

Preview, Edit, or Add a New File


Market: House, Senate

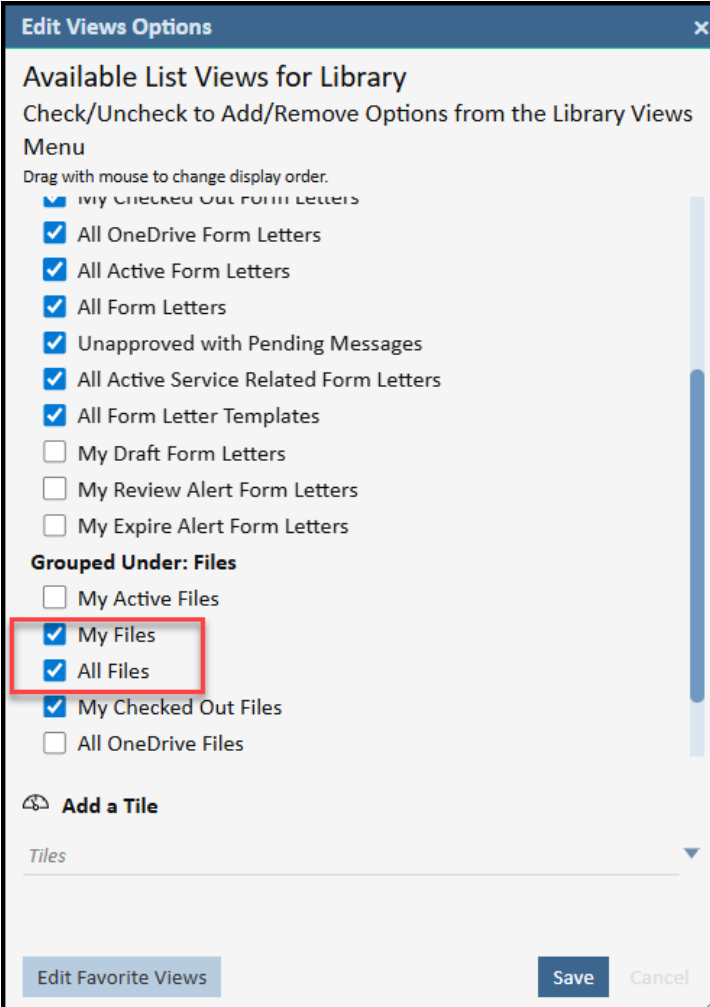
[Settings](#)

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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 Checked Out Form Letters
- All OneDrive Form Letters
- All Active Form Letters
- All Form Letters
- Unapproved with Pending Messages
- All Active Service Related Form Letters
- All Form Letter Templates
- My Draft Form Letters
- My Review Alert Form Letters
- My Expire Alert Form Letters

Grouped Under: Files

- My Active Files
- My Files
- All Files
- My Checked Out Files
- All OneDrive Files

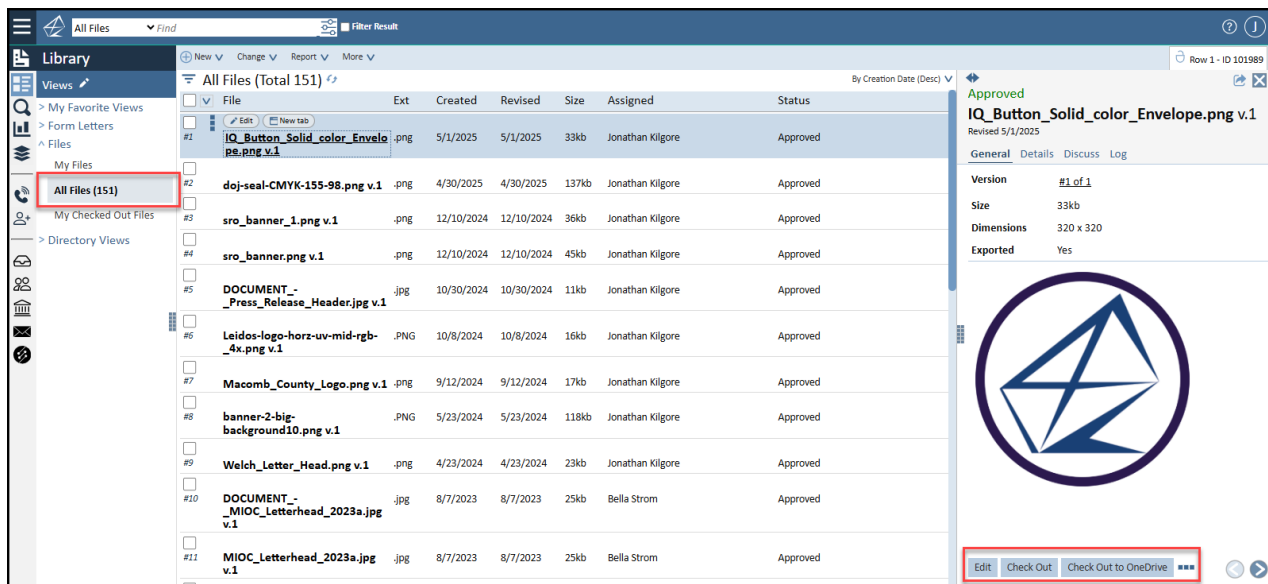
Add a Tile

Tiles

Edit Favorite Views Save Cancel

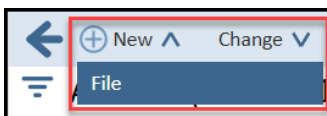
Preview and Edit

1. In the views list, select the desired View and record.
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, navigate to the appropriate view in the Files view list, i.e. My Files, then select the +New button.



2. Select **File** and complete the fields in the **Add New File** window and click **Upload**.

Add New File

Source Upload Template

Select File to Upload - or - Drop File(s) Here

Name

Directory