What's Inside:

What's Inside: (Continued)

Introductions and General Information

Organization of this Document

This document is for rail and sea carriers only and provides information on basic functionality of the ACE Reports Tool as well as outlines detailed instructions on how to access available reports. These instructions begin with features that apply to all reports users. Following the basic features, instructions are organized into three key sections:

1) Standard Reports – Viewing reports with pre-set data fields.
2) Modified Reports – Modifying data fields within standard reports.
3) Customized Reports – Building fully customized reports from a blank slate.

Each section is organized similarly by providing instructions on how to run, filter, sort, save, schedule, create charts and graphs, and print reports. The instructions provided are designed to supplement the web based training titled, *"ACE Reports for the Trade Community"* and other instructional documents within the Training and Reference Guides section on cbp.gov/modernization.

Introductions to ACE Reports Tool

By selecting the **Launch Tool** within the "*Reports*" link on the "*Accounts*" tab, you have many report options. The ACE Reports Tool allows you to run a variety of reports that range from a standard report to one that is fully tailored to your needs. The Reports Tool also allows you to print, download and save these reports for later use or further manipulation, or share reports within your account. This document is intended for rail and sea carriers. All other trade and CBP users should refer to either *"Running ACE Reports for All Importer, Broker and Surety Trade Users," "Running ACE Reports for Truck Carriers or "Running ACE Reports for CBP," respectively.*

The reports available are organized into several folders. There are Account Management, Multi-Modal Manifest, Reference, Shared Reports and Transactions. The Transactions reports are for truck carriers only.

I. Account Management

Within the Account Management folder the following sub-folders are available:

1. Account Profile

2. Declarations

II. Multi-Modal Manifest

Within the Multi-Modal Manifest folder the following sub-folders are available:

1. BOL
2. In-Bond
3. Manifest Equipment
4. Trade Reporting

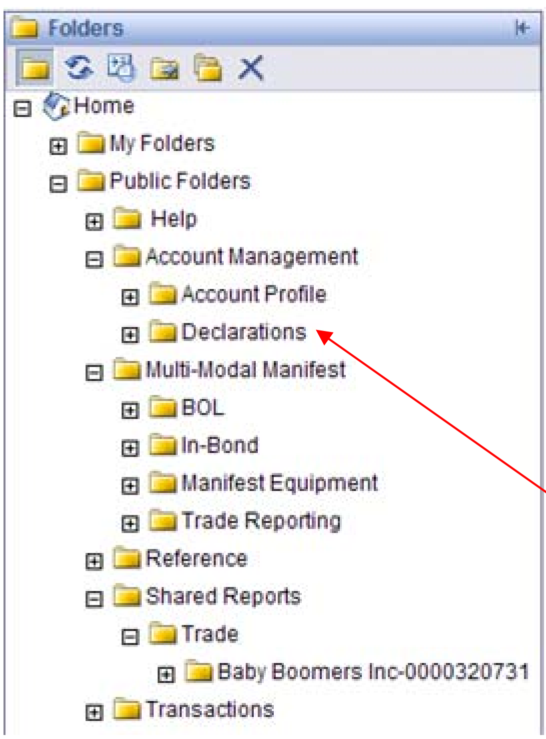
III. Reference

IV. Shared Reports

Within the Shared Reports folder the following sub-folder is available:

1. Trade

V. Transactions – for truck carriers only



Within the "*Reports*" tab the report list is used to find the desired report folder.

Select the **+** to expand the report list and the folders.

See "Appendix A" of this document for a list and brief description of all Account Management, Multi-Modal Manifest and Reference reports.

The Declarations report will be available to importers and brokers at this time.

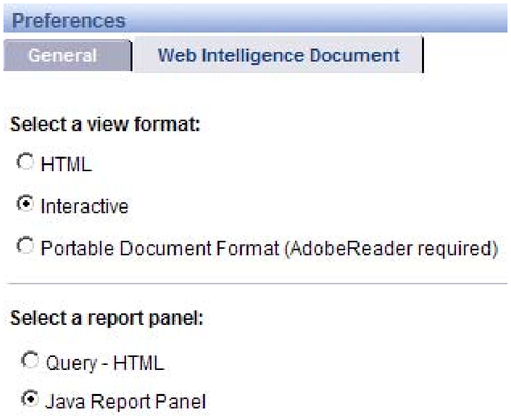
Software Set Up and Requirements

It is important for first time users to verify setting preferences and that Java 1.6 is installed on the computer. Internet Explorer is recommended to access any ACE reports or to utilize the ACE Portal. To run Modified or Customized reports, the user must set their preference to "Interactive" and must operate Java. To set preferences or to verify Java, follow the instructions below:

- Setting Preferences 

When you select the **Reports** tab and select **Launch Tool**, the Welcome to ACE Reports screen, as shown above, will display.

1. Select the **Preferences** icon or the link from the "*Welcome to ACE Reports*" page. A new screen will open.
2. Select the **Web Intelligence Document** tab.
3. Select **Interactive** radio button under "*Select view format*" and **Java Report Panel** radio button under "*Select report panel*".
4. Scroll down and select **OK** on the bottom right hand corner of the screen.



- Verifying Java

All users need to verify Java running on their computer. To determine if Java is on your computer, following the steps below:

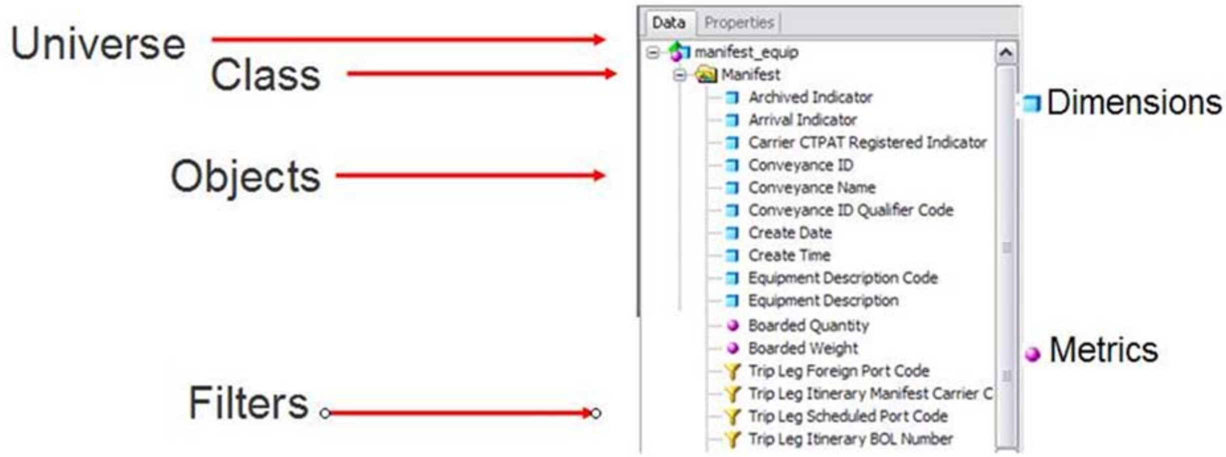
1. Launch Internet Explorer.
2. Select **Tools**.
3. Select **Sun Java Console**.
4. Verify Java Plug-In Version.

*If a pop up appears asking if you want to upgrade to the latest version of Java, CBP recommends you **NOT** upgrade at this time.*

Terminology

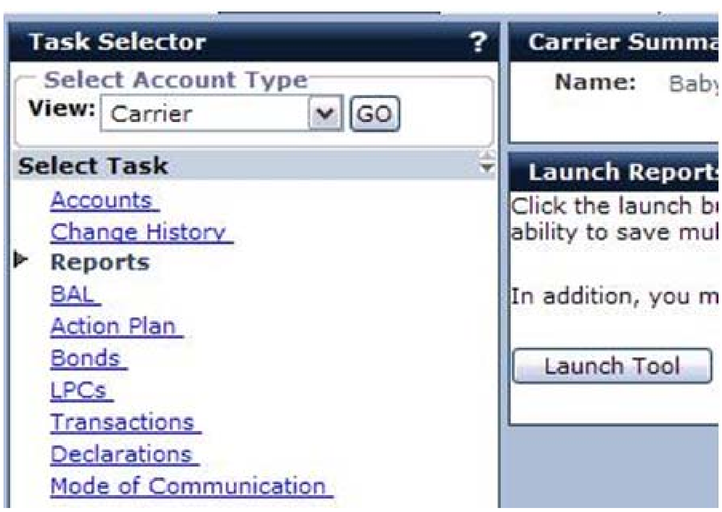
There may be unfamiliar terms and acronyms used within the ACE Secure Data. Here are 5 frequently used terms when running reports:

- **Universe:** A representation of the information available in a database. Universes are made up of classes and objects.
- **Class:** Logical groups of objects with a meaningful name.
- **Object:** A named component that maps to data in the database. Blue boxes = Dimensions (qualitative) and Pink circles = Measures (quantitative)
- **Query:** A request for data from the database.
- **Filter:** A control to limit the amount of returned data.



Using the Toolbar

1. Log in with your User ID and Password.
2. Select the **Accounts** tab.
3. In the "*Task Selector*" under "*View*," select **Carrier** and select **GO.**
4. Select the **Reports** link.
5. Select **Launch Tool**.



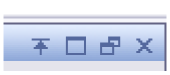
At the top left of the "*Welcome to ACE Reports*" page there is a gray toolbar that displays the following icons:

- *Home* Icon: The "*Home"* icon on the far left of the toolbar is the home page for the report tool. By selecting the "*Home"* icon, you will be returned to the home page and will see "*My Folders" and "Public Folders" dis*played.
- *Toggle Navigation* Icon: The square icon to the right of the house is the "*Toggle Navigation"* icon that allows you to show or hide the "*Folders*" panel. You can also hide the "*Folders*" panel by selecting the arrow in the right corner of the panel.
- *Applications* Icon: The third icon from the left on the toolbar is the "*Toggle Applications"* icon, which at the time of publication, is not working.
- *New* Icon: The fourth icon on the toolbar is "*New."* This icon will allow you to create private folders. See topic: "*Creating a Folder"* for additional information.
- *Refresh* Icon: The fifth icon is the "*Refresh"* icon. Selecting this icon will refresh your "*Workspace Panel*."
- *My InfoView* Icon: "*My InfoView*" allows you to customize your dashboard. See section: "*Customizing Your Dashboard"* for additional information.
- *Search Title* Icon: The "*Search"* function allows you to search for reports by title and keyword and advanced options. See topic: *"Searching for a Report."*

The three icons on the far right side of the toolbar are:

- *Preferences:* Allows you to set how information is displayed in your workspace panel.
- *Log Out*: Logs you out of the Reports Tool.
- *Help:* Displays the Online Help for the Reports Tool.

Under the gray toolbar there is a blue toolbar containing four icons on the right side of the workspace view.



- The upward pointing arrow "↑" removes the header from the screen. To reinsert the header, select the downward pointing arrow "↓."
- The large box to the right of the arrow maximizes the workspace panel.
- The two smaller boxes minimize the workspace panel.
- The "x" returns the workspace panel to the last main page visited.

Hold your mouse arrow over any one of these icons to display a text box with the definition of the icon.

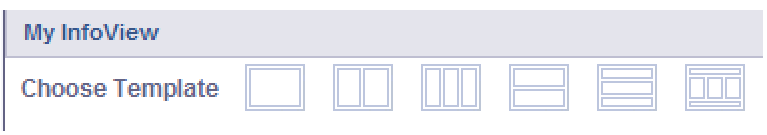
The "back" button only works in the ACE Reports Tool and does not work with any other Portal application.

In order to modify a report with additional data elements, you must have your preferences set to "Interactive," as stated under the "Setting Preferences" section. If this is not done, "Available Objects" will not appear on your screen and you will not be able to add new data objects to your report.

Before selecting the "Reports" tab, please ensure you have selected the correct view for your account type. For example, carriers must be under the carrier view before running ACE reports for results to be displayed.

Customizing Your Dashboard

You have already logged into the ACE portal, selected "*Reports*" and launched the report tool.

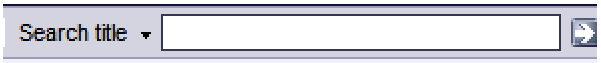


1. Select **My InfoView** from the gray toolbar.
2. You will notice the "*Choose Template*" option under "*My InfoView*." There are six templates available. Select the template you would like to use to customize your dashboard (for example, select on the template with two containers).
3. Select the **Define Content** link. The "*Dashboard Properties*" window opens.
4. Select the "**+**" next to "*My Folders*" then select **Favorites**.
5. Select the **OK** button.
6. Follow steps above to define the content of additional containers.

In the "Dashboard Properties" window you also have the option to "link to web address". For example, you could link to www.CBP.gov from your dashboard.

Searching for a Report

The center icon in the toolbar is “*Search title*.”



1. Select the down arrow **“**↓” beside *“Search title.*”
2. Select the **Search Title** to view the following 4 options: (1) *Search all fields* (2) *Search title* (3) *Search keyword* or (4) *Advanced search*. Select how you would like to search.
3. Enter the word, partial word or report number (e.g. “MMM-9022”) in the text box for the report you want to find and it will return any report that has that text in the title. By default, you can also search keywords.
4. Select the right arrow →. Your search results will appear in the workspace panel.

In order for the “Search Keyword” functionality to work you must first save the report to your “Favorites” folder and associate a keyword with that report.

Chapter 1: Standard Report

Running a Standard Report

Standard reports are reports with pre-established data fields. You will be able to add data elements (“objects”) to a standard report; however, only the data elements that are pre-defined for that particular report will be available. If you would like to add additional data elements to the report, you should follow instructions in the next chapter called, *“Modified Report.”*

Data Availability: Data available for ACE reports will include the previous four CBP fiscal years plus the current fiscal year with the exception of reports in the Multi-Modal Manifest/Trade Reporting sub-folder. The CBP fiscal year runs October 1 through September 30. Initially only 18 months of data will be converted from the Automated Manifest System (AMS) for inclusion in Multi-Modal Manifest reports. Reports in the “Trade Reporting” sub-folder will include data created or amended within the past 30 days.

You have already logged into the ACE portal, changed to your carrier view, selected **Reports** and launched the reports tool.

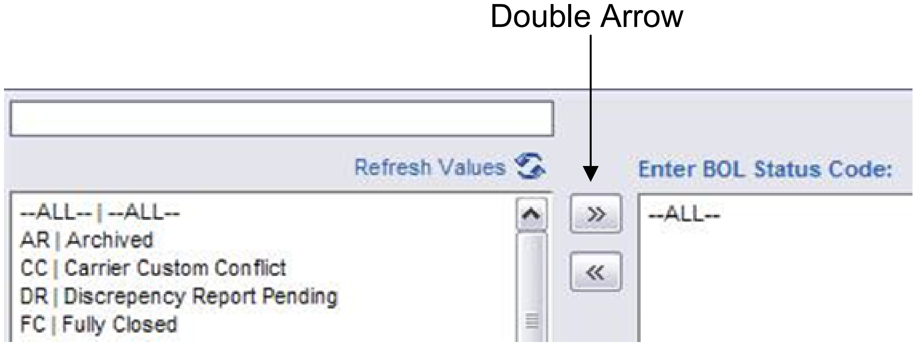
1. Select the “**+**” beside “*Public Folders*” in the left hand column. Determine the type of report in the public folders you want to run (e.g., Multi-Modal Manifest or Account Management). Continue to select “**+**” beside the report folder to see the sub-folders for Multi-Modal Manifest and Account Management reports.
2. A list of available reports will appear on the right. Select the report name you wish to run. You will see the “*Prompts*” box displayed that allows you to set your preferred parameters for viewing the report. You will then be able to change the prompts for the report. If the prompt shows a red arrow ( ) then a value must be entered. If the prompt shows a green check mark ( ), then a default setting has been selected and you can change the prompt or leave the default setting. A value for each prompt must be shown (either entered by you or the default value) before running the query or the “*Run Query*” selection will not be available.

3. Select the prompt you wish to change. Note, most prompts contain an *"ALL"* option. Either select the **--ALL--** option or for greater efficiency, enter the specific value.
    - You can also scroll through the list of values or search for a value by entering it in the box to the left of the binoculars. You will need to highlight your entered value to move it to the selected value box. You can also enter a value in the rectangular box above the selected prompt value.

To improve performance, you should narrow the scope of the report as much as possible by amending the prompts.

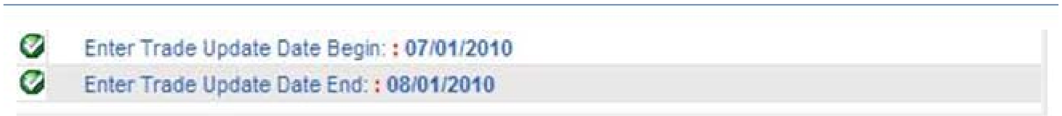
4. Select the double right arrow to move the selected value into the box on the right. Note: You will need to use the double left arrows to remove the word *"--ALL--"* (after you select and highlight the word **--ALL--)** from the selected value box if you want to run your report for a specific BOL status code.

Double Arrow



5. Repeat steps above for each prompt shown that you wish to change.

6. Select the date range. You can either enter a date in the text box or left click on the calendar to select the date and/or year.



7. Select "**Run Query**" to run the report with the prompts you have changed. Note: You will not be able to select the "*Run Query*" box until all prompts have been satisfied.

Once the report has been generated, if there is a blue hyperlink displayed in the report, select the hyperlink to view additional detail. Detail will vary by report. Not all reports contain a hyperlink.

Using the "Quick Filter" in a Standard Report

To apply filters among the data returned, follow the steps below:

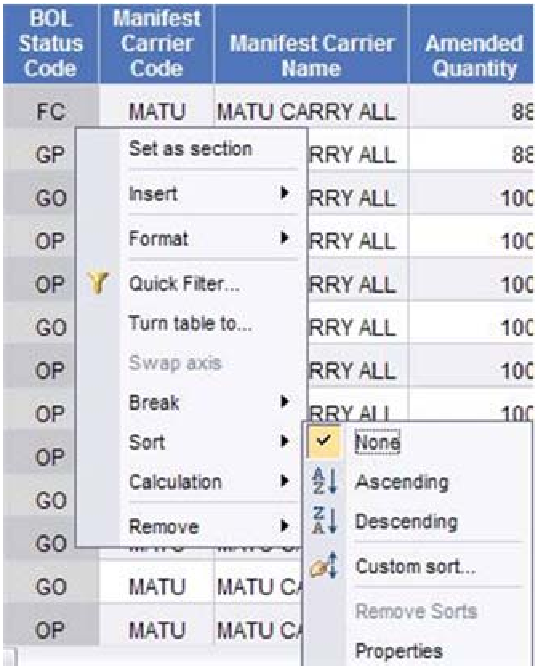
1. Highlight the column you want to filter by clicking below the column header. This will highlight the entire column.
2. Right click your mouse in the highlighted column.
3. Select **Quick Filter**. The "*Quick Filter*" window will appear. 

4. Enter the value you want to filter and then select the double arrows to move the value into the blue box on the right.
5. Select the dropdown arrow to select the filtering options.
6. Select, for example, the "*greater than or equal to*" option.
7. Select the **OK** button at the bottom of the "*Quick Filter*" window. Only values greater than or equal to the value you entered will now appear in the highlighted column of the report.

Sorting a Column in a Standard Report

To sort the data returned, follow the instructions below:

1. Left click to highlight the column in the report that you want to sort below the column header. This will highlight the entire column.
2. Right click your mouse in the highlighted column.
3. Select **Sort**. If the "*Remove Sort*" option is highlighted, select it. You will need to remove the existing sort before selecting a new sort option.
4. Select one of the options displayed, for example select **Ascending**. The highlighted column now appears in ascending order.



Saving a Standard Report

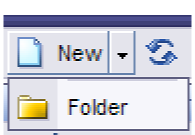
To save a standard report, you have two options.

1. Save the report in your "*Favorites*" folder in ACE, which allows scheduling capabilities; or
2. Save the report to your computer.

Saving to Your ACE Favorites Folder

To create a folder within your ACE Favorites folder, follow the steps below:

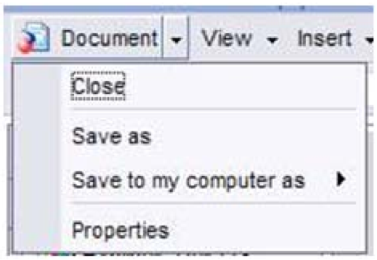
1. Select the "**+**" beside "*My Folders.*"
2. Select the **Favorites** folder.
3. Select the **New** icon and select the down arrow.



4. Select the **Folder** option. The "*Create a New Folder*" portlet appears.
5. Enter a "*Folder Name*." You also have the option of entering a "*Description*" or "*Keywords*."
6. Select the **OK** button.

Follow the steps to save to your "*Favorites*" folder:

1. Select the **Document** dropdown by selecting the down arrow.
2. Select **Save as.** The "*Save Document*" dialog box appears. CBP recommends changing the report name. To do that, position your mouse at the end of the report name in the "*Title*" box and click. Type in your new name for the report.
   a. The "*Refresh on Open*" box, if checked, allows you to save the report format but not the data.



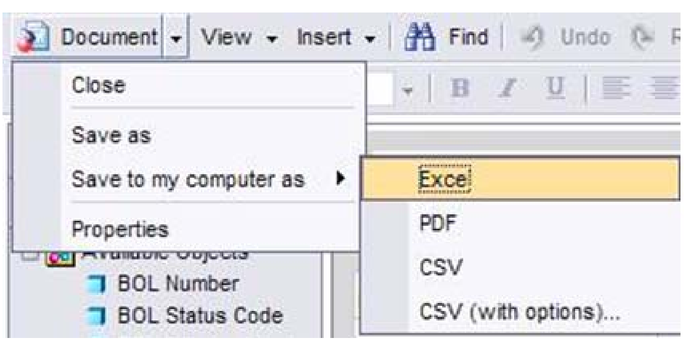
3. Navigate down the page and select the "**+**" beside "*My Folders*."
4. Select the **Favorites** folder.
5. Select the **OK** button. You have now saved the report to your favorites.

You can also save a report to any other folder you have created under "Favorites" by locating the folder and highlighting it.

Saving to Your Computer

To save the report to your computer, follow the steps below:

1. Select the **Document** dropdown by selecting the down arrow.
2. Select **Save to my computer as**.
3. Select a format, e.g. **Excel**.



4. Select the **Save** button in the "*File download*" box.

Accessing a Saved Standard Report from Your Favorites Folder

To access a report saved in your Favorites folder, follow the steps below:

1. Select the "**+**" beside "*My Folders*."
2. Select the **Favorites** folder. You will see a list of reports you have saved to the "*Favorites*" folder.
3. Select the report you want to open by selecting the report name. The report will display.

Deleting a Saved Standard Report from Your Favorites Folder

To delete a report saved in your Favorites folder, follow the steps below:

1. Select the "**+"** beside "*My Folders*."
2. Select the **Favorites** folder. You will see a list of reports you have saved to the "*Favorites*" folder.
3. Select the check box beside the report name that you wish to delete.
4. Select the **X** icon shown at the top of the "*Favorites"* screen. The report selected will be removed from the "*Favorites.*"

Trouble Shooting Tips for Saving a Standard Report to Your Computer

When you try to export a report to your computer using the "*Document" / "Save to my computer as"* menu option and the screen flickers but nothing happens, check your download security options in Internet Explorer. To do so, follow the steps below:

1. Open Internet Explorer.
2. Select **Tools** and then select **Internet Options**.
3. Select the **Security** Tab.
4. Highlight the Internet Globe and select **Custom Level**.
5. Scroll down the list of choices until you find the "*Downloads*" section.
6. Locate "*Automatic prompting for file downloads*" and select **Enable**.
7. Locate "*File download*" and select **Enable**.
8. Locate "*Font download*" and select **Enable**.
9. Select **OK** to close the dialogue box.
10. Select **OK** to close the Internet Explorer properties box.

Turn off any pop-up blockers that are active so that the report will download.

Data Refresh

- *Reports in the "Trade Reporting" sub-folder are refreshed every two hours.*
- *Reports in the "BOL, In-Bond and Manifest Equipment sub-folders are refreshed nightly.*
- *Reports in the "Account Management" and "Reference" folders are refreshed nightly.*

Scheduling a Standard Report

You have already logged into the ACE Portal, selected "*Reports*" and launched the report tool. You now have the option to schedule a report to run from your "*Favorites*" or *"Public Folders".* Scheduling a report from your "*Favorites"* will generate the report you saved. Scheduling a report from the "*Public Folders"* will generate the standard report. To schedule a report with moving date parameters, such as "*45 Days Ago,*" please review "Running a Modified Report" section.

1. Select the report that you wish run.
2. Run the report and save it to your *"Favorites"* folder or a personal folder that you have created (See topic: Saving to Your ACE Favorites Folder*).* This will allow you to schedule a standard report.
3. Select the "**+**" beside "*My Folders."*
4. Select the **Favorites** folder*.* Choose the report you want to schedule.
5. Select the word **Schedule** under the report name. The "*Schedule*" portlet displays.
6. Notice that the "*Instance title*" fills with the report name you selected. The "*When*" category expands to reveal a dropdown menu. "*Run Object*" will default to "*Now*."
7. Select the **Run Object** dropdown.
8. Select, for example, the **Last Day of the Month** from the dropdown.
9. Notice that the remainder of the "*When*" category has changed to include a "*Start Time" and "End Time*" selection. The "*Start Time*" is the time and date you would like this report to run on a recurring basis. The "*End Time*" is the time and date that you no longer wish to have the report run on a scheduled basis.
10. Select the **Start Time** from the dropdown menus.
11. Select the **Calendar** icon and select, for example, **February 28th**.
12. Follow instructions above to select the **End Time**. You may also want to change the end date for the report since the default is 2017.
13. Select the "**+**" next to the "*Format*" option to specify the format for the report.

14. The default is “*web Intelligence.”* Select the dropdown if you want to change to either Microsoft Excel or Adobe Acrobat.
15. Select the “**+**” next to the “*Prompts”* option then select **Modify Values***.* If you do not change the date range on your prompt values once you select “Modify Values”, you will see the same results each time the report is scheduled.
16. Enter the filters you want included in your report and select **Apply***.* The prompt values will be displayed.
17. Select the **Schedule** button to complete scheduling the report. If you scheduled the report from your “Favorites,” the report results can be found by selecting the “History” link under the name of the report you scheduled. If you schedule a standard report, the report results will be returned to your “Inbox.” All scheduled reports are available by selecting the “History” link under the name of the report you scheduled.

Rescheduling a Standard Report

1. Select the **+** beside “*My Folders.”*
2. Select the **Favorites** folder. Choose the report you want to reschedule.
3. Select the word **History** under the report name.
4. Select the **Reschedule** link. You are now back on the schedule page.
5. Select the **+** next to the “*Prompts”* option then select **Modify Values***.*
6. Enter the filters you want included in your report and select **Apply***.* The prompt values will be displayed.
7. Select the **Schedule** button to complete scheduling the report.
8. You are now returned to “*History*” and will notice there are two instances of the scheduled report.
9. On the tool bar within the portlet, place a check mark in the small box next to the originally scheduled instance of the report and select the **Delete** button to remove the old report.

Deleting a Scheduled Standard Report

1. Select the **+** beside “*My Folders.”*
2. Select the **Inbox** folder.
3. Select the check box beside the report name that you wish to delete.
4. Select the **X** icon shown at the top of the “*Inbox”* screen. The report selected will be removed from the “*Inbox.*”

Creating Charts and Graphs in a Standard Report

There are several options to create a chart or graph of the data retrieved.

Chart Types

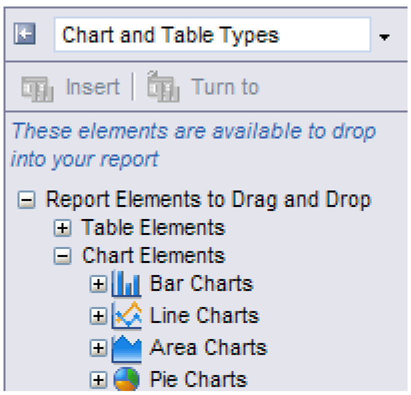
There are five basic chart types available: bar charts, line charts, area charts, pie charts and radar, polar and scatter charts. There are multiple options within these chart types as well. Chart selection will vary depending on the data you are charting.

1. Bar Charts: Bar charts display data in bar form, either vertically or horizontally. Bar charts are useful if you want to compare similar groups of data. There are 5 types of bar charts: grouped, bar and line, stacked, percent and 3D.
2. Line Charts: Line charts connect specific data values with lines, either horizontally or vertically. Line charts are useful if you want to show trends or changes in data overtime. There are five types of line charts: mixed, stacked, percent, 3D and 3D surface.
3. Area Charts: Area charts are line charts in which the area between the lines and axis are filled in. Area charts are useful if you want to emphasize the size of the total data in a report, as opposed to the changes in the data. If you have a sharp contrast between specific data points, it is recommended that you use a line chart instead of an area chart.
    a. You can use more than one object on the Y-axis as long as the measures are the same type and scale, e.g. number of entry summaries reviewed and number of discrepancies found. There are five types of area charts: absolute, stacked, percent, 3D area and 3D surface.
4. Pie Charts: Pie charts display data as segments of a whole. Pie charts are useful if you want to show how each part of your report data contributes to the total.
    a. You can only include one object in a pie chart. If you have several measures in your report, you should choose another chart type. There are four types of pie charts; pie, 3D pie, ring and 3D ring.
5. Radar, Polar and Scatter Charts: The four types in this category are radar line, stacked radar, polar and scatter.
    a. In radar charts, the X- and Y-axis connect at the chart's center. Radar charts are useful if you want to look at several different factors related to one item. For example, you could use a radar chart to display revenue data for different commodities within a port.
    b. Scatter charts are similar to line graphs, except that the data points are plotted without a line connecting them. Scatter charts are useful to make a comparison between specific data points.

c. A polar chart is an XY plot drawn on a circular grid, showing trends in values on the basis of angles. The dependent variable (Y) is charted on the radial axis, with the origin (by default) at the center of the circle.

To create a chart from your standard report, follow the instructions below:

1. Select the dropdown arrow in the left margin next to the table of data.
2. Select **Chart and Table Types**.
3. Expand, for example, the "*Pie Charts"* list by selecting the **+** beside "*Pie Charts*."
4. Select **Pie**.



5. Drag and drop **3D Pie** so that it is displayed at the bottom of the report.
6. The "*Format Chart*" window appears showing the "*Pivot*" tab. You will need to define the "*X-axis*" and the "*Y-axis*" for your pie chart.
7. Select the data element you want from the "*Available Objects*" list to define the "*X-axis*." You must select a dimension (field shown in blue font) for the *"X-axis*."
8. Select the right arrow button to add the data element to the "*X-axis*."
9. Select the **Y-axis** radio button and follow steps 7 and 8 above to define the "*Y-axis*." You must select a metric (field shown in pink) for the "*Y-axis*."
10. Select the **OK** button if there are no other changes you wish to make. To view, scroll down to the bottom of the report where you indicated you wanted to insert the chart.

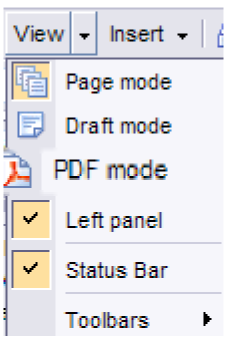
Please note at this time only MMM 9022, the BOL Status Report, contains the metrics necessary to create a chart of graph from a standard report.

Printing a Standard Report

Reports can be printed in portrait or landscape format.

Printing a Standard Report in Portrait

1. Select the **View** dropdown by selecting the down arrow.
2. Select **PDF** mode. Opening the report in "PDF" mode will allow you to see the report in a printable format. The Adobe Acrobat reader opens to display the report.
3. Select the **Printer** icon. The print options window displays on your screen. From this window you can specify number of copies, etc.
4. Select the **OK** button in the "*Printer*" dialog pop-up box to print.



Printing a Standard Report in Landscape

1. When results are received right click the mouse one time above the report header.
2. Select **Format report** from the drop down list displayed.
3. Select **Layout properties.**
4. Change paper size to letter or legal.
5. Change orientation to *"Landscape."*
6. Select **OK.**
7. Select the **View** dropdown by selecting the down arrow.
8. Select **PDF** mode. Opening the report in "PDF" mode will allow you to see the report in a printable format. The Adobe Acrobat reader opens to display the report.
9. Select the **Printer** icon. The print options window displays on your screen. From this window you can specify number of copies, etc.
   a. Select **Properties** and then **Basics** to change the orientation to "landscape." This may be a two step process for you.
   b. Another option is to check "*choose paper source by PDF page size*."
10. Select the **OK** button in the "*Printer*" dialog pop-up box to print.

Chapter 2: Modified Report

Running a Modified Report

ACE Reports Tool allows you to modify a standard report by providing greater flexibility in choosing the data objects desired. The *"modify"* functionality has greatly enhanced the ability to customize reports and improve reports performance. You are no longer restricted to the available objects list. The entire universe of objects is now available utilizing the "*Edit Query*" mode. In addition, reports run faster because filters may be applied prior to generating the report. Furthermore, ACE Reports now allows reports to be scheduled within set date parameters, such as "*7 Days Ago to Today*." This will be discussed later in the document.

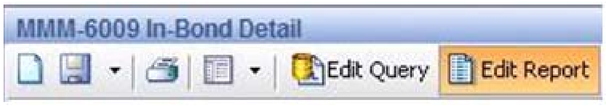
To run a modified report, follow the instructions below using the *MMM-6009 In-Bond Detail Report* as an example:

1. Select the **Reports** link on the *"Accounts"* tab after you have changed to the Carrier view.
2. Select **Launch Tool.**
3. Select the **+** beside "*Public Folders*."
4. Select the **+** beside the "*Multi-Modal Manifest*" folder.
5. Select the **In-Bond** sub-folder and then select the "*MMM-6009 In-Bond Report.*"
6. Select **Modify** below the report name.

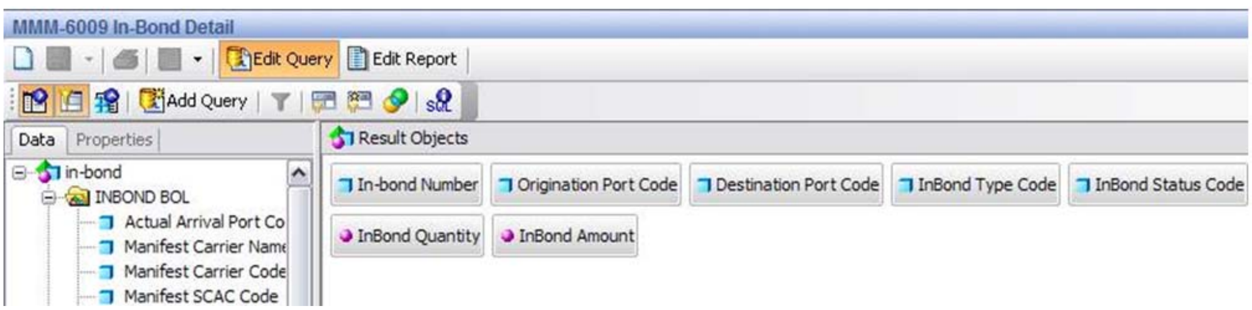
   a. Selecting **Modify** allows greater editing capabilities.
   b. Selecting the report name will generate the standard report. You will not be able to add *"Available Objects*" to modified reports.
7. Select **Yes** if you see a "*Warning – Security*" message displayed after selecting **Modify.**
   a. You will see messages cycle through the window until all of the report information has been retrieved.
8. Select **Cancel** when the "*Prompts*" box displays to enter the edit mode.
   a. If you know you will be modifying the report once it is generated, select **Cancel.**

b. If you want to run the standard report with no customization, enter data for the prompts.

9. A new screen displays; select the **Edit Query** button located just below the report title.



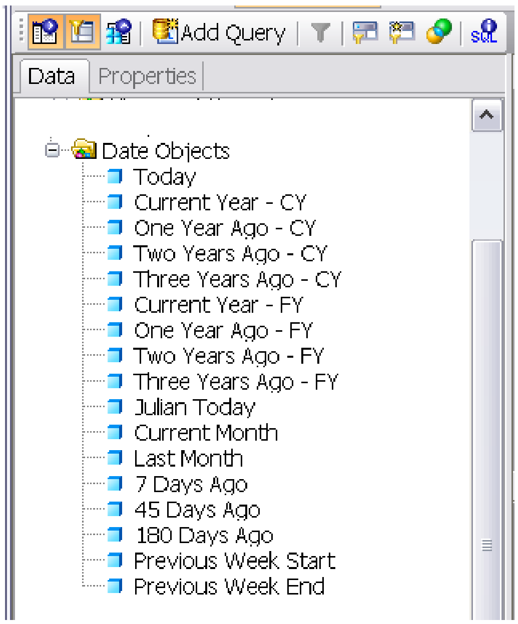
10. Delete extra objects in the standard report by highlighting the object and selecting the "*delete*" button. You may also drag the object to be deleted into the list of objects under the "*Data"* panel.
    a. By deleting an object from the "*Results Objects*" pane, the object remains available in the "*Data*" panel. Objects in the "*Data*" panel are not part of the report query's output.



11. To expand the list of objects:
    a. Select a "*Universe*" (e.g. **In-Bond**) by selecting the "**+**" sign.
    b. Select a "*Class*" (e.g. **INBOND BOL**) to expand the list of objects. Additional data elements will be displayed to customize the report.
    c. Select the object and drag it from the left side of the screen under the "Data" tab to the "*Result Objects*" pane. For example, add **In-Bond Quantity** and **In-Bond Amount** to the report.
    d. Note: You may also select the new object by double-clicking the object to move it to the "*Results Objects*" pane. Multiple objects may be selected at one time by holding down the shift key to move them to the "*Results Objects" pane.*
    e. By dragging and dropping an object into the "*Result Objects*" pane the object will be available to add to the report once it has run.

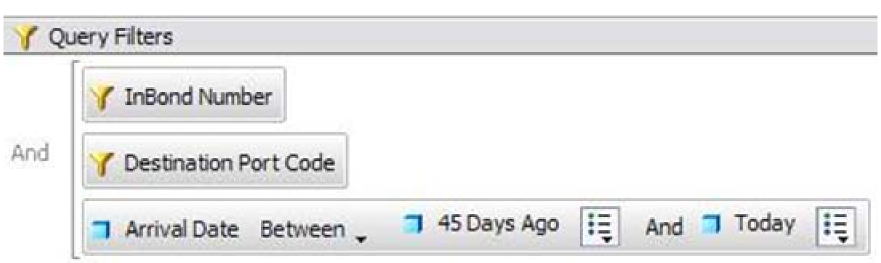
Adding New Date Objects for Modified Reports

Date Objects allows reports to be run and updated with variable date ranges. Reports no longer must be run against specific calendar dates; they can now be run with date ranges such as "*7 Days Ago*" to "*Today*." This eliminates the need to filter by date each time you choose to run a report.



To add a new date filter to "MMM-6009," for example, add the new date object to the "*Query Filter*" pane and follow the steps below:

1. Once the new date filter has been added to the "*Query Filter*" pane, select the dropdown arrow ▼ next to "*In List*" to view options for defining the filter.
2. Select **Between.**
3. Select the first filter type menu button and select **Object.**
4. Select the "**+**" icon next to the "*Date Objects*" class to expand the folder.
5. From the "*Date Objects*" class, select **45 day ago** as an example.
6. Select the second filter type button and select **Object.**
7. Select **Today.**



8. Select **Run Query.**

Note: If you save the report to your "*Favorites,*" when you run the report it will always display in-bond shipments with an arrival date of 45 days ago until today.

Hyperlinks do not work in edit mode. The report must be viewed, not edited, for the hyperlinks to work.

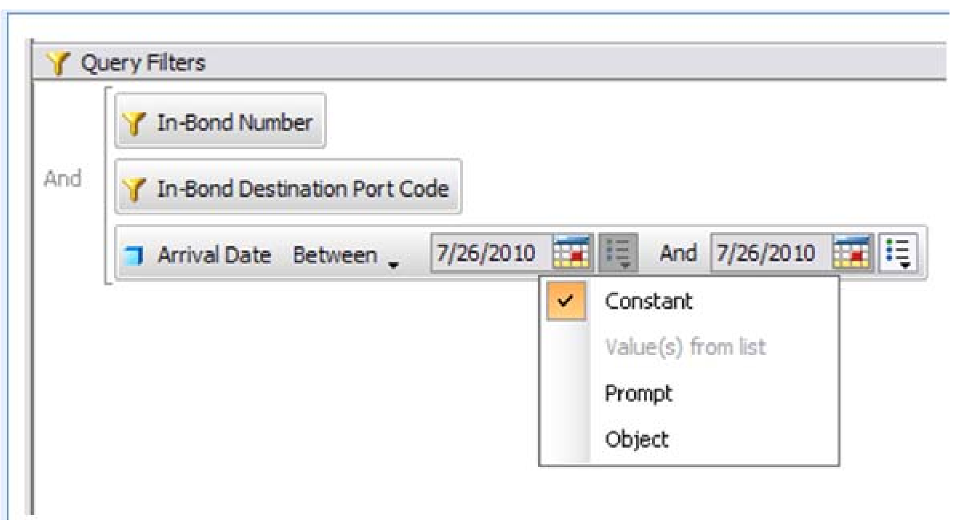
Using the Query Filters in a Modified Report

Once you have entered all the data objects needed for your report, the system can filter these data objects and return only the desired data fields. This can be done by using "*Query Filters*". 

"*Query Filters"* allow you to retrieve a sub-set of the data requested, resulting in improved report performance and usability.

Follow the steps below to add filters to the "*Query Filters*" pane. Similar to the data objects in the "*Result Objects*" pane, dragging and dropping an object into the "*Query Filters*" pane will apply it to the query. "*Query Filters*" is where the prompts can be set.

1. After adding a new filter to the "*Query Filters*" section, select the down arrow to view options for defining the filter.



2. Select **Constant, Value from a List, Prompt,** or **Object.**
    a. A "*Constant*" allows you to enter a specific value or values that do not change unless you edit the query again. This is useful when you have a certain port, carrier, importer, broker ID, or other data that remains the same for this report.

b. "*Value (s) from List*" allows you to select a value from a list, if one is provided.
c. "*Prompt*" allows you to type in text when prompted. When the report is run the prompt will require your input. You may also select default values if you choose a prompt.
d. "*Objects*" will allow specific variable objects to be used in the filters. See section titled "*New Date Objects.*"

3. Select the **Edit Report** button. 

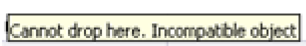
    a. When you return to the "*Edit Report*" view, the new data objects added to the report will be displayed in the "*Data*" pane.
    b. You must add the new data objects to the report in order to see the data.
4. Drag and drop or double-click the objects to be added to the final report. It is possible to add more than one object at a time by highlighting the objects to be added to the report.
5. Select the **Refresh Data** button. 

6. When the "*Prompts*" dialog box opens, update prompts as needed, then select "*Refresh Data*" to display the report.

OR in lieu of steps 1 through 6

7. Select **Run Query** button. 

8. When the "*Prompts*" dialog box opens, update prompts as needed then select **Run Query** to display the report.
9. Drag and drop or double-click the objects to be added to the final report. It is possible to add more than one object at a time by highlighting the objects to be added to the report.



Incompatible objects: Sometimes it is not possible to use certain combinations of data objects. This is because the data objects are not related. These objects are called "incompatible." If you run a report and include incompatible objects, you will not be able to combine the data by dragging and dropping objects.

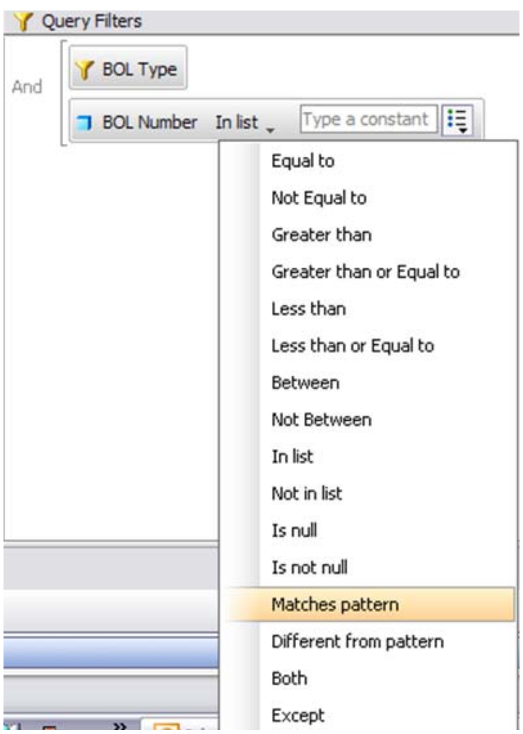
Using Wildcards with Query Filters

Within *"Query Filters"*, you have the ability to use wildcards on any field that is defined as alpha numeric. The wildcard symbol is "%." For example, a wildcard may be used by entering the first six digits of the BOL number followed by the percent sign. If you enter QVCW07%, the report will return all BOL numbers that begin with QVCW07. It will take a little longer for the report to display when using the wildcard capability.

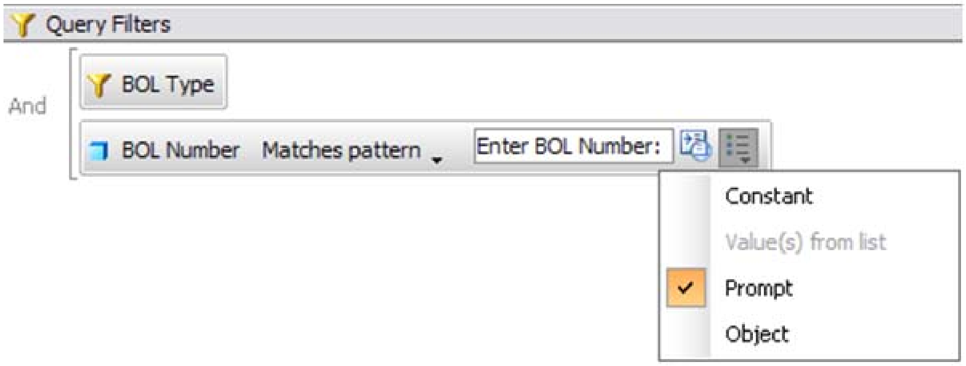
The example below outlines the steps to run a report filtering by BOL number and using the wildcard.

1. Select the report.
2. Select **Modify** below the report name.
3. Select **Cancel** when the "*Prompts*" box displays to enter the edit mode.
4. A new screen displays; select the **Edit Query** button located just below the report title.
5. Add and remove data elements as needed.
6. Select the object you want to use as the wildcard capability. The object MUST appear in the "*Query Filters*" pane.
    a. Let's assume you want to use the wildcard on the BOL number. If the BOL number appears with the 

    icon, delete the object by highlighting it and selecting the "**Delete**" button; or right click and select **"Remove."** You may also drag the object to be deleted to the objects list under the Data panel.
    b. Under the Data panel, open the "*BOL*" class and drag the BOL number object (with the blue square) to the "Query Filters" pane.
    c. Select the down arrow "▼" beside "*In List*" to view options for defining the filter.
    d. Select **Matches Pattern**.



    e. Select the down arrow ▼ next to "*Type a constant*" and select **Prompt.**



7. Select **Run Query** button.
8. When the "*Prompts*" dialog box opens, update prompts as needed. Enter the BOL number with the wildcard, for example, "*QVCW07%*."

9. Select **Run Query** to display the report. The results displayed will include all BOL numbers beginning with QVCW07.

If doing a word search using the wildcard search feature, remember all alphabetic characters are case sensitive. Results will be only returned if it is an exact match to the wildcard search.

In addition to adding a data element to the body of the report, you can drag a data element and place it above the table to further customize the report by that specific data element.

Using a Quick Filter in Modified Reports

Once you have selected the desired data objects, used the query filter function, and have run your query, you can now apply a quick filter. To do so follow the steps below:

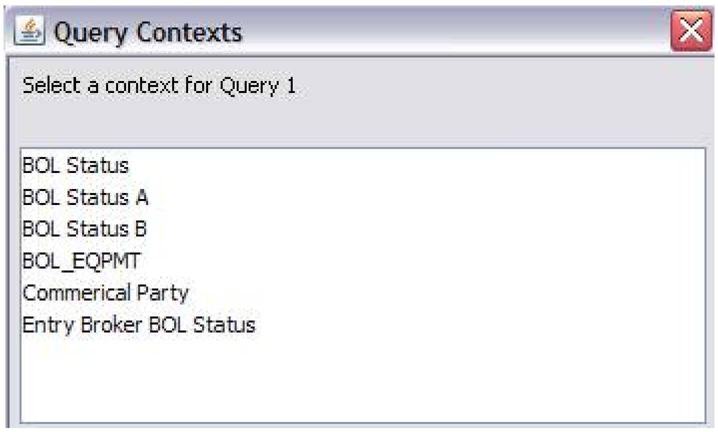
1. Select the column in which you would like to filter by placing your cursor within the column and left click.
2. Select the "**Quick Filter**" icon in the tool bar. 

3. "*List of Values*" pop up window appears. Select the values you would like filtered. You may select one or more values. To select more than one, hold down the "*Ctrl*" key and select each additional value. To select more than one

consecutive value, select one value, hold the "*Shift*" key and select another value. All values in between the two values selected will be highlighted.

4. Select "**OK**" and your revised report will display.

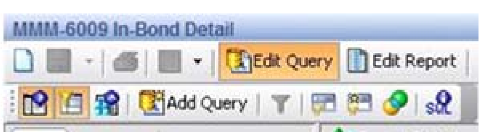
You may occasionally see a "Context Pop-up" if based on the objects and filters you have chosen, the reports tool has more than one way to answer the question. When this happens, the possible classes will be listed and any one of them is valid depending on the results you are seeking.



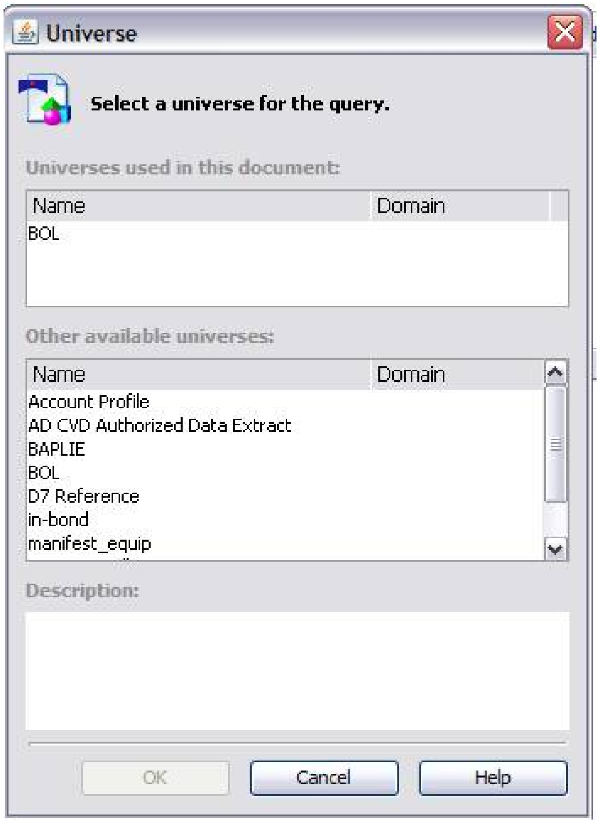
Adding a Query

In addition to being able to modify the report selected you can also add a query to that report. To add a query, follow the steps below after you select "*Modify*" for the report you want to customize and then "*Edit Query.*"

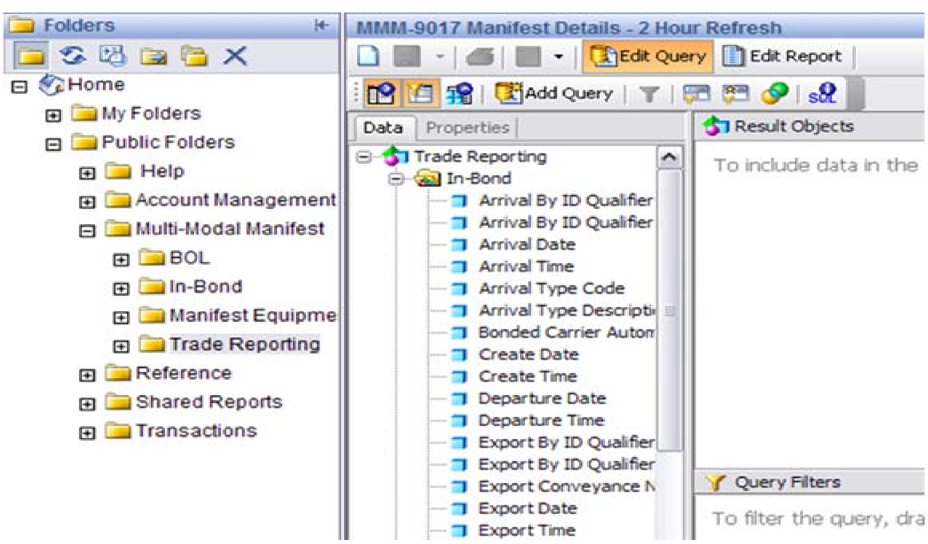
1. Select the **Add Query** button on the query toolbar. A new screen appears asking you to "*select a universe for the query*." You can create a new query on a universe already used or select a different universe.



2. Select the **appropri**ate universe by highlighting it under the "*Other available universes*" then select ***OK**. A new query* screen appears.



3. To expand the list of objects under the Multi-Modal Manifest Universe:
   a. Select a "*Class*" (e.g. BOL) to expand the list of objects. Additional data elements will be displayed to customize the report.



b. Select the objects you would like displayed in the report and drag them from the left side of the screen under the "*Data*" tab to the "*Result Objects*" pane.
c. If you would like to include all of the objects in the *"Result Objects,"* simply highlight the class name and drag that into the *"Result Objects."*
d. The objects and filters you define will only apply to the selected query.

4. Select **Run Query** button, 

if you want the data from both queries to be displayed.
5. When the "*Prompts*" dialog box opens, update prompts as needed then select **Run Query** to display the report.
6. The "*New Query*" box appears asking you to "*Choose how you want to include the data from the new query.*"

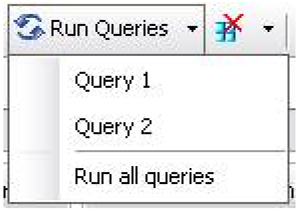
If you want to:	Then select
Display the data on a new report	**Insert a table in a new report**
Display the data on the current report in a new table	**Insert a table in the current report**
Include the data in the document without displaying the data in a report	**Include the result objects in the document without generating a table**

7. Select, for example, **Insert a table in a new report.** The new query will appear as a new tab at the bottom of the results when the report displays.

8. Select **OK**.

OR

9. If you want to return data for just the new query, select the drop-down arrow next to the "*Run Queries*" button on the toolbar and select **Query 2**.



10. Follow steps 6 – 8 above to include the data from the new query and to display the results. The results will display under "*Report 2.*"

When creating a report from scratch or adding a query to an existing report, if you are logged on as a Carrier, you MUST include your SCAC code in the report to receive results. The SCAC code can be added to either the "*Result Objects*" pane or the "*Query Filter*" pane.

To add the SCAC code to the "*Result Objects*" pane, select the SCAC code with the blue box to the left and drag it over. If you want to add the SCAC code to the "*Query Filter*" pane, you will need to follow the steps below:

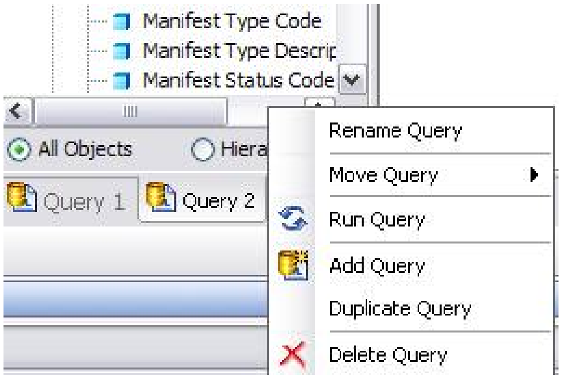
1. Drag the SCAC code with the blue box to the left into the "*Query Filter*" pane.
2. Select the drop down arrow to the right of the "*On List.*"
3. Select "***Equal To.***"
4. Select the drop down arrow to the right of "*Type a constant*."
5. Select "**Object**."
6. Select the SCAC code with the blue box to the left from the Carrier Class.

Carriers, you will need to drag your SCAC number into any report that you create from scratch or when you are adding a query to an existing report.

Renaming a Query

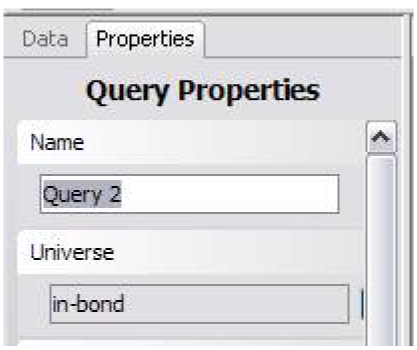
By default, each query is identified by a number in sequence. The first query is named "*Query 1*" and the second "*Query 2*." You can rename the query something more meaningful to reflect the data the query includes. To rename a query, follow the instructions below:

1. Make certain you are in the "*Edit Query*" view.
2. Right click the tab of the query you want to rename.
3. Select **Rename Query** from the shortcut menu.



OR

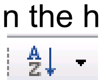
4. With the query tab highlighted that you want to rename, select the **Properties** tab.
5. Type the name for the query in the "*Name*" box.



6. Press the **Enter** key. The new name appears on the "*Query*" tab.

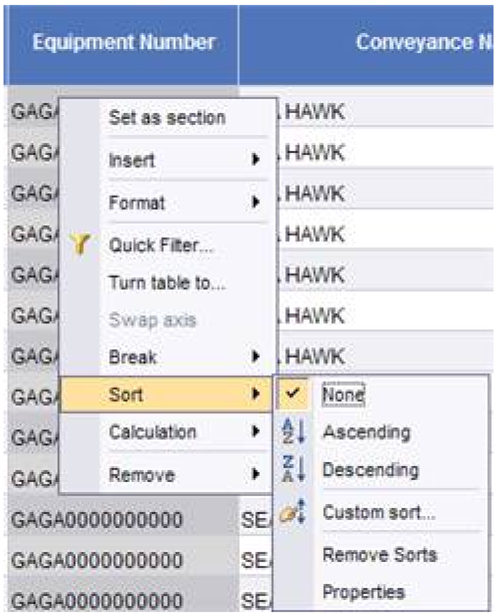
Sorting a Column in a Modified Report

You have already logged into the ACE portal, selected ***Reports****,* launched the report tool and successfully run a modified report. The report has returned all the data fields requested, but you would like it sorted differently than the report displays.

1. Highlight the column in the report that you want to sort by clicking below the column header. This will highlight the entire column.
2. Right click your mouse in the highlighted column and select **Sort,** or select the **Sort** icon in the toolbar. 
3. If you choose to sort another column you must remove the existing sort before selecting a new column to sort. This can be done by right clicking on the sorted column and choosing "*None*." You may now sort a new column.

You can sort multiple columns at once (i.e. Bill of Lading Numbers) as long as the first column sorted has repeated values.

4. Select one of the options displayed, for example select "**Ascending**." The highlighted column now appears in ascending order.



Saving a Modified Report

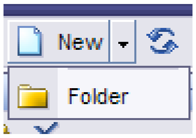
To save the modified report, you have two options.

1. Save the report in your "*Favorites*" folder in ACE (this allows for scheduling capability.); or
2. Save the report to your computer.

Saving to Your ACE Favorites Folder

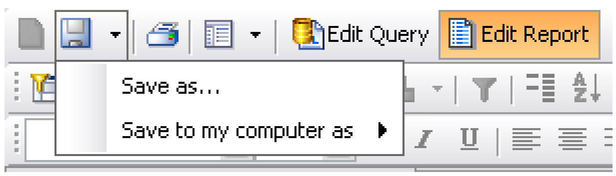
Follow the steps below to create a folder within your ACE Favorites folder:

1. Select the **+** beside "*My Folders.*"
2. Select the **Favorites** folder*.*
3. Select the **New** icon and select the down arrow.



4. Select the **Folder** option. The "*Create a New Folder*" portlet appears.
5. Enter a "*Folder Name*." You also have the option of entering a "*Description*" or "*Keywords*."
6. Select the **OK** button.

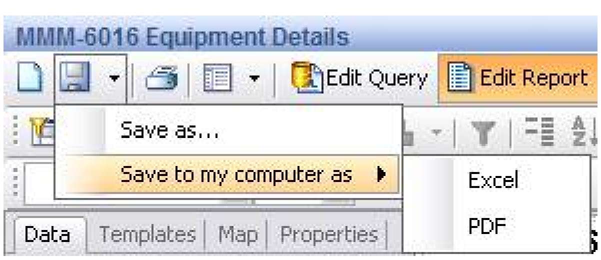
Follow the steps below to save to your Favorites folder:
1. Select the down arrow ▼ beside the "Save" icon.
2. Select **Save as** from the dropdown list.



3. The "*Save Document*" dialog box displays. Type a new report title in the "*Title*" field.
   a. The "*Refresh on Open*" box, if checked, allows you to save the report format but not the data.
   b. The "*Permanent Regional Formatting*" box, if checked, allows you to save the data and the report format.
4. Select the "**+**" sign next to "*My Folders*."
5. Select **Favorites** to save the report to your personal folder.
6. Select **OK** at the bottom right of the window.

Saving a Report to Your Computer

Follow the below steps to save the report to your computer.
1. Select the down arrow "▼" beside the "Save" icon.
2. Select **"Save to my computer as."**
3. Select either the "**Excel**" or "**PDF**" option.



4. You may also print after opening the report in “Excel or PDF”. See section on *“Printing a Modified Report.”*

Modified reports have only two format options for saving a report from Edit mode: Excel and PDF. If you need to save a customized report in CSV format, you will have to create it using Edit mode, then save it to your Favorites folder. When you open the report from your Favorites folder, you will have the option to save it as CSV.

Deleting a Saved Standard Report from Your Favorites Folder

To delete a report saved in your Favorites folder, follow the steps below:

1. Select the **+** beside “*My Folders*.”
2. Select the **Favorites** folder. You will see a list of reports you have saved to the “*Favorites*” folder.
3. Select the check box beside the report name that you wish to delete.
4. Select the **X** icon shown at the top of the “*Favorites”* screen. The report selected will be removed from the “*Favorites.*”

Trouble Shooting Tips on Saving a Modified Report to Your Computer

When you try to save a report to your computer using the “*Document”* and then *“Save to my computer as”* menu option and the screen flickers but nothing happens, perform the following steps:

1. Open “*Internet Explorer*.”
2. Select **Tools**, and then select **Internet Options**.
3. Select the **Security** tab.
4. Highlight the Internet Globe and select **Custom Level**.
5. Scroll down the list of choices until you find the “*Downloads*” section.
6. Locate “*Automatic prompting for file downloads*” and select **Enable**.
7. Locate “*File download*” and select **Enable**.
8. Locate “*Font download*” and select **Enable**.
9. Select OK to close the dialogue box.
10. Select OK to close the Internet Explorer properties box.

Turn off any pop-up blockers that are active so that the report will download.

Data Refresh

- *Reports in the "Trade Reporting" sub-folder are refreshed every two hours.*
- *Reports in the "BOL, In-Bond and Manifest Equipment sub-folders are refreshed nightly.*
- *Reports in the "Account Management" and "Reference" folder are refreshed nightly.*

Scheduling a Modified Report

You will have the option to schedule the report you want to run from your "*Favorites*" or from the *"Public Folders."* Scheduling a report from your "*Favorites"* will generate the customized report you saved. Scheduling a report from the "*Public Folders"* will generate the standard report.

History | Schedule | Properties

1. Select the report you want to run.
2. Run the report and save it to your *"Favorites"* folder or a personal folder that you have created (See topics, "*Creating a Folder" and "Saving a Report").* This will allow you to schedule a customized report.
3. Select the "**+"** beside "*My Folders."*
4. Select the **Favorites** folder*.* Choose the report you want to schedule.
5. Select the word **Schedule** under the report name. The "*Schedule*" portlet displays.
6. Notice that the "*Instance title*" fills with the report name you selected. The "*When*" category expands to reveal a dropdown menu. "*Run Object*" will default to "*Now*."
7. Select the **Run Object** dropdown.
8. Select, for example, the **Last Day of the Month** from the dropdown.
9. Notice that the remainder of the "*When*" category has changed to include a "*Start Time" and "End Time*" selection. The "*Start Time*" is the time and date you would like this report to run on a recurring basis. The "*End Time*" is the time and date that you no longer wish to have the report run on a scheduled basis.
10. Select the **Start Time** from the dropdown menus.
11. Select, for example, the **Calendar** icon and select **February 28th**.
12. Follow instructions above to select the **End Time**. You may also want to change the end date for the report since the default is 2017.
13. Select the "**+"** next to the "*Format*" option to specify the format for the report.

14. The default is "*Web Intelligence.*" Select the dropdown if you want to change to either Microsoft Excel or Adobe Acrobat.
15. Select the "**+**" next to the "*Prompts*" option then select **Modify Values**. If you do not change the date range on your prompt values once you select "Modify Values," you will see the same results each time the report is scheduled.
16. Enter the filters you want included in your report and select **Apply**. The prompt values will be displayed.
17. Select the **Schedule** button to complete scheduling the report. When the scheduled report is run, it can be found by selecting the "*History*" link under the name of the report you scheduled from your "*Favorites*."

Rescheduling a Modified Report

1. Select the "**+**"beside "*My Folders.*"
2. Select the **Favorites** folder. Choose the report you want to reschedule.
3. Select the word **History** under the report name.
4. Select the **Reschedule** link. You are now back on the schedule page.
5. Select the "**+**" next to the "*Prompts*" option then select **Modify Values**.
6. Enter the filters you want included in your report and select **Apply**. The prompt values will be displayed.
7. Select the **Schedule** button to complete scheduling the report.
8. You are now returned to "*History*" and will notice there are two instances of the scheduled report.
9. On the tool bar within the portlet, place a check mark in the small box next to the originally scheduled instance of the report and select the **Delete** button to remove the old report.

Deleting a Scheduled Modified Report

To delete a previously scheduled report, follow the instructions below:

1. Select the "**+**" beside "*My Folders.*"
2. Select the **Inbox** folder.
3. Select the check box beside the report name that you wish to delete.
4. Select the **X** icon shown at the top of the "*Inbox*" screen. The report selected will be removed from the "*Inbox.*"

Creating an Alerter

You have already logged into the ACE portal, selected the "*Reports*" link from the "*Accounts*" tab, launched the report tool and successfully run a modified report. When the results are displayed you want to add an alerter, which helps you highlight certain conditions or attributes in a report. This calls attention to that defined condition. To create an "*Alerter*" follow the instructions below:

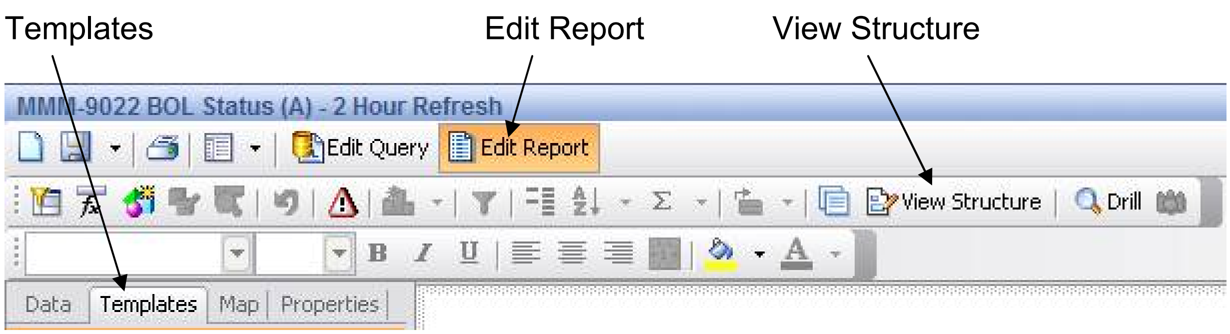
1. Highlight the column you wish to contain the alerter.
2. Select the **Alerter** icon on the tool bar.
3. Select **New** when the "*Alerter*" box appears.

4. The Alerter Editor box appears. Enter a "*Description*" for the alerter.
5. Under the "*Sub Alerter*" section, select **Operator** from the drop down list.

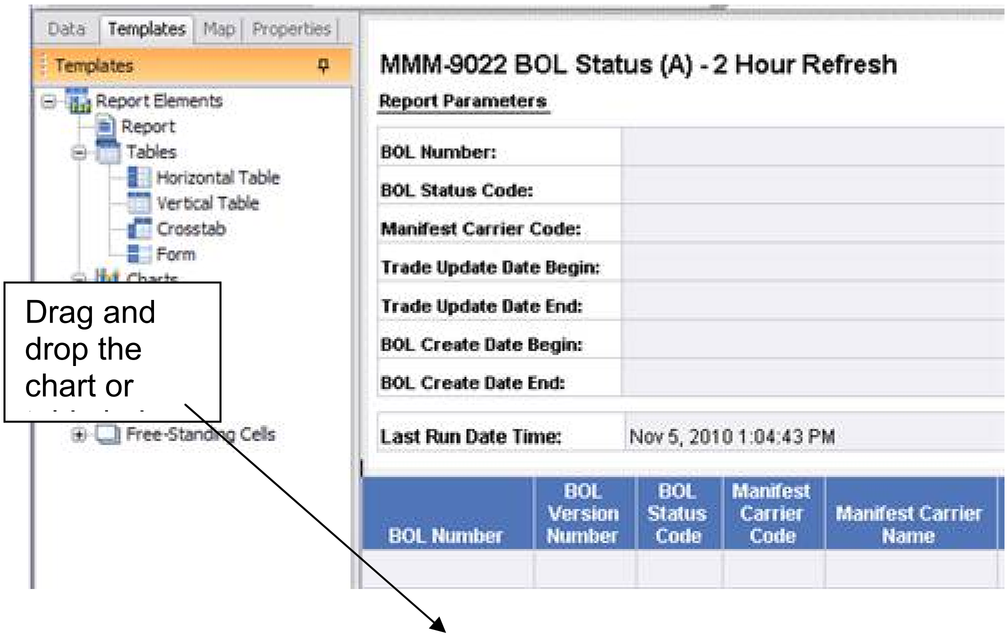
6. Select **Operand(s)** or enter an amount depending on your alerter. For example, type the District Port Code. You can add a second alerter by selecting the + button.
7. To change the format of the alerter, select the **Format** button. You can format the following elements in your report.
    a. Number format – number, currency, date/time, etc.
    b. Cell properties – text, cell border, cell background colors
8. Select **OK** to close the "*Alerter Editor*" box. You are returned to the "*Alerter*" box.
9. Select **OK** to close the "*Alerter*" box. Alerters have now been added to the report.
10. Save your report.

Creating Charts and Graphs for a Modified Report

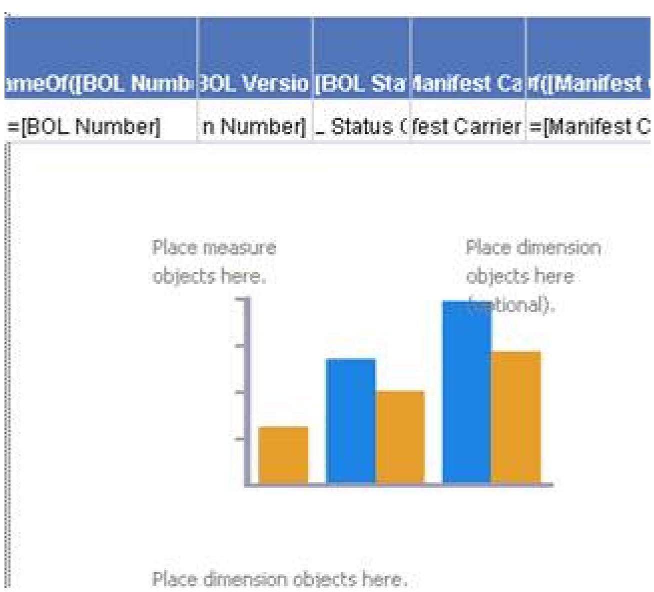
There are charts and graph options to depict the results of your modified report. To create a chart or graph, your tool bar options should be "*View Structure*" and you need to be in the "*Edit Report*" mode. Select **Templates.**



1. Select "**+**" beside the folder you want to choose from to open the sub-folders.
2. Select the chart of your choice, and drag and drop just below the report.



3. Change from the ”*Templates*” view to the “*Data*” view, and drag and drop “*Measures*” (pink circles) directly on the “*Place measure objects here*” section. You can drag and drop multiple “*Measures*” in that section.

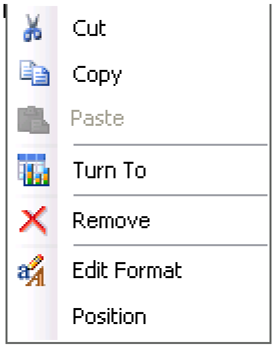


4. Drag and drop dimension objects (blue squares) into the “*Place dimension objects here*” section.
5. Select the “**View Results**” tab on the tool bar. The chart results are now visible.

Change a Chart Type

To change the type of chart or graph, choose one of the options listed below:

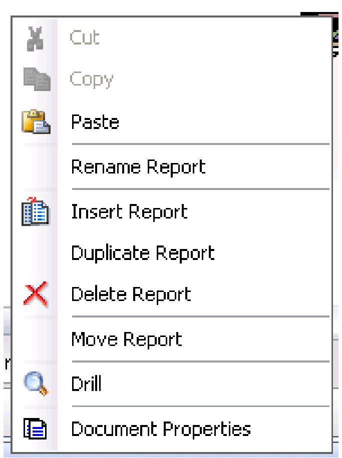
1. Right click in the center of the chart and select **Turn To** and select a different chart/graph; or
2. Drag a new chart over from the "*Template*" view and drop it on the chart or graph you wish to replace.



Creating Multiple Charts on One Report

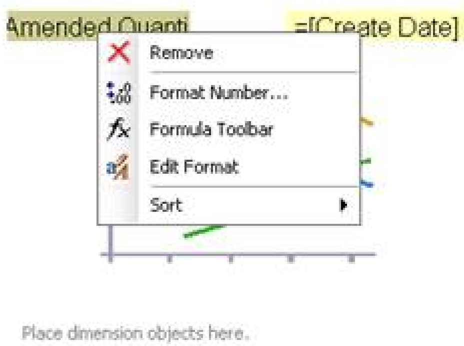
To depict the data in an additional chart format, you can add another chart type by the following:

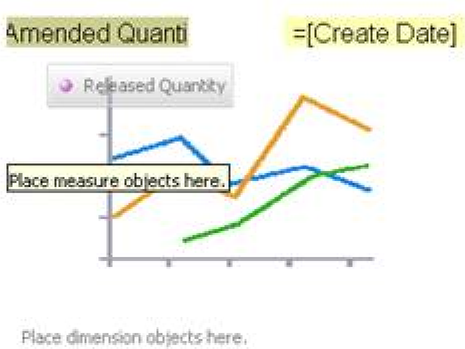
1. Right click on the original chart.
2. Select **Copy.**
3. Move cursor to area below the original chart and right click.
4. Select **Paste.**
5. Than drag a different chart onto the duplicate chart.



Changing a Measure or Dimension

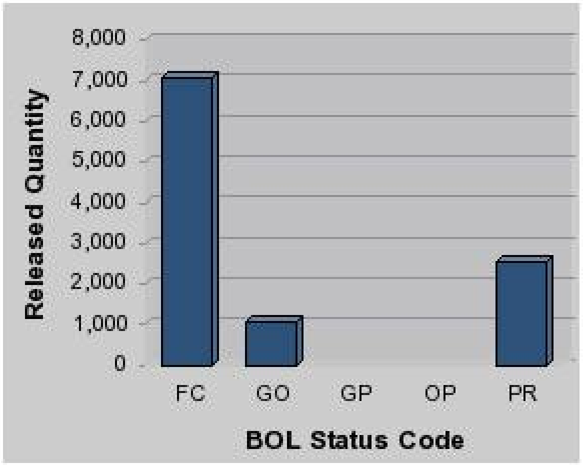
You have viewed the chart and have decided you would like to change the data objects. To change the Measure (Y Axis – Pink) or Dimension (X Axis – Blue) in the chart, select the "**View Results**", drag another measure or dimension directly onto the one you wish to replace, or you may drag the measure or dimension back to the data box, or right click on the item you wish to remove and select "**Remove**".





Sizing a Chart

Select the chart and place the cursor over the border you wish to change. The cursor will change to the double arrow; click and drag the border to the desired size. Repeat for the other border if you would like to change the size.

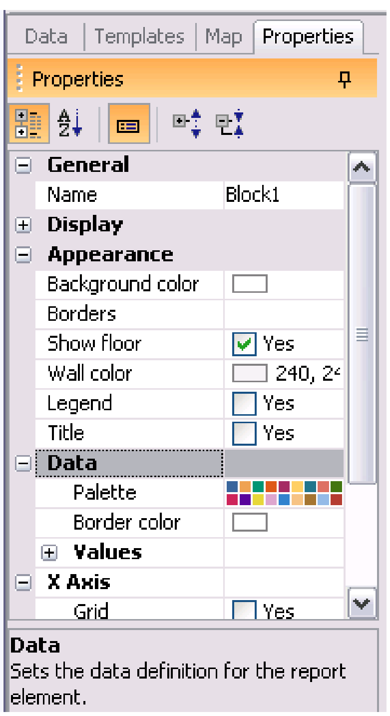


Removing a Chart

To remove a chart, right click on the chart and select **Remove,** or verify that the data tab is displayed and drag the chart from the document and drop it in the data section.

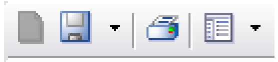
Changing Properties of Charts and Graphs

The properties of each chart and graph can be changed as well. The appearance, colors, page lay out and more can be change to fit your needs.



Printing a Modified Report

To print a modified report you will need Adobe Acrobat, as you are only able to print in PDF mode unless you would like to save and print the report from Excel. For instructions on saving, see the section above called "*Saving a Modified Report*."

1. Select the **Printer** icon. 
2. Choose landscape or portrait layout. You must choose the layout now before opening in "*PDF*" mode.
3. Select the **OK** button. The report will open in the "*PDF*" mode.
4. Select the **Printer** icon. The print options window displays on your screen. From this window you can specify number of copies, etc.
5. Select the **OK** button in the "*Printer*" dialog pop-up box to print.

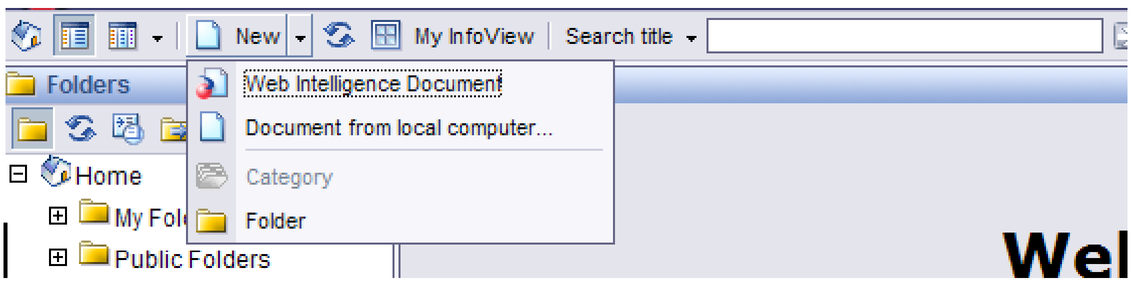
Chapter 3: Customized Report

Creating a Customized Report

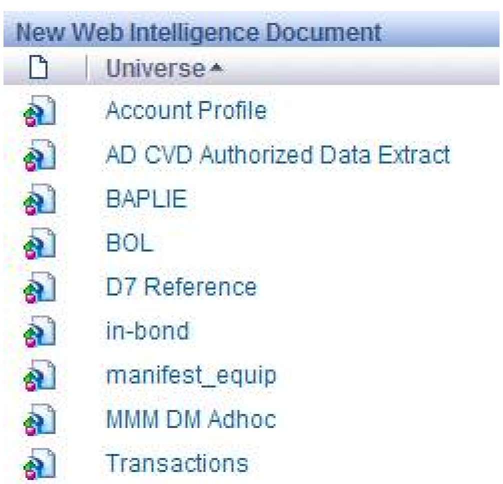
This section provides instructions on how to create a customized report from scratch by using the *"Web Intelligence Document"* capability.

You have already logged into the ACE portal, selected the carrier view, selected the **Reports** link from the "*Accounts*" tab and launched the reports tool. To create a customized report from scratch, follow the steps below:

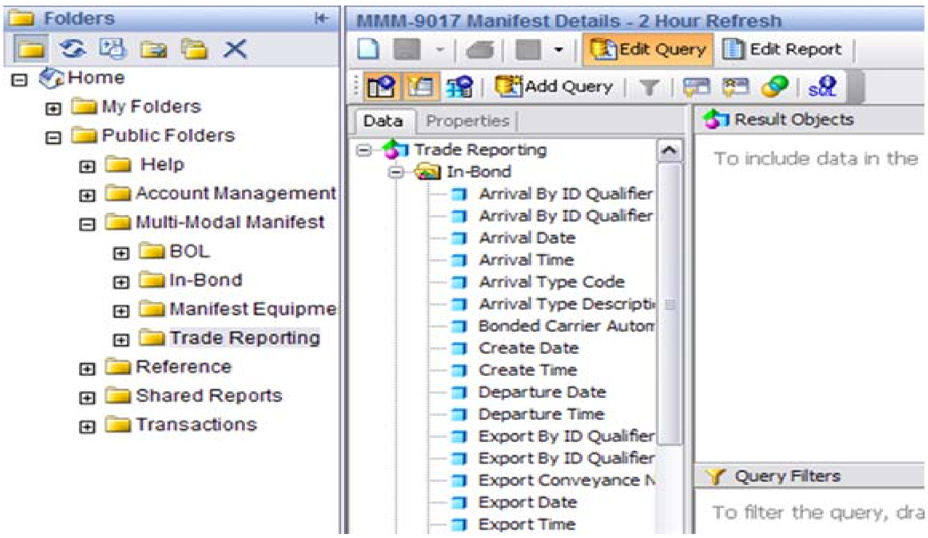
1. Select the down arrow ▼ on the toolbar to the right of the "*New*" icon.
2. Select **Web Intelligence Document.** A new screen will open which displays a list of Universes.



3. Select the appropriate Universe, for example **BOL**, to create your customized carrier report. A new screen will open once you have selected the Universe.



4. To expand the list of objects under the Trade Reporting Universe:



a. Select a "*Class*" (e.g. In-Bond, etc.) to expand the list of objects. Additional data elements will be displayed to customize the report.
b. Select the objects you would like displayed in the report and drag them from the left side of the screen under the "*Data*" tab to the "*Result Objects*" pane.
   - Note: You may also select the new object by double-clicking the object to move it to the "*Results Objects*" pane. Multiple objects may be selected at one time by holding down the shift key to move them to the "Results Objects" pane.
   - By dragging and dropping an object into the "*Result Objects*" pane the object will be available to add to the report once it has run.

5. Follow the steps above to add filters to the "*Query Filters*" pane. Similar to the data objects in the "*Result Objects*" pane, dragging and dropping an object into the "*Query Filters*" pane will apply it to the query.
   a. "*Query Filters*" is where the prompts can be set.
   b. "*Query Filters*" allow you to retrieve a sub-set of data from the database without first having to pull all the available data before filtering. This improves report performance because you are limiting the amount of data being pulled from the database.

CBP recommends you enter a date range in your filters to ensure you receive results.

When creating a report from scratch, or adding a query to an existing report, if you are logged on as a Carrier, you MUST include your SCAC code in the report to receive results. The SCAC code can be added to either the "*Result Objects*" pane or the "*Query* Filter" pane.

To add the SCAC to the "Result Objects" pane, select the SCAC code *with the blue box to the left and drag it over. If you want to add the SCAC code to the "Query Filter" pane, you will need to follow the steps below:*

1. Drag the SCAC code with the blue box to the left into the "*Query Filter*" pane.
2. Select the drop down arrow to the right of the "*On List*."
3. Select "**Equal To**."
4. Select the drop down arrow to the right of "Type a constant."
5. Select "**Object**."
6. Select the SCAC code with the blue box to the left from the Carrier Class.

6. After adding a new filter to the "*Query Filters*" section, select the down arrow ▼ to view options for defining the filter.
7. Select **Constant, Value from a List, Prompt** or **Object.**
   a. A "*Constant*" allows you to enter a specific value or values that do not change unless you edit the query again. This is useful when you have a certain port, carrier, importer, broker ID or other data that remains the same for this report.
   b. "*Value from a List*" allows you to select a value from a list, if one is provided.
   c. "*Prompt*" allows you to type in text when prompted. When the report is run the prompt will require your input. You may also select default values if you choose a prompt.
   d. *"Objects"* will allow specific variable objects to be used in the filters. See section titled "*New Date Objects."*
8. Select the **Edit Report** button. 

   a. When you return to the "*Edit Report*" view, the new data objects added to the report will be displayed in the report layout in the order you selected them and in the "*Data*" pane. You have the opportunity to re-arrange the objects in the report layout if needed.
9. Select the **Refresh Data** button. 

10. When the "*Prompts*" dialog box opens, update prompts as needed then select **Refresh Data** to display the report.

OR in lieu of steps 8 through 10

11. Select the **Run Query** button. 

12. When the "*Prompts*" dialog box opens, update prompts as needed then select **Run Query** to display the report.
13. The final report will display the objects in the order you selected them. You have the opportunity to re-arrange the objects in the report layout if needed.

Cannot drop here. Incompatible object *Incompatible objects: Sometimes it is not possible to use certain combinations of data objects. This is because the data objects are not related. These objects are called "incompatible." If you run a report and include incompatible objects, you will not be able to combine the data by dragging and dropping objects.*

You may occasionally see a "Context Pop-up" if based on the objects and filters you have chosen, the reports tool has more than one way to answer the question. When this happens, the possible classes will be listed and anyone of them is valid depending on the results you are seeking. This will happen more frequently with Transactions reports than reports.

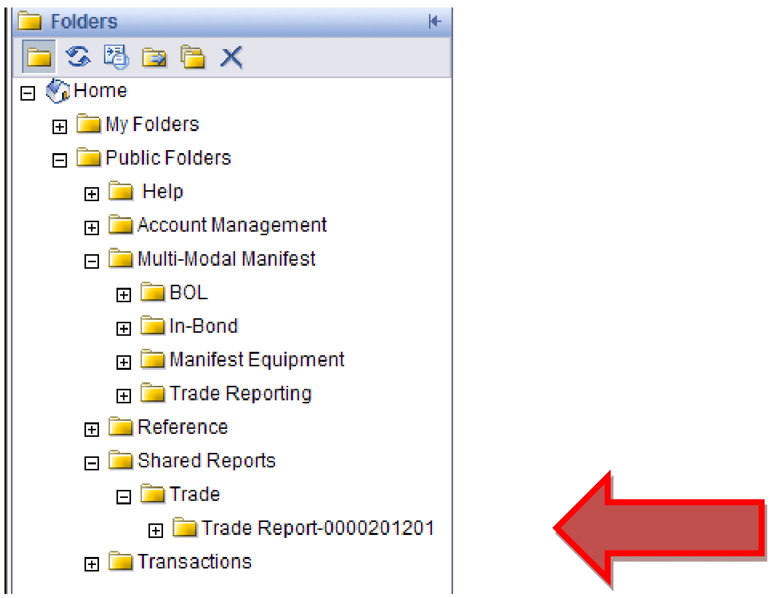
All Other Functions for Customized Reports

For all other functions, except creating the customized report, please refer to corresponding sections within the "*Modify*" Reports section. Other functions include sorting, adding a new date object, printing, charts and graphs, etc.

Chapter 4: Shared Reports

Creating and Managing Shared Reports

All ACE report users now have the ability to share customized reports with any user of their account who has access to ACE reports. This will improve efficiency for the account by eliminating the need for multiple users to create similar reports.

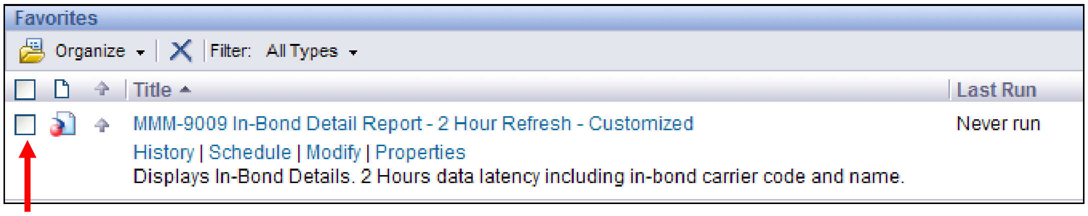


Your account shared folder is located under the "*Public Folders, Shared Reports, Trade"* folder. The account specific folder will be automatically generated by ACE and will reflect your top account ACE ID number followed by the name of the top account. Any reports posted to this folder can be viewed by all users within your account who have access to ACE reports, but will not be visible to other accounts.

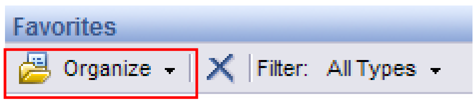
Creating a Shared Report

You are already logged into ACE reports and have successfully run an ACE modified report that you believe will benefit others in your company. (See section on *Running a Modified Report*.) You decide to share this report.

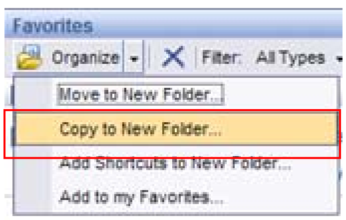
1. First save the report to your "Personal Folder" so that you always have a pristine copy of the report. (See section on *Saving a Modified Report to your Favorites*) You are now ready to save the report to the "*Shared Folder."*
2. Select the **Favorites** folder.
3. Select the **Checkbox** next to the report you want to share.



4. Select the **Organize** dropdown arrow.

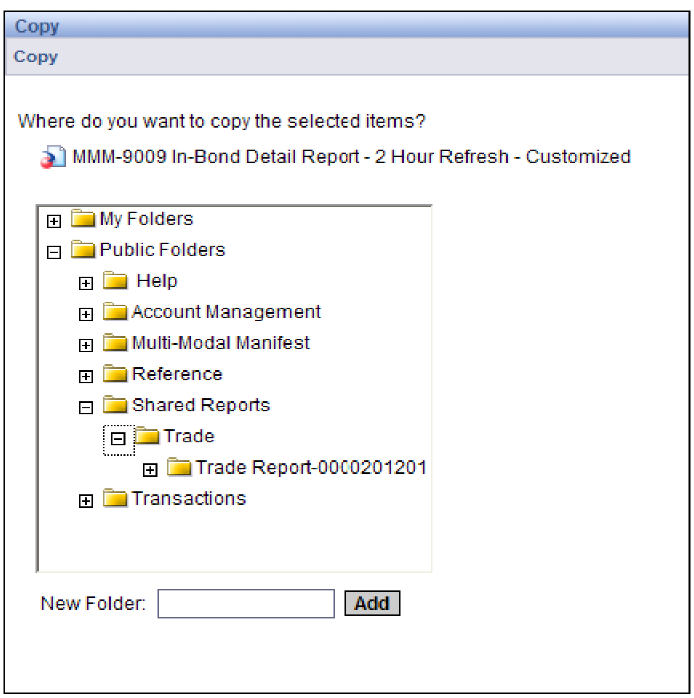


5. Select **Copy to New Folder** from the dropdown menu.



Selecting "Move to New Folder" will move the report out of your "Favorites." To keep a pristine copy of the report you want to share, always select "Copy to New Folder."

6. Select the "**+**" next to "*Public Folders*" in the "*Copy*" panel.
7. Select the "**+**" next to "*Shared Reports*;" then select the "**+**" next to "*Trade*."
8. Select the "**+**" next to your account folder.

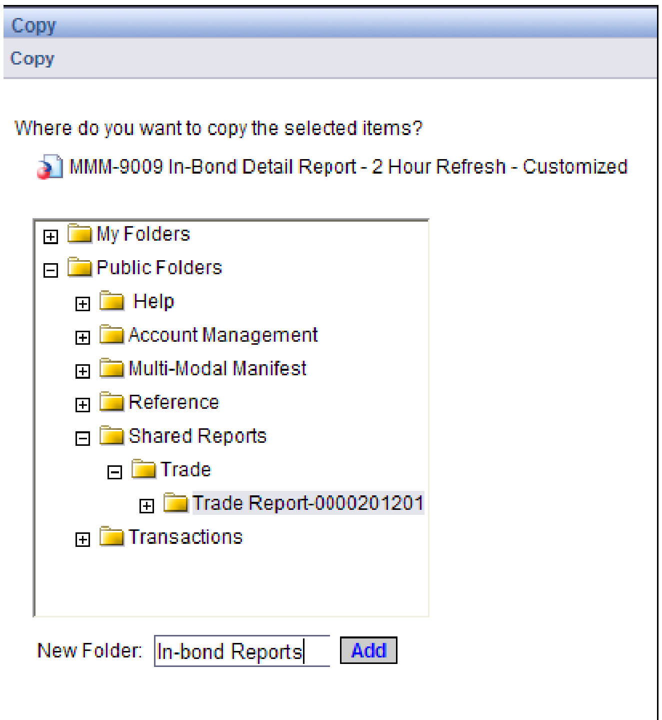


9. Select **OK.** You are returned to your personal folder.
10. Select your account folder to see that the report has been successfully saved to the shared folder.

Creating a Sub-folder

To create a folder within your “Shared Reports” folder, follow the steps below:

1. Highlight the folder under Shared Reports/Trade.
2. Enter a sub-folder name in the “New Folder” box.
3. Select the **ADD** button.



4. Select **OK.**
5. The sub-folder name appears. You can then save the shared report to the sub-folder.

You may occasionally see a "Context Pop-up" if based on the objects and filters you have chosen, the reports tool has more than one way to answer the question. When this happens, the possible classes will be listed and anyone of them is valid depending on the results you are seeking. This will happen more frequently with Transactions reports than reports.

Managing Shared Reports

There is only one shared report folder per account. Any account user with access to ACE reports can post, modify or delete a report from this shared folder. Thus, as the Trade Account Owner you needed to manage this folder carefully. Here are some recommendations for managing your shared folder.

Recommendations:

- *Develop consistent naming standards for shared reports*
- *Appoint one or two users to manage the shared reports folder*
- *Delete unnecessary or duplicate reports*
- *Use sub-folders under your account folder*
- *Keep a pristine copy of any report that you share or that you create in your personal folder*
- *Copy a shared report to your personal folder before making any modifications*
- *Add meaningful descriptions and keywords to shared reports to assist the user in quickly identifying the report*

Adding a meaningful, detailed description and keywords to shared reports will reduce the amount of time other users spend searching for the appropriate report. Descriptions and keywords can be included when saving a report or when editing the properties of an existing report.

Chapter 5: Additional ACE Resource

There are several options to help you better understand the ACE Reports Tool and how to fully utilize the tool.

- The "*Help*" folder located under "Public Folders" contains both the ACE Reports Data and the Reports User Guide. The Reports User Guide contains step by step instructions for running ACE reports.

- For additional assistance, take the web-based training (WBT) titled "*ACE Reports for the Trade Community*," or visit the "*Training and Reference Guides*" section on www.cbp.gov.modernization.

The URL for the ACE Online Training Center is:

http://nemo.cbp.gov/ace_online

Do you need additional assistance using the ACE Portal*? If you are a trade member calling or if you are calling outside the United States, please contact the* ***Technology Service Desk*** *at 1-866-530-4172.*

Appendix A

Account Management: Account Profile

Report Number	Report Name	Report Description
AM_5096	Carrier – Account profile	This report displays all information contained within an account profile by specific account type.

Account Management: Declarations

Report Number	Report Name	Report Description
AM_7002	Trade Declarations	Not yet available to Carriers, only available to Importer and Broker Accounts.

Help: ACE Reports Data Dictionary Carriers

Report Number	Report Name	Report Description
	ACE Reports Dictionary-Carriers	ACE Portal Reports Dictionary for Carriers. Contains details of report data elements.
	Rail and Sea Carrier Reports User Guide	Contains step by step instructions on running truck carrier reports.

Multi-Modal Manifest: BOL (Ocean & Rail Carriers Only)

Report Number	Report Name	Report Description
MMM_6021	BOL Details	This report displays the Bill of Lading Number, Master Bill Indicator, House Bill Indicator, Submission Method Code, Bill of Lading Status Code and Bill of Lading Type Code. Master Bill Indicator and House Bill Indicator are mutually exclusive meaning only one indicator can be set to Yes per BOL. However, it is possible for both indicators to be No. Descriptions for the code fields are available and can be added to the

		report. This report will show data that was current as of the previous day.
MMM_6023	Commercial Party	This report displays Bill of Lading Number, Commercial Party Type Code and Commercial Party Name. Descriptions for the code fields are available and can be added to the report. This report will show data that was current as of the previous day.

Multi-Modal Manifest: In-Bond (Ocean & Rail Carriers Only)

Report Number	Report Name	Report Description
MMM_6009	In-Bond Details	This report displays the In-bond Number, Origin Port Code, Destination Port Code, In-bond Type Code, In-bond Status Code, Arrival Date/Time and Departure Date/Time. Descriptions for the code fields are available and can be added to the report. This report will show data that was current as of the previous day.

Multi-Modal Manifest: Manifest Equipment (Ocean & Rail Carriers Only)

Report Number	Report Name	Report Description
MMM_6016	Equipment Detail	This report displays all pieces of equipment related to the latest version of the Bills of Lading. The report displays Equipment Number, Conveyance Name and lists associated Equipment Seal Numbers. This report will show data that was current as of the previous day.
MMM_6017	Manifest Details	This report displays Manifest Number, Manifest Status Code and Manifest Type Code. Descriptions for the code fields are available and can be added to the report. This report will show data that was current as of the previous day.

Multi-Modal Manifest: Trade Reporting

The data displayed in the report, not the report itself, is automatically refreshed within 2 hours of creation or amendment. To see the most current data, you will need to re-execute or refresh the report.

Report Number	Report Name	Report Description
MMM_9009	In-Bond Detail Report – 2 Hour Refresh	This report displays the In-bond Number, Origin Port Code, Destination Port Code, In-bond Type Code, In-bond Status Code, Arrival Date/Time and Departure Date/Time and includes all In-bonds that have been created or amended within the past 30 days. Descriptions are available for code fields and can be added to the report.
MMM_9016	Equipment Details Report – 2 Hour Refresh	The report displays Equipment Number, Conveyance Name and lists associated Equipment Seal Numbers and includes all versions of Bills of Lading that have been created or amended in the past 30 days.
MMM_9017	Manifest Details – 2 Hour Refresh	This report displays Manifest Number, Manifest Status Code and Manifest Type Code and includes all manifests that have been created or amended in the past 30 days. Descriptions are available for code fields and can be added to the report.
MMM_9021	BOL Details – 2 Hour Refresh	This report displays the Bill of Lading Number, Master Bill Indicator, House Bill Indicator, Submission Method Code, Bill of Lading Status Code and Bill of Lading Type Code and includes all Bills of Lading that have been created or amended within the past 30 days. Master Bill Indicator and House Bill Indicator are mutually exclusive meaning only one indicator can be set to Yes per BOL. However, it is possible for both indicators to be No. Descriptions for the code fields are available and can be added to the report.
MMM_9022	BOL Status (A) – 2 Hour Refresh	This report displays the Bill of Lading Number, Bill of Lading Version, Bill of Lading Status Code, Carrier Code, Carrier Name, Amended Quantity Entered Quantity, Released Quantity,

		MOT Code, Master Bill of Lading Number, House Bill of Lading Number, In-Bond Number, In-Bond Status Code, Entry Number, Disposition Code, Create, Update and Trade Update dates. It includes all Bills of Lading that have been created or amended within the past 30 days. Descriptions for the code fields are available and can be added to the report.
MMM_9023	Commercial Party Report – 2 Hour Refresh	This report displays Bill of Lading Number, Commercial Party Type Code and Commercial Party Name and includes all Bills of Lading that have been created or amended within the past 30 days. Descriptions for the code fields are available and can be added to the report.

Reference:

Report Number	Report Name	Report Description
MMM_6003	Public FIRMS	This report provides a list of Facilities Information Resource Management System (FIRMS) codes including name, status, type and location information.
MMM_6005	UN Location Code	This report uses the United Nations Location Codes to produce a report which provides physical locations and attribute data for use on BAPLIE/Vessel Stowage Plan manifest transactions.