

# EpiFiles user guide

**A user guide for the roles Manager, Contributor (Uploader), and Downloader**



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**bold** : terms and menu items that are found within the application

*courier* : text that the user would input into the information system

*italics* : titles and references of other websites, documents, books, magazines, works.

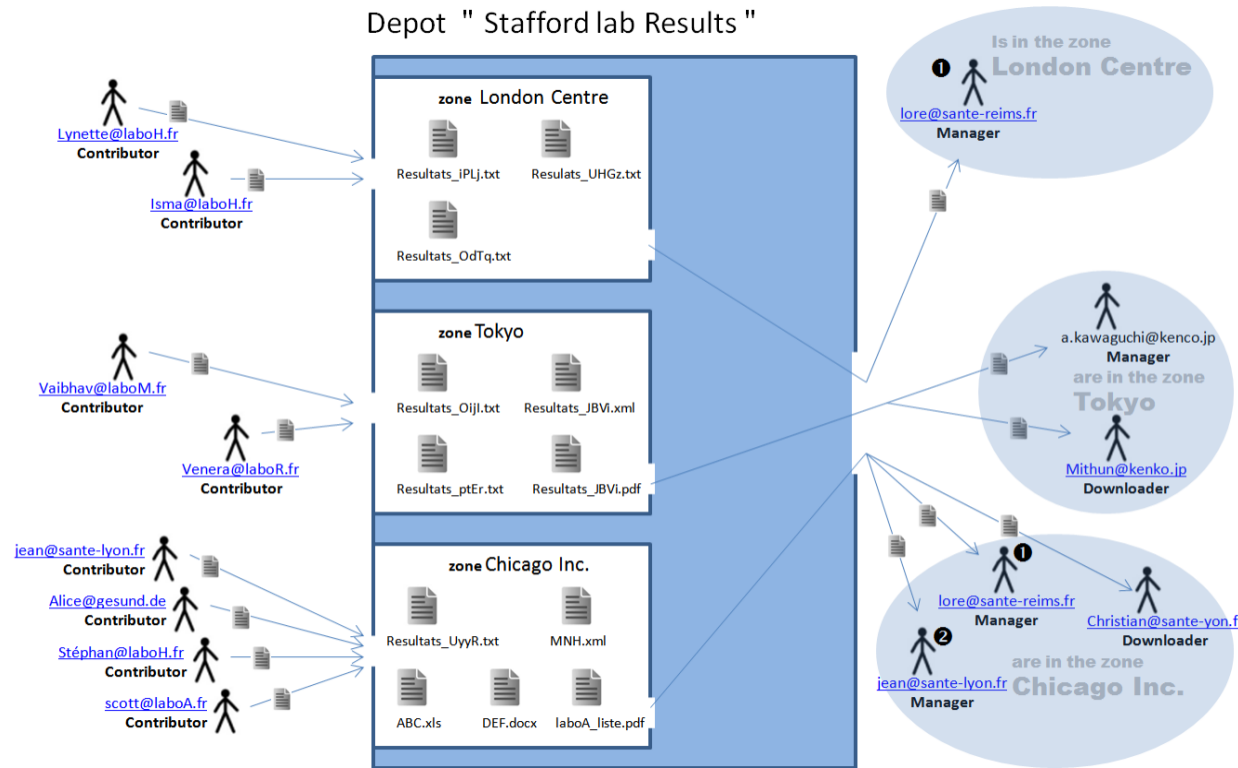
**Lines of programming code**

EpiFiles™ is based on the metaphor of a depot.

## Explanation

This is similar to a deposit box found at the exterior of some banks. A given depot is divided in to several zones or repositories (see image) and users have access to these zones (repositories) to pickup, drop off or delete files. Users with the role of **Downloader** or **Manager** (right side) can pick up or delete files in the zones they have been given access to. Users attributed with the role of **Contributor** (left side) can drop off (upload) files into the zones they have been given access to, and delete a file they have deposited (so long as no one has yet picked it up). Unlike the commercial Dropbox® system, a contributor cannot see the files other contributors have uploaded.

- 1) Note that Lore is a manager for two zones of this depot
- 2) Note that Jean is both a manager and a contributor to the zone Chicago Inc.
- 3) Note that there are three separate storage zones in this example



Because any type file system can become full of useless files over time, Epifiles includes an automatic file deletion system to keep it from becoming a messy waste bin of cluttered files. When a depot is created by an administrator, he/she configures the "Freshness dating" system for deletions and notifications of those deletions. Below are the default values that are assigned to a depot.

Description	Organisation A
<b>Automatic file deletion</b>	
Files expire after X days *	30
Automatic extension after first download (days) *	30
Extended time by uploader action (days) *	30
Warning notification before expiration (days) *	7

## Explanation

Using the values shown in the example screen.

### 1. File deletion

When a file is first uploaded, it gets a freshness dating of 30 days, after which, it is considered stale and will be deleted.

### 2. Auto-extension for downloaders

Often, an uploaded file is needed by multiple people. Once the file is downloaded by someone, the freshness date of the file is extended another 30 days to allow others time to download it.

### 3. Contributor extension

When a Contributor's files are about to go stale and get deleted, he/she will receive a notification mail (item 4 below) of the upcoming deletion but is also presented with a link to extend the freshness of the file by another 30 days.

### 4. Imminent deletion notification

Seven days before the file gets deleted, the uploader is notified by email that the file will be deleted in seven days if he/she does nothing. However, there is a link in the email to extend the freshness date (item 3 above).

**Depot:** A group of zones belonging to one organization for storing and picking up files based on users' rights and roles.

**Zone (repository):** A secure section of a depot which serves to limit the access to the files contained in it. The users access only the zone or zones that the administrator or manager has attributed to him or her.

**Administrator:** This is the project manager at Epiconcept who sets up the depots, zones and managers.

**Manager:** The role that has access to one or more zones in the depot to download and/or delete files that have been submitted. Only an Administrator can give a user the Manager role. Only a Manager in a zone (there could be multiple managers) has the right to invite people inside or outside of the organization to become contributors, downloaders or both to his or her zone. Note that it is possible for a manager to be a contributor as well in the same or other zones.

**Downloader:** Like a manager, he or she can see and download the files of a given zone. The downloader however cannot invite anyone to be a contributor to that zone. He or she can also delete files in a zone whether or not they have been downloaded by another downloader or manager.

**Contributor (Uploader):** This person uploads files into the zones (repositories) that he or she has been invited to by the various managers. The Contributor does not know who nor how many other contributors there are and only knows what files he/she has contributed to the depot. He or she can consult a journal of the files that he/she has uploaded.

**Deleted:** A file has the Deleted status when it has been deleted by someone and this line listing is the only trace of it left. There is no record of who deleted the file, only when it was deleted. The file is forever gone and cannot be resurrected regardless of a user's role.

*Rights for the roles that have access to a zone (repository)*

	Contributor (uploader)	Downloader	Manager	Administrator
Can upload files to a zone	X			
Can read/download files from a zone		X	X	
Can add or delete a zone				X
Can delete a file in a zone	X <sup>(1)</sup>	X	X	
Can move a file from one zone to another			X	
Can create a contributor			X <sup>(2)</sup>	
Can create/attribute a downloader account			X	
Can create/attribute a manager account				X
Can know who are the other managers/downloaders in a zone				X
Can remove someone from a depot's zone			X <sup>(3)</sup>	
Can modify someone's password			X <sup>(4)</sup>	

(1) Only if nobody has downloaded it yet.

(2) By inviting someone to be a contributor and/or downloader, an account is created when the invitee clicks on the agreement link in their invitation email.

(3) But only from that manager's zone.

(4) Only in the case that the person has access only to zones of that manager.

## Explanation

The screenshot shows the EpiFiles 'Send files' interface. At the top, there's a navigation bar with 'Upload history', 'Invitations and Users', and 'User guide'. Below that, the 'Send files' section is active, showing a depot selection dropdown set to 'Association BNL > Rapports hebdos'. A text area for notes contains the text 'These are the presentation files from the general meeting on 12 June 2016.' Below the notes is a 'Browse' button. A table of files is displayed with columns for 'File name', 'Size', and a delete icon. The files listed are 'QUESTIONNAIRE TOOLS.txt' (1Ko), 'Hospital X - left tibia -HY141265.dicom' (1Ko), and 'Flat file versus Relational Database.pptx' (552Ko). At the bottom of the file list is a 'Send file(s)' button.

1. Only available to individuals with **Contributor** status.
2. Only available to a user assigned as a **Manager** to at least one zone.
3. **Send files section** is available only for users who are Contributors to at least one zone. The History (below) will display a list of all the files the contributor has uploaded and to which zones.
4. Select which depot/zone you want to drop your file(s) into.
5. Enter some notes here about the files or the reason they are being dropped off.
6. Choose the file(s) on your computer that you will drop off into the depot. *You can shift or ctrl-click on files to select multiple files at once. Or simply **drag and drop** files from your computer onto this section.*
7. Send the files to the depot.

The 'Uploads dashboard' shows the progress of three uploads. The first two are at 100% completion: 'QUESTIONNAIRE TOOLS.txt' and 'Hospital X - left tibia -HY141265.dicom'. The third is at 0% completion: 'Flat file versus Relational Database.pptx'. Below the progress bars are two icons representing upload status: a green cloud with an upward arrow and a red cloud with an upward arrow.

### Uploading and broken Internet connections

EpiFiles is designed such that one can see the progress of the files being uploaded in percentage of completion. If there is a break in the Internet connection, the orange cloud icon will change to red indicating that the uploading has stopped. By leaving the browser open, the file upload process will resume when an Internet connection is re-established with the computer. If you close the browser or the browser tab, none of the files (even those files indicating 100 %) will not be placed into the depot and zone.

**Deposited files**

Total row count: 4

First Previous 1 Next Last

Action	Status	Sender	Date sent	Depot > zone	File(s)
	Completely uploaded	c.broderick@epiconcept.fr	06/03/2016 11:30:43	Association BNL > Rapports hebdos	epifiles_diag_en.jpg multi-map-coropleth.R
	Completely uploaded	c.broderick@epiconcept.fr	06/03/2016 10:47:42	Association BNL > Rapports hebdos	epifiles new upload EN.camrec
	File(s) downloaded	f.randria	05/30/2016 16:02:46	Epiconcept > Contact Bogui	ebogui-prod.sql.gz

**Deposited files** section will only appear if the user is a **Downloader** or **Manager** in at least one zone. This is the list of files that have been uploaded to the zone(s) that the user has access to. Simply click on the name of the file in the right-most column to download it.



Users with the role **Contributor** can see a history of their uploaded files.

## Explanation

**EpiFiles**  
Secure file exchange platform

Powered by **voozango**

Home Disconnect (Patricia.Fellows@newradiology.com)

**Filters**

Zone :    
 Status :    
 File name :

Note :   
 Sent after :   
 Sent before :

**Upload history**

Status	Date sent	Depot > zone	Notes	File(s)
☰ File(s) downloaded	19/11/2018 11:55:36	Organisation A > X-rays	file for patient BG-638820	stata.toc
☰ Deleted	18/01/2016 14:31:11	Organisation A > X-rays	Standard chest X-ray	
☰ Deleted	18/01/2016 14:26:37	Organisation A > X-rays		

1

The **Filters** box allows you to find the file(s) of interest. The **Upload history** shows the status of the files that you as a Contributor have uploaded.

**Completely uploaded:** indicates that the file or group of files has been uploaded and is in the indicated *Depot > Zone*, but nobody has downloaded it yet.

**File(s) downloaded:** indicates that someone has downloaded the file or group of files.

**Deleted:** You or a manager or a downloader in the zone has deleted the file or group of files.

This screen is available only to **Managers** in order for them to invite **Contributors** (Uploaders) or **Downloaders** to a zone or to modify (next page) their access privileges.

### Invitations and Users

1 Depot > zone \*

+ / -

- Entrepôt test > Zone M
- Epiconcept > Contact Bogui
- Framework public exchange > All
- Framework public exchange > Curtis

Enter the email address of individuals to invite. \*

*One user per line*

2

Enter a personalized message here.

3

**Info: syntax for creating and inviting users**

<p><b>Simple format:</b> Email* ; Role*</p> <p><b>Advanced format:</b> Email* ; Role* ; Language ; Password</p> <p><i>Values for the Role: d (downloader)   u (uploader)   du (both)</i></p>	<p><b>Examples:</b> john.law@mail.com;du e.norton@mail.com;d,en;L67rpt2 jean.dupont@mail.fr;du;fr thomas.newfield@health.com;u,en;mypassword</p>
--	--

Send invitations

## Explication

### 1 Depot > Zone

The depot and zones in which the user is a manager and to which he can invite contributors and downloaders.

### 2 Invited users

A field to enter (or paste in) a list of persons to invite to one or more zones. Enter one person per line as shown in the examples.

### 3 Message

A personalized message to be included in the email invitations.

Here in the lower part of the same screen as the invitations, the zone **Manager** can manage the rights of the people he/she has invited.

The screenshot displays a web interface for managing invited users. At the top, there is a search bar labeled 'Search' with a 'User email' input field and a 'Search' button. Below the search bar, there are two buttons: 'Uploader' and 'Downloader'. The main content area is a table with columns for 'Email address' and 'Depot'. The table lists three users: b.cotte@epiconcept.fr, brodrock22@yahoo.com, and curtisbroderick1@gmail.com. A context menu is open for the first user, showing options: Reinvit, Reset pwd, Change pwd, and Delete. The 'Depot' column for each user shows a list of zones (Entrepôts) with upload and download icons. For example, b.cotte@epiconcept.fr has zones B, C, H, A, E, F, I, G, J, and D. brodrock22@yahoo.com has zones B and C. curtisbroderick1@gmail.com has zones B, C, and A.

## Explication

### 1 Search tool

To find a given user.

### 2 Users

Users whom you have already invited.

### 3 Depot & Zones

The depot and zones where the user has the right to upload files, download files or both.

### 4 Menu

The actions that can be performed on a given user.

It may happen that a user belongs to another zone or depot with another manager. In this case, your rights as manager are limited in terms of password modification.

**Note:** For each invited user, you can see the zones for which he/she has not yet accepted the e-mailed invitation. The invitee just needs to click on the [accept](#) link in the invitation.

**General**

**Q:** My password doesn't work anymore. What can I do?

**A:** It's possible that the zone's Manager changed your password. If your account is linked to one single manager (only one person has invited you to be a downloader or contributor) then he/she has the right to modify your password. Contact the Manager who invited you if you need to have your password modified. Otherwise, use the link "Forgot password?" on the EpiFiles login page.

**Q:** Can I or an administrator make a zone inside of a zone, a sort of subzone?

**A:** No.

**Q:** Can my company/organization have more than one depot?

**A:** Yes, however it makes more sense for one organization to have a single depot and many zones.

**Contributor (Uploader)**

**Q:** Can a contributor know who or how many other contributors there are for his or another zone?

**A:** No, unless a manager of the zone tells him/her.

**Q:** Can a person be a Contributor in two different organizations' depots.

**A:** Yes. This just means that two different organizations' (ex: a radiology lab and a hospital) zone managers have invited that person to be a contributor to their respective depots and zones.

**Q:** Can I, as a Contributor, delete a file I accidentally uploaded to a zone?

**A:** Yes, so long as a Manager or Downloader has not already downloaded it. Once a file you have contributed to a zone is downloaded, only a Manager or Downloader can delete it even though it was you who originally put it there. Files also get deleted once they get too old. This "freshness" date is controlled by the administrator but is usually 60 days if you do not extend it. Warning e-mails are sent from EpiFiles before a file is deleted.

**Q:** As a contributor, can I batch upload a folder or a number of files at once.

**A:** You cannot upload a folder but you can upload some or all of the files of a folder by using the ctrl or shift key while clicking on the files in your computer's file dialog box.

**Downloader**

**Q:** Is it an error to see a file multiple times in a zone?

**R:** No. In fact what you are seeing is that two different files with the same name have been uploaded by one or two contributors. This is why it is important to place a descriptive commentary note when uploading files just in case two or more people inadvertently use the same file name.

**Q:** In the status column of “Received files” I see “file downloaded” for one of the files but yet I know I did not download it. How is that possible?

**A:** This status indicates that the file has been downloaded by another downloader or manager in that zone.

**Manager**

**Q:** What happens if I invite someone to be a contributor but it is an incorrect e-mail address, his/her mailbox is full or it is rejected by the mail server?

**A:** The invitation status will remain as “Sent”. You will not receive any further indication from EpiFiles about what happened to the mail after it was sent (unknown address, mailbox full, mail server address rejection, etc.).

**Q:** Can a manager know how many contributors there are in his/her zone and who they are?

**A:** No. He/she can only look at his/her own invited list to see who he or she has invited and can only know that other contributors exist if those other contributors upload a file to that zone.

**Q:** Can a Manager or a Downloader know how many other zones exist?

**A:** No. A Manager will only see the list of zones of his organization of which he is the Manager.

**Q:** As a Manager, if I invite someone to be a Contributor (Uploader) to my zone in a depot, but he/she already has an EpiFiles account, which password should he/she use, the password I assigned in my invitation, or his/her regular password?

**A:** Assigning a password (an option) in an invitation does not do anything to someone who already has an EpiFiles account. Your selected password will be ignored.

## Manager

**Q:** As a Manager, why am I able to modify some people's passwords in a depot's zone, but not the passwords of others?

**A:** You cannot modify the password of someone who has access to other zones which you are not the Manager. Only those people in who are exclusively in your zone(s) can you modify their password.

**Q:** If a zone has two or more Managers, can a Manager remove a Contributor or Downloader that he did not invite.

**A:** Yes, if the target person only has access to a zone or zones in which you are a Manager. No, if the target person has access to another zone in which you are not a Manager.

**Q:** The person that I invited to a zone in my depot does not see the zone, neither to upload a file nor to download a file. Why doesn't the zone show up for my invited user?

**A:** The person that you invited must first click the link in the invitation email "Accept invitation" before EpiFiles will give him/her access to the zone(s).

**Q:** Can a Manager invite himself to be a Contributor (Uploader)?

**A:** Yes. Otherwise, he can manage and download files, but not contribute files.

**Q:** How can I change a person in my zone from a Contributor only to a Contributor and Downloader? Or from Downloader only to Contributor and Downloader?

**A:** You must invite him/her again with the new privilege you want to add.