

Preview, Edit, or Add a New File


Market: House, Senate

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Settings

1. Navigate to the **Library** application and ensure that file-related views are enabled. Click  next to the Views column heading and ensure that any of the below options are selected:

Edit Views Options

Available List Views for Library

Check/Uncheck to Add/Remove Options from the Library Views Menu

Drag with mouse to change display order.

☒ My Approvals Denied
 ☒ Needing My Approval
 ☒ My Form Letters
 ☒ All OneDrive Form Letters
 ☒ My Active Files
 ☒ **My Files**
☒ **All Files**
☒ All Active Form Letters
 ☒ All Form Letters
 ☒ Unapproved with Pending Messages
 ☒ All Active Service Related Form Letters

Add a Tile

Tiles

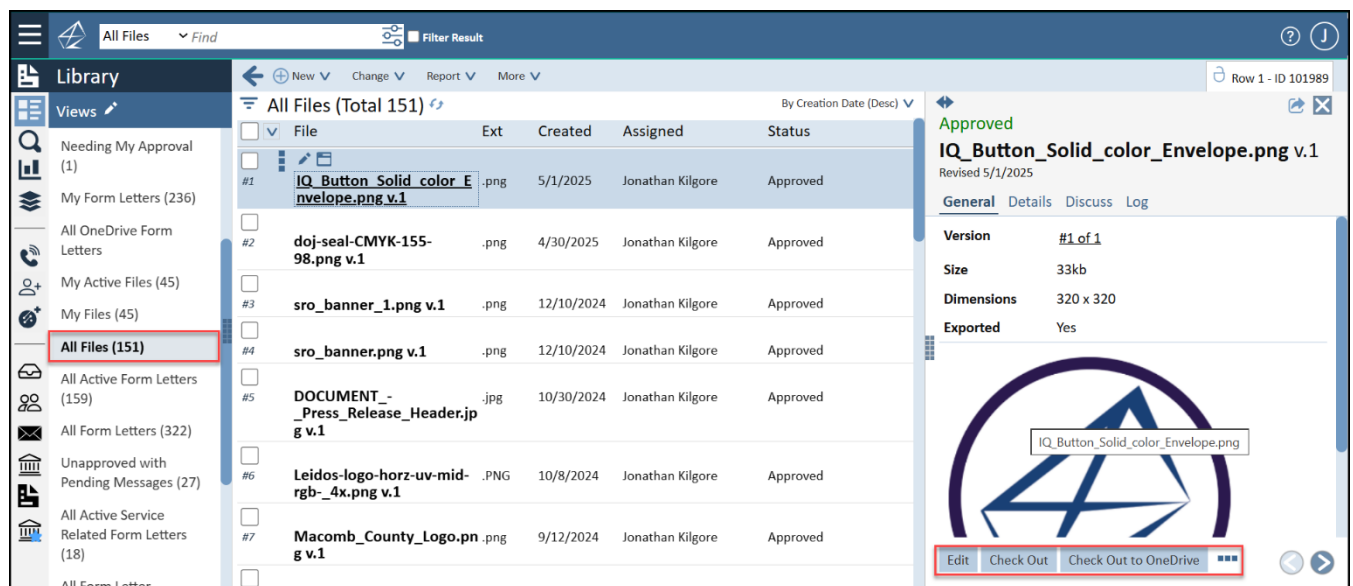
Reset to Defaults

Save

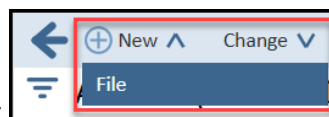
Cancel

Preview, Edit and Add New Version

1. In the views list, select the desired View.
2. A preview of the file will display, with options to **Edit**, **Check Out**, **Check Out to One Drive**, and **more**.
 - a. **Note:** Check Out to OneDrive only works if have an Office 365 email to connect with IQ. Talk to your IQ Consultant for more information.



Add a New File



1. To add a new file, select
2. Select **File** and complete the fields in the **Add New File** window and click **Upload**.

Add New File

Add New File

Source ☒ Upload ☐ Template

Select File to Upload

- or - Drop File(s) Here

Name

Directory

Upload

Close