

RECIPE DESIGN

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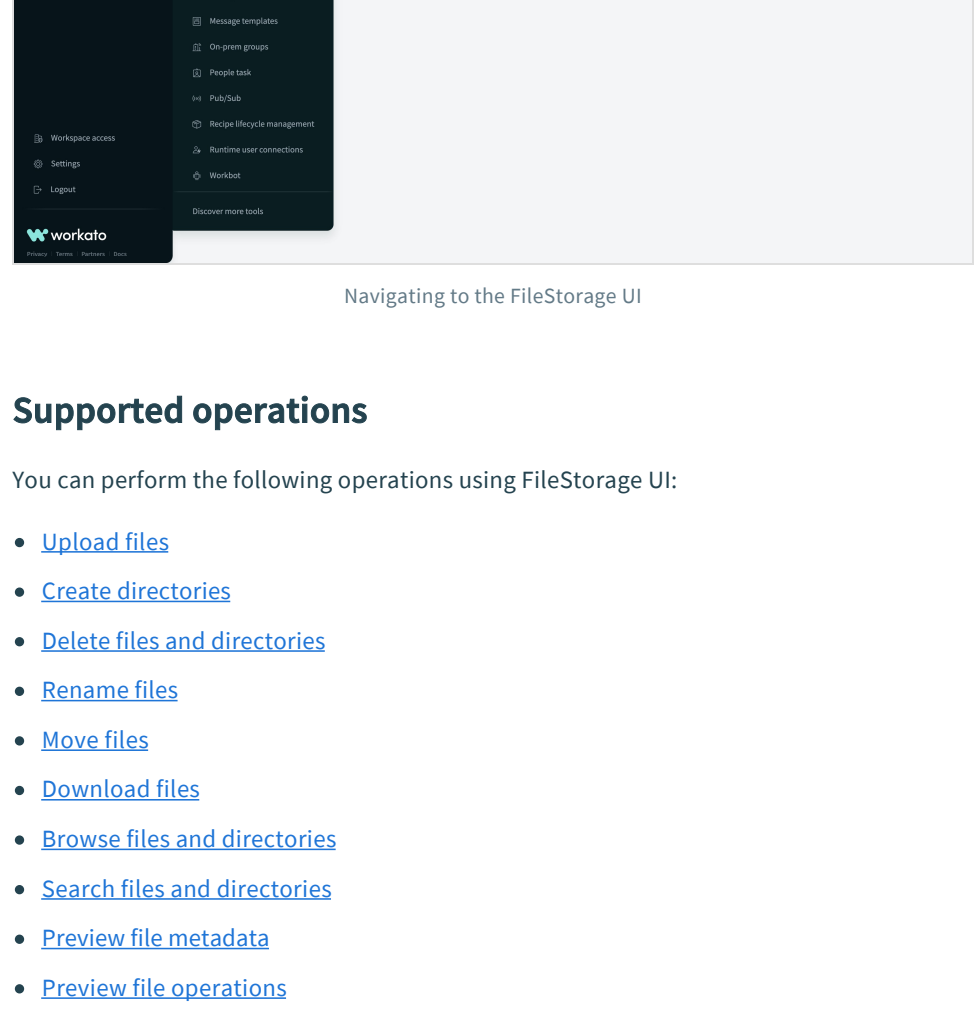
EXPAND AUTOMATION POSSIBILITY...

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WORKATO FILESTORAGE

FileStorage UI

Use the Workato FileStorage user interface (UI) to upload, delete, and manage files or directories stored in the [FileStorage](#) system. To access the FileStorage UI, navigate to **Tools > FileStorage**.



Navigating to the FileStorage UI

Supported operations

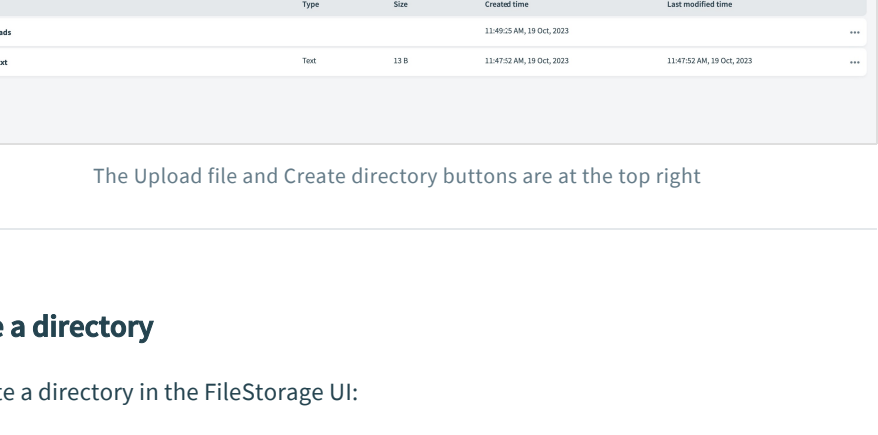
You can perform the following operations using FileStorage UI:

- [Upload files](#)
- [Create directories](#)
- [Delete files and directories](#)
- [Rename files](#)
- [Move files](#)
- [Download files](#)
- [Browse files and directories](#)
- [Search files and directories](#)
- [Preview file metadata](#)
- [Preview file operations](#)

Upload files

To upload a file:

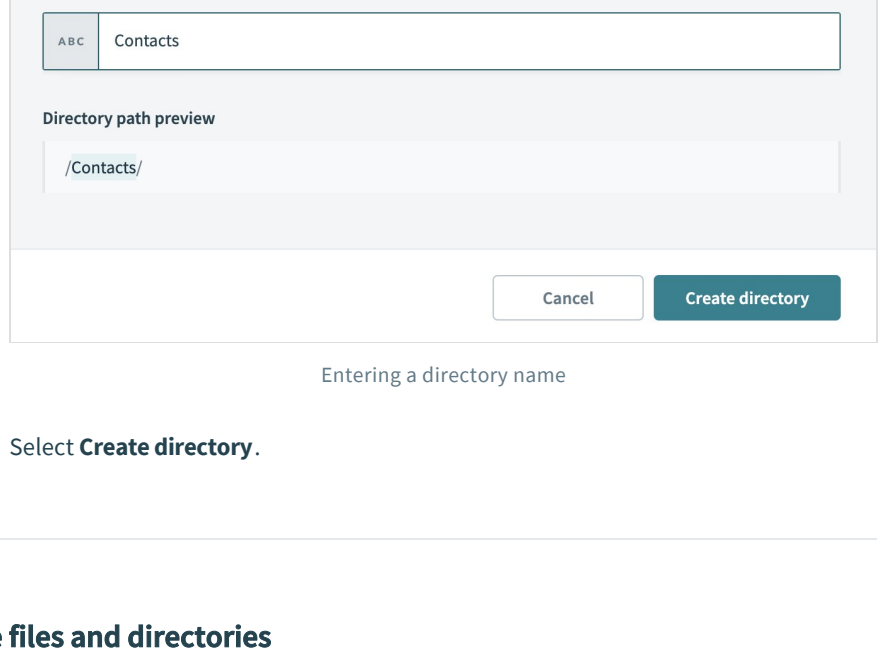
- 1 Select the **Upload file** button, next to the **Create directory** button. The file is uploaded to the directory that you select **Upload file** in. In this example, the directory that files are uploaded to is the root directory.



The Upload file button in the FileStorage UI

- 2 **FILE SIZE LIMIT**
When you upload files through the FileStorage UI, each file has a 5 GB size limit. If you want to upload larger files, use the FileStorage connector's **Create file** action in a recipe.

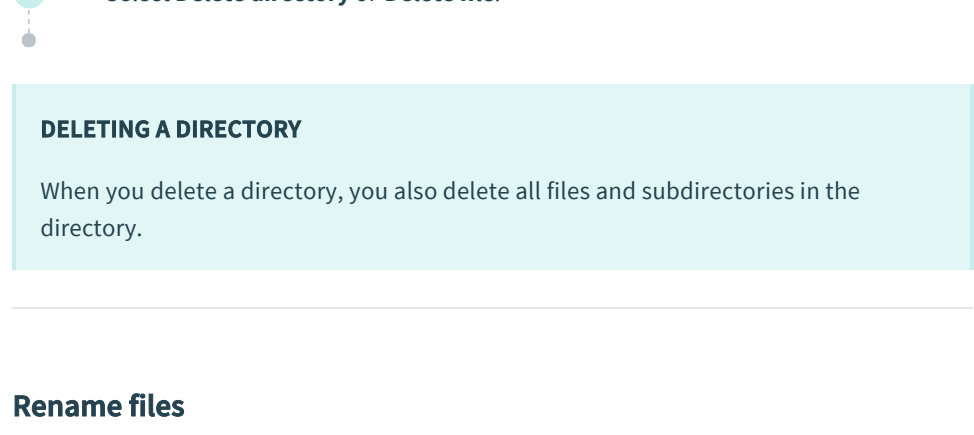
Drag and drop a file or select a file from your device in the modal that appears. You can upload one or multiple files at a time.



Successfully uploading a file

- 3 After you finish uploading all files, select the **Done** button at the bottom left of the modal. The files you uploaded display in your FileStorage directory.

Once you have one or more files or subdirectories within a directory, the **Upload file** and **Create directory** buttons will move to the top right of the UI.

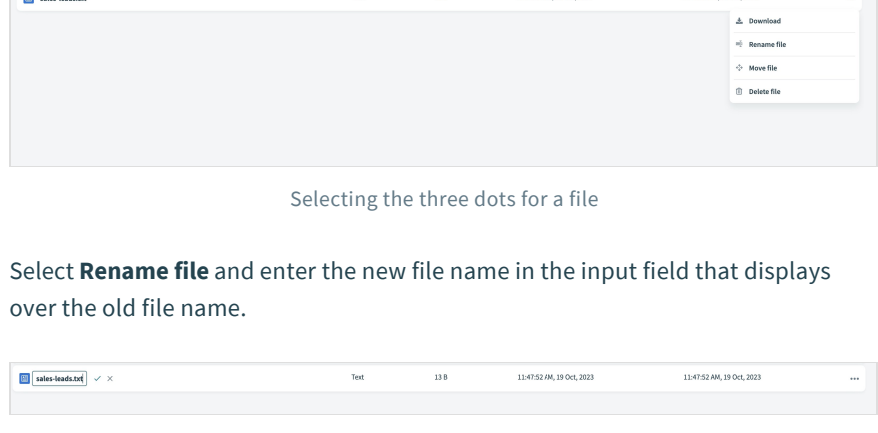


The Upload file and Create directory buttons are at the top right

Create a directory

To create a directory in the FileStorage UI:

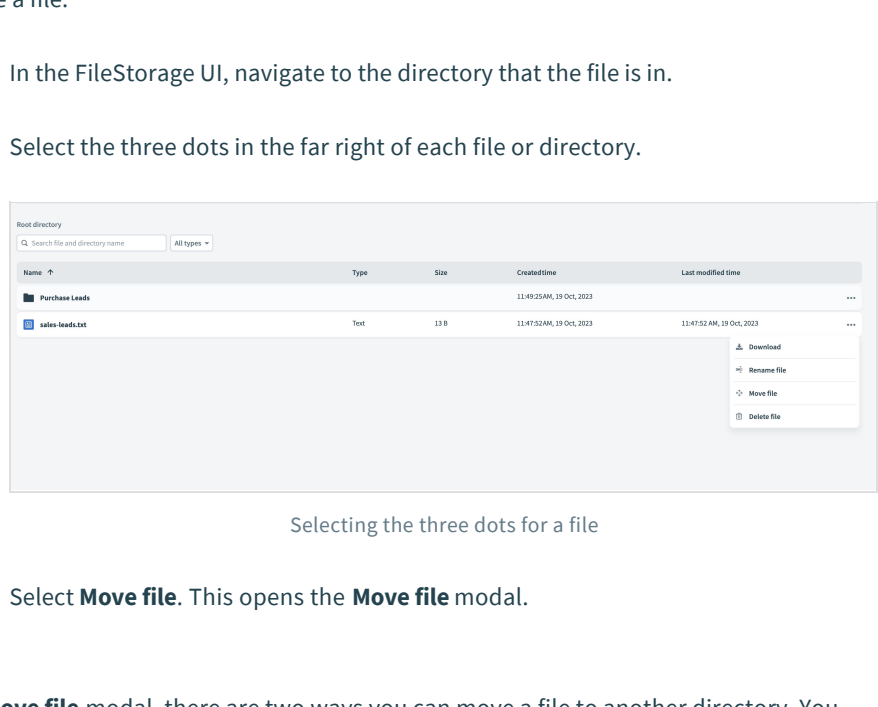
- 1 Select the **Create directory** button in the upper right of the UI.



The Create directory button in the FileStorage UI

- 2 Enter the directory name in the modal that appears. The UI shows the directory path preview.

In the following example, the directory path preview is `/Contacts/`:



Entering a directory name

- 3 Select **Create directory**.

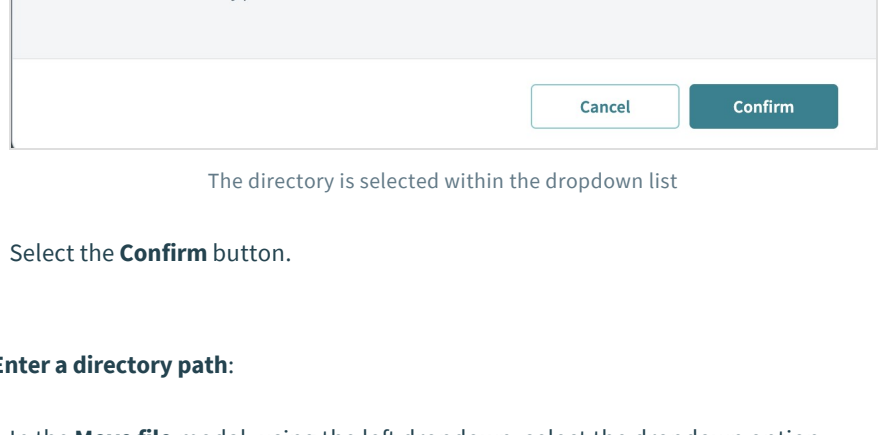
Delete files and directories

Within the FileStorage UI, you can delete existing files and directories. You cannot undo deleting a file or a directory.

To delete a file or directory:

- 1 In the FileStorage UI, navigate to the directory that the file or directory is in. If the file or directory is not in the root directory, select the subdirectory that your intended file or directory is in.

- 2 Select the three dots in the far right of the file or directory.



Selecting the three dots for a directory

- 3 Select **Delete directory** or **Delete file**.

DELETING A DIRECTORY

When you delete a directory, you also delete all files and subdirectories in the directory.

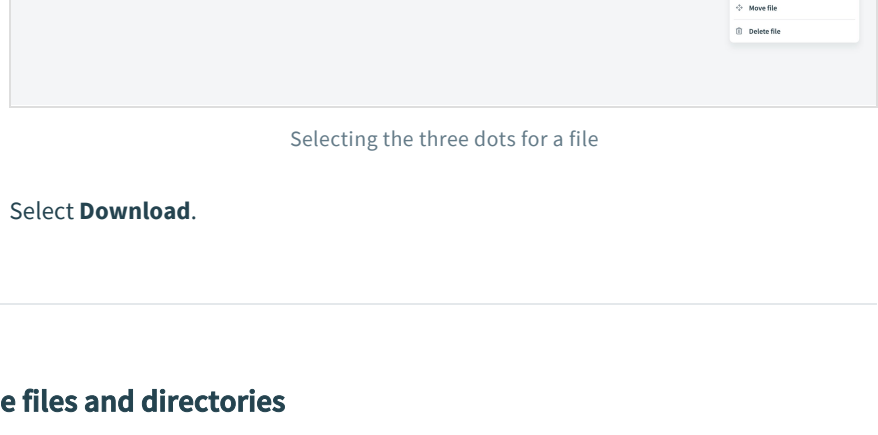
Rename files

Within the FileStorage UI, you can rename files.

To rename a file:

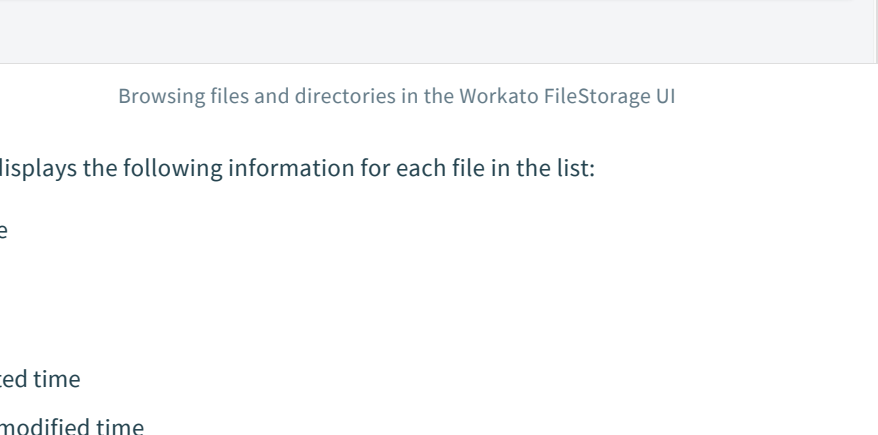
- 1 In the FileStorage UI, navigate to the directory that the file or directory is in. If the file or directory is not in the root directory, select the subdirectory that your intended file or directory is in.

- 2 Select the three dots in the far right of the file.



Selecting the three dots for a file

- 3 Select **Rename file** and enter the new file name in the input field that displays over the old file name.



Example of input text field

- 4 Select the checkmark icon next to the input field to save the new file name. After you save the file name, a file preview side panel displays on the right side of the UI. Select the **X** button within the panel to exit the file preview.

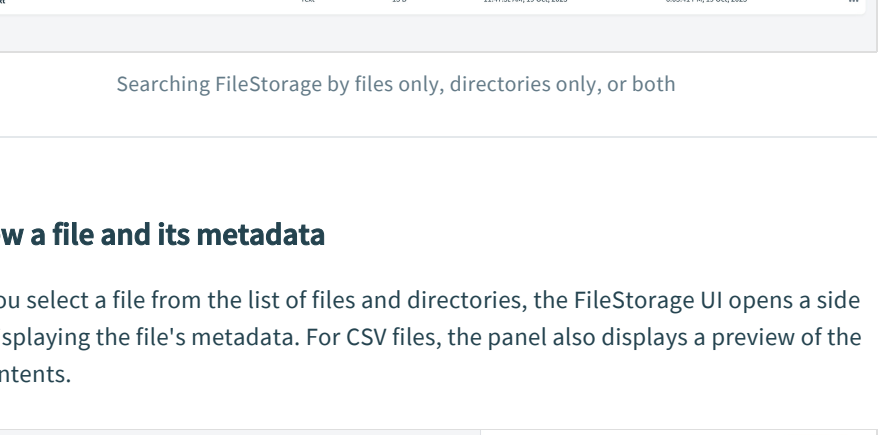
Move files

Within the FileStorage UI, you can move files to other directories in the FileStorage UI.

To move a file:

- 1 In the FileStorage UI, navigate to the directory that the file is in.

- 2 Select the three dots in the far right of each file or directory.



Selecting the three dots for a file

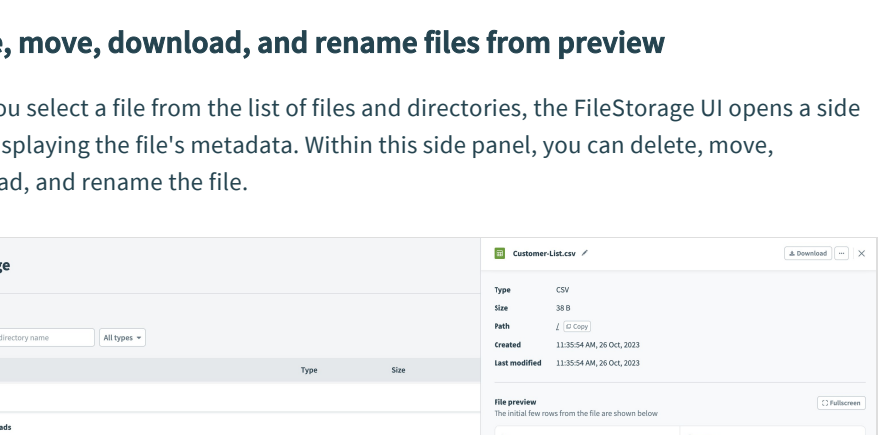
- 3 Select **Move file**. This opens the **Move file** modal.

In the **Move file** modal, there are two ways you can move a file to another directory. You can either use the **Choose a directory** method, or the **Enter a directory path** method. To use **Choose a directory**, you select the directory path from a dropdown menu. To use **Enter a directory path**, you enter the directory path directly.

To use **Choose a directory**:

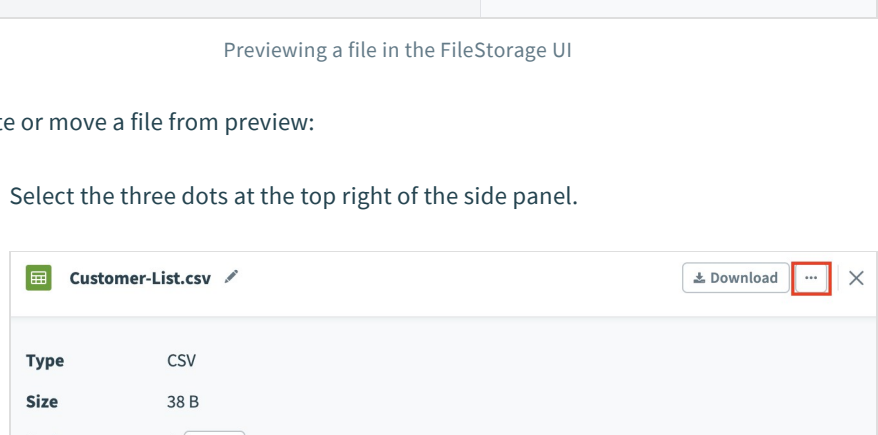
- 1 In the **Move file** modal, using the left dropdown, make sure that you've selected the dropdown option **Choose a directory**.

- 2 Select the vertical triangle next to the name of the directory the file is. This opens a dropdown list of all the subdirectories within the current directory. If the directory you'd like to move the file to is not listed in the list of subdirectories after selecting the vertical triangle, continue to expand the subdirectories using the vertical triangle until you see the subdirectory you'd like to move the file to.



Finding the directory you'd like to move the file to

- 3 From the dropdown list of subdirectories, select the name of the directory you want to move your file to.



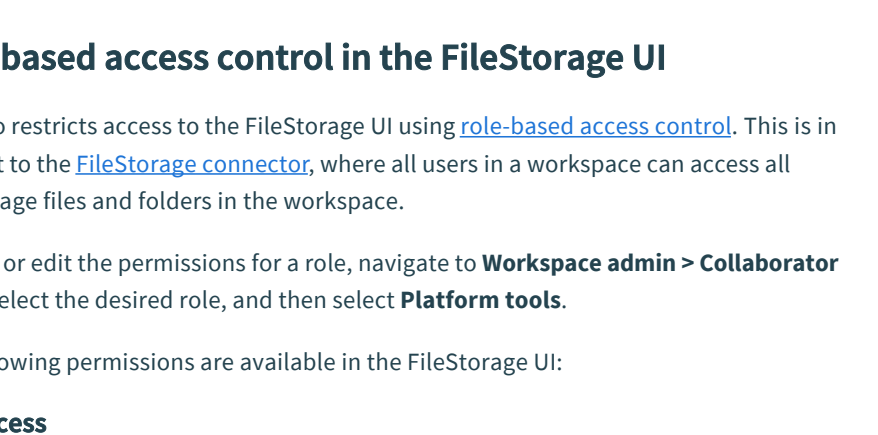
The directory is selected within the dropdown menu

- 4 Select the **Confirm** button.

To use **Enter a directory path**:

- 1 In the **Move file** modal, using the left dropdown, select the dropdown option **Enter a directory path**.

- 2 Enter the path of the subdirectory you want to move the file to. Directory paths in the FileStorage UI take the format of `//Directory_Name/`. If you are moving a file to a nested subdirectory, the format for the path is `//Directory_Name/Subdirectory_Name/`. The path for the root directory is `/`.



Entering the path of a subdirectory

- 3 Select the **Confirm** button.

CONFIRM NEW DIRECTORY

After you move a file, a green popup displays at the top of the UI. This popup confirms the file was moved successfully. When you select the **Show file location** link in the popup, the link redirects to the file's new directory.

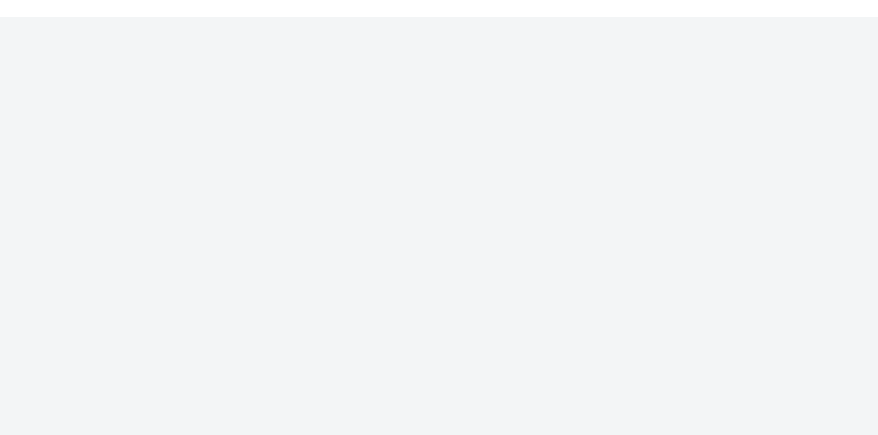
Download a file

Within the FileStorage UI, you can download previously uploaded files.

To download a file:

- 1 In the FileStorage UI, navigate to the directory that the file is in.

- 2 Select the three dots in the far right of each file or directory.

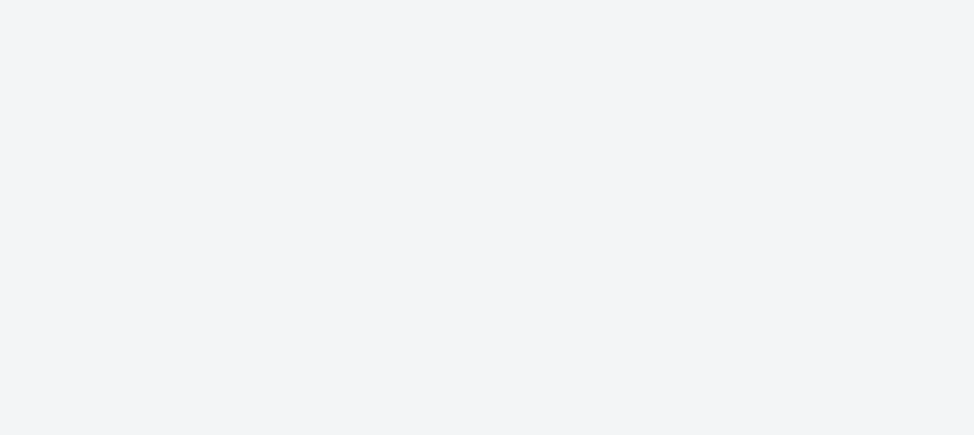


Selecting the three dots for a file

- 3 Select **Download**.

Browse files and directories

The FileStorage UI displays the FileStorage system's root directory by default. From the root directory, you can view a list of files and subdirectories, select a file to preview, select a subdirectory to browse, or create a directory.



Browsing files and directories in the Workato FileStorage UI

The UI displays the following information for each file in the list:

- Name
- Type
- Size
- Created time
- Last modified time

The UI displays the following information for each directory in the list:

- Name
- Created time

You can sort by **Name** or **Created time** by selecting the appropriate column name. Select it again to reverse the sort direction.

Search files and directories

You can recursively search both files and directories using FileStorage UI. To search only files or only directories, select the **All types** dropdown menu and choose the desired type.

The search function is the same instance. For example, the search terms `contacts` and `CONTACTS` return the same files.

Searching FileStorage by files only, directories only, or both

Preview a file and its metadata

When you select a file from the list of files and directories, the FileStorage UI opens a side panel displaying the file's metadata. For CSV files, the panel also displays a preview of the file's contents.

Previewing a file in the FileStorage UI

- Type
- Size
- Path (with **Copy** to copy the file path)
- Created
- Last modified

When you select a CSV file, the preview displays up to the first 10 rows of the CSV.

Select the **Fullscreen** button to view a fullscreen preview of the file. You can also use the keyboard shortcut **Command + Enter** (macOS) or **Ctrl + Enter** (Windows).

Select **Exit** or use the keyboard shortcut **Esc** to return to the default preview.

Delete, move, download, and rename files from preview

When you select a file from the list of files and directories, the FileStorage UI opens a side panel displaying the file's metadata. Within this side panel, you can delete, move, download, and rename the file.

Previewing a file in the FileStorage UI

To delete or move a file from preview:

- 1 Select the three dots at the top right of the side panel.

When you select the dots, a dropdown menu opens with the options to Move file or Delete file

- 2 From the dropdown menu, select either **Move file** or **Delete file**. For detailed instructions on how to use these options, see [Move file](#) or [Delete file](#).

To download a file from preview, select the **Download** button in the upper-right corner of the side panel.

To rename a file from preview, select the pencil icon next to the file's name. After you enter a new name in the input field, select the checkmark icon.

Role-based access control in the FileStorage UI

Workato restricts access to the FileStorage UI using [role-based access control](#). This is in contrast to the [FileStorage connector](#), where all users in a workspace can access all FileStorage files and folders in the workspace.

To view or edit the permissions for a role, navigate to **Workspace admin > Collaborator roles**. Select the desired role, and then select **Platform tools**.

The following permissions are available in the FileStorage UI:

Full access

View and create files and directories

View

View files and directories

Create

Create files and directories

System and custom roles have the following permissions:

Admin and Analyst system roles

All permissions enabled

Operator system role

No permissions enabled

Custom roles

No permissions enabled by default; any permission can be assigned

FURTHER READING

- [Managing your team collaborators with role-based access control](#)
- [Collaborator roles](#)
- [Collaborator privileges](#)