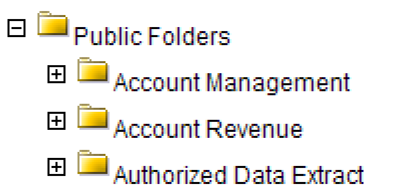
Scheduling an Authorized Data Extract
The following should be noted for those electing to schedule an Authorized Data Extract: (1) Initially only Account Management Cargo Entry, Cargo Exam, Entry Summary, Entry Summary Compliance and Account Revenue reports will be available; and (2) Only the Trade Account Owner (TAO) or the Proxy Trade Account Owner (PTAO) will be able to request an Authorized Data Extract.



1. Click on the "*Authorized Data Extract"* folder.
2. Select the Authorized Data Extract you want to schedule:
   - AD-001 Entry Summary Report
   - AD-002 ADD/CVD Case Report
   - AD-003 Cargo Entry Report
   - AD-004 Cargo Exam Result Report
   - AD-005 Team Review Report
   - AD-006 Account Revenue – Receivables (AR 006 and AR 007)
   - AD-008 Account Revenue - Aged Entry Report (AR 002)

Title	Last Run	Type
AD-001 Entry Summary Report View Latest Instance | History | Schedule | Properties	3/16/2008 7:59 PM	Web Intelligence Document
AD-002 ADD/CVD Case Report View Latest Instance | History | Schedule | Properties	3/5/2008 12:08 PM	Web Intelligence Document

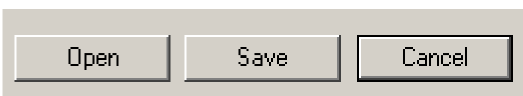
3. Click on the word "***Schedule***" under the report name. You will be taken to the scheduling screen. If you click on the report name, you will also be taken to the scheduling screen.
4. Select "***Modify Values***."
5. Enter the filters you want included in your extract and select "***Apply***." The prompt values will be displayed. Since the maximum row limit for each extract is one million, you will need to adjust the date range accordingly, when scheduling the selected extract.

Note: For AD 001 the default is "Yes" for "Include Entries with No Entry Date." Also for AD 001 you will need to change the "Entry Report Creation Date (end)" to a future date later than the "End Entry Report Entry Date" for the extract to run.

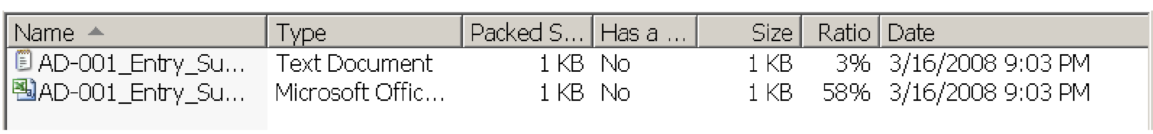
6. Select the "***Schedule***" button to complete scheduling the extract. The status will display after the report has been scheduled.

- The user can also view the status of the extract by clicking on the *“History”* tab associated with the Authorized Data Extract report name that was scheduled.
- The extract status, either “*Pending*,” “*Running*” or “*Success*,” will be displayed on the history screen. When the word *“Success”* is displayed the user will find the report in the “Inbox”.

7. Select the “Inbox” from “My Folders” and select the name of the “Shortcut to” the Authorized Data Extract scheduled. It may take a few seconds or minutes for the file to display.
    - The extract will be delivered in a CSV (comma separated value) format. The file will be zipped.



8. Save the extract file to your computer. The file will automatically be saved in a CSV format. Then select Open to view the extract. You will see two files listed:



    - One file will be the CSV file and will contain the data extract.
    - The other file is a text file and will reflect the number of rows in the extract. Double click on the text file first to view the number of rows in the extract.

Note: The text file will read “----1000000 rows. (Warning: Partial Result returned due to row/time limitations” if the extract file exceeds the 1,000,000 row limit. The user will need to narrow the request to receive results.

Note: If the extract is successful but no data is returned, then the extract has exceeded the time limit allowed and the user needs to narrow the request to receive results. This may happen, depending on the size of your account, when you use "all" as the default for the filer and the importer prompts. The error message received will read: "---- 0 rows. (Warning: Partial Result returned due to row/time limitations". When possible it is always best to use specific filer codes and importer of record numbers.

9. Double click on the CSV file if the text file has 65,000 rows or less. The file will open in Excel.
10. Single click on the CSV file if the text file has over 65,000 rows. This will highlight the file name.
11. Click on "***Extract***".
12. Decide where you want to save the extract file and click "***Extract****."*
13. To open the file in Microsoft Access, do the following:
    - Select Access and then select "**Open**."
    - Select "text files."
    - Select desktop or wherever you saved the CSV file
    - Follow the Wizard to open the file. Make certain to check the box which indicates "first row contain field names." Also if the "Text Qualifier" box does not default to show a double quotation ("), select the **"** from the drop down.
    - Double click the file name to open in Access.

The "Inbox" will show the last three instances of each extract. By selecting "History" under the Authorized Data Extract name you will see the last three instances of that extract. Please ensure you save the extract to your desktop computer since only the last three of the extract will be available in the inbox.

Please note that if a Portal Account grants access to a user who is either a TAO or a PTAO in their respective Portal Account, that TAO or PTAO will also have the ability to run an authorized data extract on any Portal Account to which they have access. However, the Portal Account granting access can also decide to give "*No Access*" to the Reports tab to any individual to whom they grant cross account access thus prohibiting them from running an authorized data extract or any other type of report.