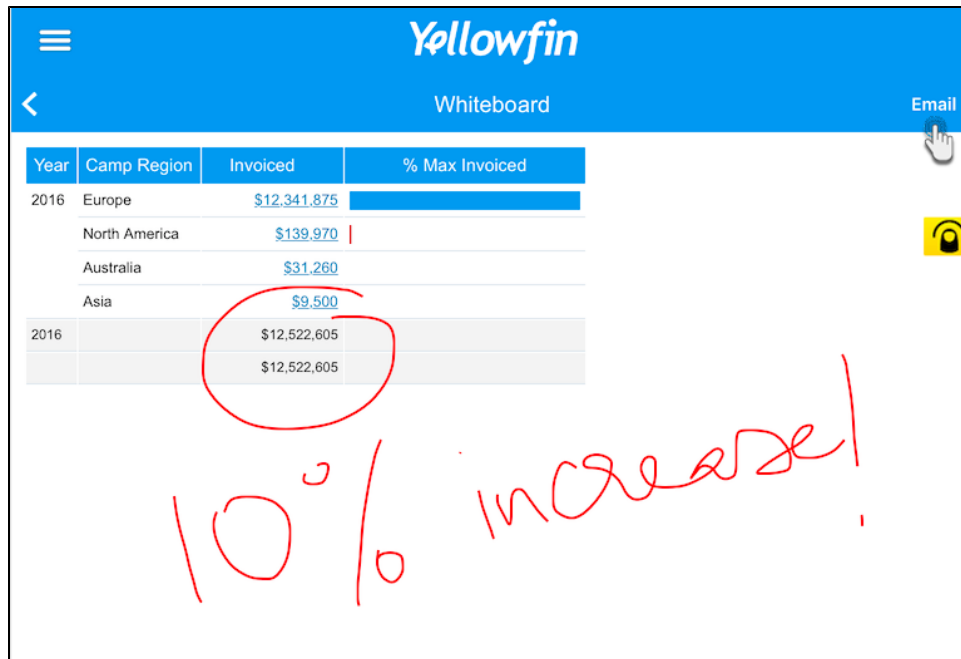# Manage Data on your iOS Device

You can use this section to manage your reports and charts using the dashboard.

Follow these steps to learn how to draw on a report or chart like on a whiteboard and email it.

1. Open a report or chart.
2. Tap on the drawing icon to activate the whiteboard feature.

3. Now you will be able to draw directly on the report.
4. You can then email this report screenshot by tapping on the Email option in the top-right corner of the screen.

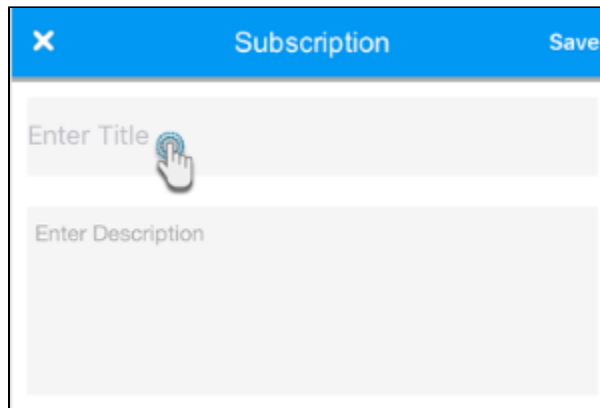5. In this next screen, provide the recipient's email and other details and then tap on Send.

You can subscribe to your reports and charts by scheduling them to be sent out at a pre-defined time, as frequently as required.

1. Open a report or chart.
2. Tap on the subscription icon in the bottom-right corner.

3. When the side panel expands, tap on the title field and provide a title for this subscription.

4. You can also use the next field to provide a description.
5. Tap on the option to add a condition, if you would like to include one.

> ✅ Conditions provide a unique way to set up a schedule, in that the report will only be sent out if the condition(s) become true.

- Create a condition by choosing a field from the report, an operand that applies to this field, and finally entering a value. Then tap on Save. For example, you could select the *invoice* field, choose the *greater than* operand and set the value as *5000*. So now your condition will become true if the invoice value surpasses the amount of $5000.

6. Next, choose the format in which to send out the report by tapping on the HTML option and making a selection.

7. Schedule the frequency with which to repeat this subscription. (E.g: If you subscribe for a weekly report, then select a week day.)

8. You can also set up advanced scheduling options. Use the Advanced option to view additional scheduling options:
   * Choose a time zone.
   * Select the time at which to send out the report.
   * Then tap on Save.

9. Once all the details have been added, tap on Save to schedule this subscription.

10. Note: You will notice that the subscription icon in the report options will have turned blue.

> ✓ You can always return to a subscription to update or delete it.

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Here's how you can mark a report as a favourite item to make it appear in the *Favourite* panel:

1. Click on a report to access it.
2. And simply tap on the favourite icon in the bottom-right corner.

3. Once favourited, this button will turn blue and the report will be added to the *Favourite* panel on the home page.

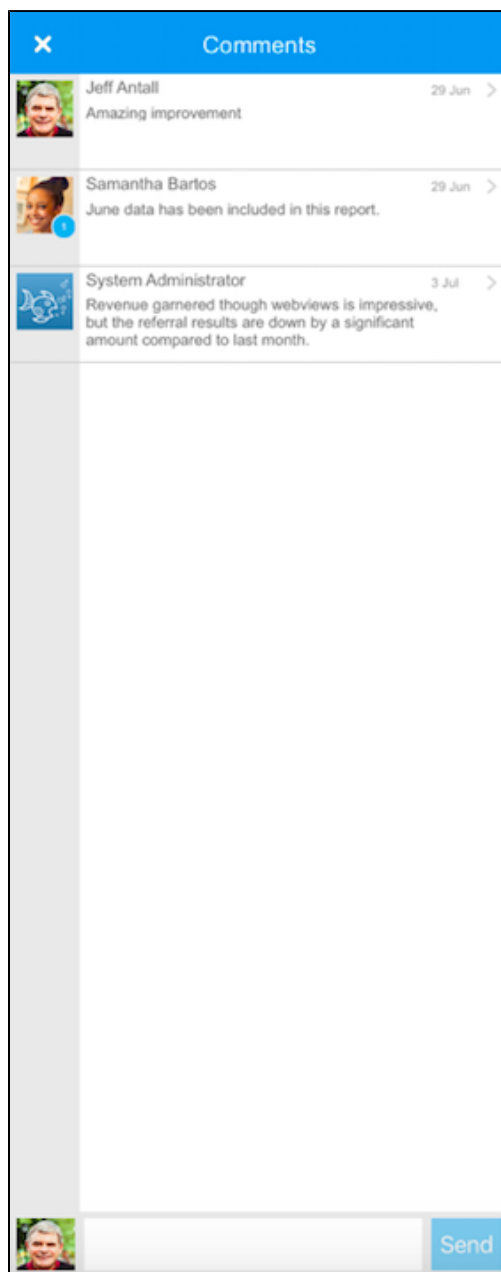> ✓ Tapping on a blue star button will unfavourite the report.

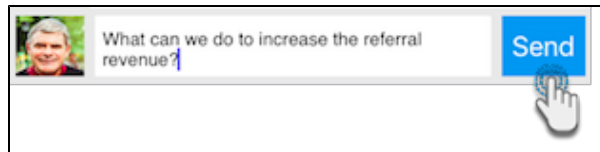The most basic method to add a new comment to your report is explained below:

1. Open a report or chart.
2. Tap on the comment icon in the bottom-right corner (or the top-left side).
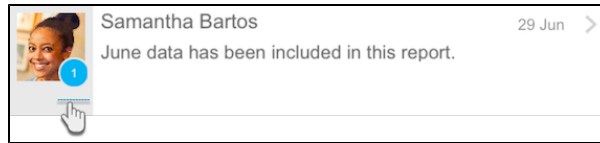

3. A side panel will appear with a list of all comments added.

4. To add a new comment, tap on the text bar at the bottom of this panel and press Send.

5. To reply to a comment, tap on that comment and use the bottom text bar to enter your reply. Once a reply has been added, a reply notification will appear next to the avatar of the main commenter.

6. Similarly, you can also perform the following functions on a comment:

Icon	Feature	Description
	Insightful	To mark a comment as insightful.
	Check	To check a comment.
	Delete	To delete a comment.

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Carry out the steps below to share a report with other Yellowfin users:

1. Click on a report to access it.
2. Tap on the share icon in the bottom-left corner; a menu with report sharing options will appear.
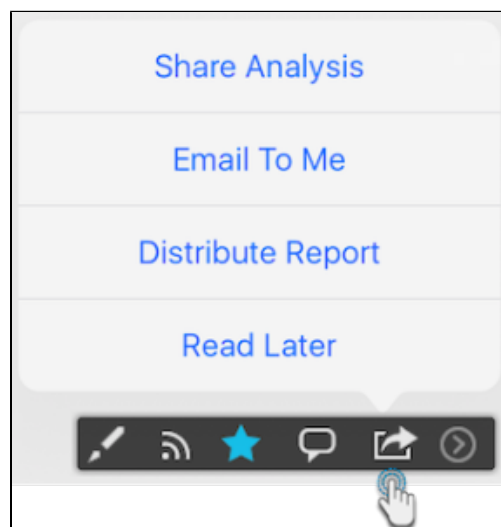
3. Select any of these options to share or distribute your report. This chart explains the main purpose of each of them:

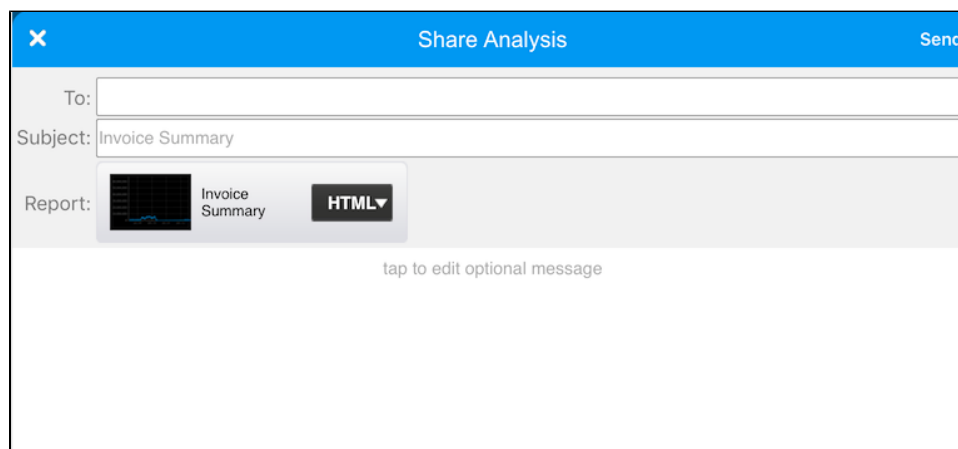| Option	Description
Share analysis	To email this report to recipients.
Email to me	To email a copy of this report to yourself. Your email address will already by provided when you tap on this option.
Distribute report	To send a copy of the report to other Yellowfin users.
Read later	To save this report in your inbox to be accessed at a later time.

4. In our example below, we will follow how to email a report to other people.

    a. Choose the Share Analysis option. An email composing screen will appear.

    b. Enter the email address of the recipient(s).
    c. Provide a subject.
    d. Tap on the HTML option to choose how to attach the report.
    e. You can also enter a message by tapping on the main canvas of this screen.
    f. Finally, press Send.

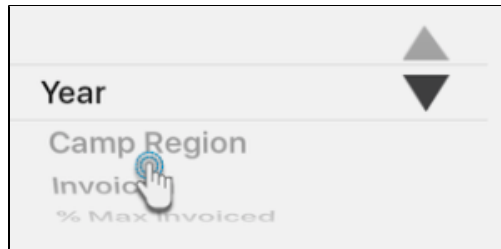You can sort your report or chart according to any data type, provided it can be sorted.

⚠ Not all reports or charts will contain content that can be sorted, in which case this option will be disabled.
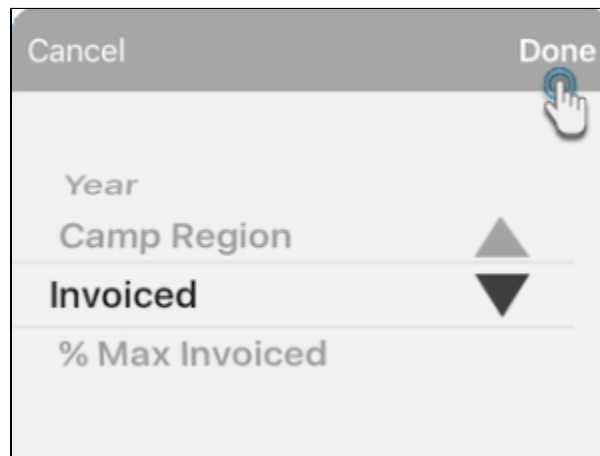
1. Tap on the sort icon in the top-right corner.

2. Select a data column according to which you wish to sort your report, by scrolling through the list.

3. Choose either the ascending or descending order to display the data in.

Order	Explanation
▲	Displays data in ascending order.
▼	Displays data in descending order.

4. Tap on Done.

You can view quick details on your report with this simple option.

1. Tap on the information icon in the top-right corner.

2. Information on your report will appear.

Region Revenue by Year

A drill through report displaying revenue by camp region and year, allowing to drill through to a detail report.

Usage (100%)

Tags: No tags

Data Source: Ski Team

View: Ski Team

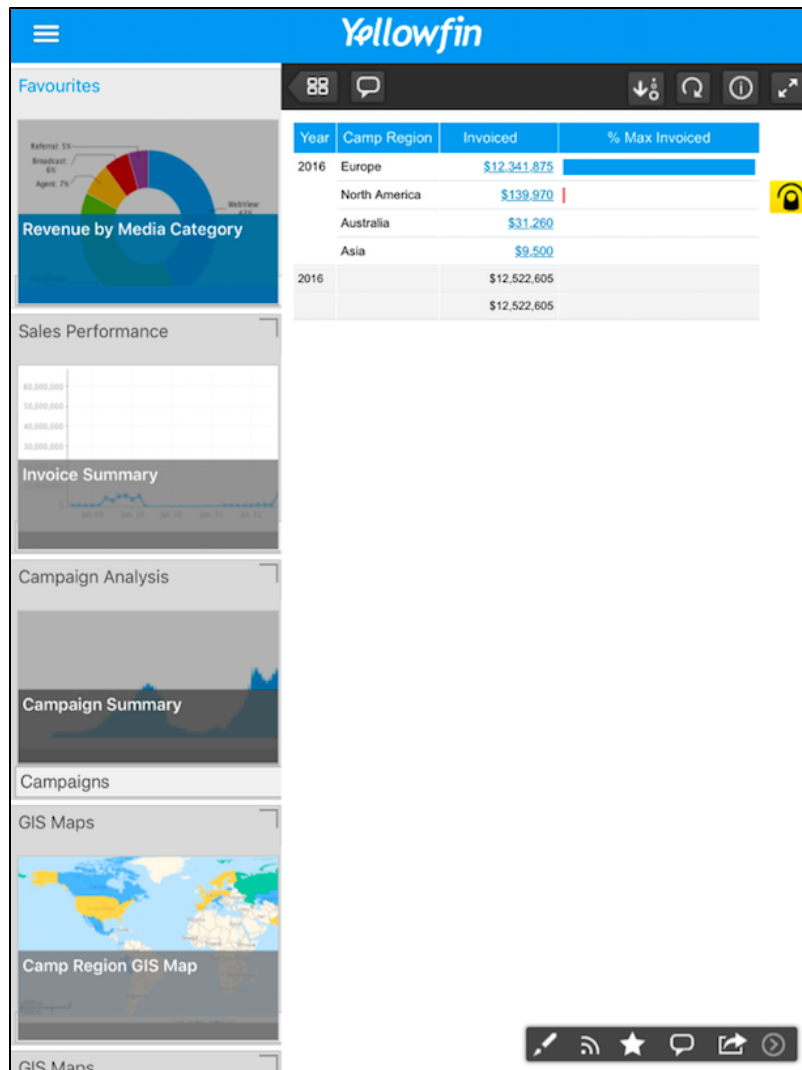Modified: 2016-11-18

Modified By: System Administrator

You can pop open a side panel to your dashboards, directly on your report screen.

1. Tap on the expand icon in the top-right corner.

2. A dashboard on the left side will appear.

If your report or chart has any drill through information, you can easily view it.

Note: This icon will indicate if your report has drill through information. Tapping on it reveals the following message:

1. Simple tap on a drill through link in your report.

Year	Camp Region	Invoiced	% Max Invoiced
2016	Europe	$12,341,875	
	North America	$1 70	
	Australia	$31,260	
	Asia	$9,500	
2016		$12,522,605	
		$12,522,605	

2. You can then view a further breakdown of the information.

Region Revenue by Year   Camp Revenue Detail Report

Camp Country	Camp Name	Athletes	Invoiced	Avg Rating
Austria	Brixen im Thale	4	$21,805	5.8
	Fuegen	3	$52,553	7.0
	Patscherkofel	5	$78,151	7.6
	S Caterina Valfurva	3	$32,274	6.7
Austria		15	$184,782	6.8
Italy	Kastelruth	7	$12,017,026	8.3
	Padola	3	$53,897	8.3
	Ratschings	3	$32,274	6.7
Italy		13	$12,103,196	7.8
Sweden	Bork Bork Camp	3	$53,897	8.3
Sweden		3	$53,897	8.3
		31	$12,341,875	7.3

3. If there are any reports related to this one, a Related Reports button will appear at the bottom.

4. Tap on it to view thumbnails of all related reports. You can then easily access these reports directly from here.

Here is how you can access report filters, provided they are added by the creator of the report through the Yellowfin platform.

1. Open a report.
2. Tap on the filter icon in the top-left corner of the screen. (Note: This option will only appear if there are any filters included in the selected report.)

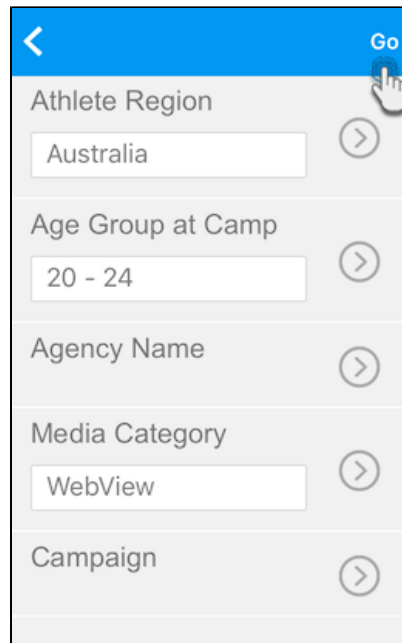3. A panel with filters will appear on the side, as shown in the example below.

> ⚠ These filters will differ according to the data added to the filter field when the report was created in the Yellowfin platform.
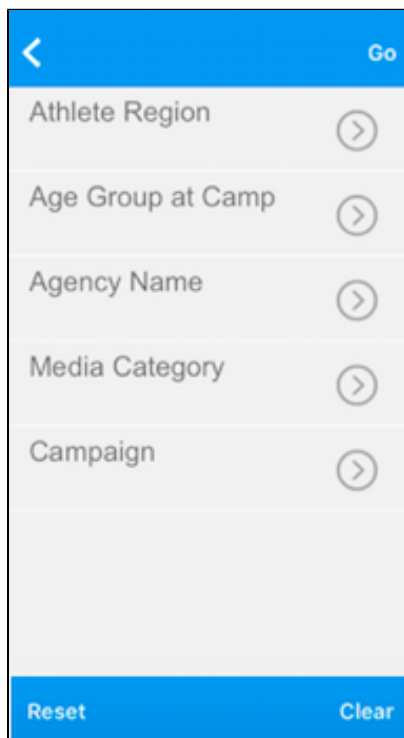
4. You can start selecting filters now.

5. Once added, tap on Go to apply them to your report.

Using the time slider feature, you can adjust the report content according to a specified time mark.

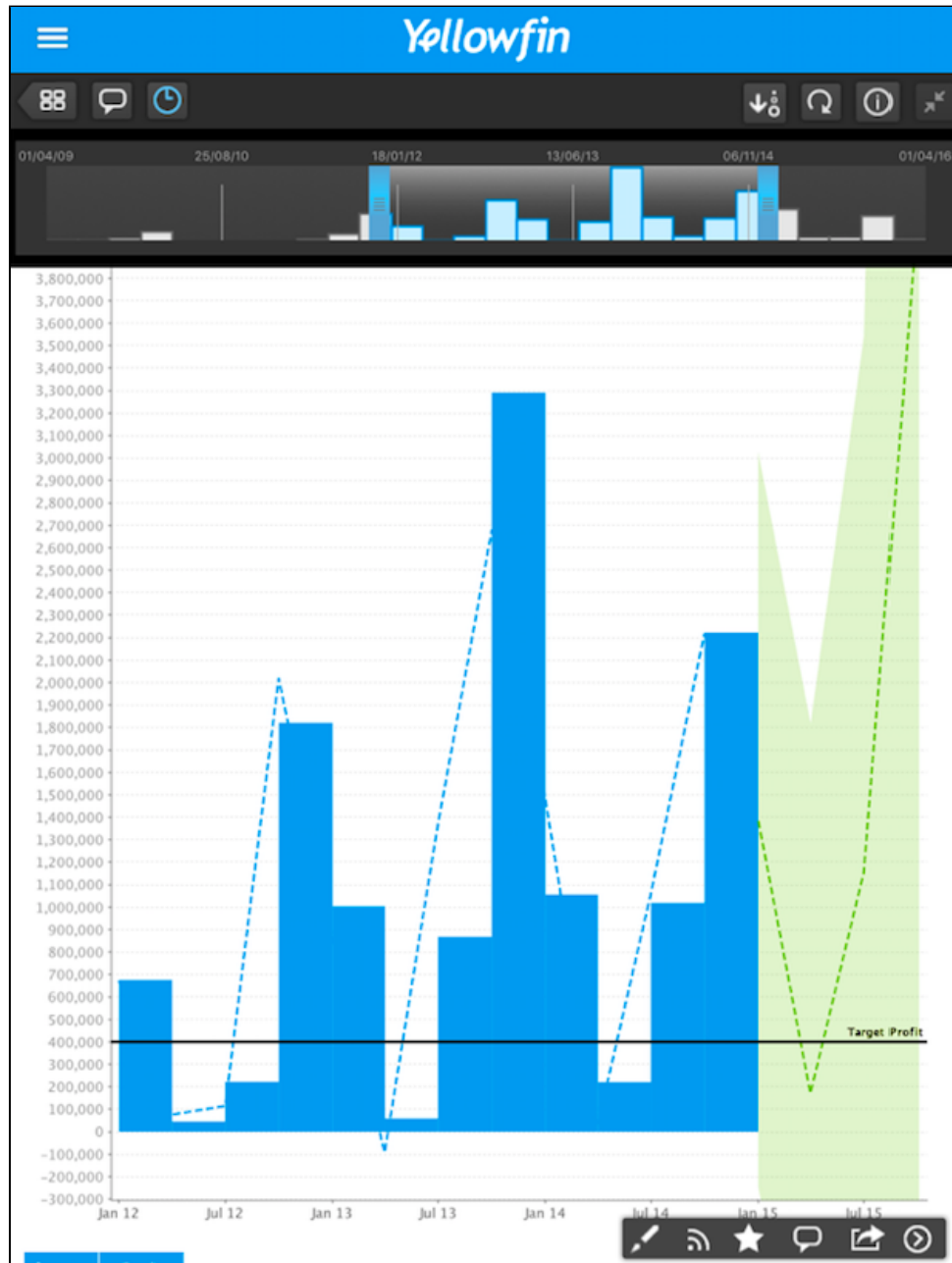> ⚠ This option only appears if the report creator has included a time slider field in the report.

1. Open a report with the time slider feature.
2. Tap on the time slider option. The slider will appear in a new panel.

3. Drag either one or both of the adjustment buttons to set a time interval.
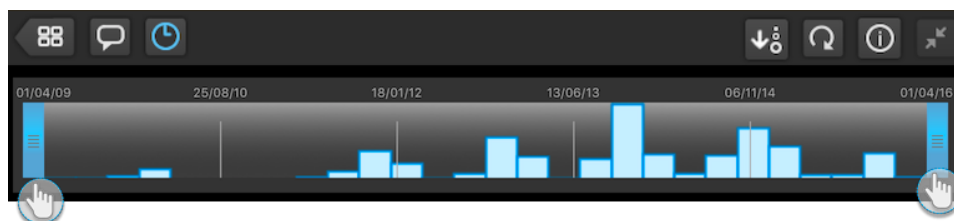
4. The report content will be filtered according to the selected time interval.
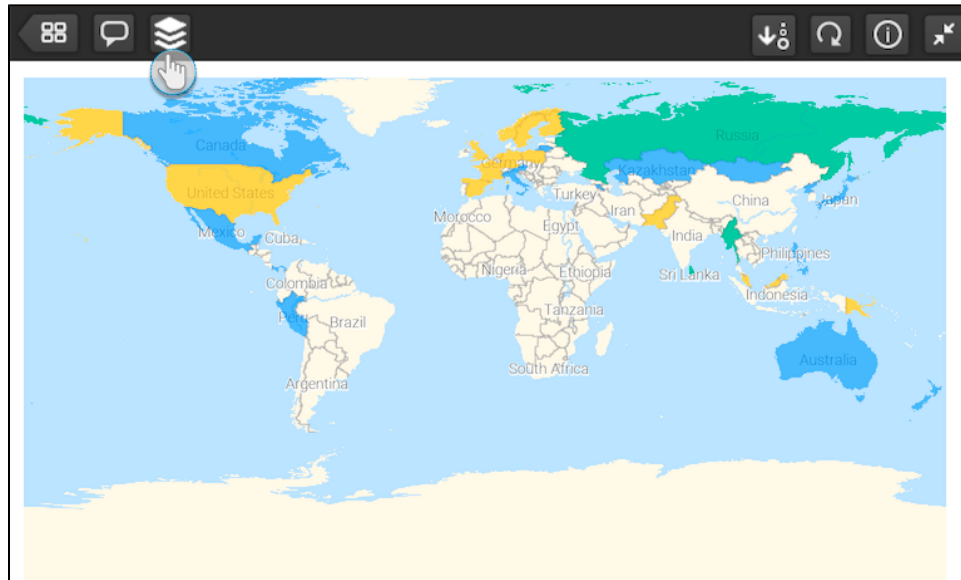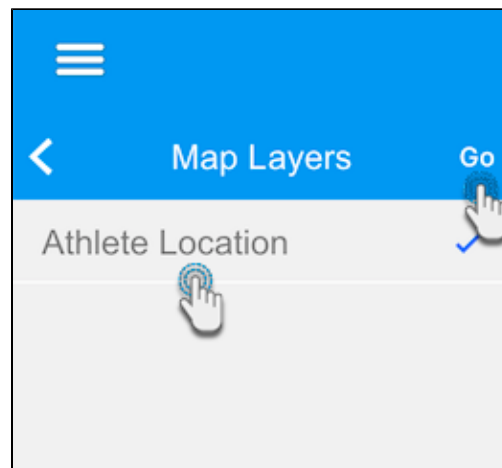
If your map has data layers, you can use a layer to view its data, as located on the map.
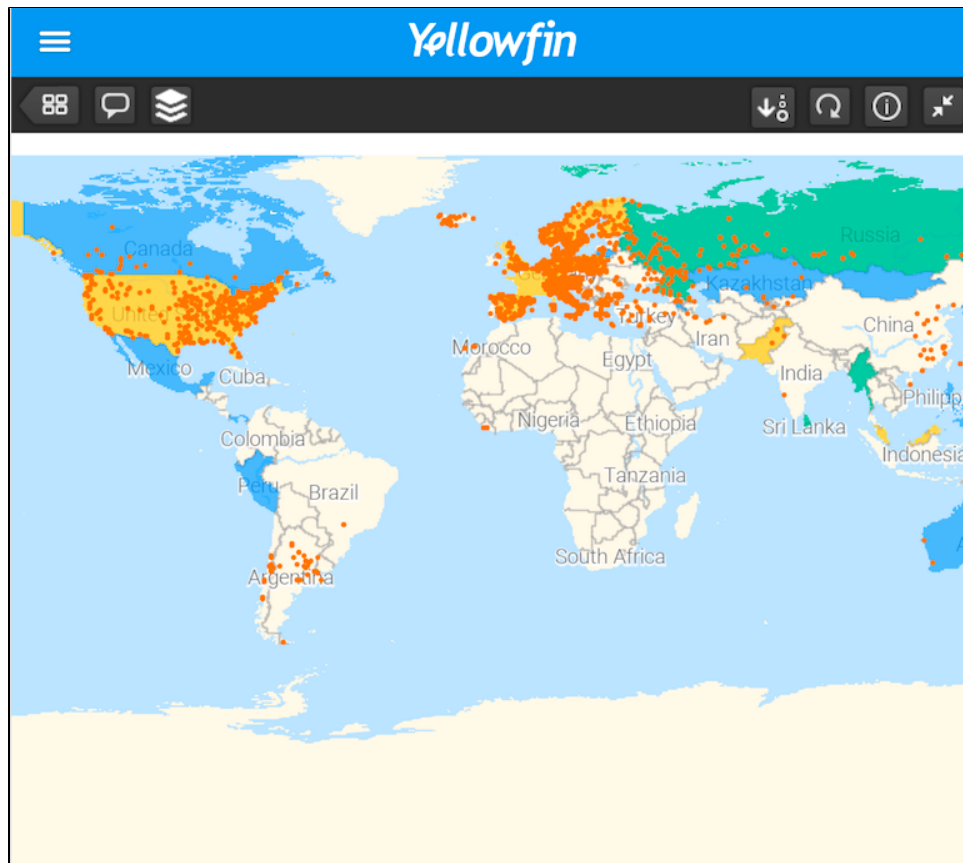
1. Access a GIS map on your device.

2. Tap on the map layers icon on the top-left side.

3. When the side panel expands, choose a layer and then tap on Go.

4. You will be able to view the data records belonging to that layer on the map.

Related links: