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 “*AR 006 Periodic Statement Detail*” report as an example:

1. Select the “*Reports” tab*.
2. Select **“Launch Tool.”**
3. Click the **“+”** beside “*Public Folders*.”
4. Click the **“+”** beside the Account Revenue Subfolder.
5. Click **“Workflows”** and select the *AR 006 Periodic Statement Detail report.*
6. Click **“Modify”** below the report name.
   a. Clicking “*Modify*” allows greater editing capabilities.
   b. Clicking the report name will generate the standard report. You will not be able to add “*Available Objects*” to modified reports.
7. Click **“Yes”** if you see a “*Warning – Security*” message displayed after clicking “Modify.”
   a. You will see messages cycle through the window until all of the report information has been retrieved.

8. Click **“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, click **“Cancel.”**
   b. If you want to run the standard report with no customization, enter data for the prompts.

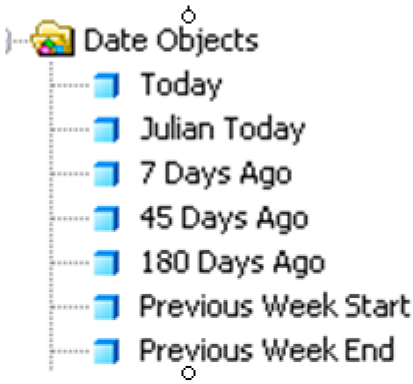
9. A new screen displays; click the "*Edit Query*" button located just below the report title.
10. Delete extra objects in the standard report by highlighting the object and clicking the "delete" button. You may also drag the object to be deleted into the list of objects under the "*Data"* panel.
    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. Account Revenue) by clicking the "+" sign.
    b. Select a "*Class*" (e.g. Receivables, Inventory, etc.) 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 class code and class text to the report to view fee breakouts.
    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.

Date Objects allow reports to display continually updated data that match variable date ranges.



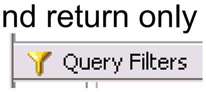
For example, to use this new feature to add a new date filter to AR 006, see step 12 above on adding query filters.

1. Once the new date filter has been added to the "*Query Filter*" pane, click the dropdown arrow "▼" next to "*In List*" to view options for defining the filter.
2. Select **"Between."**
3. Click the first filter type menu button  and select **"Object."**
4. Click 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. Click the second filter type button and select **"Object."**
7. Select **"Today."**
8. Click **"Run Query."**

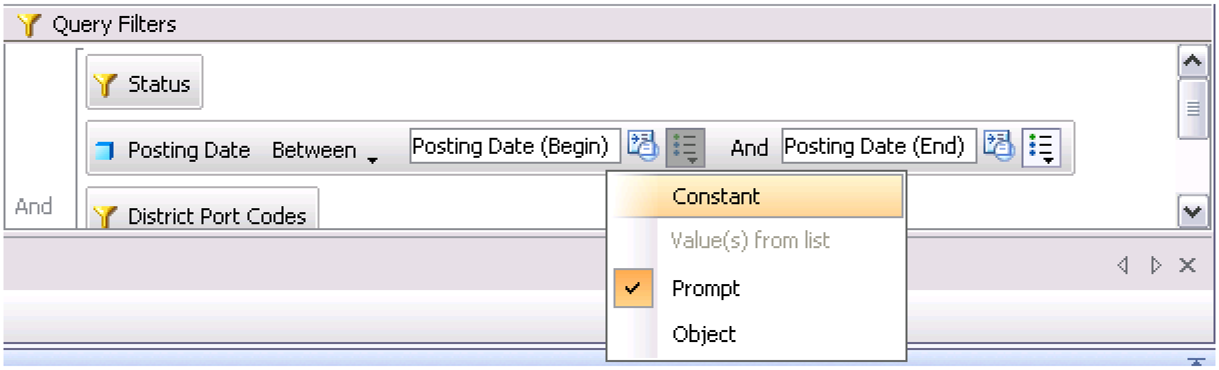
Note: If you save the report to your "*Favorites*" when you run it, it will always display entry summaries flagged for periodic statement with a date range of the last 45 days until today.

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

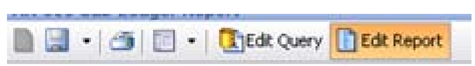
Once you have entered all the data objects needed for your report, the system can filter these data object and return only the desired data fields. This can be done by using Query Filters. 

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, click 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 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.*"

   .
3. Click the "**Edit Report**" button. 

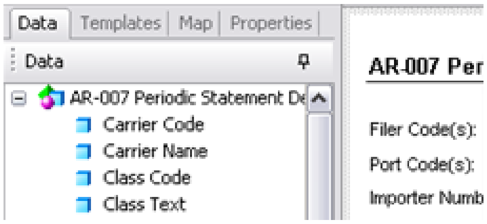
   a. When you return to the "*Edit Report*" view, the new data objects added to the report will be displayed in the "*Data*" pane.
   b. You must add the new data objects to the report in order to see the data.
4. Drag and drop or double-click the objects to be added to the final report. It is possible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

6. When the "*Prompts*" dialog box opens, update prompts as needed, then click "*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 click "**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.

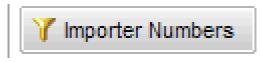
Incompatible objects: Sometimes it is not possible to use certain combinations of data objects. This is because the data objects are not related. These objects are called "incompatible." If you run a report and include incompatible objects, you will not be able to combine the data by dragging and dropping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

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 with an Importer of Record (IR) number by entering the first 9 digits followed by the percent sign. If you enter 12-3456789%, the report will return 11 digit IR numbers that have 12-3456789 as the first nine digits. Another example is using a wildcard with the Harmonized Tariff Schedule (HTS) number by entering the four, six or eight digit HTS number followed by the percent sign. Entering 9102% will pull all 10 digit HTS numbers that begin with 9102. It will take a little longer for the report to display when using the wildcard capability.

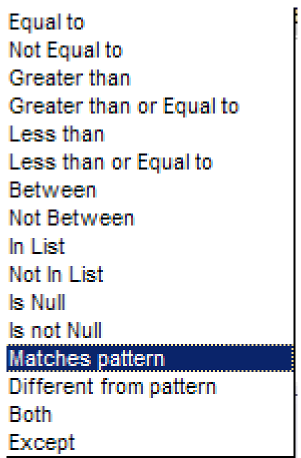
The example below outlines the steps to run a report filtering by IR number and using the wildcard.

1. Select the report.
2. Click "**Modify**" below the report name.
3. Click **"Cancel"** when the "*Prompts*" box displays to enter the edit mode.
4. A new screen displays; click the "*Edit Query*" button located just below the report title.
5. Add and remove data elements as needed.

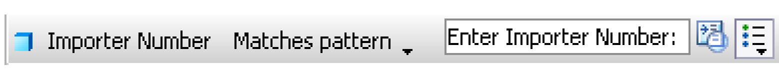
6. Select the object you want to use as the wildcard capability. The object MUST appear in the "*Query Filters*" pane.
   a. Let's assume you want to use the wildcard on the IR number. If the IR number appears with the 

icon, delete the object by highlighting it and clicking 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 "*Importer*" class and drag the IR number object to the "Query Filters" Pane.
   c. Click the down arrow "▼" beside "In list" to view options for defining the filter.

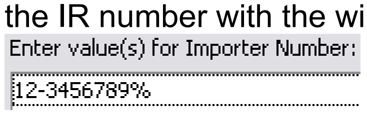
   d. Select "**Matches Pattern**."



   e. Click 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 IR number with the wildcard, for example 12-3456789%.



9. Click "**Run Query**" to display the report. The results displayed will include all suffixes associated with the nine digit IR number entered.

If doing a word search (such as by importer name) 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. For example if you are running AM 012, Summary of Port of Entry Codes by Value, and you select the “Country of Origin” and place it above the table, your data would be sorted by country of origin allowing you to view what is imported into each port by country.

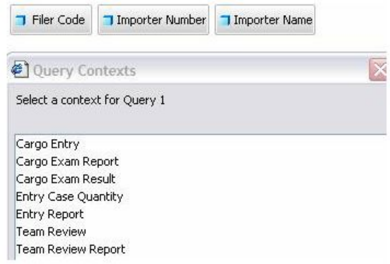
Using a Quick Filter in Modified Reports

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. 

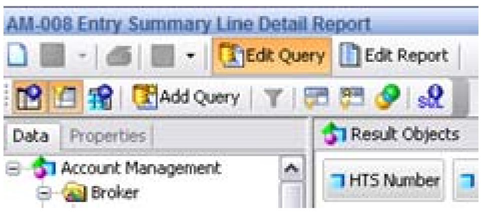
3. “List of Values” pop up window appears. Select the values in which you would like filtered. You may select one or more values. To select more than one, hold down “*Ctrl*” key and click on each additional value. To select more than one consecutive value, select one value, hold the “*Shift*” key and 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 anyone of them is valid depending on the results you are seeking. This will happen more frequently with Transactions reports than Account Management reports. Let’s say as a broker you want a list of importers whose entry summaries had been flagged for team review in the past 6 months. You create your report by selecting filer code, importer number and importer name. In this example, the objects can be pulled from several classes. You would highlight the “Team Review” class to obtain the needed results.

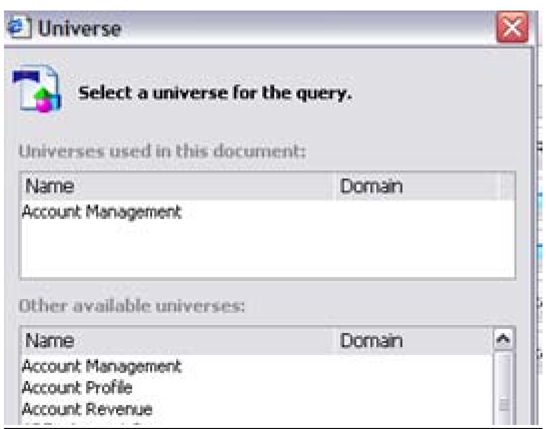


Adding a Query

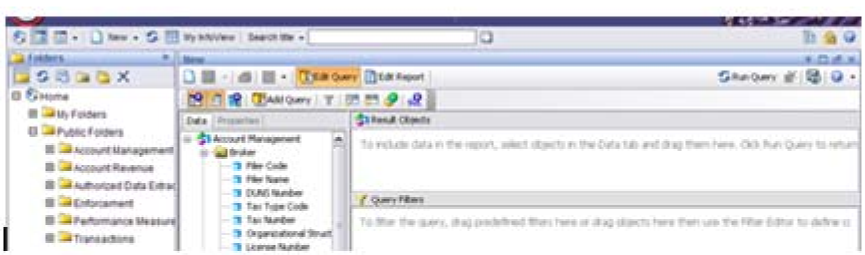
In addition to being able to modify the report selected you can also add a query to that report. To add a query, follow the steps below after you select "*Modify*" for the report you want to customize and then "*Edit Query.*"



1. Select **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 appropriate universe by highlighting it under the "*Other available universes".* Then click "**OK**." A new query screen appears.



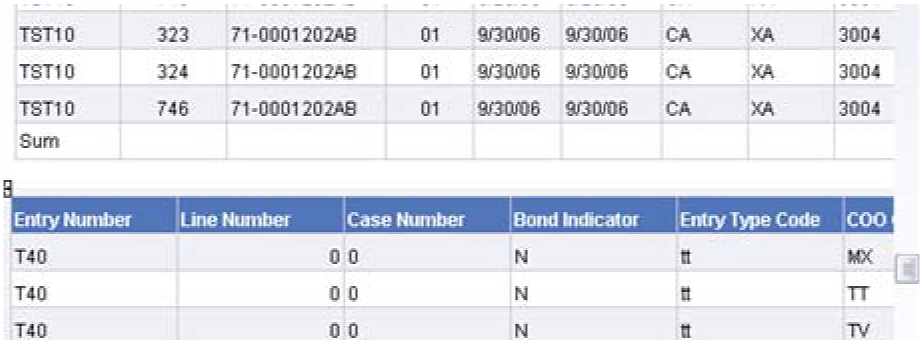
3. To expand the list of objects under the Account Management Universe:
    a. Select a "*Class*" (e.g. Entry Case Quantity) to expand the list of objects. Additional data elements will be displayed to customize the report.
    b. Select the objects you would like displayed in the report and drag them 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 click "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*

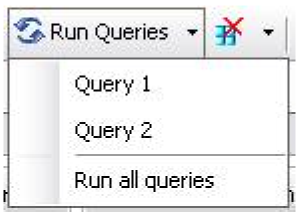
7. Select, for example, "Insert a table in the current report." The new query will appear at the bottom of the results when the report displays.
8. Select **OK**.



TST10	323	71-0001202AB	01	9/30/06	9/30/06	CA	XA	3004
TST10	324	71-0001202AB	01	9/30/06	9/30/06	CA	XA	3004
TST10	746	71-0001202AB	01	9/30/06	9/30/06	CA	XA	3004
Sum								

Entry Number	Line Number	Case Number	Bond Indicator	Entry Type Code	COO
T40	0	0	N	tt	MX
T40	0	0	N	tt	TT
T40	0	0	N	tt	TV

OR



9. If you want to return data for just the new query, click 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 Broker, you MUST include your filer code in the report to receive results. The filer code can be added to either the “Result Objects” pane or the “Query Filter” pane.

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

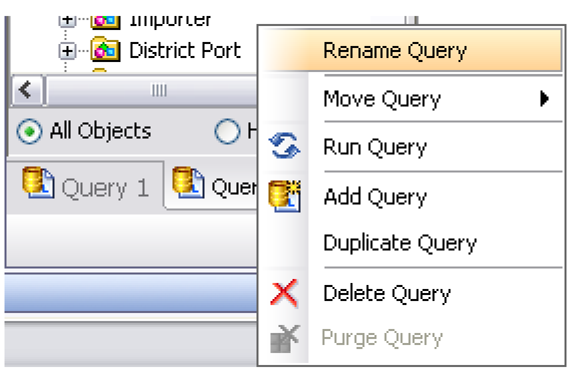
1. Drag the filer code with the blue box to the left into the “*Query Filter*” pane.
2. Select the drop down arrow to the right of the “*On List.*”
3. Select “*Equal To.*”
4. Select the drop down arrow to the right of “*Type a constant*.”
5. Select “**Object**.”
6. Select the filer code with the blue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

Importers, you will need to drag your Importer 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 which reflects the data the query includes. To rename a query, follow the instructions below:

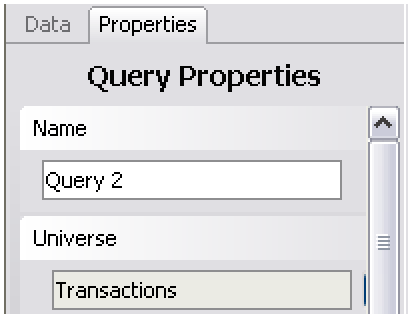
1. Make certain you are in the “Edit Query” view.



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, click on 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.

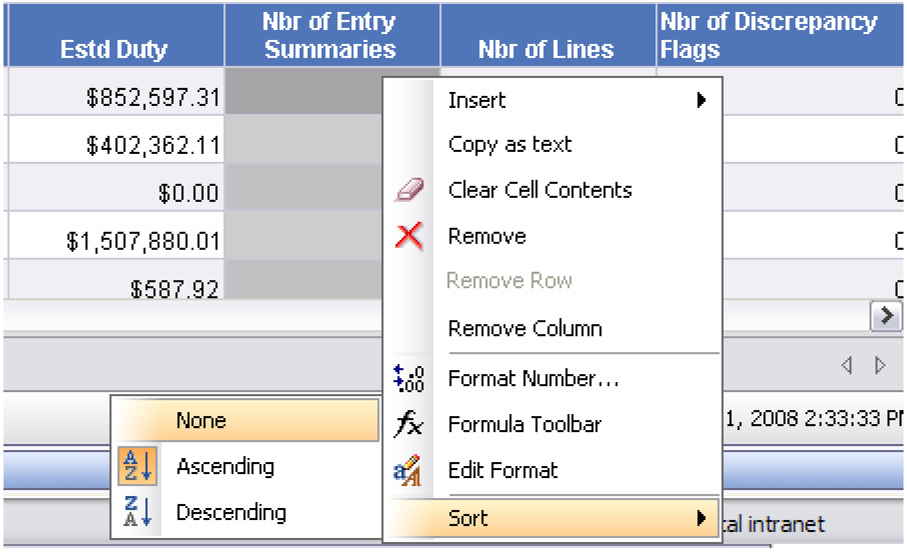
Sorting a Column in a Modified Report

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. # of entry summaries by port code) as long as the first column sorted has repeated values (i.e. there are at least two different port codes with the same number of entry summaries).

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



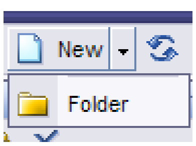
Saving a Modified Report

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:



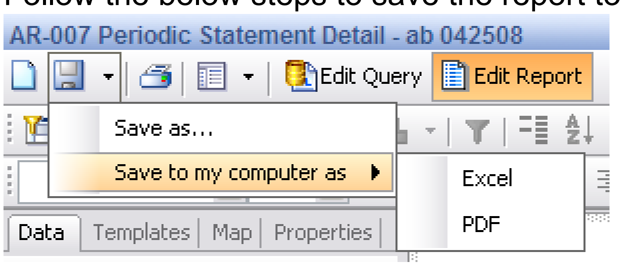
1. Select the "**+**" beside "*My Folders.*"
2. Select the "**Favorites**" folder.
3. Select the "**New**" icon and select the down arrow.
4. Select the "**Folder**" option. The "*Create a New Folder*" portlet appears.
5. Enter a "*Folder Name*." You also have the option of entering a "*Description*" or "*Keywords*."
6. Select the "**OK**" button.

Follow the steps below to save to your Favorites folder:

1. Click 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. Click the “+” sign next to “My Folders.”
5. Click **“Favorites”** to save the report to your personal folder.
6. Click **“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. Click 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**," 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

- *Entry, Entry Summary and Bond data are refreshed nightly. Entries filed on Monday should be available for reports run on Tuesday. For truck carriers, transaction data in reports is also refreshed nightly.*
- *Compliance data is refreshed monthly, normally around the 20th of the month. For example, January compliance data should be available around February 20th.*
- *Periodic monthly statement data is refreshed hourly.*

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 will appear in your "*Inbox*" which is located under "*My Folders.*"

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.

Data available for ACE reports includes the previous three CBP fiscal years plus the current fiscal year. The CBP fiscal year runs October 1 through September 30.

Deleting a Scheduled Modified Report

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

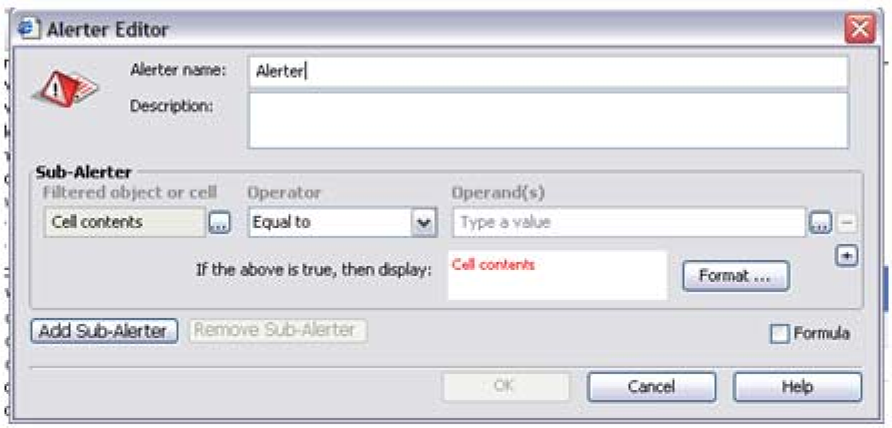
1. Select the "**+**" beside "*My Folders.*"
2. Select the "**Inbox**" folder.
3. Select the check box beside the report name that you wish to delete.
4. Select the "**X**" icon shown at the top of the "*Inbox*" screen. The report selected will be removed from the "*Inbox.*"

Creating an Alerter

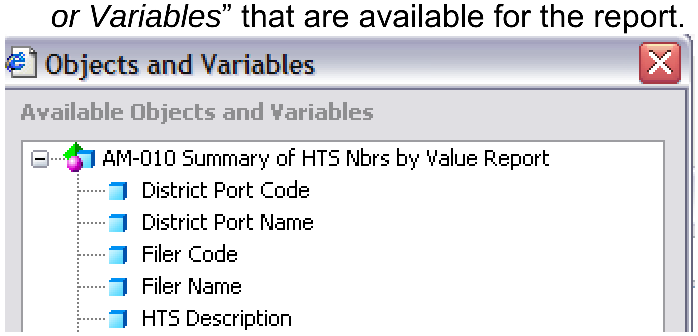
You have already logged into the ACE portal, selected "*Reports*," launched the report tool, and successfully run a modified report. When the results are displayed you want to add an alerter, which helps you highlight certain conditions or attributes in a report. This calls attention to that defined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

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

The Alerter Editor box appears.



4. Enter a "*Description*" for the alerter.
5. Under "*Sub Alerter*" section, click the "Cell contents" to select the "*Objects or Variables*" that are available for the report.

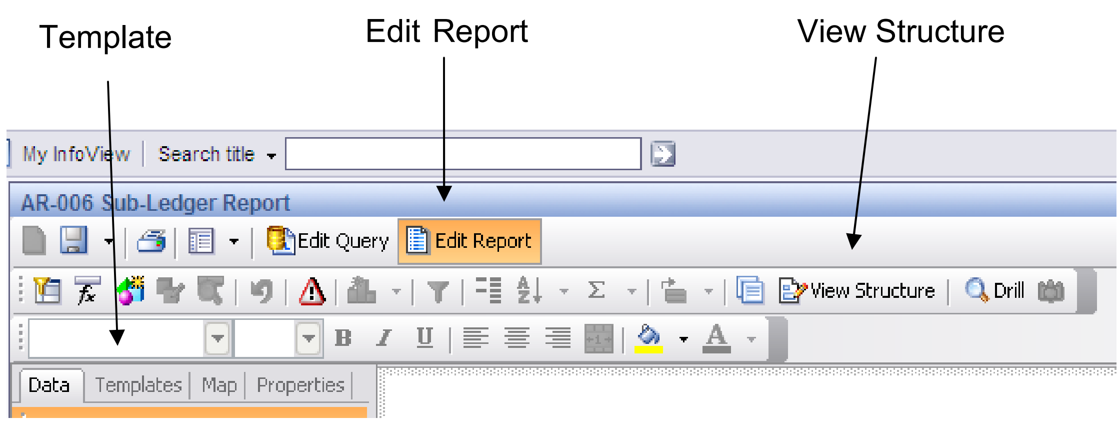


6. Highlight your selection and click "**OK**."

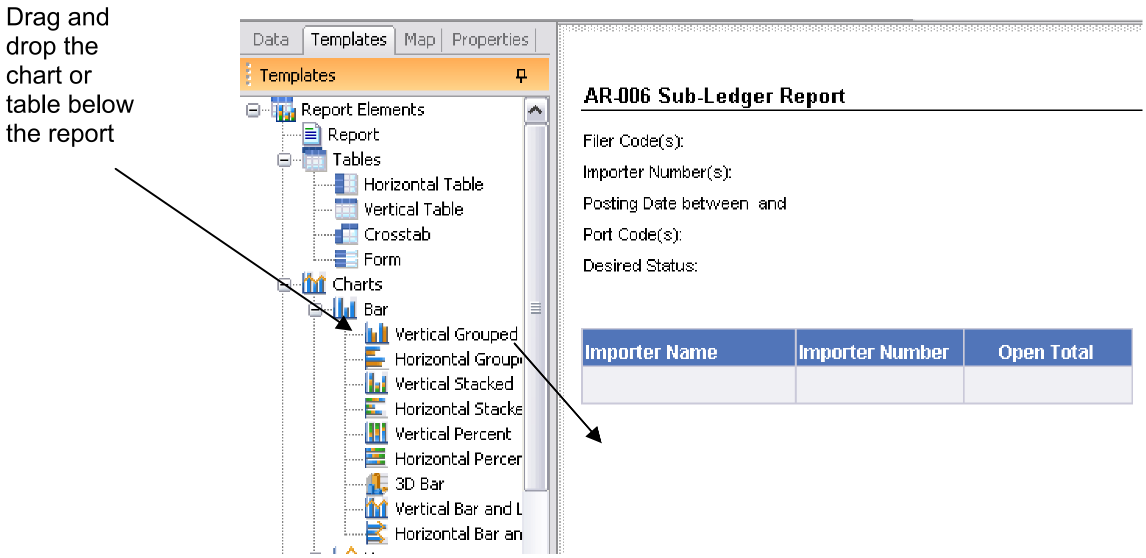
7. Next select the "*Operator*" from the drop down list.
8. Select "Operand(s)" or enter an amount depending on your alerter. For example, type 1000000.00. You can add a second alerter by clicking the + button.
9. To change the format of the alerter, click the "**Format**" button. You can format the following elements in your report.
   a. Number format – number, currency, date/time, etc.
   b. Cell properties – text, cell border, cell background colors
10. Click "**OK**" to close the "*Alerter Editor*" box. You are returned to the "*Alerters*" box.
11. Click "**OK**" to close the "*Alerter*" box. Alerters have now been added to the report.
12. Save your report.

Creating Charts and Graphs for a Modified Report

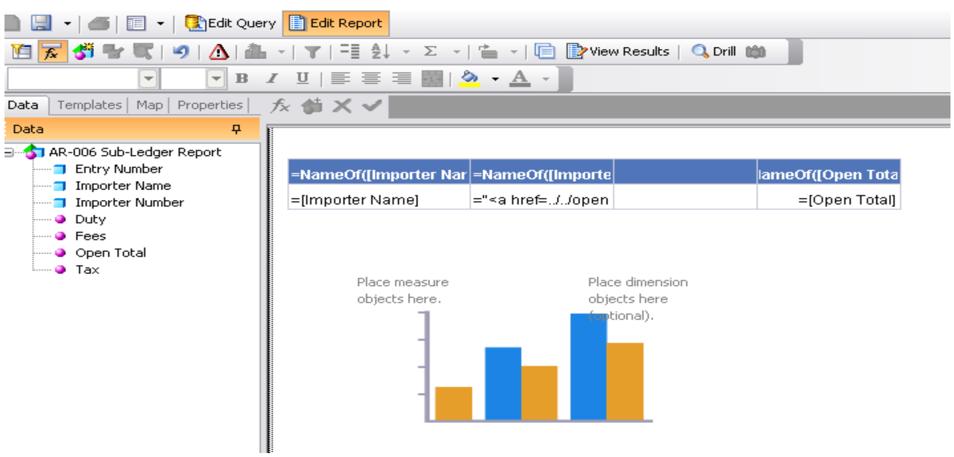
There are charts and graph options to depict the results of your modified report. To create a chart or graph, your tool bar options should be "*View Structure*" and you need to be in the "*Edit Report*" mode, select "**Templates.**"



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



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



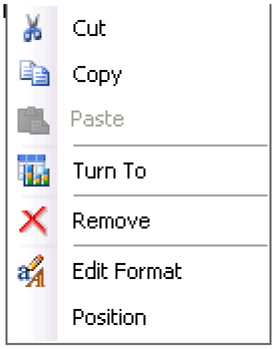
4. Drag and drop dimension objects (blue squares) into the “Place dimension objects here” section.
5. Click on the “*View Results*” tab on the tool bar. The chart results are now visible.

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

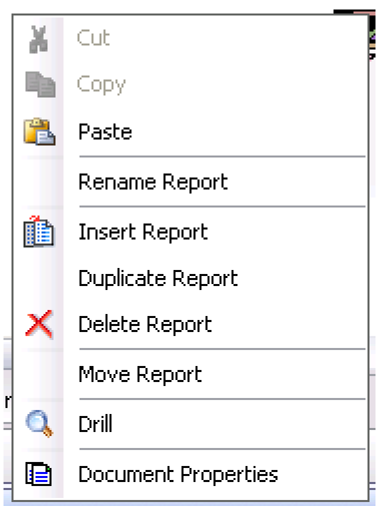
2. Drag a new chart over from the template view and drop it on the chart or graph you wish to replace.



Multiple Charts on One Report

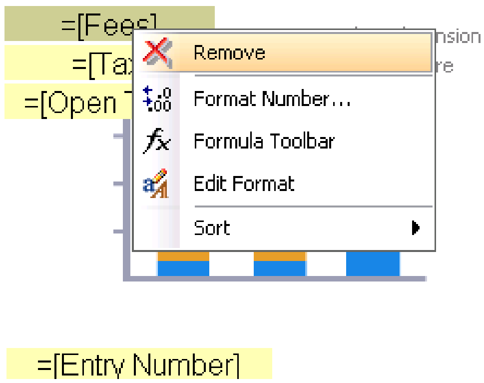
To depict the data in an additional chart format, you can add another chart type by the following:

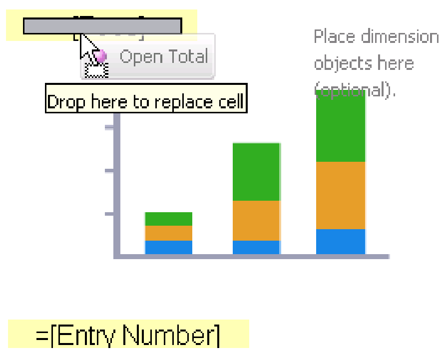
1. Right click on the original chart.
2. Select “**Copy.**”
3. Move cursor to area below the original chart and right click.
4. Select “**Paste.**”
5. Than drag a different chart onto the duplicate chart.



Changing a Measure or Dimension

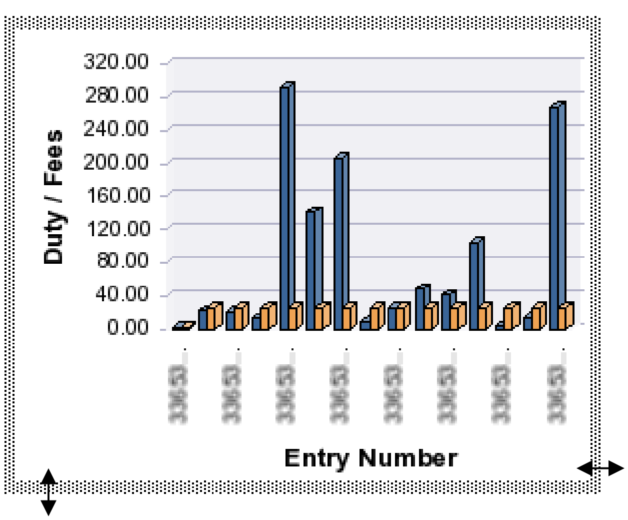
You have viewed the chart and have decided you would like to change the data objects. To change the Measure (Y Axis – Purple) or Dimension (X Axis – Blue) in the chart, click on the view results, drag another measure or dimension directly onto the one you wish to replace, or you may drag the measure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





Sizing a Chart

Click on 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.

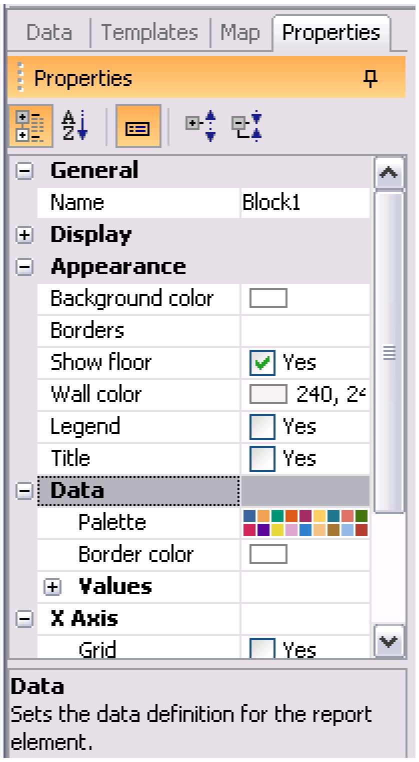


Removing a Chart

To remove a chart, right click on the chart and click "**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 export the report and print from excel. For instructions on exporting, 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

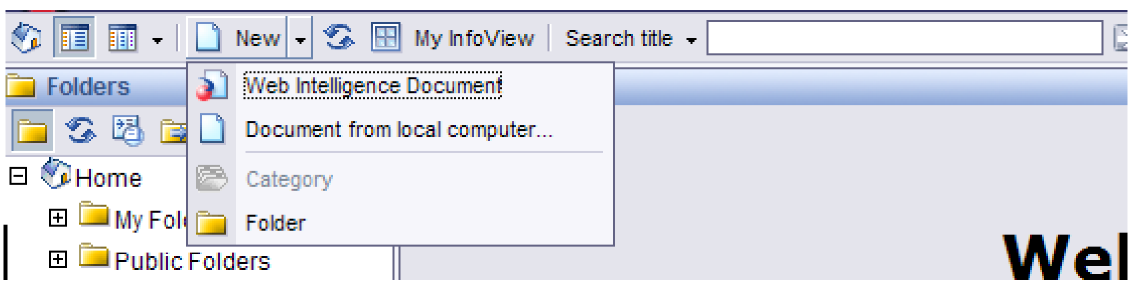
Creating a Customized Report

This section provides instructions on how to create a customized report from a blank slate. Only the Trade Account Owner and the Proxy Trade Account Owners are authorized to create a customized report from a blank slate using the steps outlined in this section.

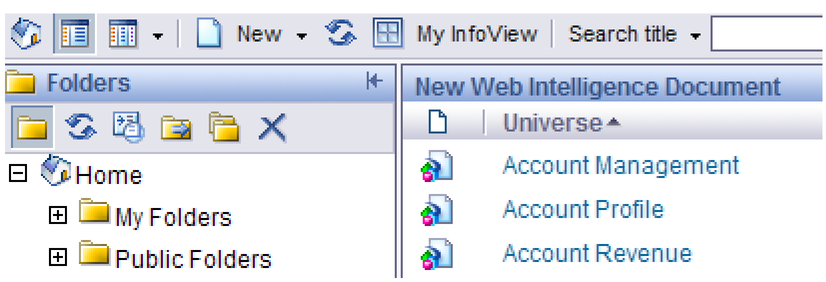
In reality, any user has the ability to create a fully customized report from a blank slate by simply removing all of the data objects and filters in a modified report and adding desired data objects to meet specific needs.

You have already logged into the ACE portal, selected "*Reports*" and launched the reports tool. To create a customized report from a blank slate, follow the steps below:

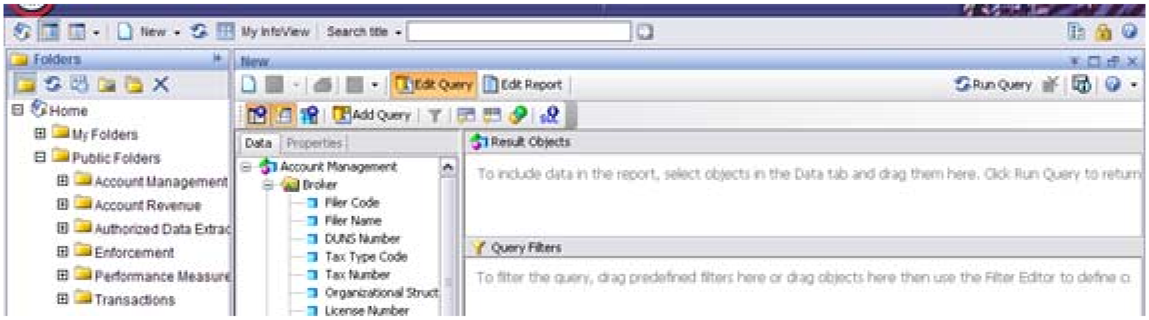
1. Select the down arrow "▼" on the toolbar to the right of the "New" icon.



2. Select "**Web Intelligence Document".** A new screen will open which displays a list of Universes.



3. Select the appropriate Universe, for example Account Management, to create your customized entry summary report. A new screen will open once you have clicked on the Universe.



4. To expand the list of objects under the Account Management Universe:
    a. Select a "*Class*" (e.g. Entry Summary, 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. .
    c. 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.
    d. 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.

When creating a report from scratch and you are requesting data objects from the Entry Report class, the Importer of Record (IR) number and date range will be a predefined filter. Therefore there is no need to enter an IR number or the date range in the query filters. However, for reports created from all other classes, 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 Broker, you MUST include your filer code in the report to receive results. The filer code can be added to either the “Result Objects” pane or the “Query Filter” pane.

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

1. Drag the filer 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 filer code with the blue box to the left from the Broker Class.

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

6. After adding a new filter to the “*Query Filters*” section, click 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.”*

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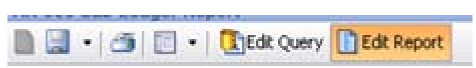
8. Click the “**Edit Report**” button. 

    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.
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.
10. Chick the “**Refresh Data”** button. 

11. When the “Prompts” dialog box opens, update prompts as needed then click “**Refresh Data**” to display the report.

OR in lieu of steps 8 through 11

12. Select **“Run Query”** button. 

13. When the “Prompts” dialog box opens, update prompts as needed then click “Run Query” to display the report.
14. 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.

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 Account Management reports. Let’s say as a broker you want a list of importers whose entry summaries had been flagged for team review in the past 6 months. You create your report by selecting filer code, importer number and importer name. In this example, the objects can be pulled from several classes. You would highlight the “Team Review” class to obtain the needed results.

All Other Functions for Customized Reports

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