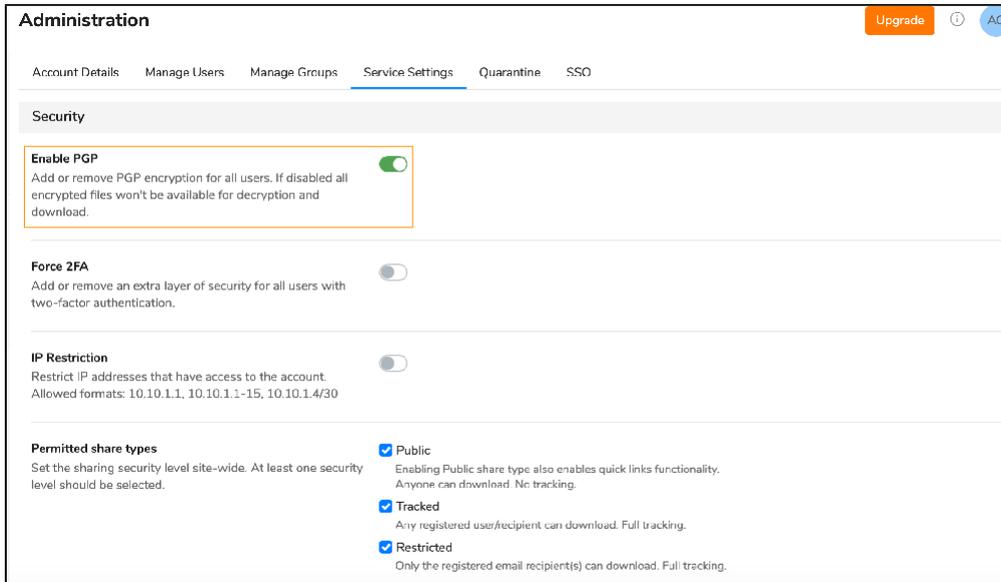
As soon as PGP is activated, all users can share PGP encrypted files, besides contacts that can only decrypt, download and return encrypted files.

> If you disable PGP, all encrypted files won't be available for decryption and download.

6.2.1.1 PGP Key Generation

To proceed with encrypted file sharing you need to check if private and public keys are generated.

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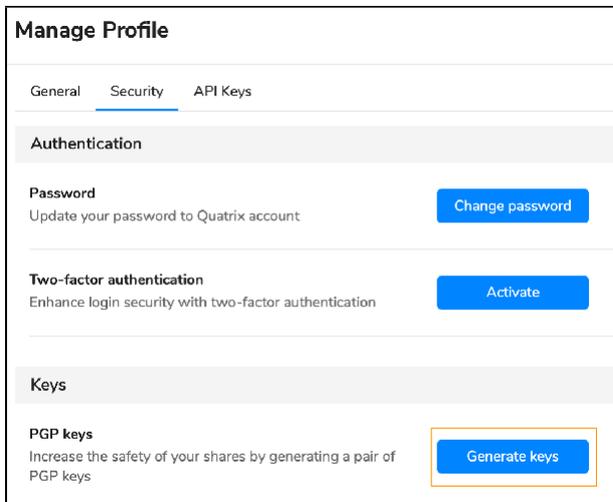
> Key Security
>
> Your keys are securely stored on the Quatrix platform, additionally all private keys are encrypted using your passphrase. The passphrase is not stored or remembered by Quatrix which gives you peace of mind that no one (and that includes Quatrix staff), can ever decrypt files in transit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

6.2.1.2 Public Key Generation

You should generate public keys at first - follow 3 simple steps below:

1. Click on the link with your name at the top right and follow the Manage Profile link.
2. Open the Security sub-tab.

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3. Click on the Generate Keys button which opens the window for creating the passphrase for your keys. After clicking on the Generate keys button you get the notification that your PGP keys have successfully been generated.

and then request another pair of keys from the intended recipient - send PGP key generation request.

You should determine who you are going to share encrypted files with, tick the boxes next to them either on the Contacts, or on the Administration tab and select the Request PGP keys button from the top menu.
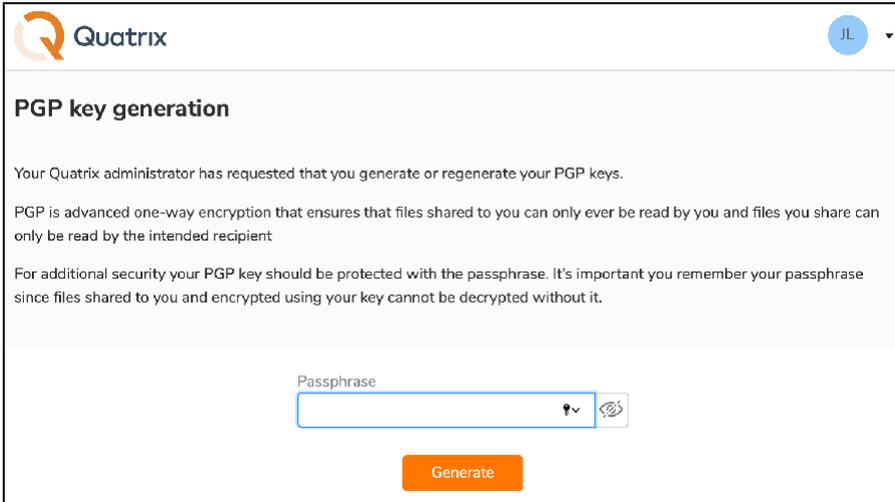

Besides you can send the request while adding your contacts by ticking the Request PGP keys check box.

6.2.1.3 Private Key Generation

When the request is sent, your recipient gets an email with the link to generate PGP keys. The recipient follows the link and generates PGP keys.

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Once PGP keys are generated, a confirmation email will be sent to the sender of the request.

> ### Changing PGP Keys vs Passphrase
>
> Your PGP keys can be changed at any time on the Security sub-tab, but all previously encrypted files won't be accessible as they were encrypted with the different PGP keys. If you noticed that your passphrase was compromised, you can simply change the passphrase to your keys by clicking on the Change Passphrase button. This preserves you the right to decrypt all previously encrypted files.
>
>
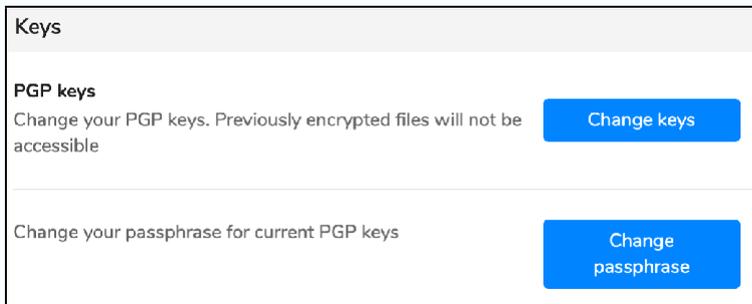
6.2.2 Encrypting and Decrypting Files

Encrypting 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.

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To share encrypted files you should select the PGP encrypt files check box on the Optional Settings section while sharing files.
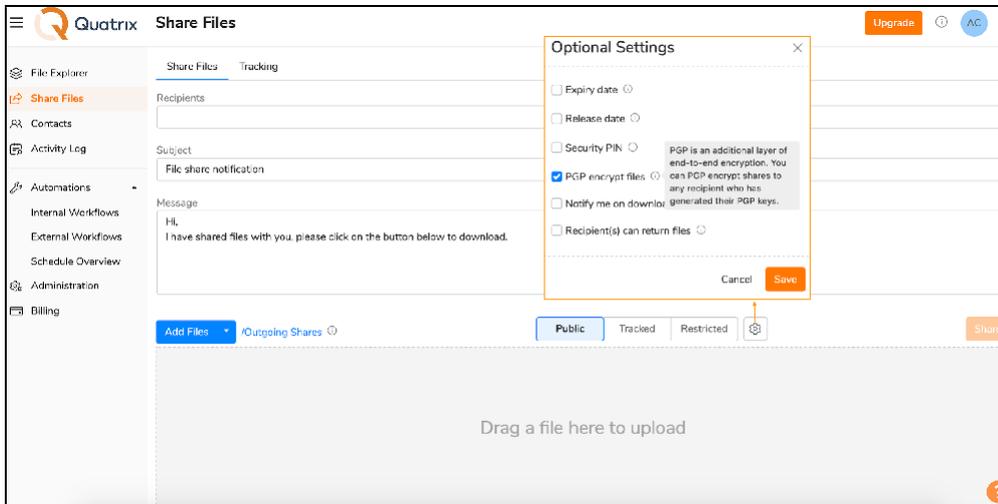
If your recipient hasn't generated PGP keys, the email will be highlighted in red and you will be notified of missing keys. You should request keys from your recipient on the Administration or Contacts tab to proceed with encrypted file sharing.

You can easily decrypt files by following the Download link from the email and entering the passphrase while downloading files. You can store your files locally or on Quatrix cloud.

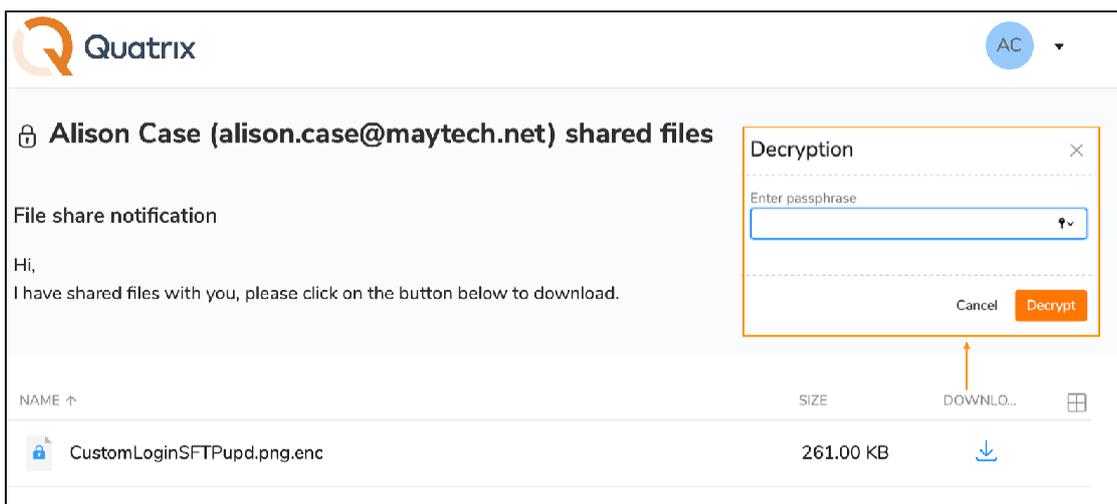If you forgot your passphrase, you won't be able to decrypt shared files! To proceed with encrypted file sharing you need to change your PGP keys on the Security sub-tab.

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6.3 File security settings

This page contains features that constitute the security of your files.

- Expiry and release dates for shared files
- PIN code file access
- Revocation of files
- Granular permissions to access files
- Notifications on download
- Quarantine files

6.3.1 Expiry and release dates for shared files

You can share your files with anyone and then for the security reasons you can limit the time your shared files will be available (by setting the expiry time and date) or you can specify the time when your uploaded files will be available for download (by setting the release time and date).

Follow the steps below to share files with the expiry date:

1. Go to the Share files tab, specify the recipients and upload files.

2. Select your preferred share privacy: public, tracked or restricted and click on the Optional settings icon which opens the window for setting additional share adjustments.

3. Check the Expiry date check box, pick the required date and time and click Apply date button.
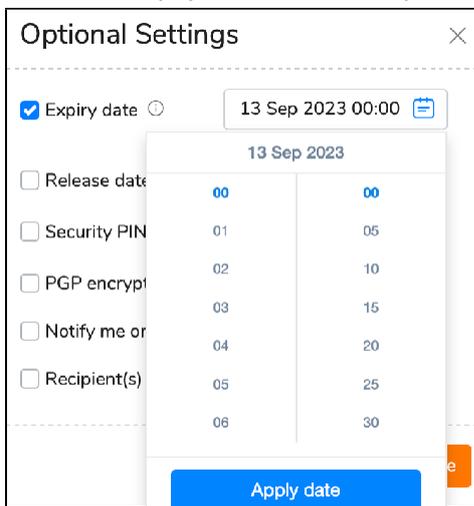
4. Save your settings and share your files.

Your uploaded files will be sent with the link that expires on your specified time.

To share files with the release date follow the steps above (1-2), and specify the release date and time for your shared files the same way as described above. You can upload your files and send out the links any time, but download links are inactive until the chosen time.

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6.3.2 PIN code file access

Users can create a unique PIN code for recipients to enter before accessing the shared files.

To share files with the Security PIN you need to check the corresponding check box in the Optional settings while sharing your files.
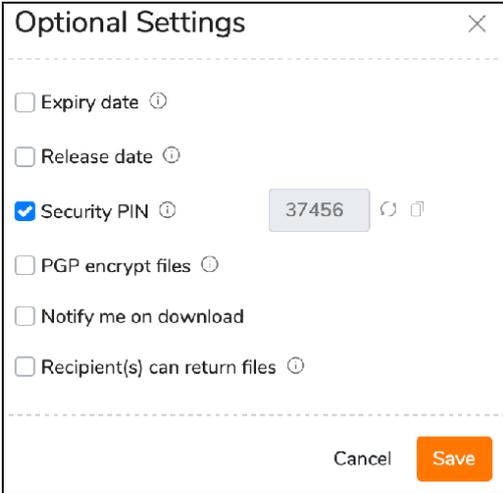
> PIN code can be used only once. If the user forgot your shared PIN code, you need to share files again. To omit double sharing, save PIN code until the user receives your files.

6.3.3 Revocation of files

If you would like to make already sent files unavailable, go to the Tracking tab, find the required share and click on the ✖ Revoke share icon.

The revoked share will be greyed out in the list and the share information will contain the status indication Revoked.

> The revoked files cannot be returned back. You can make these files available only by sharing them again.

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6.3.4 Granular permissions to access files

You can keep control over what your users can do with what you have shared. Granular permissions in Quatrix allow you to control what files your users can access and what they can do with these files.

Share privacy in Quatrix allows you to set the sharing security level, specifying who can access your shared files.

- **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.

Every user can specify the sharing security level while sharing files. Learn more on File Sharing. Account owners and administrators can adjust share types that will be allowed for sharing on the Administration tab.

If you would like to limit the permitted share types account-wide, follow these steps:

1. Go to the Administration tab and open the Service Settings sub-tab.
2. Tick the check boxes with the share types that you would like to allow.
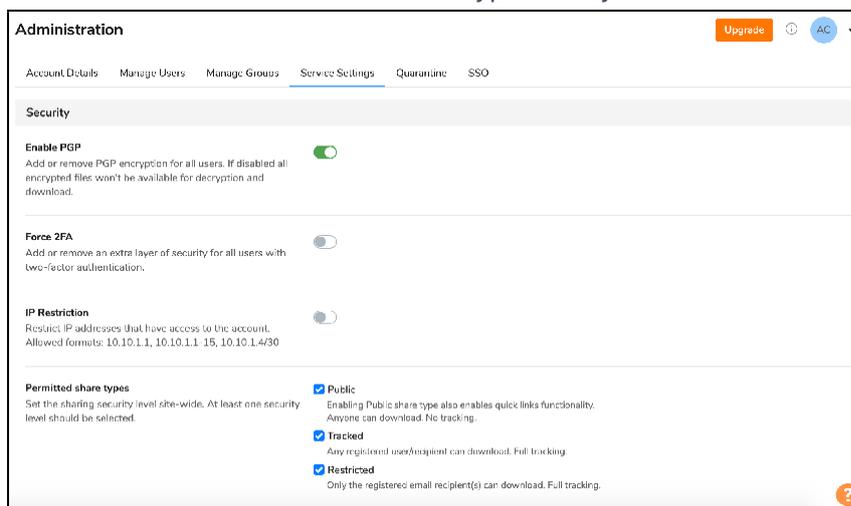
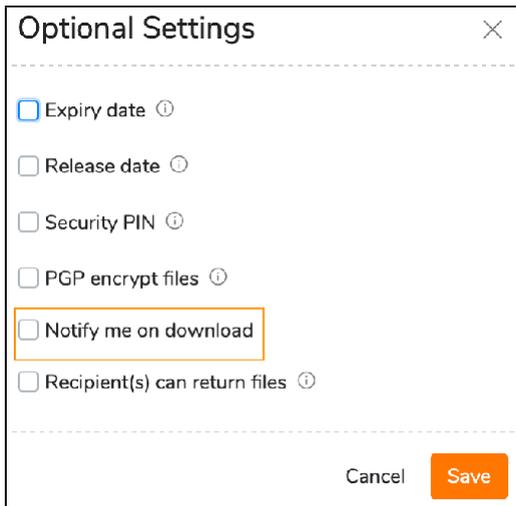3. Save changes.

The control of files and folders inside Quatrix can be performed via project folder permissions. Learn more here.

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6.3.5 Notifications on download

If you use Quatrix to share files with your clients, you can be notified when your clients have downloaded files. To receive the download notification, check Notify me on download check box in the Optional settings while sharing files.

As soon as your client receives your desired files, you will be emailed the download confirmation with details who, when and how many times downloaded your files.

This feature allows you to control if your shared file was downloaded and if your intended recipient downloaded it.

6.3.6 Quarantine files

Since we are responsible for the security of your data that you store or send with Quatrix, an Antivirus is enabled by default.

Once a file is uploaded, it is queued for the antivirus check. If a file is infected, it gets blocked for the download.

Quatrix Antivirus quarantines suspicious files to a special place called 'Infected files' located on the Administration tab.

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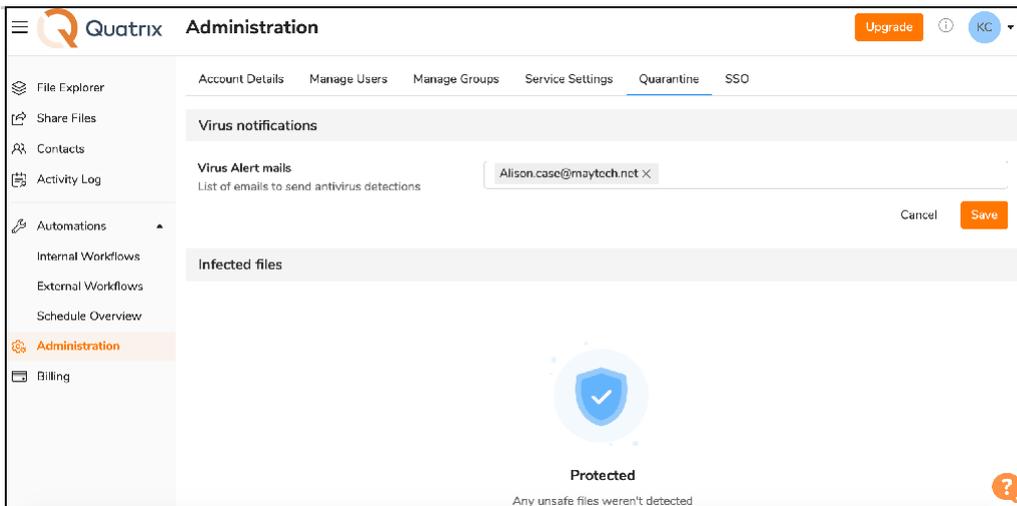
If you are certain a quarantined file is not a threat, you can restore it.

In case a malware is detected, an email alert is sent to emails listed in the Virus Alert mails field. The virus name is also shown in the File Info.

> Worth mentioning that Antivirus is free!

6.4 Account security settings

We care for the protection of your account security. Here are some tips to hep you set up your account securely.

- Create strong and unique passwords
- Turn on 2FA verification
- Set IP address restrictions
- Adjust PIN code user registration access
- Control access to your account by assigning a user group or administrator permission
- Get copy of all shares via BCC
- Track activity history in your account

6.4.1 Create strong and unique passwords

A strong password is the one that you can easily remember, but the hacker will never guess. In order to ensure strong password security for users, Quatrix password must conform the following rules:

- be at least 8 characters long.
- include lowercase and uppercase alphabetic characters, numbers and symbols.
- not be a common dictionary word, email address or any information associated with the account.
- should be unique, different from the previous passwords.

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Change your passwords from time to time

If you would like to keep your passwords secure, try to change them regularly and never repeat previously used passwords.

Follow the steps below to change your account password:

1. Click on the link with your name at the top right and follow the Manage profile link.
2. Open the Security sub-tab and click on the Change password button.
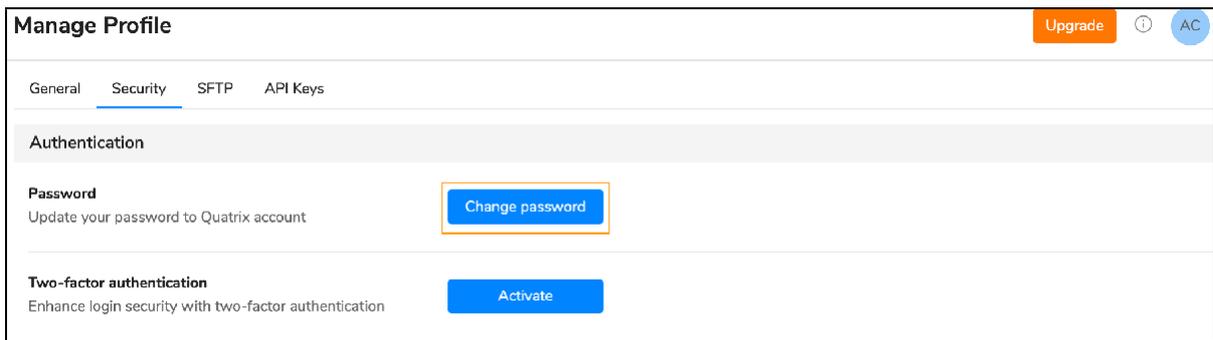
3. Type in your current password and then generate a new one.
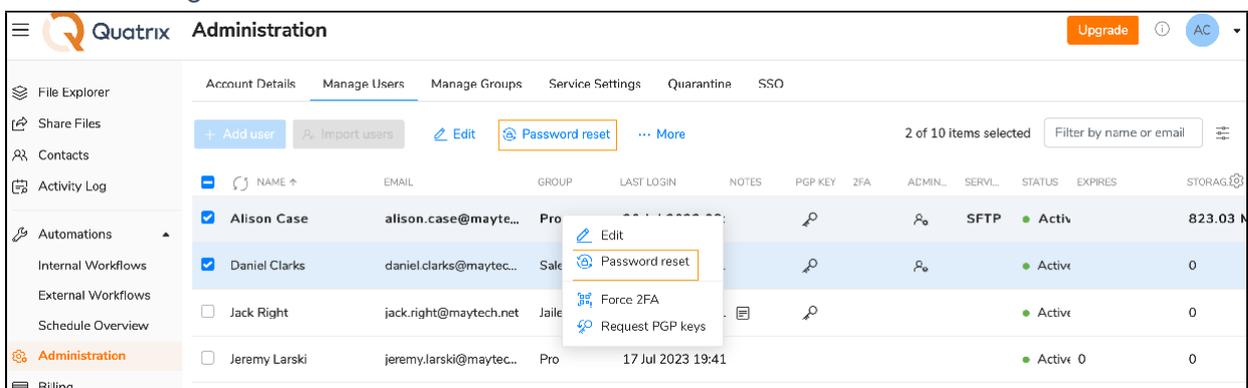4. Save your password.

If you forgot your password, follow the Forgot password link on the Account Login page and follow the instructions sent by email to reset the password.

Force password reset for account users

Account owners and admins can keep Quatrix account secure by requiring their users to reset passwords.

To send a password reset request:

1. Go to the Administration tab and open the Manage users sub-tab.
2. Select users you would like to change their passwords and click on the Password reset icon from the above or right-click menu.

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3. Click on the Send button.

Your users will receive emails with the links to reset their passwords.

6.4.2 Turn on 2FA verification

Two-factor authentication (also known as two-step verification or 2FA) adds a second layer of security to your online file sharing. Every time you log in to your Quatrix account, you will need to enter a six-digit security code using your phone or other mobile device in such a way verify your identity. This prevents anyone but you from logging in, even if they know your password. For more information on how to enable or disable 2FA see our User Guide.

Force 2FA for account users

The account owner or administrators can enforce 2FA either for one user, or a group of users, or for all users of the account.

If you would like to force 2FA only to a definite user or a group of users, go to the Administration tab and tick the check box next to the user(s) and select the Force 2FA icon from the drop-down menu or choose an appropriate icon from the above menu.

To make 2FA mandatory for all users on the account level follow these steps:

1. Go to the Service Settings sub-tab of the Administration tab.
2. Tap the toggle from off to on next to the Force 2FA under Security section.
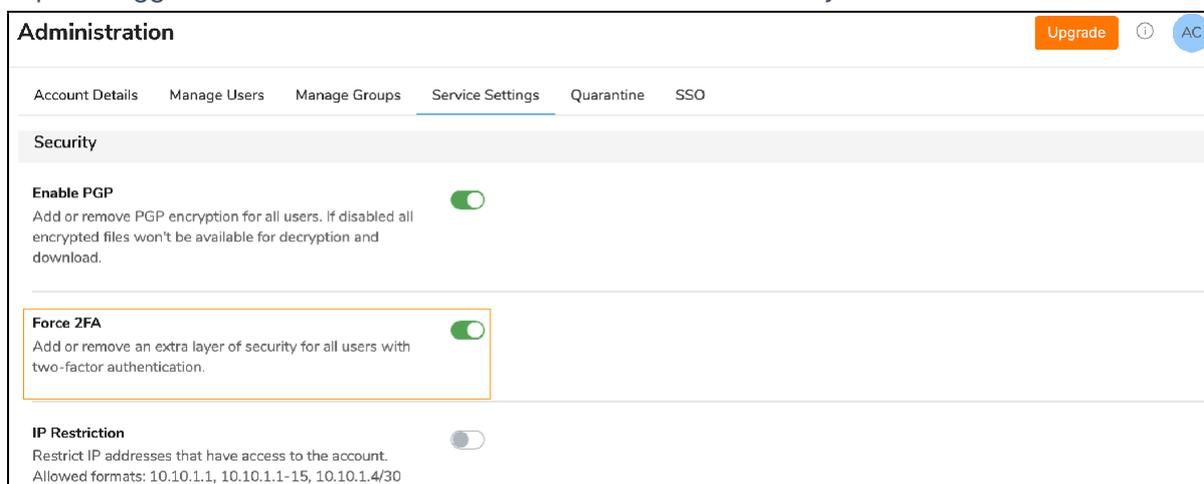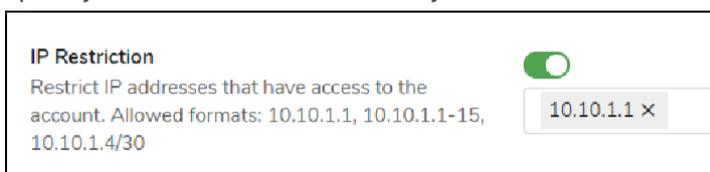

3. Click on the Save button.

6.4.3 Set IP address restrictions

As the owner or administrator, you can use the IP Restriction setting to prevent users in your company from logging in to your Quatrix account from any unauthorized locations. You can specify the range of IP addresses (or networks) to allow connection to Quatrix both via HTTPS and

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SFTP protocols.

To restrict IP addresses that have access to the account:

1. Go to the Administration tab and open the Service Settings sub-tab.
2. To activate IP address restrictions tap the toggle from off to on next to IP restriction.
3. Specify a list of IP addresses in any of the allowed formats: 10.10.1.1; 10.10.1.1-15; 10.10.1.4/30.

> You must include your current IP address to the list before saving the IP filter configuration.
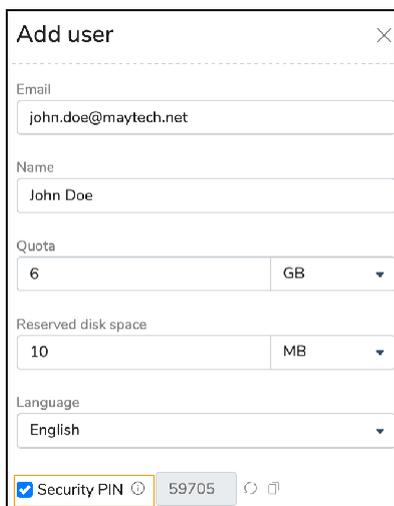
4. Save changes.

Your users with the listed IP addresses will have access to your account, the others won't be able to log in to Quatrix.

If you would like to deactivate IP restrictions, switch the toggle to off state. This returns the access to your account for all your available users.

6.4.4 Adjust PIN code user registration access

If you add a new user to your account, you can use the Security PIN feature that allows you to check if the person you intend is registering for the account.

To use this feature, you need to check the Security PIN check box while adding a user and share this PIN code in the most secure way.

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Your user will perform 3 steps instead of 2 ones to register for the account.

1. Follow the one-time link form the email to set the password.
2. Log in to the account with the already set password and email.
3. Enter PIN code to access the account.

> The security PIN is randomly generated and cannot be changed. Save this PIN until your user is registered. If your user loses your shared PIN, you can share your saved PIN code and omit the repetition of adding this user with PIN code again.

For security reasons, we are not allowed to tell the user if they have entered an invalid user name, password, or PIN. If they have forgotten their password, they should go to the Log in page and follow the Forgot password link. If the PIN code is incorrect, the user should contact the administrator mentioned in the email.

6.4.5 Control access to your account by assigning a user group or administrator permission

The access to your account can be managed by assigning a specific user group to your users or by granting administration rights.
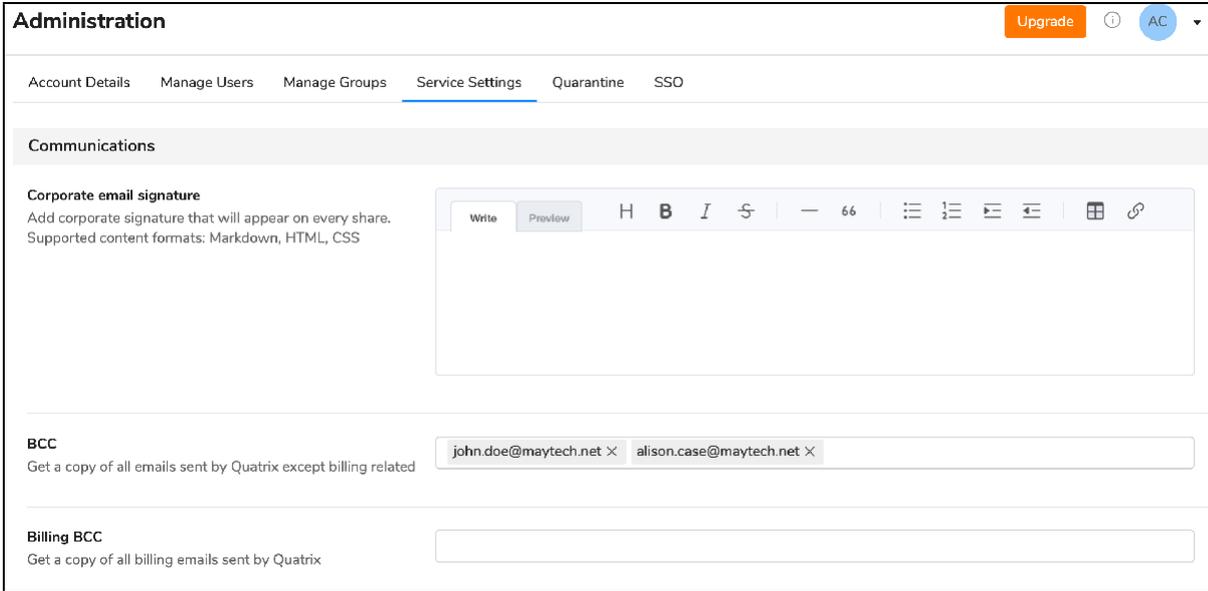
You can organise your users into groups with necessary sharing and access permissions. The following 3 predefined user groups are created by default:

- **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

Learn more about user groups and their permissions in our User guide.

You can let your users perform account management tasks by granting them administration rights. This can be done while adding or editing a user by checking the Administrator check box. Users with administrative privileges have access to the Administration tab and can manage the access to your account.

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6.4.6 Get copy of all shares via BCC

Blind carbon copy (BCC) allows you to specify recipients that will receive a copy of all shared files through Quatrix. They will get emails secretly, i.e. emails will be invisible to others.
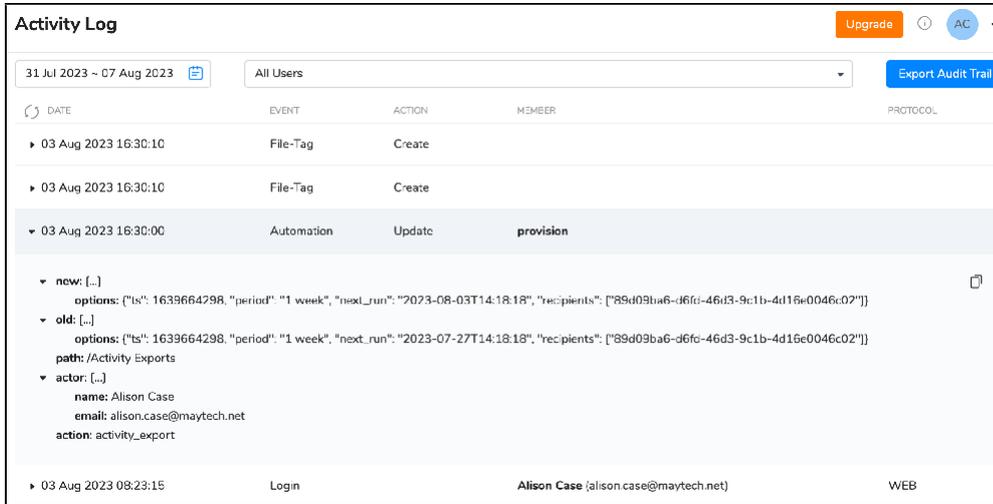
This feature is useful if you would like to keep track of all sharing actions in your account. To get more details of your account activity history, download the account activity log that displays all actions performed in your account on the Activity Log tab.

BCC can be adjusted by the account owner or administrators on the Administration tab. The recipients in the To field will not know that the others on the BCC field are secretly receiving shares.

> BCC recipients get copies of all emails, except the ones that are security related, e.g. password reset emails.

Billing BCC allows recipients to receive all billing related emails: upgrade or downgrade details, etc.

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6.4.7 Track activity history in your account

The activity log tracking allows to get an extremely detailed record of all activity from all users within a specified date range. The activity log displays individual actions of users including:

- date and time they logged in and out
- user actions within Quatrix platform
- shared and accessed files
- any updates or changes.

The main goal of audit trail reports is to assist account owners or administrators find out what their users are doing with files while they are logged in to Quatrix platform, providing complete visibility and added peace of mind. The audit log displays cases with multiple log-in attempts to the account which gives administrators information about potential security threats. Besides, if there were made any unauthorized changes to files, the log will determine which user made these changes.

Overall, activity logs provide owners or administrators the tool for getting a better vision of how files within Quatrix platform are being used.

Learn more about Activity Logs.

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