


# Reports on Mobile

- [Accessing Reports](#)
  - [Understanding the Reports list](#)
  - [Navigating Reports](#)
  - [Accessing Reports from the Timeline](#)
- [Interacting with Reports](#)
  - [Understanding the report page](#)
  - [Switching visualizations](#)
  - [Filtering data](#)
    - [Refreshing cached filter values](#)
  - [Drilling down](#)

You can read and interact with reports directly on the Yellowfin mobile app.

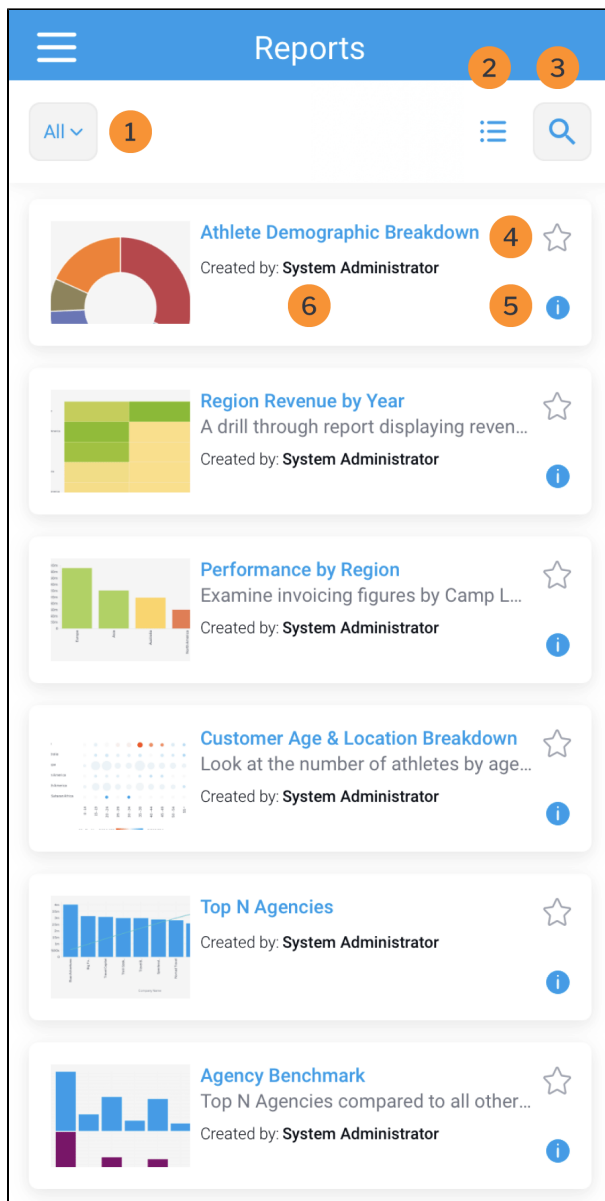
## Accessing Reports





Reports can be accessed in two ways:

- By tapping on the burger bun  in the top-left corner, and then tapping 'Reports' to access the Reports list.
- By tapping on a tile in your Timeline that contains a report.

## Understanding the Reports list

The Reports list provides access to all available reports, with options for filtering, searching and accessing report information.




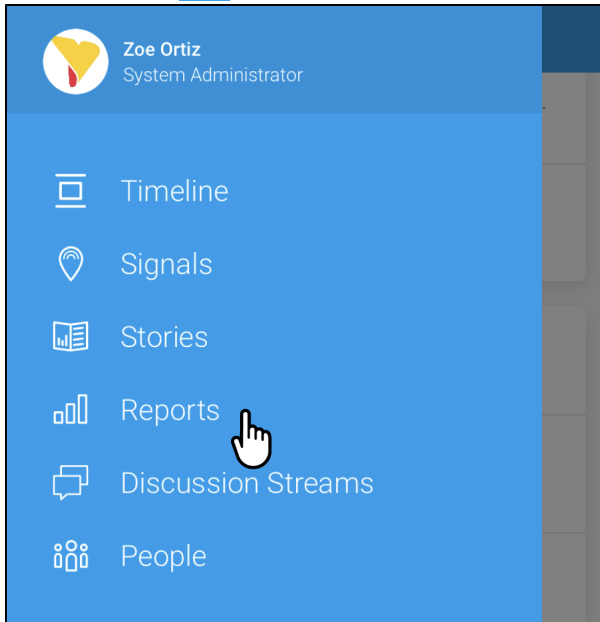
Number	Feature	Description
1	Filter	Tap the filter to change which reports to view in the list: <ul style="list-style-type: none"> <li>• <b>All:</b> shows all published reports.</li> <li>• <b>Newest:</b> displays the latest published reports.</li> <li>• <b>Recently Viewed:</b> brings up the recently viewed reports.</li> <li>• <b>My Favorites:</b> shows reports that you've marked as favorites.</li> </ul>
2	List	Tap the list button  to toggle between large and small report tiles.
3	Search	Tap the search button  to search for a report.
4	Favorite	Tap the favorite button  to mark the report as a favorite.
5	Report Information	Tap the information button  to display report information, which includes the report description, author and folder location.
6	Report tile	Tap on the report tile to view the report.

## Navigating Reports

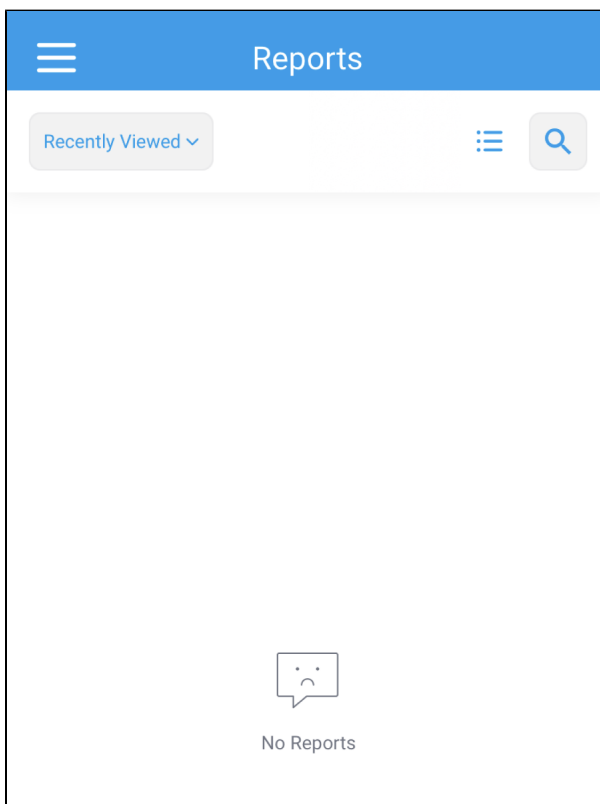


Reports with larger datasets may take longer to run. A loader will be displayed on the screen.

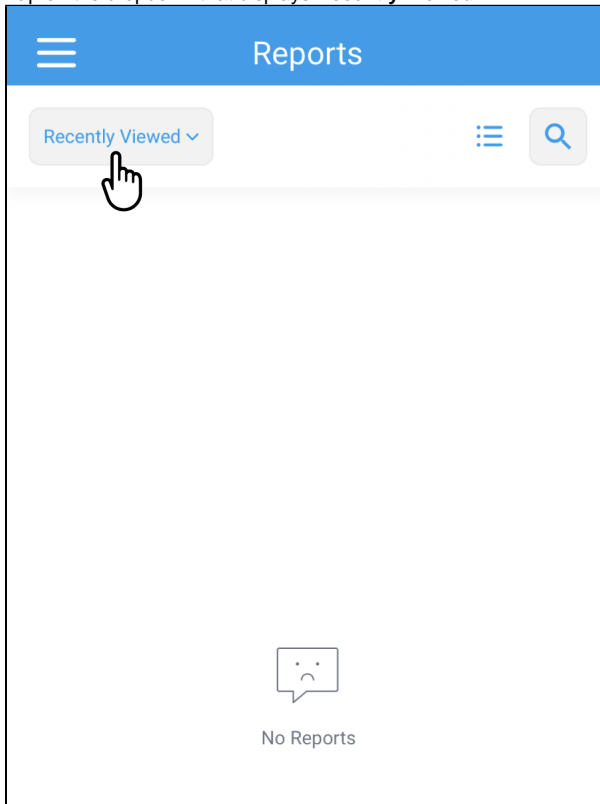
1. Tap the burger bun  in the top-left corner to access the main menu, then tap on **Reports** to access the Reports list



The Reports list will be displayed, and may be empty due to the **Recently Viewed** filter

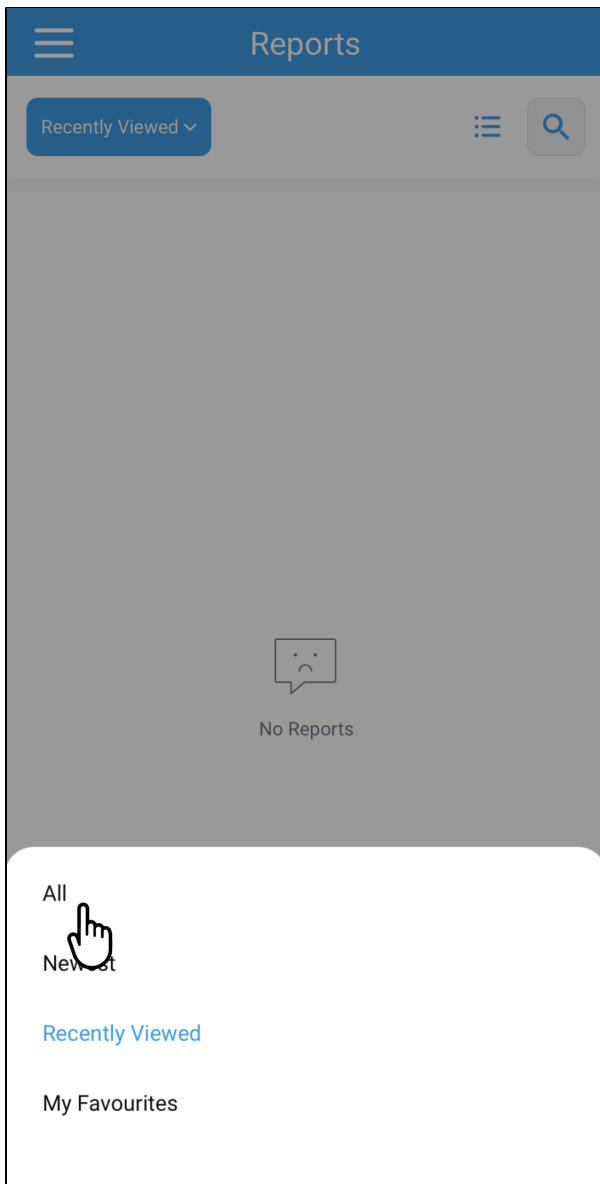


2. Tap on the dropdown that displays **Recently Viewed**



A popup will appear at the bottom of the screen

3. Tap **All** to display all available reports

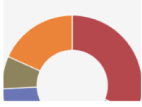


The Reports list will refresh and display all available reports



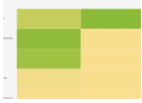
## Reports

All ▾



### Athlete Demographic Breakdown

Created by: **System Administrator**



### Region Revenue by Year

A drill through report displaying reven...

Created by: **System Administrator**



### Performance by Region

Examine invoicing figures by Camp L...

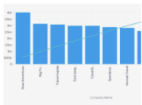
Created by: **System Administrator**



### Customer Age & Location Breakdown

Look at the number of athletes by age...

Created by: **System Administrator**



### Top N Agencies

Created by: **System Administrator**



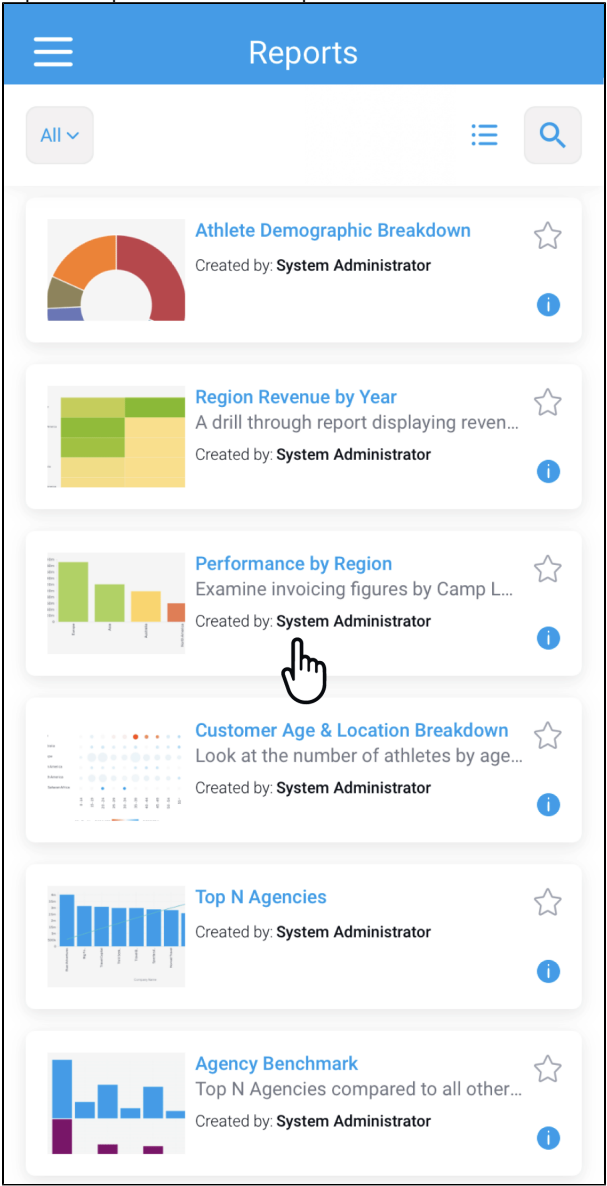
### Agency Benchmark

Top N Agencies compared to all other...

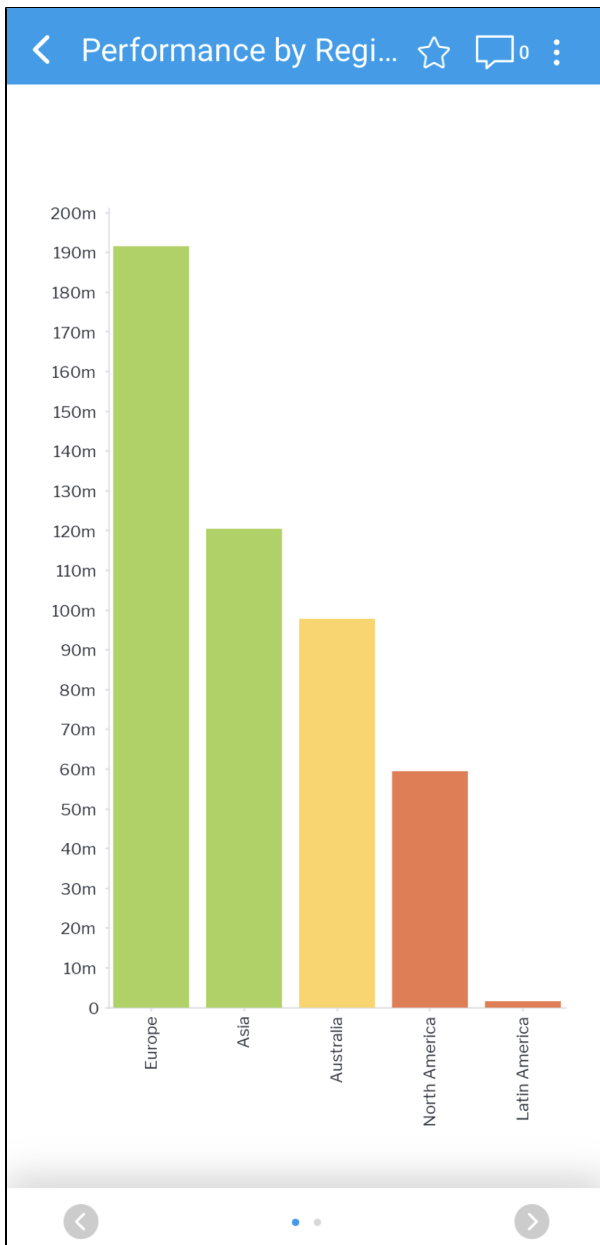
Created by: **System Administrator**



4. Tap on a Report tile to view the report



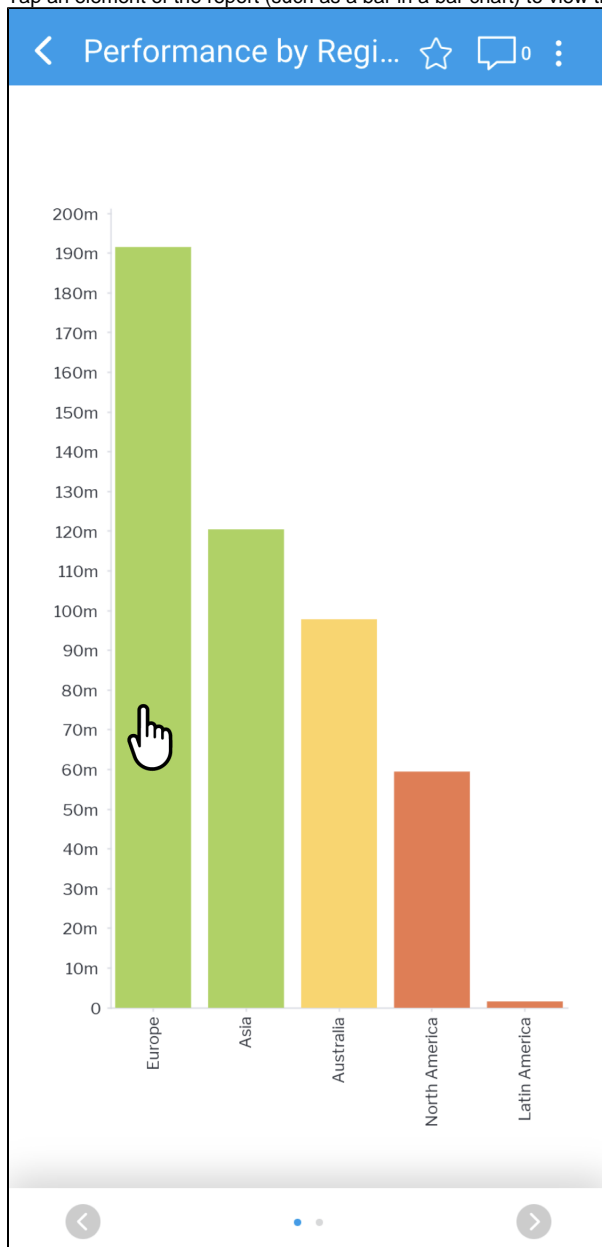
The report will run and the output will be displayed



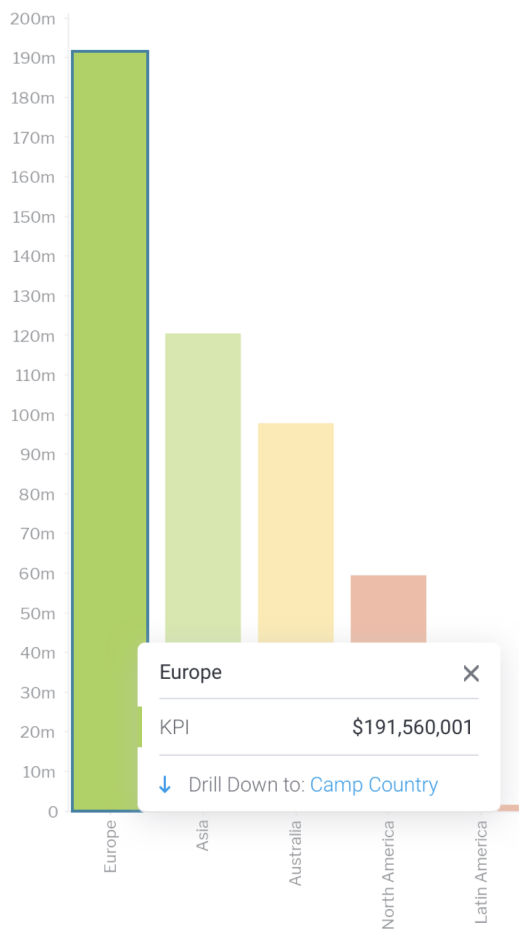
The report page allows you to interact with the report



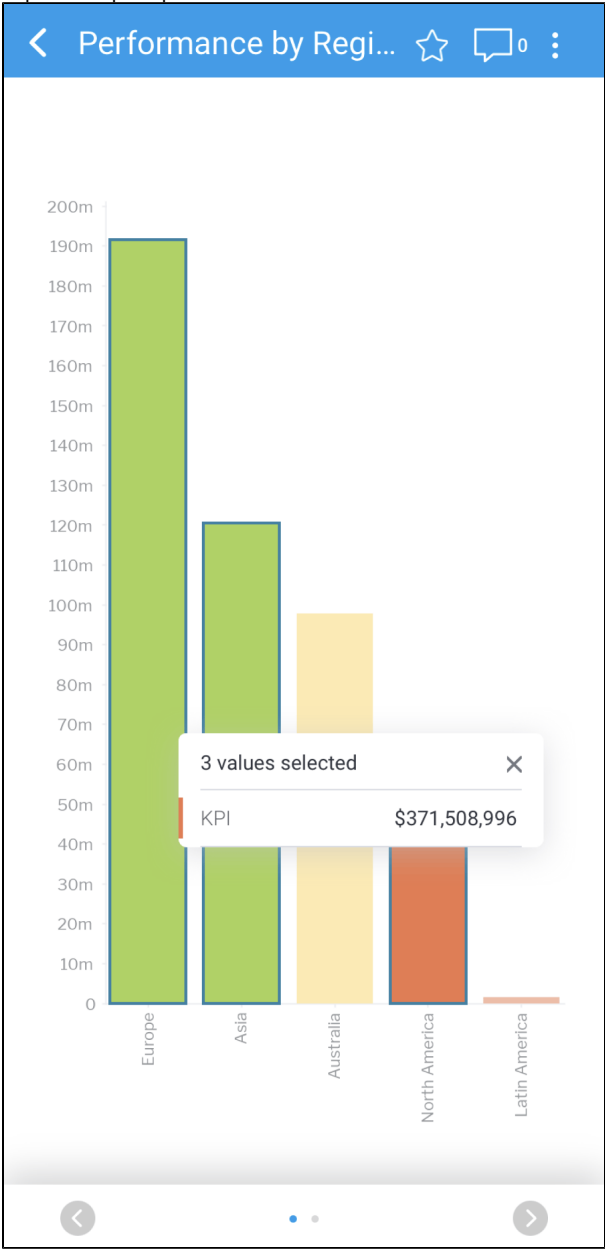
5. Tap an element of the report (such as a bar in a bar chart) to view the information for that element



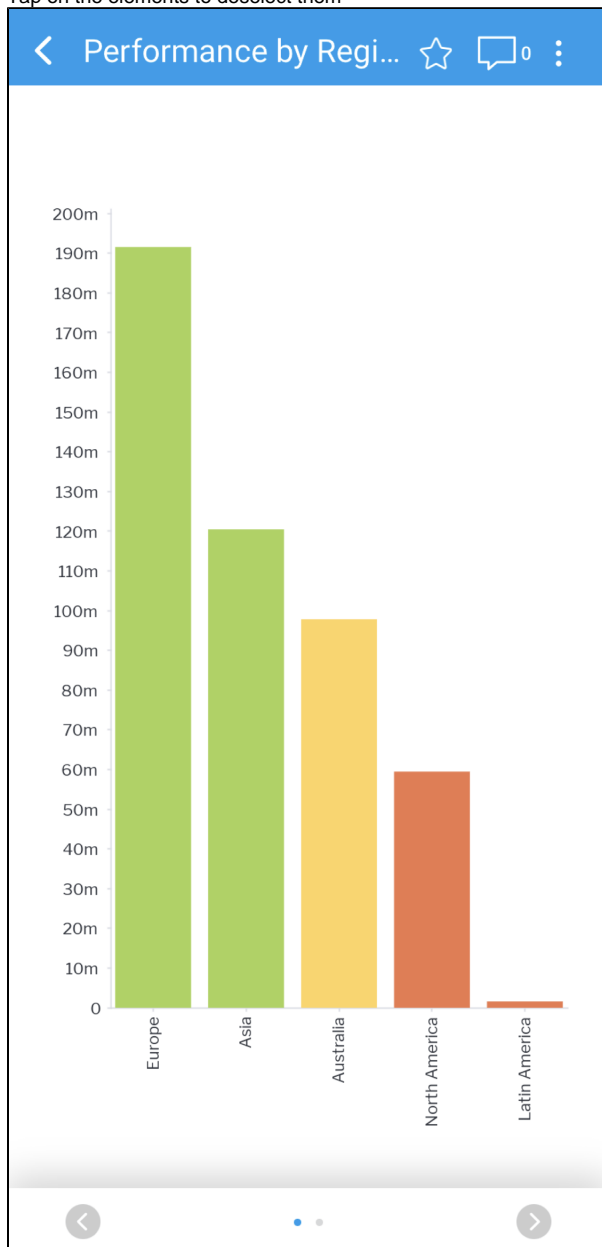
A tooltip will appear with the details of the report element



6. Tap on multiple report elements to view the cumulative value for the selected elements



7. Tap on the elements to deselect them

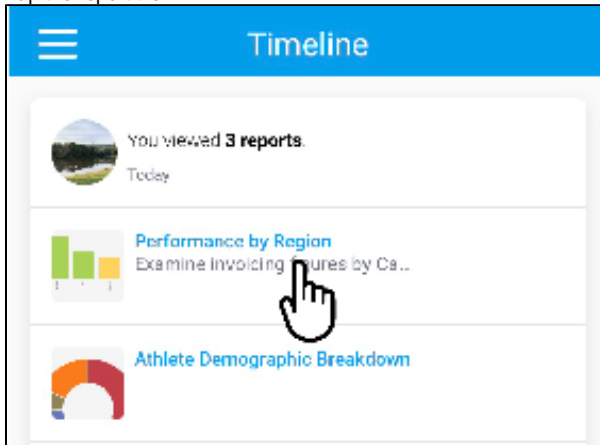


## Accessing Reports from the Timeline

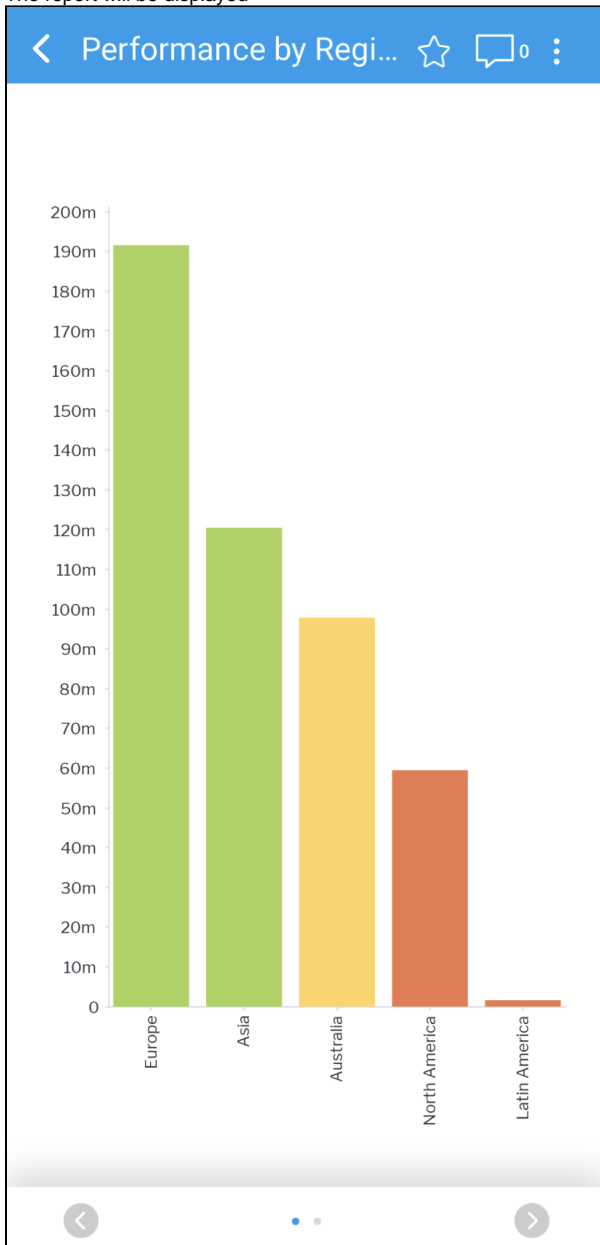
Reports are accessible from the [Timeline](#) if they have been previously viewed, shared by another user, broadcast to you, or triggered via other events such as receiving a notification of a new report published by a user you follow.

To view a report from your Timeline, follow the steps below:

1. Tap the report tile



The report will be displayed



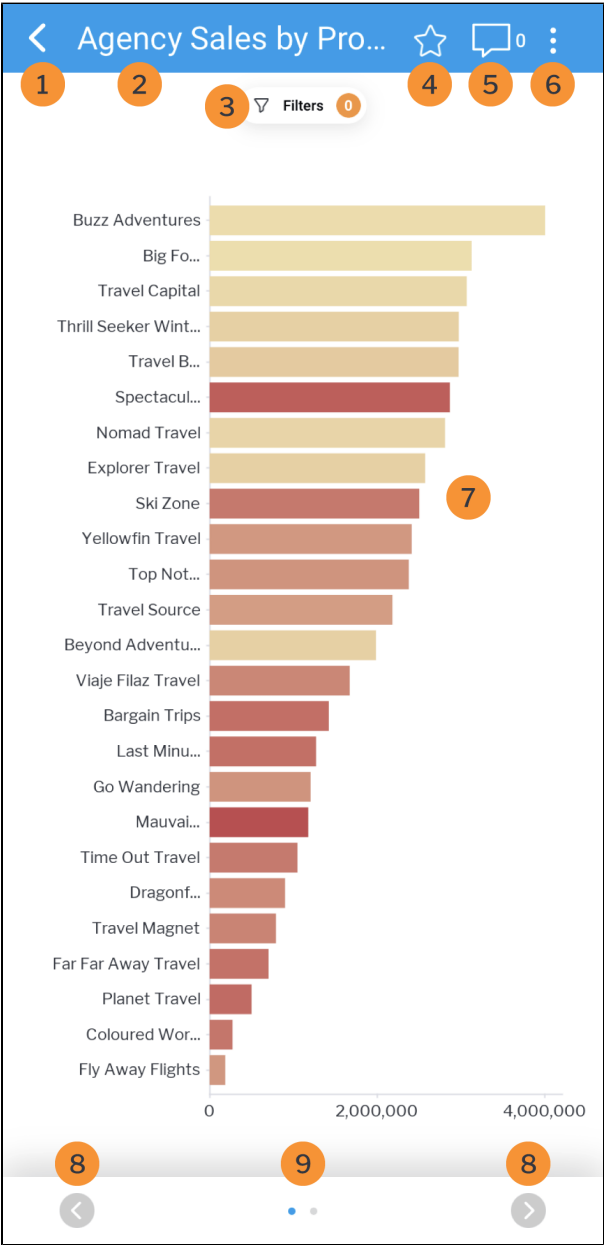
# Interacting with Reports


You can interact with reports in many ways to help you assess and interpret the data comprehensively. The Yellowfin mobile app allows you to:

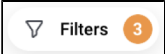






- [Switch visualizations.](#)
- [Filter data.](#)
- [Drill data.](#)
- Access additional report features such as report information, comments, sharing and favorites.

## Understanding the report page

The report page shows the details of the report. All interactive report features are accessible from this page.



Number	Feature	Description
1	Back button	Tap the back button  to go back to the previous page.
2	Report title	Displays the title of the report.
3	Filters button	

		 <p>Tap the filters button to filter values and refine the data displayed in the report.</p>
4	Favorite	 <p>Tap on the favorite button to mark the report as a favorite, for quicker access to this report in the future.</p>
5	Comments	 <p>Tap on the speech bubble button to comment on a report, or view existing comments.</p>
6	Report information	<p>Tap the more options button to display the report menu:</p> <ul style="list-style-type: none"> <li>• Tap the more info button  to display report information which includes the report description, author and folder location.</li> <li>• Tap the share button  to send this report to other users.</li> </ul>
7	Report	Tap the report visualization to highlight one or more elements, or drill for more information.
8	Report visualization buttons	  <p>Tap the arrow buttons to toggle between visualizations (if available).</p>
9	Carousel indicator	Displays the number of available report visualizations.

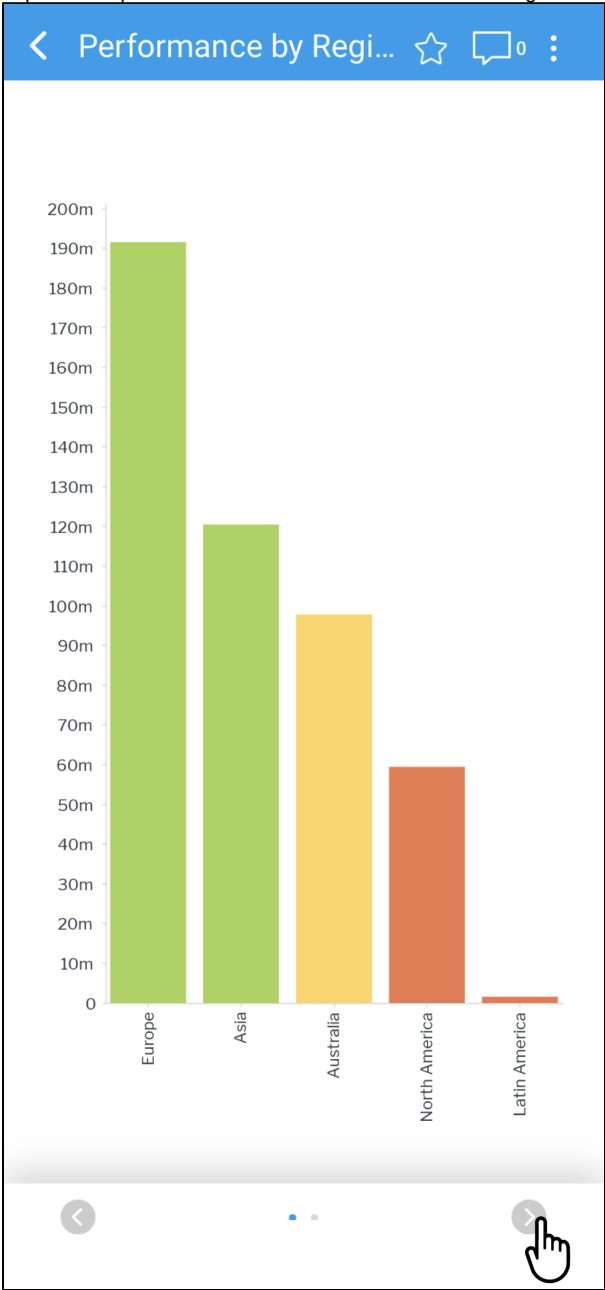
## Switching visualizations

Yellowfin reports may contain many different visualizations, ranging from tabular data and/or charts. Depending on the report, you can toggle between all available visualizations on the mobile app.

To switch visualizations, follow the steps below:

1. Open a report by tapping on a report tile  
You can access reports from the [Reports list](#), or from your [Timeline](#)

2. Tap on the report visualization arrow button at the bottom right of the report page



An alternate report visualization will be displayed



Performance by Regi... ☆ 0 ⋮		
Camp Region ▼	KPI ▼	Invoiced ▼
Asia	✓	\$120,474,325
Australia	!	\$97,832,651
Europe	✓	\$191,560,001
Latin America	✗	\$1,602,199
North America	✗	\$59,474,670
		\$470,943,846

- Take note of the number of dots between the two arrows at the bottom of the screen: this indicates the number of report visualizations that are available

[top](#)

## Filtering data

Filters allow you to refine the results displayed in a report based on the values selected for the filter.

The Filters button incorporates a number which indicates the number of filters applied to the report. Upon opening a report for the first time, this number will reflect the amount of default filters applied. In this case, the number reads '0', as no filters are applied. When you apply one or more filters, the number will change to the respective number of applied filters.



Reports with larger datasets may take longer to run. A loader will be displayed on the screen.

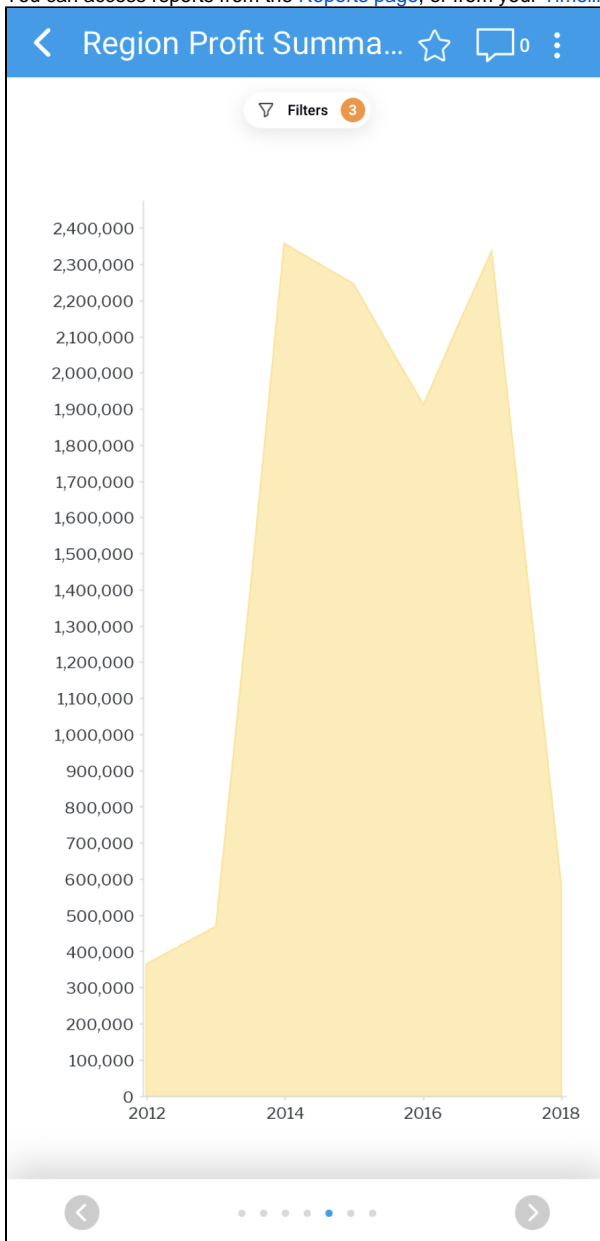


Filters may not be available on all reports. Look for the Filters button at the top of the report page.

To filter data, follow the steps below:

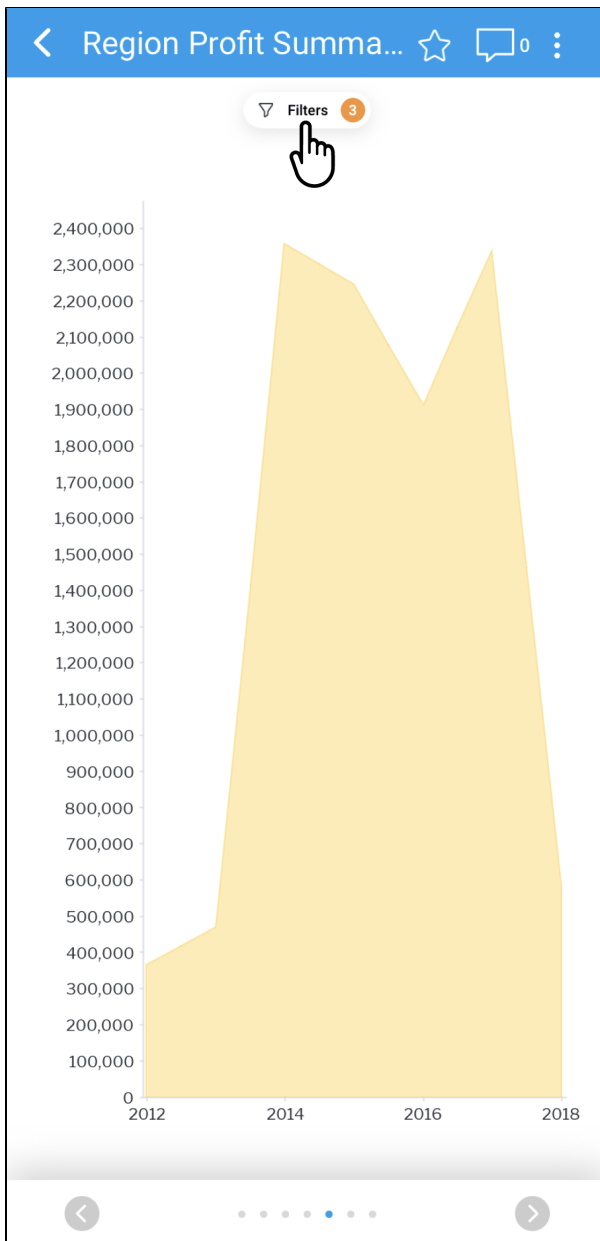
1. Open a report by tapping on a report tile

You can access reports from the [Reports page](#), or from your [Timeline](#)



2. Tap on the **Filters** button

For this report, the **Filters** button number currently reads '3', which means there are 3 filters applied by default



The filters panel will appear on the screen, showing all available filters for this report

Filters

Cancel

Region

|...

0 Items



Country

|...

0 Items



Invoiced

...



1

10,000

Gender

|...

Select All



☒ Female

☒ Male



[Reset](#)

Apply

3. To abandon filter settings at any time, tap **Cancel** at the top-right of the screen

**Region Profit Summa...** ☆ 0

**Filters** [Cancel](#)

**Region** |...  
0 Items  
☐

**Country** |...  
0 Items  
☐

**Invoiced** ...  
1 10,000

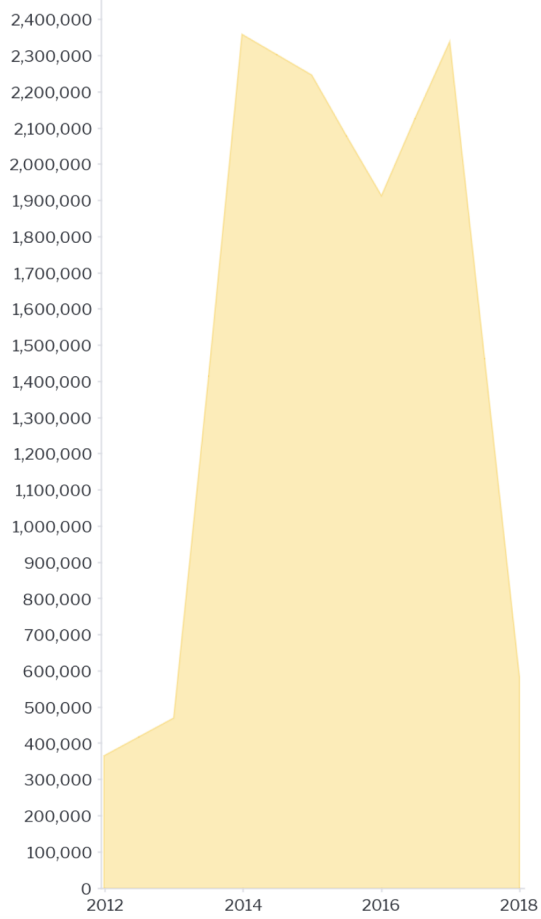
**Gender** |... ☐ Select All ☐

☒ Female  
☒ Male

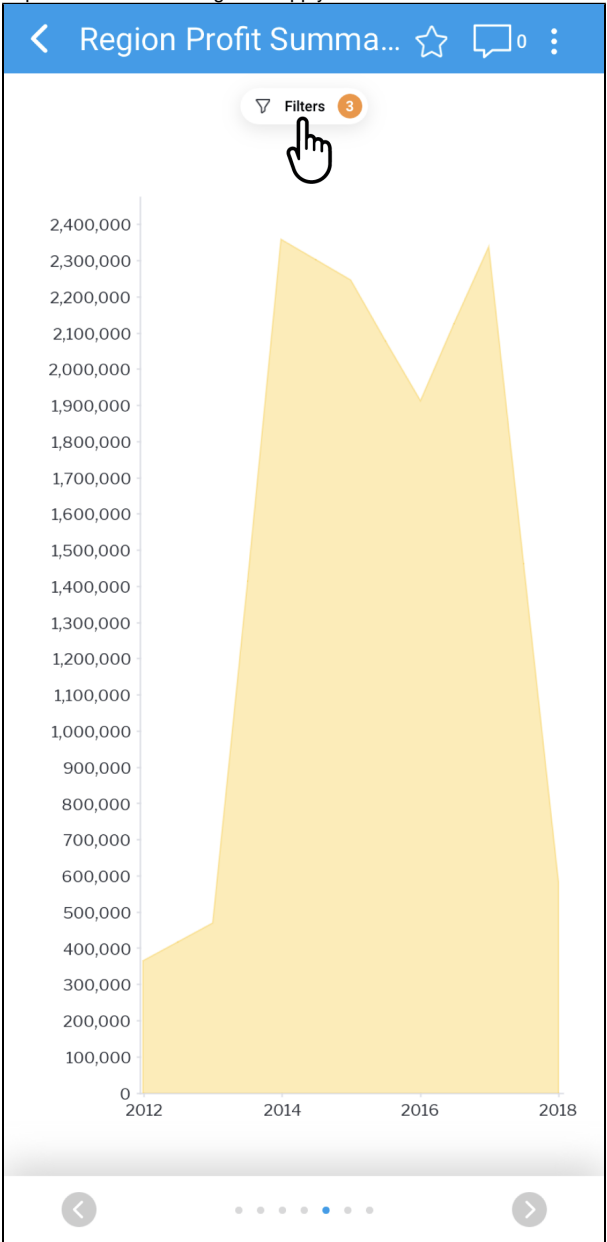
[Reset](#) [Apply](#)

The report will be displayed

Filters 3



4. Tap the **Filters** button again to apply one or more filters



5. Tap on the Region filter **dropdown**

< Region Profit Summa... ☆ 0 :

**Filters** [Cancel](#)

**Region** |...  
0 Items |...  
☐

**Country** |...  
0 Items |...  
☐

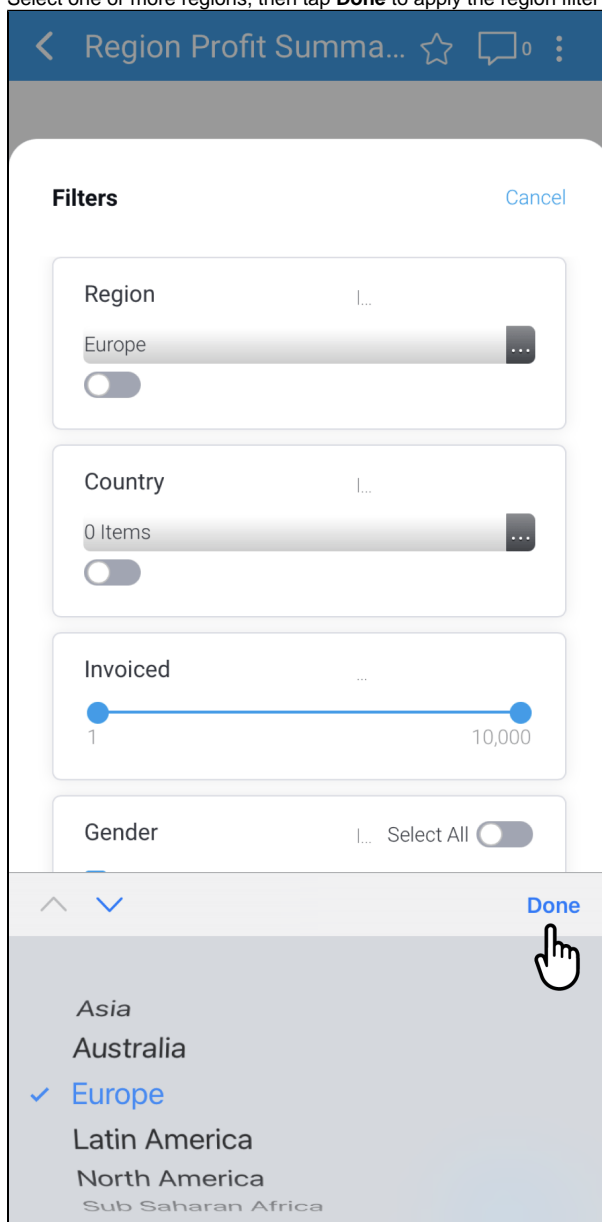
**Invoiced** ...  
1 10,000

**Gender** |... [Select All](#) ☐  
☒ Female  
☒ Male

[Reset](#) [Apply](#)



6. Select one or more regions, then tap **Done** to apply the region filter



7. Tap the **toggle** on the Country filter to select all values within that filter

Region Profit Summa...

☆

💬 0

⋮

Filters

Cancel

Region

...

Europe

...

☐

Country

...

18 Items

...

☒

Invoiced

...

1

10,000

Gender

...

Select All

☐

☒ Female

☒ Male

↺↻

[Reset](#)

[Apply](#)

8. Tap and drag the **slider** on the Invoiced filter to refine the number of values shown

**Filters** [Cancel](#)

**Region** [...](#)  
Europe [...](#)  
☐

**Country** [...](#)  
18 Items [...](#)  
☒

**Invoiced** [...](#)  
1  6,134

**Gender** [...](#) [Select All](#) ☐  
☒ Female  
☒ Male

[Reset](#) [Apply](#)

9. Tap the **checkbox** in the Gender filter to remove that value

The screenshot shows a mobile application interface with a 'Filters' dialog. The dialog has a title bar with a back arrow, the text 'Region Profit Summa...', and icons for a star, a comment bubble, and a menu. The 'Filters' section is titled 'Filters' and has a 'Cancel' button. There are four filter categories:

- Region:** A dropdown menu showing 'Europe' with a 'Select All' toggle switch.
- Country:** A dropdown menu showing '18 Items' with a 'Select All' toggle switch.
- Invoiced:** A range slider from 1 to 6,134.
- Gender:** A list of checkboxes for 'Female' and 'Male'. The 'Female' checkbox is checked, and a hand icon is tapping it. The 'Male' checkbox is unchecked.

At the bottom of the dialog are three buttons: a circular arrow icon, a 'Reset' button, and an 'Apply' button.

The value will be unchecked and **ONLY** will appear next to that value

10. Tap **ONLY** to select that value and remove all others within the Gender filter

The screenshot shows a mobile application interface with a 'Filters' dialog. The dialog has a title bar with a back arrow, the text 'Region Profit Summa...', a star icon, a comment icon with '0', and a menu icon. Below the title bar, the word 'Filters' is displayed in bold, and a 'Cancel' button is in the top right corner. The dialog contains four filter sections: 'Region' with a dropdown menu showing 'Europe' and a toggle switch; 'Country' with a dropdown menu showing '18 Items' and a toggle switch; 'Invoiced' with a range slider from '1' to '6,134'; and 'Gender' with a dropdown menu showing 'Select All', a 'Select All' toggle switch, and two checkboxes: 'Female' (unchecked) and 'Male' (checked). A hand icon is pointing at the 'ONLY' button next to the 'Male' checkbox. At the bottom of the dialog, there is a 'Reset' button and an 'Apply' button.

The other value is removed from the filter

Filters

Cancel

Region

|...

Europe

...



Country

|...

18 Items

...



Invoiced

|...

1

6,134

Gender

|...

Select All



☒ Female

☐ Male



[Reset](#)

Apply

11. Tap the **Apply** button to apply your selected filters to the report

**Filters** [Cancel](#)

**Region** |...  
Europe |...  
☐

**Country** |...  
18 Items |...  
☒

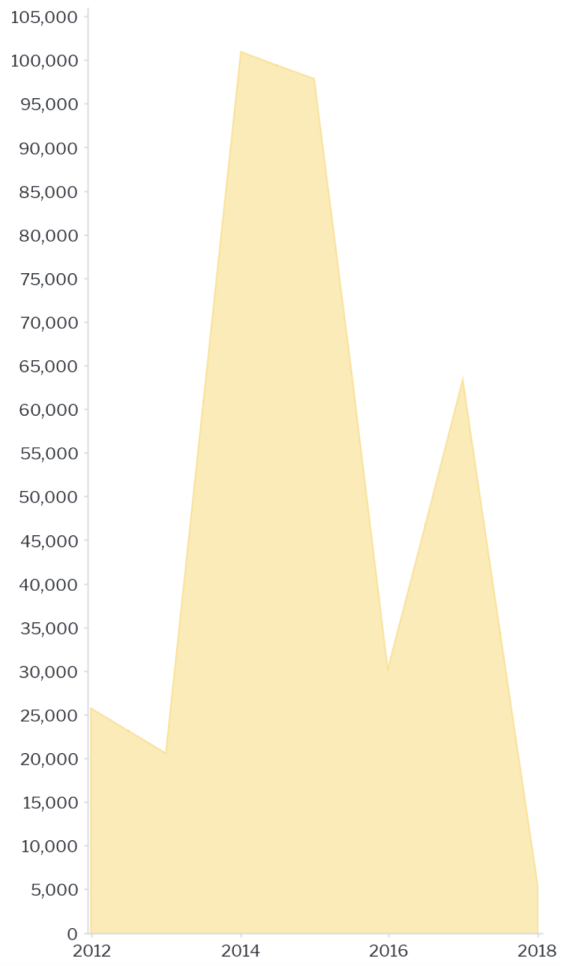
**Invoiced** |...  
1 ————— 6,134

**Gender** |... [Select All](#) ☐  
☒ Female  
☐ Male

[Reset](#) [Apply](#)

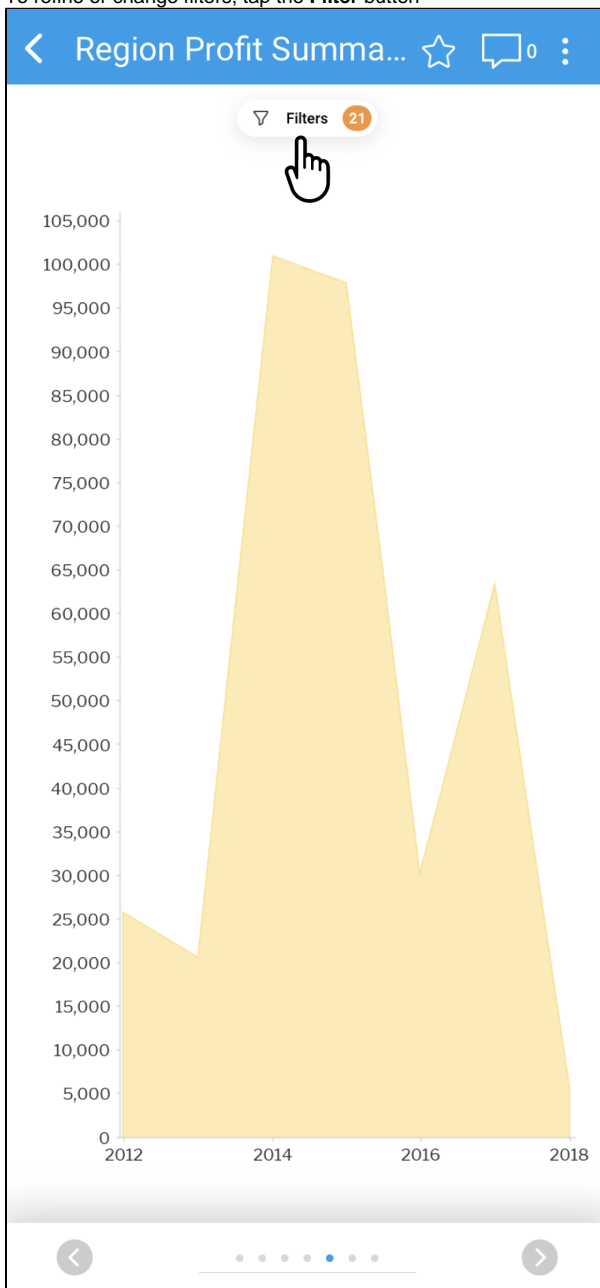
The data in the report changes to reflect your selected filter values, and the **Filters** button will display the number of filters are selected

Filters 21





12. To refine or change filters, tap the **Filter** button



The filters panel will be displayed

Filters

Cancel

Region

|...

Europe

...



Country

|...

18 Items

...



Invoiced

|...

1

6,134

Gender

|...

Select All



☒ Female

☐ Male



[Reset](#)

Apply

13. In this situation, you would like to reset the report — tap **Reset** to restore the default filters for the report

<

Region Profit Summa...

☆

💬 0

⋮

Filters

Cancel

Region

Europe

...

☐

Country

18 Items

...

☒

Invoiced

1

6,134

Gender


...

Select All

☐

☒ Female

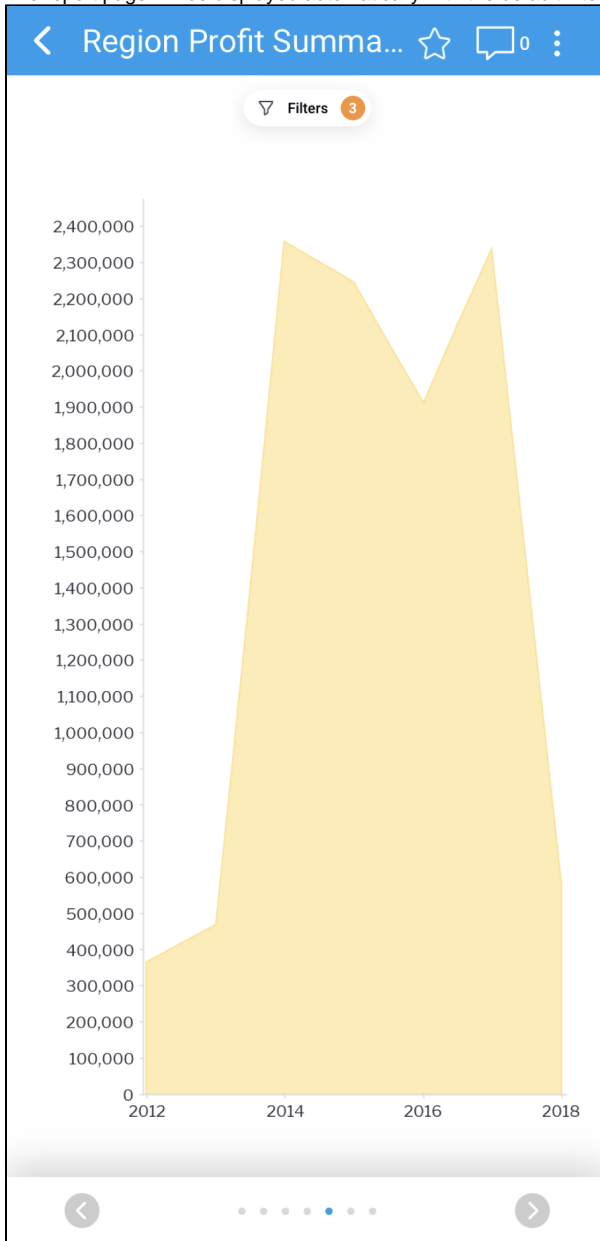
☐ Male



[Reset](#)

Apply

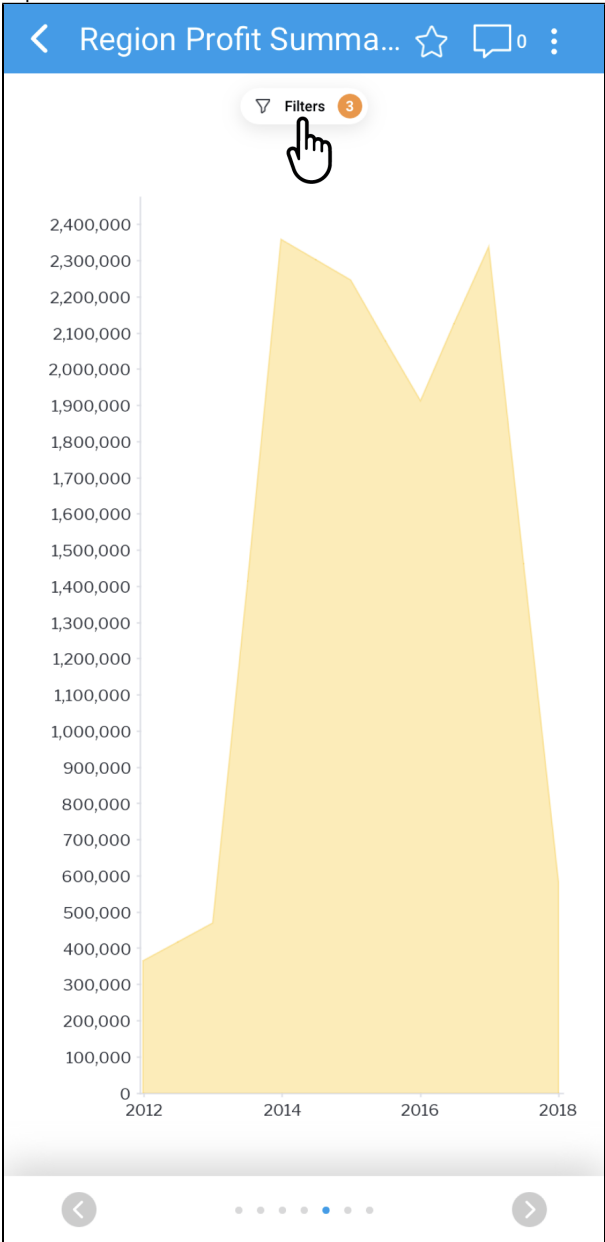
The report page will be displayed automatically with the default filters applied



### Refreshing cached filter values

Some reports contain [cached filter values](#) that can be refreshed manually. Refreshing the cache makes sure all filter values are available when displaying the report.

1. Tap on the **Filters** button



2. Tap the **refresh** button at the bottom-left of the screen to refresh any cached filter values in the report

**Region Profit Summa...** ☆ 0


**Filters** [Cancel](#)

**Region** |...  
Europe |...  
☐

**Country** |...  
18 Items |...  
☒

**Invoiced** |...  
1 6,134

**Gender** |... Select All ☐  
☒ Female  
☐ Male

 [Reset](#) [Apply](#)

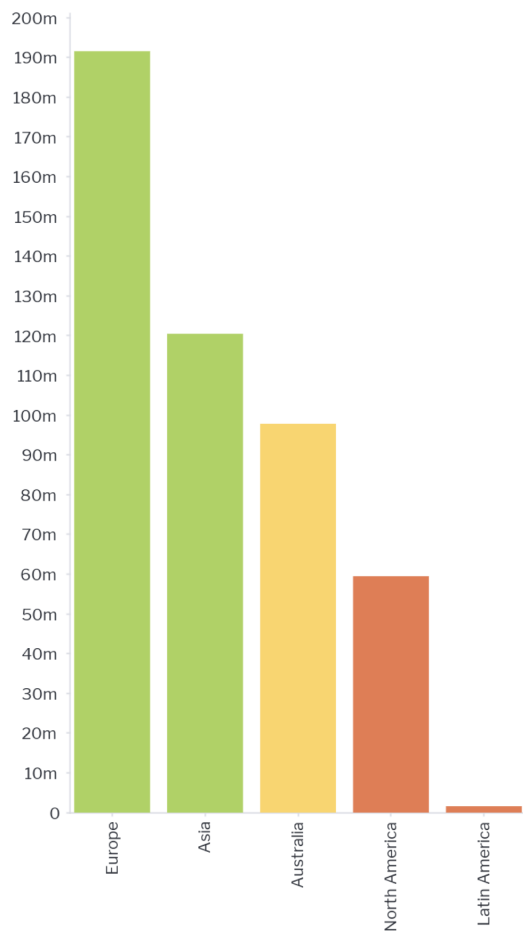
[top](#)

## Drilling down

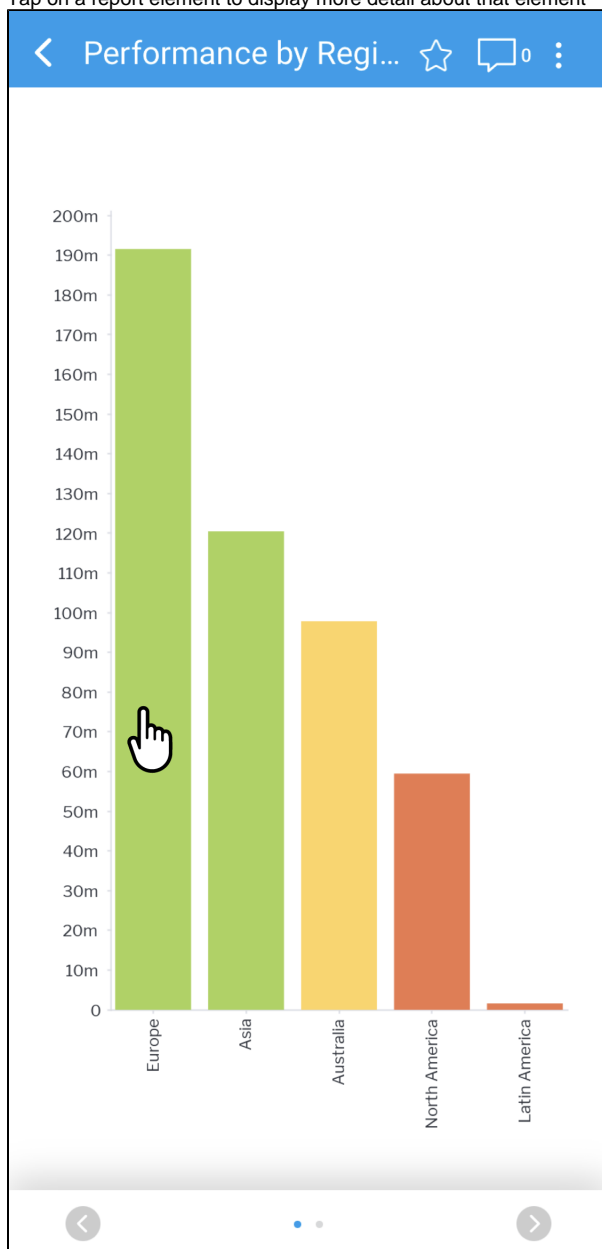
The Yellowfin mobile app supports [Drill Down](#) functionality where Drill Down has been configured for a report. Drill Down provides you with the option to access logical hierarchies within your data, allowing you to view the data from different angles and levels.

To Drill Down in a report:

1. Open a report by tapping on a report tile  
You can access reports from the [Reports page](#), or from your [Timeline](#)

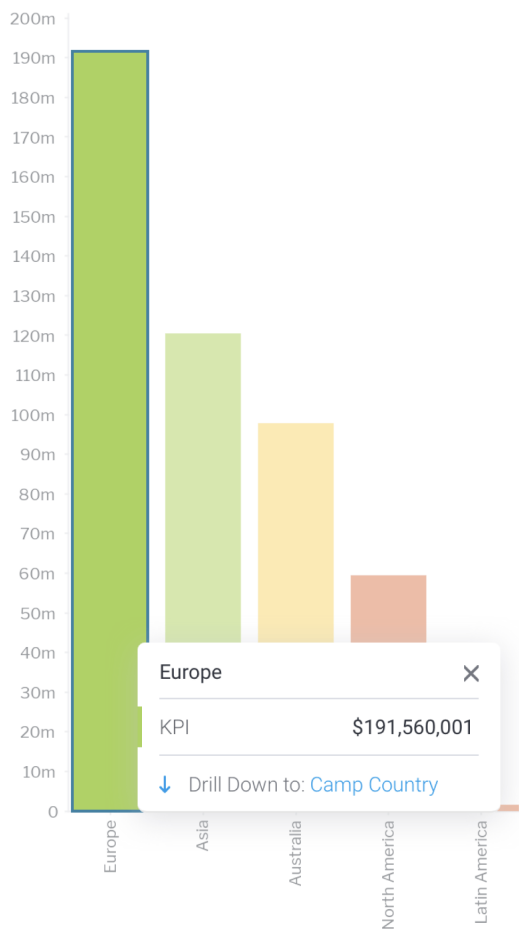


2. Tap on a report element to display more detail about that element

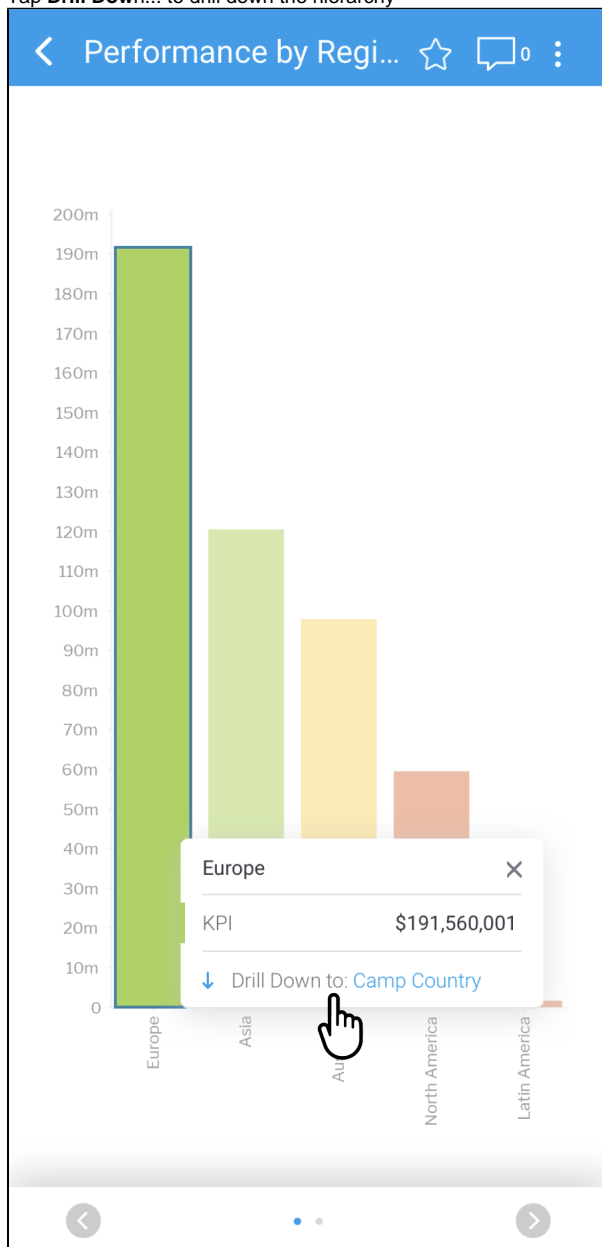


A tooltip will be displayed showing the Drill Down options and value for the element



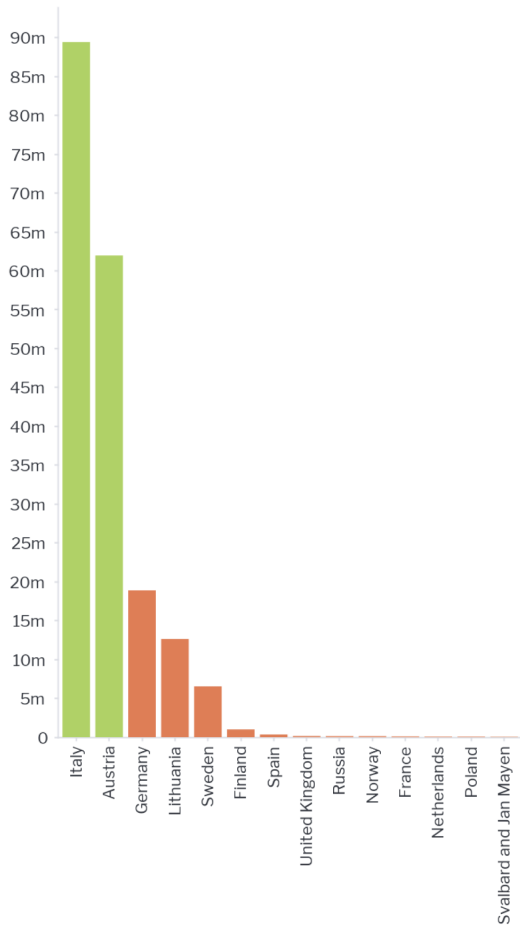


3. Tap **Drill Down...** to drill down the hierarchy

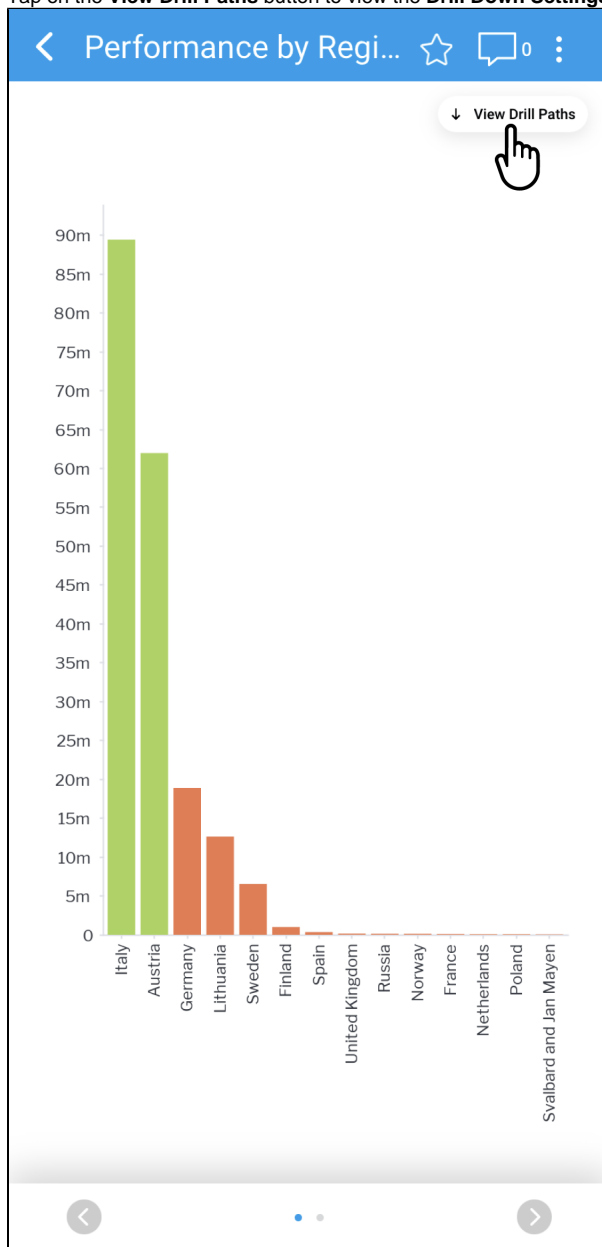


Once a report is drilled, a new button labelled **View Drill Paths** will appear

↓ View Drill Paths



4. Tap on the **View Drill Paths** button to view the **Drill Down Settings** menu



The **Drill Down Settings** pop-up will be displayed, showing the current drill path along with the option to reset the drill, remove individual drill elements, or cancel

Drill Down Settings

Cancel

[Start](#)

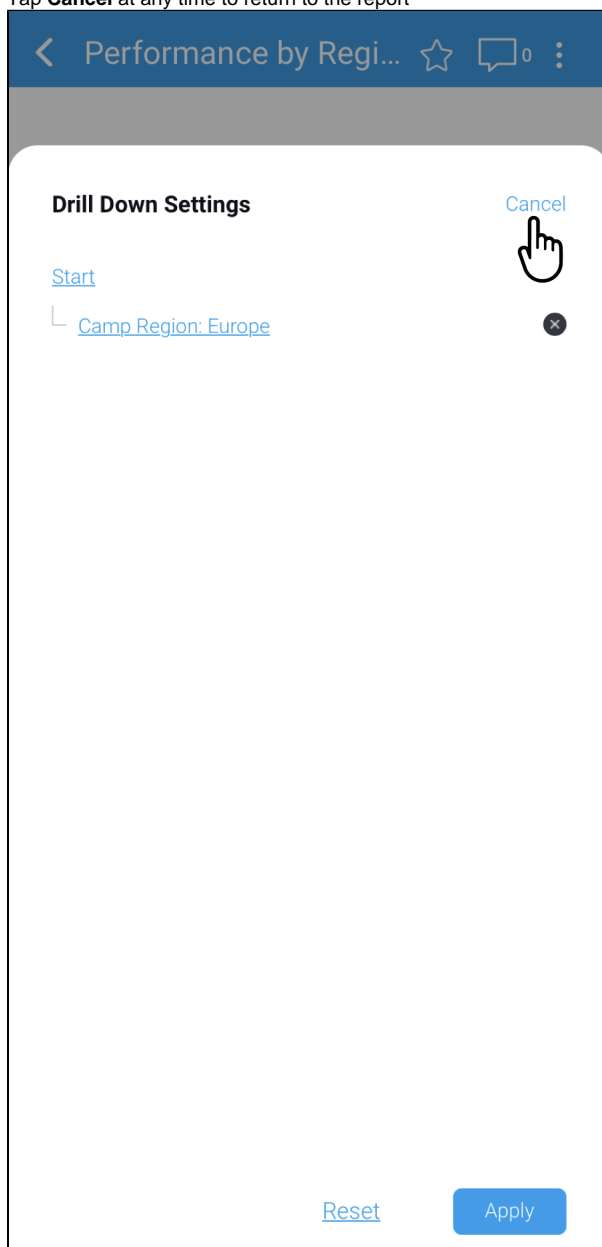
└ [Camp Region: Europe](#)



[Reset](#)

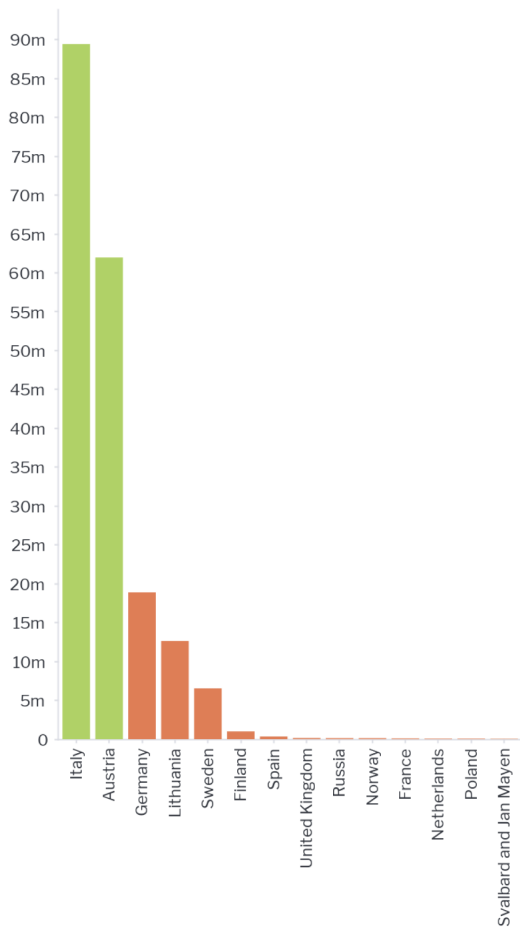
Apply

5. Tap **Cancel** at any time to return to the report

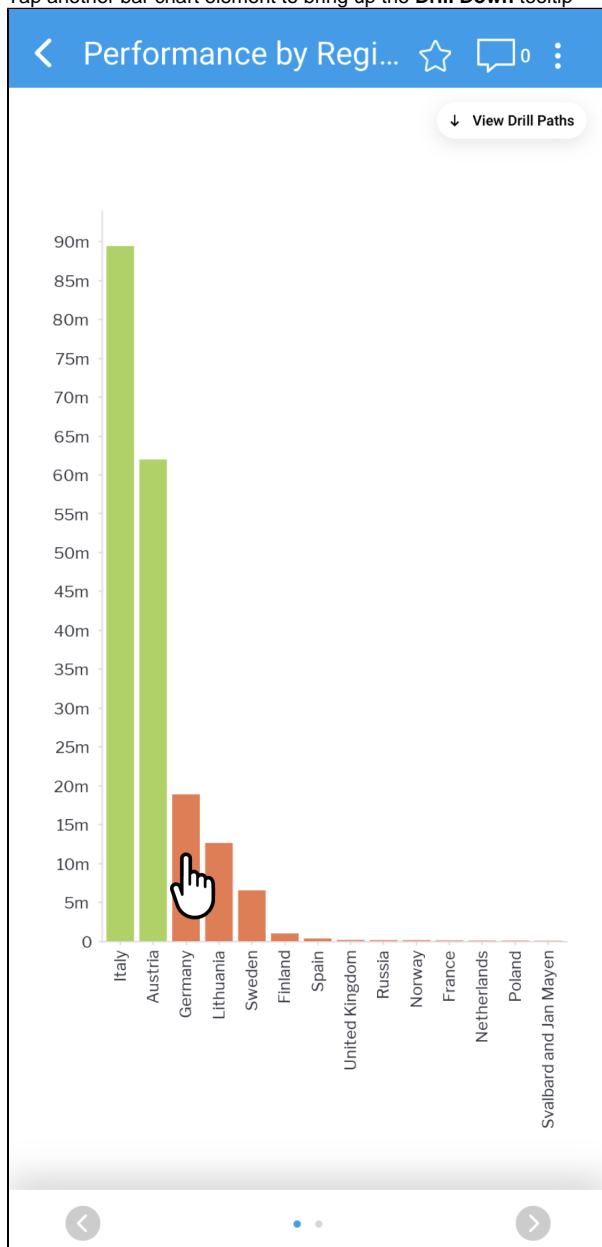


The report page will be displayed automatically with the previous drill setting applied

↓ View Drill Paths



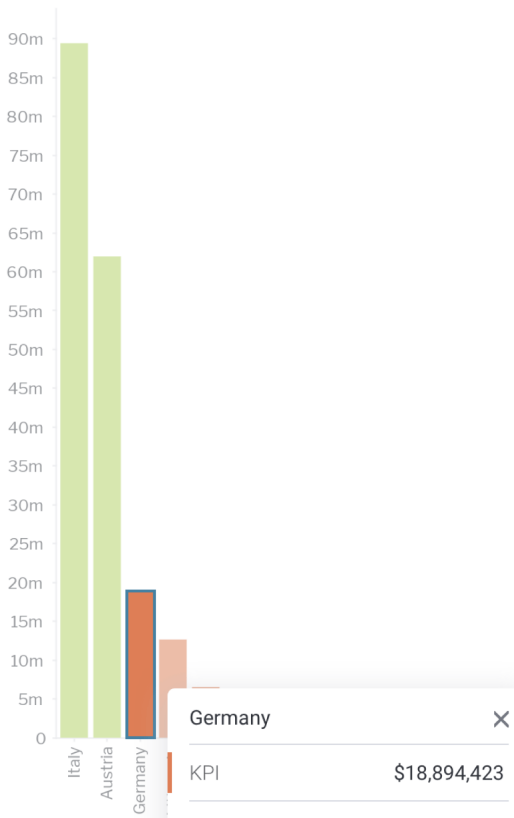
6. Tap another bar chart element to bring up the **Drill Down** tooltip



The **Drill Down** tooltip will be displayed, providing the option to **Drill Down** further in the hierarchy, **Drill Up**, or perform a **Drill Reset**



↓ View Drill Paths

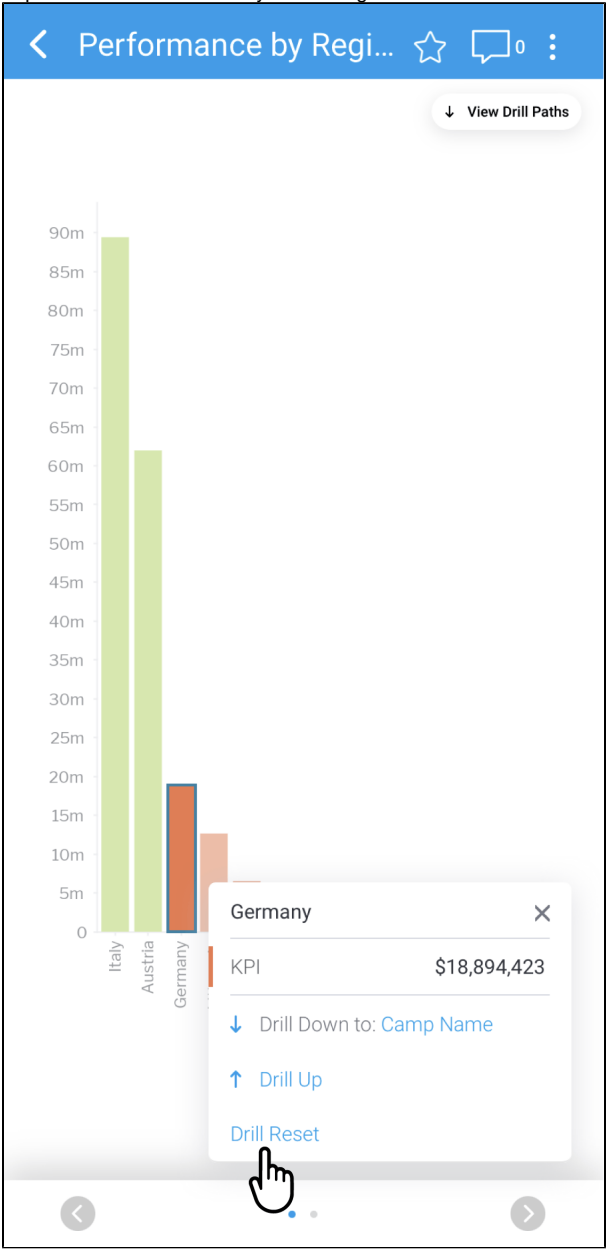


↓ Drill Down to: [Camp Name](#)

↑ Drill Up

[Drill Reset](#)

7. Tap Drill Reset to remove any drill settings



The report will be displayed automatically once the **Reset** button is tapped, with no drill settings applied

