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 licene except contacts (they don't need a licence to receive a file or send files back to you).

Administrative roles and what they can do

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

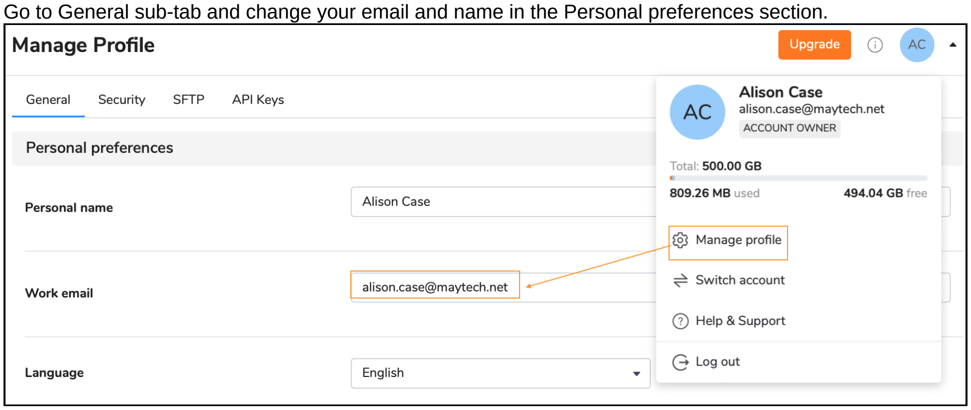
Account owner

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.
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.

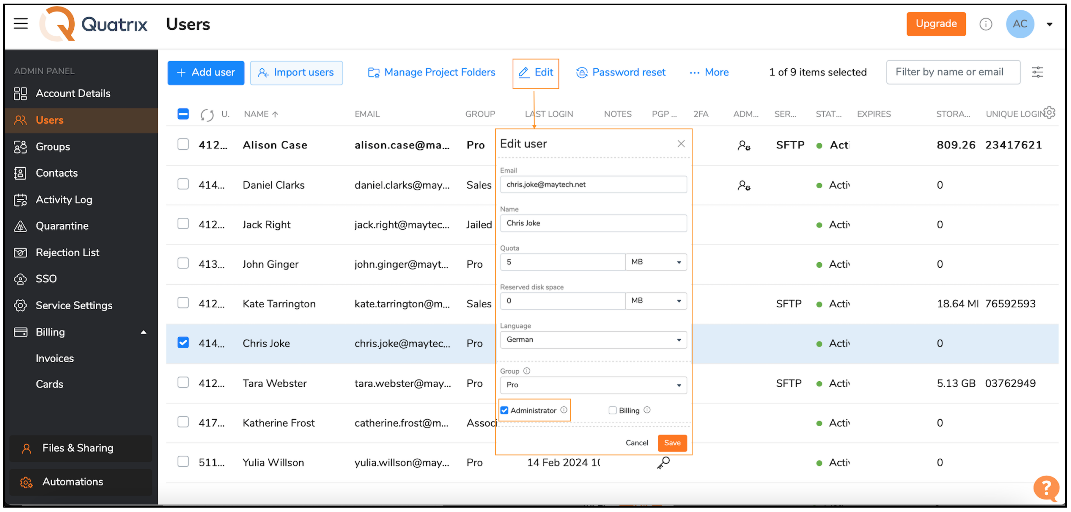
The account owner determines who can control invoice management for Quatrix account. The Billing rights can be delegated to any user in the account except jailed users and contacts. Read more to find out what user role would be the best to perform invoice management in your account.

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 Users sub-tab of the Admin panel.

How to assign an Administrator role?

You can assign administrative rights to a new user or an already existing one. In both cases you need to navigate to the Users sub-tab of the Admin panel.



Adding a new user as Administrator

1. Click on the Add user button from the above menu and specify your admin's name and email.
2. Select the Administrator checkbox and save your user.

Assigning an Administrator role to an already existing user:

1. Select the user you would like to make an administrator from the list of users.
2. Click on the Edit option from the above menu or right-click menu.
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.

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	✔

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.

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
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.

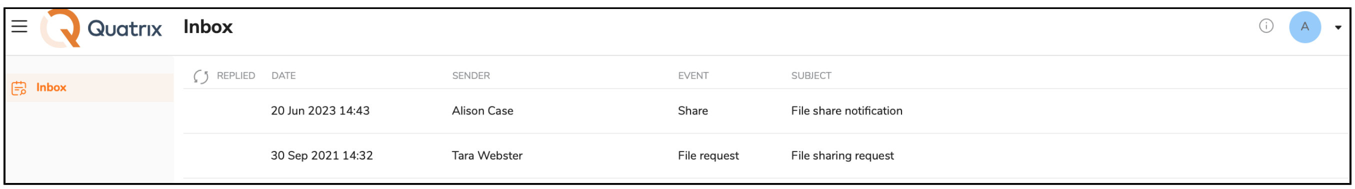
Contacts in the account

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.

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.

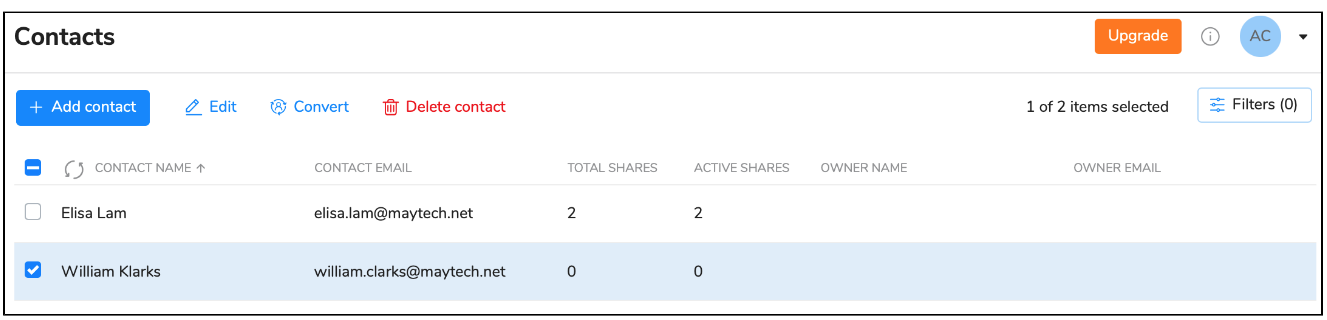
Check out Contact Management to learn more how to add, edit or delete a contact.

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.



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.