



## Union AI Reporting Package - Overview & Navigation

Welcome to the new Union Reporting Hub! This guide will help you navigate the updated interface and understand where to find your most important data.

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### Navigation Sections

The sidebar on the left is your map to the reporting package. Here is a breakdown:

#### Favorites

- What it is: A curated list of the reports you use most often.
- How to use: Click the star icon to the right of any report name to add it here. To remove a favorite, simply deselect the star.

#### My Documents

- What it is: The home for every custom report you have personally created.
- Click the + New button in the upper right-hand corner to start building a new report.

#### The Hub

It contains two key areas:

- My Venues Documents: Reports shared across your specific location or organization.
- Preset Union Folders: Standardized reports provided by Union (e.g., the Operations folder containing Adjustments, Transactions, and Sales Summaries).

#### Shared with Me & "All"

- Shared with Me: Reports sent directly to you by another user in your organization.
- All: A comprehensive view of every report available in your organization's entire database.

### Management & History

- Search Bar: Located at the top of every section. Use this to search your entire database for a specific report name.
- My Activity: A timestamped log of every action you've taken within the portal
- Trash: If you delete a report, it moves here. You can permanently delete it or use the Restore button on the right to bring it back to active status.

### Meet "Ask Alex" (AI Assistant)

Ask Alex is your new AI-powered business consultant. Instead of digging through rows of data, you can simply ask questions to get instant insights.

- Custom Reporting: Ask Alex to build a specific report for you.
- Business Insights: Ask natural language questions like, "What were my top ten sales days in the last three months?"
- Visuals: Alex doesn't just give you numbers; it will generate charts and summaries to help you visualize your performance.

**Quick Tip: The Sidebar Toggle**

If you ever lose your place or the sidebar disappears, click the three-line "hamburger" menu in the upper left-hand corner to pull the navigation menu back out.