RESEARCH AUTOMATORS

The Upload Files Tab — How It Works

Survey Automator guide

The Upload Files Tab — How It Works

GUIDE DATA AND INTEGRATIONS

The Upload Files tab is a built-in file storage area in every Survey Automator project. It is used to share files between the project team and clients without having to send attachments via email.

File statuses

Each file has one of four statuses that determine who can view and download it. The project manager can filter the list by status using the buttons at the top.

Protected Only the project manager has access. Automatically deleted after 99 days.

Shared Available to clients logged in via two-factor authentication. The file appears in the client's file list with a "Download" button. Automatically deleted after 99 days.

Public Does not appear in any file list. Shared only via a direct link; no login is required to open or download the file. Is not automatically deleted, and a direct link remains valid even if the file's status is changed later.

Pending Automatically assigned when a client uploads a file. The client sees their own uploaded file in the list. The project manager sees the file as "Pending" and decides what to do with it: keep it protected, share it, publish it, or start a participant import.

Who Sees What

	PROTECTED	PUBLIC	SHARED	PENDING
Project Manager	Upload, download, delete, change status	Upload, download, delete, copy link	Upload, download, delete, change status	Upload, download, delete, change status
Client with two-factor authentication	—	—	Download	Upload, view your own files
External user with direct link	—	Open/Save Locally	—	—

Other

- Only the project manager can change the status of a file that has already been uploaded.
- Files added via "Insert Image" in other tabs are automatically set to public.

The latest version of this guide: https://www.researchautomators.com/guides/upload-files-tab/