

Reporting Portal Quick Guide: Documents

Once you are in a category, click on the **Documents** tab. Then you will see document folders. If you do not see a folder or are missing one, please reach out to your agency contact.

Note: Folder access is assigned by the liaison.

The screenshot shows the NYC DOHMH Reporting Portal interface. The top navigation bar includes 'Request Report Access' and 'Need Help?'. The breadcrumb trail is 'Home / Syndromic Surveillance'. The 'Documents' tab is selected. Below the tabs, there are two folder icons: 'Facilities' and 'New Folder'. A red box highlights these folders, and a red arrow points to the 'New Folder' icon with the text 'Number of documents'.







You can share documents with other users including external users and DOHMH users so long as you have the same category role. Depending on your permissions, you will have the ability to add, edit, delete or lock documents.

Note: Reporting Portal is not used for co-authoring/document collaboration but only document sharing.

The screenshot shows the NYC DOHMH Reporting Portal interface with the 'Documents' list. The breadcrumb trail is 'Home / Syndromic Surveillance / New Folder'. The 'ADD' button is highlighted with a red box. Below the table, there is a table with the following data:

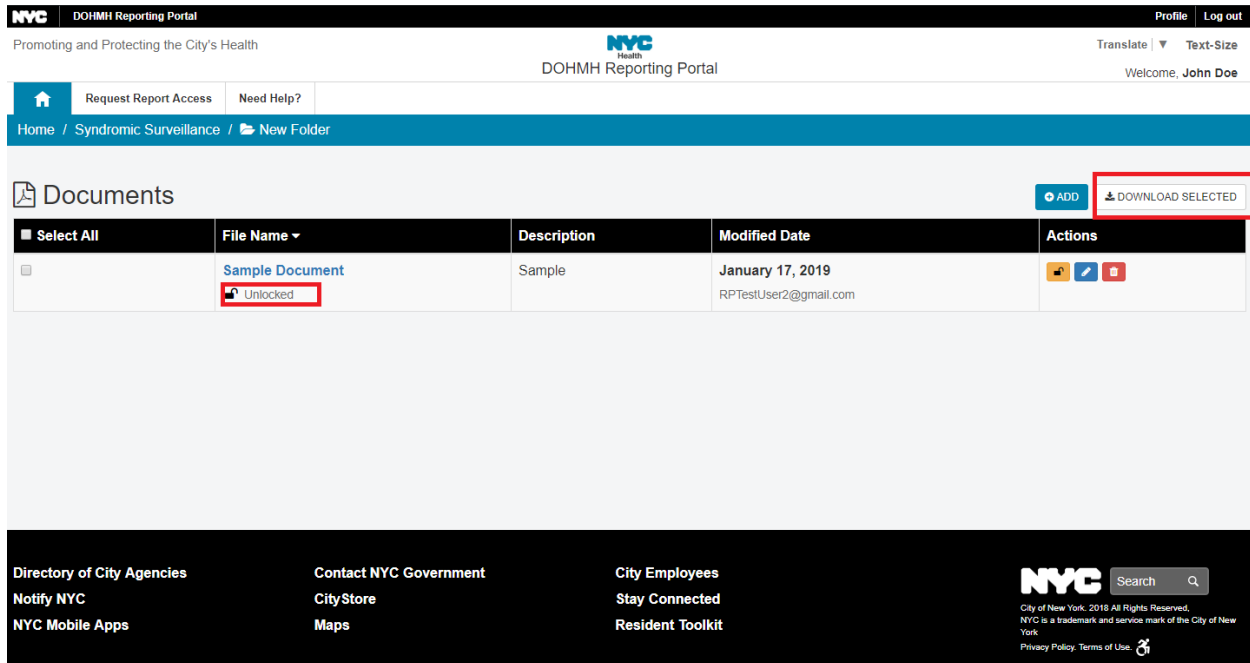
Select All	File Name	Description	Modified Date	Actions
<input type="checkbox"/>	Sample Document Unlocked	Sample	January 17, 2019 RPTTestUser2@gmail.com	

Note: Icons will be disabled if locked or not enough privileges

Icon	Privilege	Description
	Add	Add document information and file
	Edit	Edit document information and file
	Delete	Delete document information and file
	Lock	Disable editing (only view access)
	Unlock	Enable editing
		Disabled - Locked / not enough privileges

“**DOWNLOAD SELECTED**” - allows you to download multiple files selected

“**Unlock/Lock**” - enable/disable actions



The screenshot shows the NYC DOHMH Reporting Portal interface. At the top, there is a navigation bar with the NYC logo, 'DOHMH Reporting Portal', and user options like 'Profile' and 'Log out'. Below this is a secondary navigation bar with 'Request Report Access' and 'Need Help?'. The main content area is titled 'Documents' and features a table with columns for 'Select All', 'File Name', 'Description', 'Modified Date', and 'Actions'. A single document entry is visible: 'Sample Document' with a description of 'Sample', a modified date of 'January 17, 2019', and a user 'RPTTestUser2@gmail.com'. The 'Actions' column for this document includes icons for 'Add', 'Edit', and 'Delete'. A red box highlights the 'DOWNLOAD SELECTED' button in the top right corner of the document list. Another red box highlights the 'Unlocked' status icon in the 'File Name' column of the document entry. The footer contains various links such as 'Directory of City Agencies', 'Contact NYC Government', 'City Employees', and 'Resident Toolkit', along with a search bar and copyright information.