

epiconcept

smart health



User guide

For Downloaders, Contributors (Uploaders) and Managers

December 2019

| | |
|----------------------|--|
| Editor: | Epiconcept, 47 rue de Charenton, 75012 Paris, France www.epiconcept.fr |
| Title: | Epifiles User Guide: A user guide for the roles Manager, Contributor (Uploader), and Downloader |
| Current version: | Version 3.2 4 December 2019 |
| Previous versions: | Version 3.1 19 November 2018 Version 2 3 June 2016 Version 1.3 21 December 2015 Version 1.2 5 November 2015 version 1 3 December 2014 |
| Applies to: | Version 1.13 18w38 Epifiles (epifiles.voozanoo.net) |
| License: | Copyright © Epiconcept 2018 |
| Author(s): | Curtis Broderick |
| Distribution: | Unlimited |
| Other languages: | Available in French (see http://www2.voozanoo.net/fr/node/136) |
| Corollary documents: | There is also the guide for Epiconcept administrators <i>Mode d'emploi Epifiles_Administrateur_v2_fr.pdf</i> |
| Other information : | |
| Feedback: | Please signal any errors or problems with this document to c.broderick@epiconcept.fr |

| | |
|---|----|
| Information about this document | 2 |
| Table of Contents | 3 |
| Glossary | 4 |
| The Epifiles concept | 5 |
| "Freshness Dating" system | 6 |
| User rights | 7 |
| The home page | 8 |
| The Contributor's panel | 9 |
| Upload history screen | 10 |
| Participant invitation screen (part I) | 11 |
| Participant invitation screen (part II) | 12 |
| Questions and Answers | 13 |
| Questions and Answers | 14 |
| Questions and Answers | 15 |

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 they themselves have contributed to the depot. They can consult a journal of the files that they have uploaded.

Deleted: A file has the Deleted status when it has been deleted by someone and this line listing is the only trace left of it. 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.

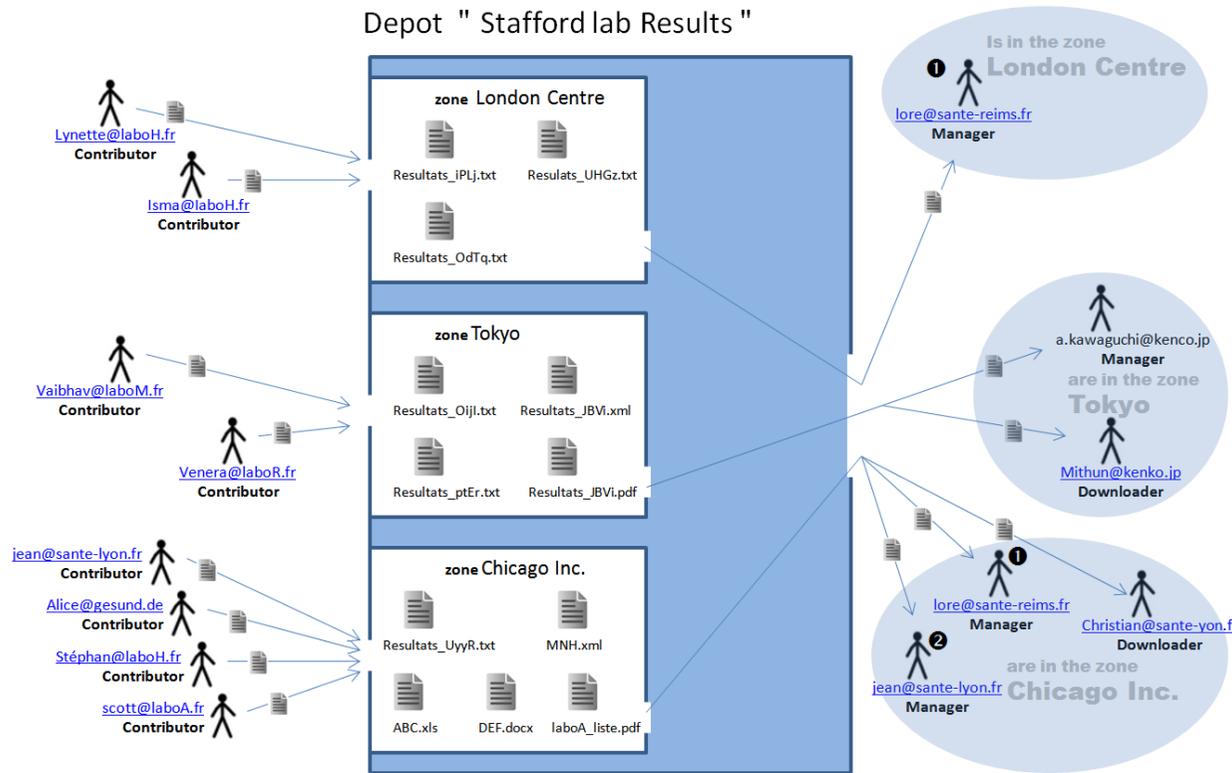
Epifiles™ is based on the metaphor of a depot. Depending on which role(s) a user has (Downloader, Contributor, Manager), they will have various rights and be presented with different screens and options.

Explanation

The Epifiles concept 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.

Some points you should note about this diagramme

- Lore is a manager for two zones of this depot.
- Jean is both a manager and a contributor to the zone Chicago Inc.
- There are three separate storage zones in this example.
- Stafford lab Results is one of many depots that exist in Epifiles.



Because any type of 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 |
| Automatic file deletion | |
| 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).

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

| | Contributor (uploader) | Downloader | Manager | Administrator (Epiconcept) |
|---|----------------------------------|-------------------|------------------|--------------------------------------|
| 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 ⁽¹⁾ | X | X | |
| Can move a file from one zone to another | | | X | |
| Can create a contributor | | | X ⁽²⁾ | |
| 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 ⁽³⁾ | |
| Can modify someone's password | | | X ⁽⁴⁾ | |

(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.

Depending on your role, the Home page will display different options and panels. A user may be given more than one role, in which case they will have more panels and options on their home page.



The Options

1. **Upload history** (contributors) Will send you to a screen showing you a history of the files you have uploaded to the various zones you have been given upload rights to.

2. **Invitations and Users** (Managers) Will send you to a two-part screen. Part I allowing you to invite someone (as a contributor or downloader or both) to one or more zones and Part II showing all invitations and their status.

3. **User Guide** (All) A link to this User Guide in PDF format.

4. **Portal** (All) A link back to a portal site if one has connected to Epifiles via a portal application.

5. **Language** (All) Allows one to switch between an English or French user interface.

6. Button to logout and close the session.

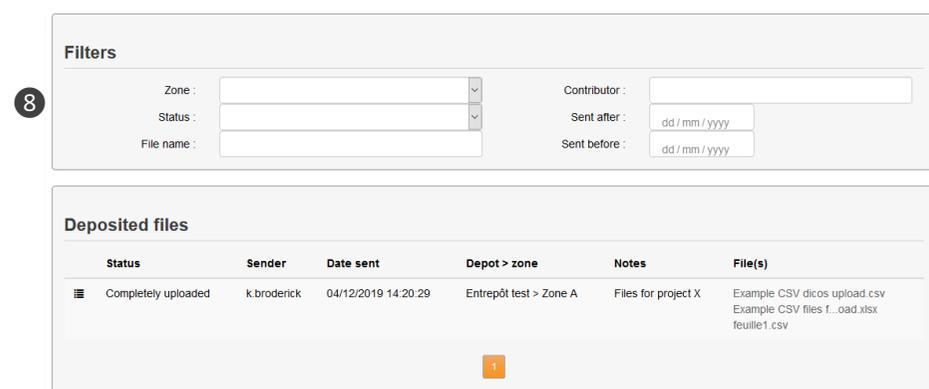
The Panels

7. This panel will be visible on the home page if one has the Contributor role for at least one zone.

8. This panel will be visible on the home page if one is a Downloader or a Manager. It will show a list of all the files uploaded to the zones in which you are either a Downloader or Manager. Simply click on the name of the file in the right-most column to download it.



Contributor: can chose a zone and upload one or more files to it.



Downloader and/or Manager: can see a list of files and download one or more files contributed by other users.

On the home page, it is only available to a user with the *Contributor* (also known as *Uploader*) role.

Send files

Depot > zone* **1** Association BNL > Rapports hebdos
 | File exchange with general public

Notes for uploaded file(s) **2**
 These are the presentation files from the general meeting on 12 June 2016.

3 Browse

| File name ^v | Size ^v | |
|---|---------|--|
| QUESTIONNAIRE TOOLS.txt | 1Ko | |
| Hospital X - left tibia -HY141265.dicom | 1Ko | |
| Flat file versus Relational Database.pptx | 552Ko | |

4 Send file(s)

1. Select which depot/zone you want to drop your file(s) into.

2. Enter some notes here about the files or the reason they are being dropped off.

3. 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.

4. Send the files to the depot.

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's zone.

Uploads dashboard

03/06/2016 à 10:34:14 - Association BNL > Rapports hebdos

- 100%** QUESTIONNAIRE TOOLS.txt
- 100%** Hospital X - left tibia -HY141265.dicom
- 0%** Flat file versus Relational Database.pptx



Users with the role *Contributor* can click on the *Upload History* option see a history of their uploaded files.

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.

Filters

Zone :

Status :

File name :

Note :

Sent after :

Sent before :

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

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

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 (see the 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>Simple format: Email* ; Role*</p> <p>Advanced format: Email* ; Role* ; Language ; Password</p> <p><i>Values for the Role: d (downloader) u (uploader) du (both)</i></p> | <p>Examples: john.law@mail.com;du e.norton@mail.com;d;en;L67rpbt2 jean.dupont@mail.fr;du;fr thomas.newfield@health.com;u;en;mypassword</p> |
|--|---|

Send invitations

1. Depot > Zone

The depot - zones pair in which the user is a manager and to which he can invite others to be contributors and/or downloaders.

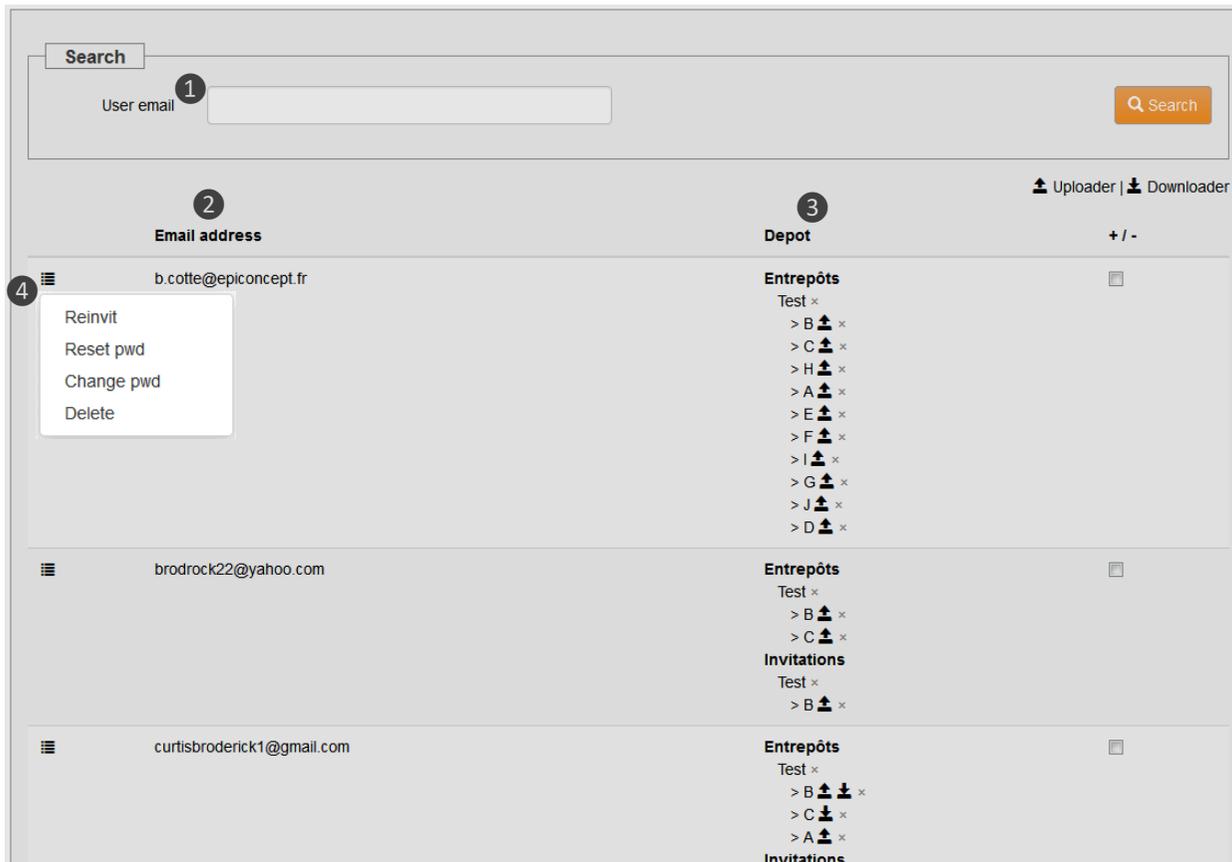
2. Invited users

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. The email and Role are required values, the language (en or fr) and a password are optional.

3. Message

A personalized message will be included in the email invitations.

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



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 depot's zone.

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 automatically 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 their 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.

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. You can only modify their passwords of those people who are exclusively in your zone(s).

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 only manage and download files, and not upload 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.