Agency Performance Management Administrators have access to Reporting 2.0 to export reports used for monitoring compliance of performance reviews and aiding in carrying out the performance management process. This quick reference guide will assist you in navigating and using Reporting 2.0 in MyPURPOSE.
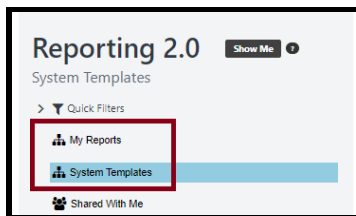
To access go to: REPORTS > REPORTING 2.0

Quick Filters expands to show you:

- Recently Viewed - Displays the reports you have viewed most recently.
- Favorites - Displays reports you have marked as Favorites from the Actions drop-down.
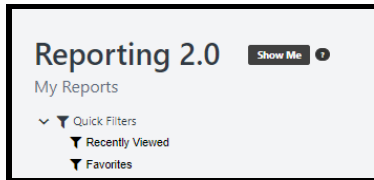
My Reports and **System Templates** tabs are displayed; however, your role will not use these features.
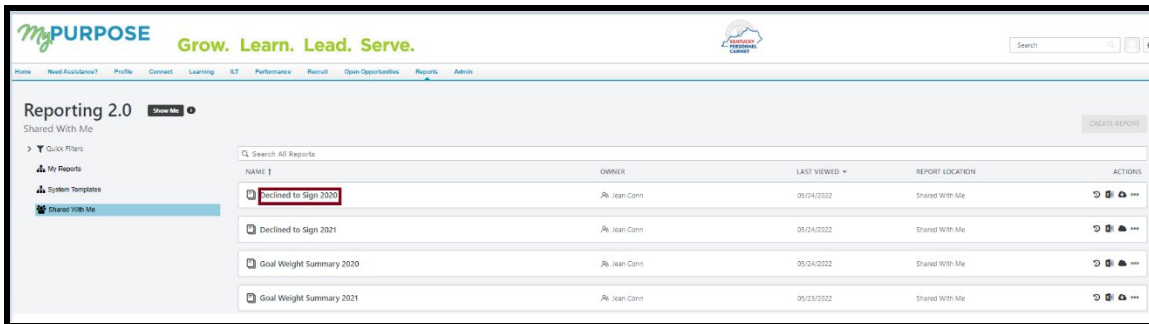

Shared With Me – This is where you will find all of the custom reports shared with you.
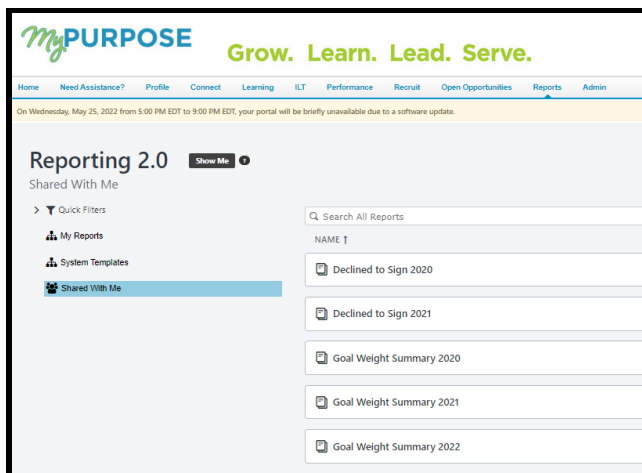
Search All Reports - You can type part or all the name of the report you want to search.

You may preview a report by selecting on the report name. Selecting the preview will not display recent data.
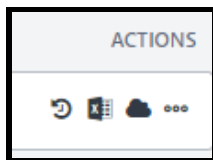


Column headings display above the report names:

- Name – Use the up or down arrow to sort ascending/ descending.
- Owner – The person who created the custom report.
- Last Viewed – The date you last viewed the report.
- Report Location – Where the report is located.
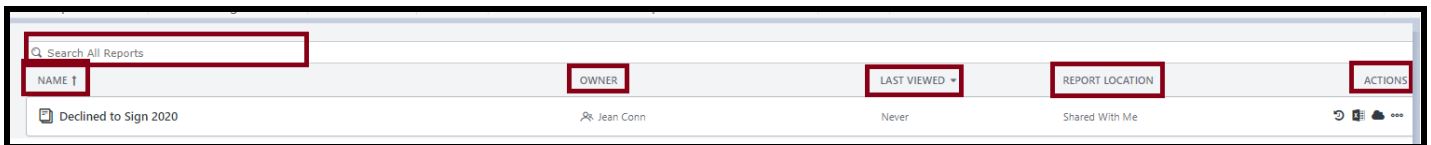

- Actions – There are several options under Actions.

- Excel icon **(recommended)** – This is the recommended process to download a report. Select the Excel icon, when processing is complete the report will display in the lower left corner of your screen. The reports are configured to refresh upon opening so the current version will display.
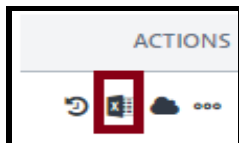
- Schedule for now icon (not recommended) – This will queue the report to process. When it completes you can choose to download by selecting the Excel icon and then import using the cloud icon. You will receive an email notification when it's complete.
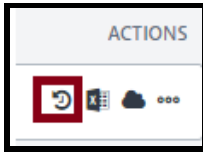

- Cloud icon – Download/ Schedule your report. The Cloud Icon with a down arrow means the report has already processed and is ready to download. Note: If you use the Excel process recommended above you will not need to complete this step.
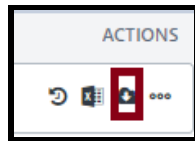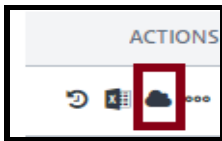
- More options – The ellipis button (…) will display additional options.
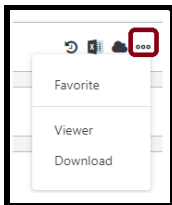
1. Favorite – Select favorite and it will add a Star to the report and store it in Favorites under Quick Filters.
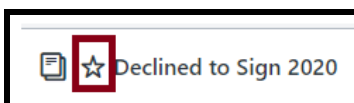
2. Viewer – This will display a view of the report.
3. Download – This is another way to download a report, but it requires multiple steps. Select Download, Schedule for now, it creates the report when it's complete you can download.
   It's highly recommended to only use the Excel Icon to download reports.