Project Folder Management

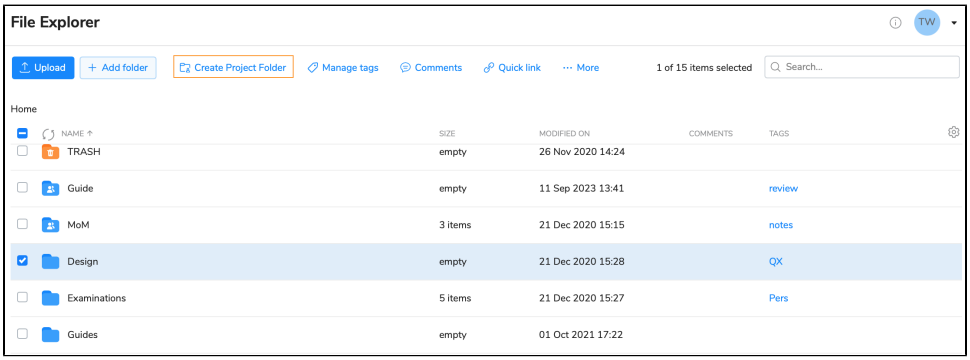
You can create secure data rooms to share files and folders inside Quatrix account using shared Project Folders. This allows you to easily collaborate with your users and take control of their actions within your shared folder.

The video below displays the basics of project folder management.

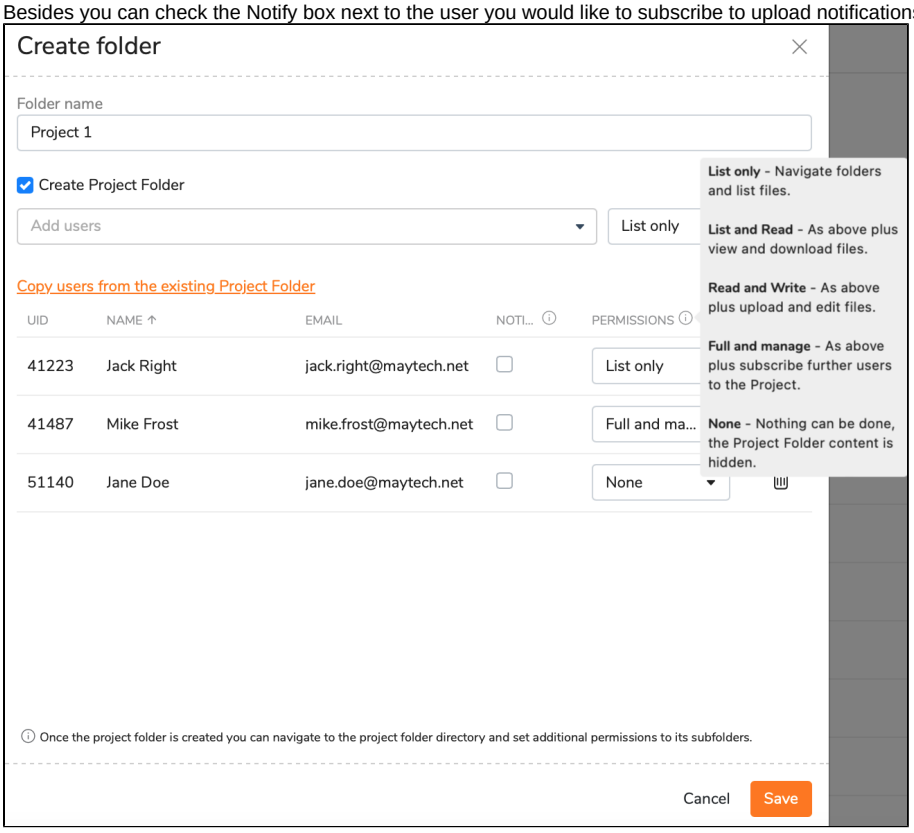
Creating a Project Folder

To create a project folder, follow these steps:

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



3. Select users from the list (or you can copy users with assigned permissions from the existing Project Folder by clicking the corresponding link) and specify their permissions.
   For details on permissions see the table **Predefined Project Folder Permissions** below.
   Besides you can check the Notify box next to the user you would like to subscribe to upload notifications.



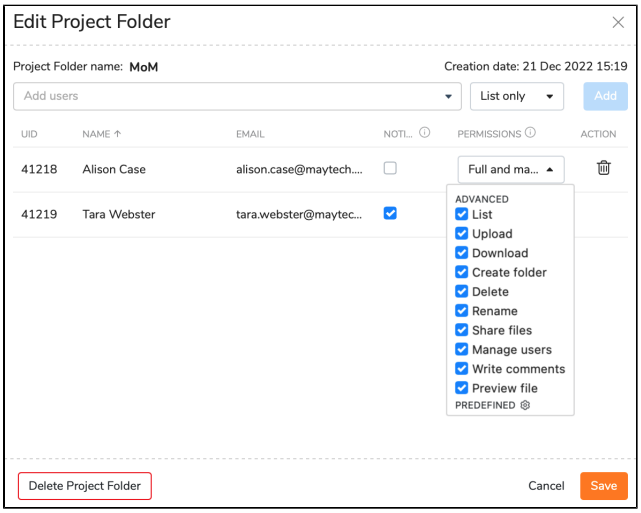
4. Click on the Save button.

As soon as your project folder is created, you will be notified and your users will get emails with details where to find the shared project folder. All your shared projects are stored in the Projects Shared With Me folder of your users.

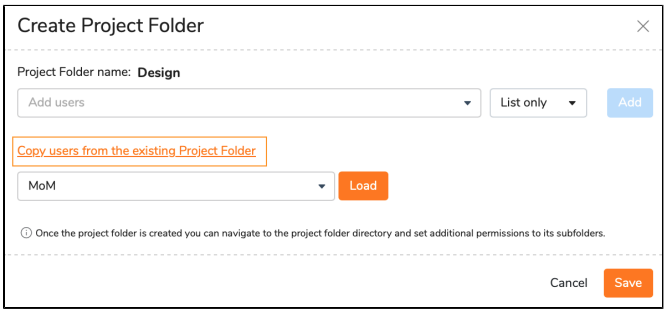
Predefined Project Folder Permissions

Permitted actions	List only	List and read	Read and write	Full and manage	None
View folder structure	•	•	•	•	
Copy		•	•	•	
Preview		•	•	•	
Download		•	•	•	
Cut			•	•	
Rename			•	•	
Delete			•	•	
Add new users				•	
Change user permissions				•	
Write comments				•	

For the convenience of adjusting specific permissions that match your own criteria, click on the permission that you set to the user and select Advanced option. Then tick the check boxes with permissions that you would like to assign to this user and save your adjustments.



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



Folders inside the Projects Shared With Me folder do not reduce user storage quota, only the quota of the project folder's owner.

Editing a Project Folder

If you want to update users or change their permissions, go through the following steps:

1. Select the project folder on the File Explorer tab and click the Edit Project Folder button from the top menu or right-click and select this option from the drop-down list.
2. Add or delete users and update their permissions.
3. Click the Save button to save all changes.

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

Every time a file is uploaded, renamed or deleted, all Project Folder users will receive email notifications (if Notify is checked), except the person who uploaded/renamed/deleted. Note, that notifications are sent on a user log out and only if you're using Project Folders via web.

Deleting a Project Folder

To delete a project folder, follow these steps:

1. Go to the File Explorer tab and check the folder you want to delete.
2. Click on the Delete option from the above menu or select an appropriate option from the right-click menu.
3. Confirm the deletion.

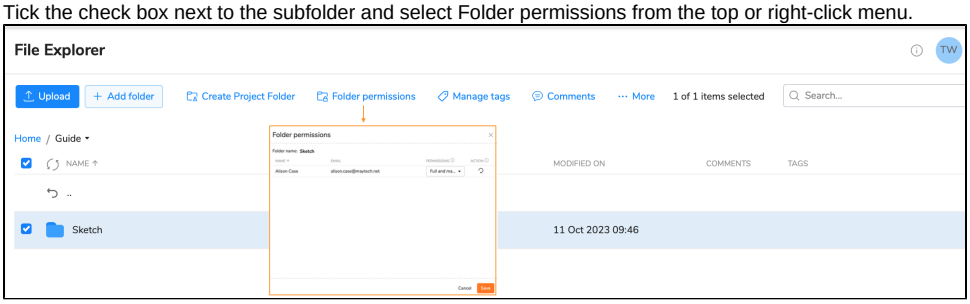
Your project folder will be deleted.

If you delete the project folder from the Edit Project Folder dialog, it won't be deleted but rather transformed to a regular folder and it won't be either visible or accessible to your users.

Managing Subfolder Permissions within a Project Folder

When you have different collaborators on the project, e.g. either your employees, or business partners, you might need to control the level of access each of them will have to your folders. Quatrix provides a possibility to manage the level of access to subfolders inside your desired project folder. If you are the owner of the project folder, administrator or user with Full and manage permissions, follow the steps below to manage subfolder permissions:

1. Tick the check box next to the subfolder and select Folder permissions from the top or right-click menu.



2. Update desired permissions and save changes.

Subfolder Permissions

When you share a folder with your users, they will automatically receive the same level of access to all containing subfolders. However, you can change the access to a specific subfolder by managing permissions at the subfolder level.

You should think twice before assigning Full and manage permissions to your users, as their deletion of contents inside the project folder cannot be restored. It is only possible to restore your originally set permissions to subfolder users by clicking on Reset to default icon.

To add more users to this subfolder, you need to update the PF and add users from the list on the Edit Project Folder form. This automatically adds users to all subfolders.

For owners and admins

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

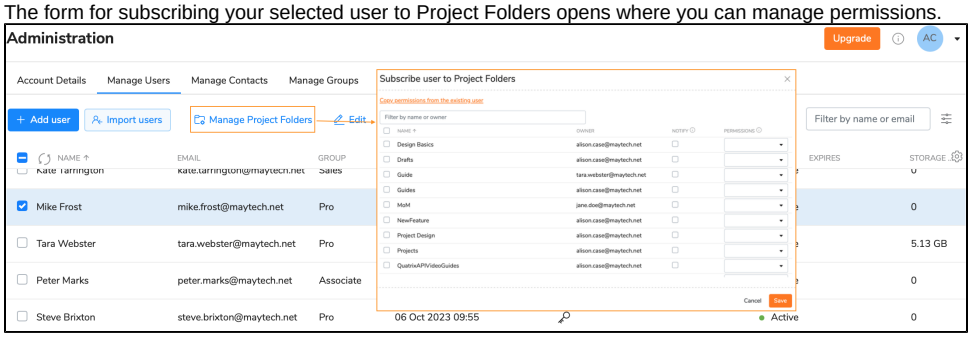
Managing user permissions to PFs

This feature is available only to account owners and administrators.

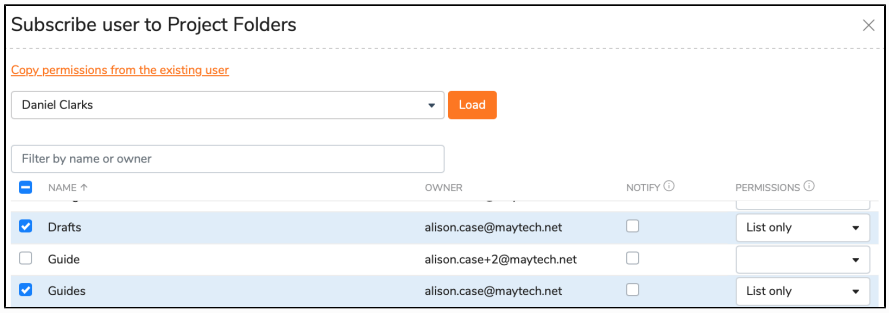
The main intention is to assist management of user permissions to existing Project Folders. It provides a possibility to have a bird's-eye view of Project Folders shared with every user.

1. Go to Administration Manage users.
2. Select the user and click on the Manage Project Folders icon from the top menu.

3. The form for subscribing your selected user to Project Folders opens where you can manage permissions.



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

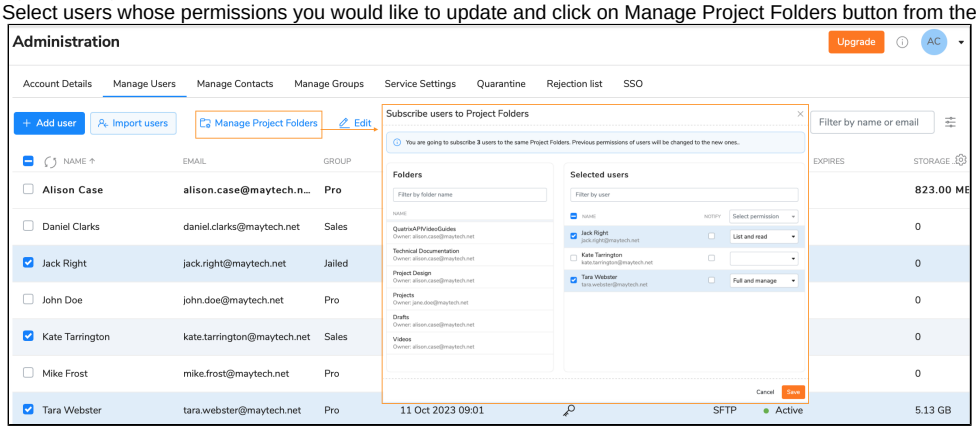
> **Copy Permissions from existing user** allows you to assign Project Folder permissions based on the existing user. Just select the user from the list and load his assigned permissions. Quatrix adds new permissions but doesn't overwrite the existing ones.
>
> Loaded permissions will be added to the table where you can update them.
>
> 
>

4. Click Save.

Bulk management of user permissions to several PFs

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

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



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