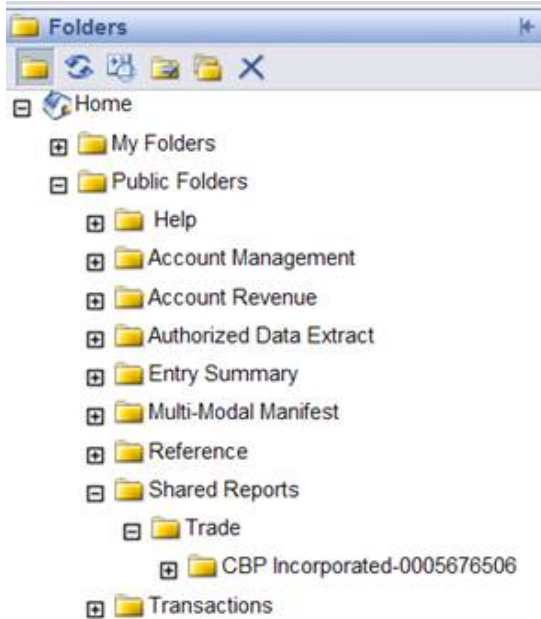




Information Notice: Shared Reports

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 reports 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 name and be followed by the ACE ID number. 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

CBP recommends using the steps below to save a report to the Shared Reports folder:

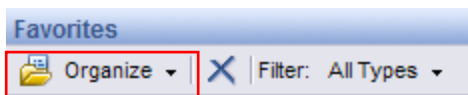
1. First save the report to your “Personal Folder” so that you always have a clean copy of the report. You are now ready to save the report to the “*Shared Reports*” folder.
2. Select the **Favorites** folder.
3. Select the **Checkbox** next to the report you want to share.



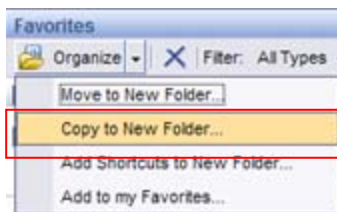
Information Notice: Shared Reports



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

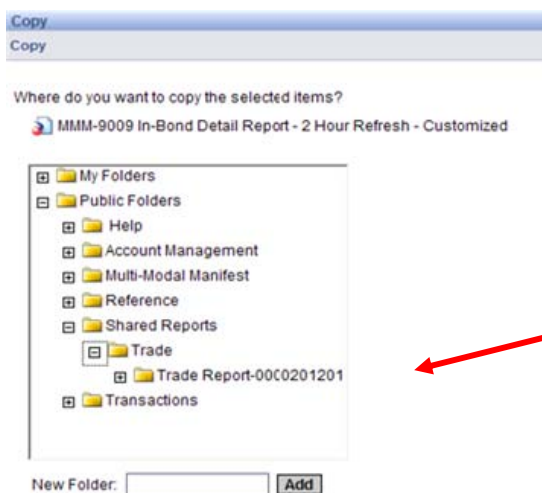


5. Select **Copy to New Folder** from the dropdown menu.



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 your account folder.





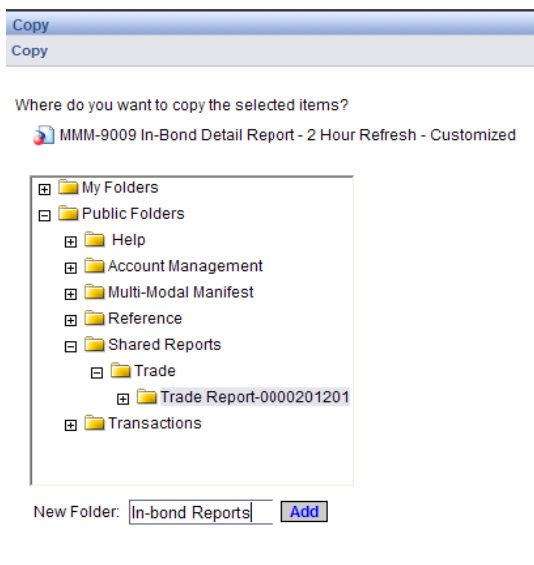
Information Notice: Shared Reports

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 subfolder within your “*Shared Reports*” folder in which to save your report, 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.





Information Notice: Shared Reports



Since there is only one Trade Report folder for the account, we recommend that accounts with multiple views (i.e. importer view, broker view, etc.) first create a sub-folder for each view so that users can more easily locate a shared report related to their specific account view.

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.** As such, the Trade Account Owner must manage this folder carefully. Here are some recommendations for managing your shared folder.

- *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 clean copy of any report that you share or that you create in your personal folder (same comment as above)*
- *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*