

## **Basic Functionality Favorites**

## Saving a Favorite Report/Dashboard

Once you have sorted and applied filters, you can save the summary report and/or dashboard as a favorite for ease-of-access on your landing page.

To select a report as a personal **Favorite**, follow the steps below:

- 1. Navigate to any report you would like to favorite.
- 2. Click the Favorite button on the top right.

| \star Favorite | 🖻 Export | Options 🗸 |
|----------------|----------|-----------|
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### Viewing Your Favorite Reports/Dashboards

To view your favorite reports/dashboards, click **Favorites** on the top menu bar.

|   |             | Q Search     |                        |           |                   |   |
|---|-------------|--------------|------------------------|-----------|-------------------|---|
| Utilization •   | Financial 🔻 | Enrollment 🔻 | Presentation Reports 🔻 | Explore 🔻 | Favorites 🔻       |   |
| <b>•</b> Rx Brand vs Generic Analysis / Rx Brand vs Generic |             |              | Personal               |           |                   |   |
| Rx Brand vs G   | eneric      |              |                        |           | Organizational    | • |
|   | enene       |              |                        |           | View All & Manage | e |
| Account: All  |             |              |                        |           |                   |   |

There are two categories where your favorite report(s) and/or dashboard(s) will display:

#### Personal

• These are your favorite reports/dashboards that you have saved.

#### Organizational

• These are reports and/or dashboards that Optima Health has saved as a favorite. They are accessible to any user. This list may be updated from time to time by Optima Health.

You can access your favorite reports by clicking the **Favorites** tab and hovering over **Personal**. Your favorite reports will display. If you do not see a favorite on the **Top 5 Visited Favorites**, please select **View All & Manage** to see the complete saved list of reports.



# DataPoint – Overall Basic Functionality - Favorites

|         | Favorites 🔻       |   |                             |
|---------|-------------------|---|-----------------------------|
|         | Personal          | • | TOP                         |
|         | Organizational    | * | FAVORITES<br>Overview Dashb |
|         | View All & Manage | e | Total Paid                  |
| sis Pha | annacy rinarysis  | - | Enrollment                  |