Carlos R. Rodriguez
James Wolford
Trade Transformation Office
Office of Trade
U.S. Customs and Border Protection

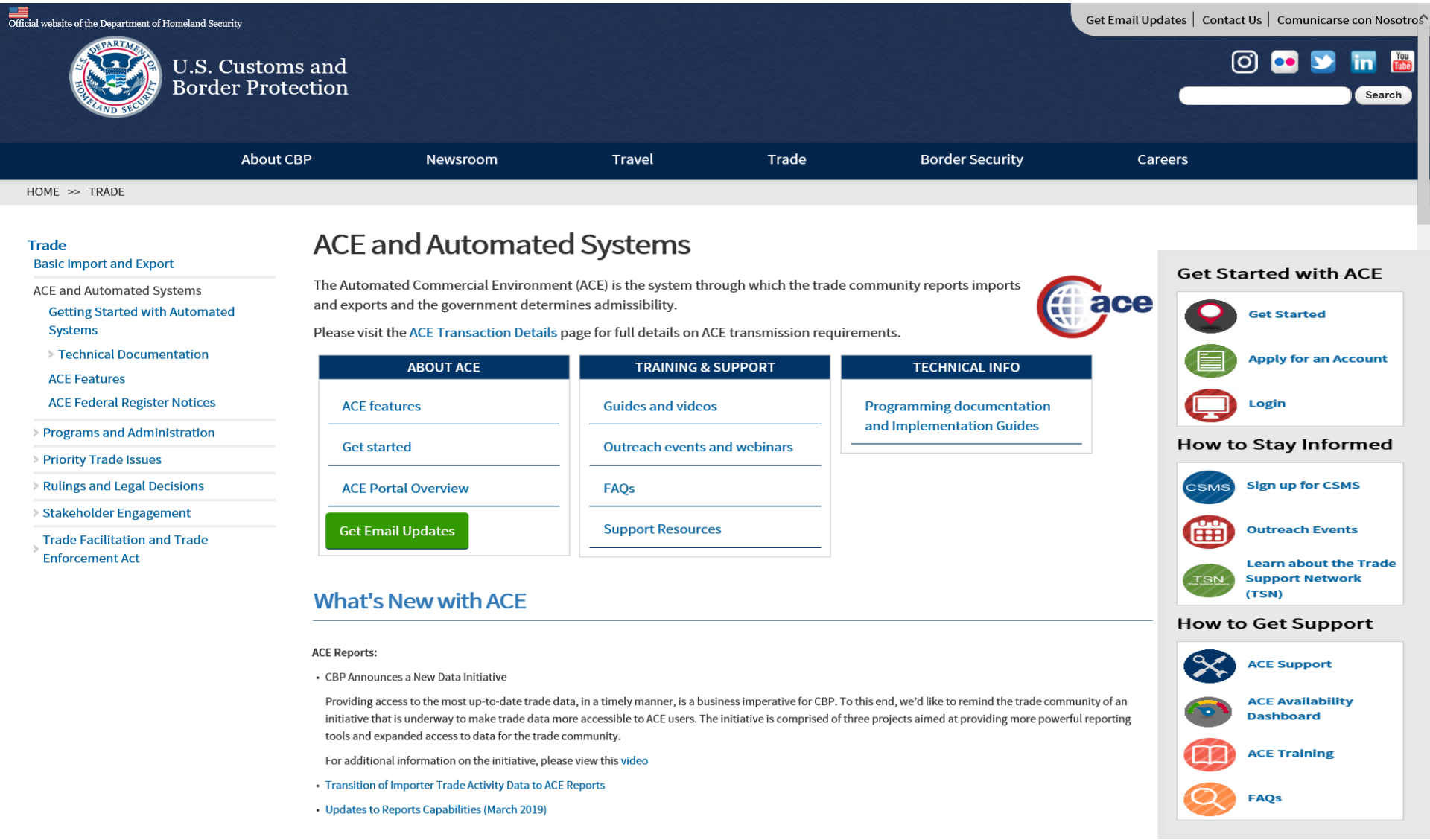
ACE Reports Workshop – Import Session

WESCCON Conference 2019

October 11, 2019

U.S. Customs and Border Protection

ACE Reports News on CBP.gov



ACE Reports Information Notice Updates

Official website of the Department of Homeland Security

U.S. Customs and Border Protection

Get Email Updates | Contact Us | Comunícarse con Nosotros

Search

About CBP | Newsroom | Travel | Trade | Border Security | Careers

HOME >> TRADE >> AUTOMATED

Trade
- Basic Import and Export
- ACE and Automated Systems
  - Getting Started with Automated Systems
    - Technical Documentation
  - ACE Features
  - ACE Federal Register Notices
- Programs and Administration
- Priority Trade Issues
- Rulings and Legal Decisions
- Stakeholder Engagement
- Trade Facilitation and Trade Enforcement Act

ACE Reports Information Notice

U.S. Customs and Border Protection (CBP) continues to create new data universes and reports, as well as enhance current reports to meet the needs of the trade community. Please see below for recent and upcoming updates regarding ACE reports and data universes.

Updated Prompts for Trade Remedy Reports to be Available Soon

CBP will be updating the prompts of the Section 201, 232, and 301 reports by replacing the "Days Ago" data element with "Entry Summary Date Begin" and "Entry Summary Date End". The data elements Filer Code, Port Code, and Importer Assigned CEE will also be added.

Updated Cargo Release Universe to be Deployed

CBP has updated the Cargo Release universe, titled Cargo Release New, and will deploy it in parallel with the current Cargo Release universe in the coming weeks. Cargo Release New will contain additional data elements found in the Additional Objects Entry folder and in the Additional Objects Entry Line folder. The current Cargo Release universe will ultimately be retired and replaced by the Cargo Release New universe.

Transitioning to Entry Summary Universe and Reports

CBP is in the process of retiring the Account Management (AM) and Entry Summary Management (ESM) reports and universes in order to fully transition to the Entry Summary (ES) universe.

The AM universe is scheduled for retirement on **April 4, 2019** and the ESM-10002 Entry Summary universe is scheduled for retirement on **April 18, 2019**.

The below legacy AM and ESM reports (left-hand side of the table below) are scheduled to be retired on **March 21, 2019**. Please begin using the ES equivalent of the AM and/or ESM report (right-hand side of the table below).

Legacy Report	Replacement ACE Report
AM-001 Entry Summary Lines by HTS Number Report	ES-003 Entry Summary Line Tariff Details
AM-003 Entry Summary Lines by Filer Code Report	ES-003 Entry Summary Line Tariff Details
AM-007 Entry Summary Lines by Mfr Code Report	ES-003 Entry Summary Line Tariff Details
AM-008 Entry Summary Line Detail Report	ES-003 Entry Summary Line Tariff Details
AM-064 Entry Summary Line by Entry Nbr Report	ES-002 Entry Summary Line Details
ESM-7008 Entry Summary Line Detail Report	ES-003 Entry Summary Line Tariff Details

Phase 2 – Retired February 21, 2019

Legacy Report	Replacement ACE Report
AM-009 Summary of Mfr Code by Value Report	ES-006 Entry Summary Dimensions by Value
AM-010 Summary of HTS Nbrs by Value Report	ES-006 Entry Summary Dimensions by Value
AM-015 Summary of IR Nbrs by Value Report	ES-006 Entry Summary Dimensions by Value
AM-019 Summary of Filer Codes by Value Report	ES-006 Entry Summary Dimensions by Value
AM-068 Entry Summary Report	ES-001 Entry Summary Header Details
ESM-7068 Entry Summary Report	ES-001 Entry Summary Header Details

Phase 1 – Retired December 27, 2018

Legacy Report	Replacement ACE Report
AM-100 Courtesy Notice of Liquidation	ES-701 Courtesy Notice of Liquidation
ESM-7001 Entry Summary Census Warning Report	ES-012 Entry Summary Census Warning and Override
ESM-7024 ACE Reject Report	ES-004 Rejected and Canceled Entry Summaries
ESM-7025 CBP Form 28, 29, 4647 Status Report	ES-013 Form 28, 29, 4647 Status Report

More information about ACE Reports can be found by visiting the ACE Training and Reference Guides page of CBP.gov/ACE. For more questions on ACE Reports, please send an e-mail to ace.reports@cbp.dhs.gov.

Updates to Importer Trade Activity Reports (ITRAC)

Spring 2019

- Most ITRAC data available in ACE Reports
- Continue to request multi-year ITRAC reports via CD
- ISA participants continue to use CTPAT portal for ITRAC reports

Summer 2019

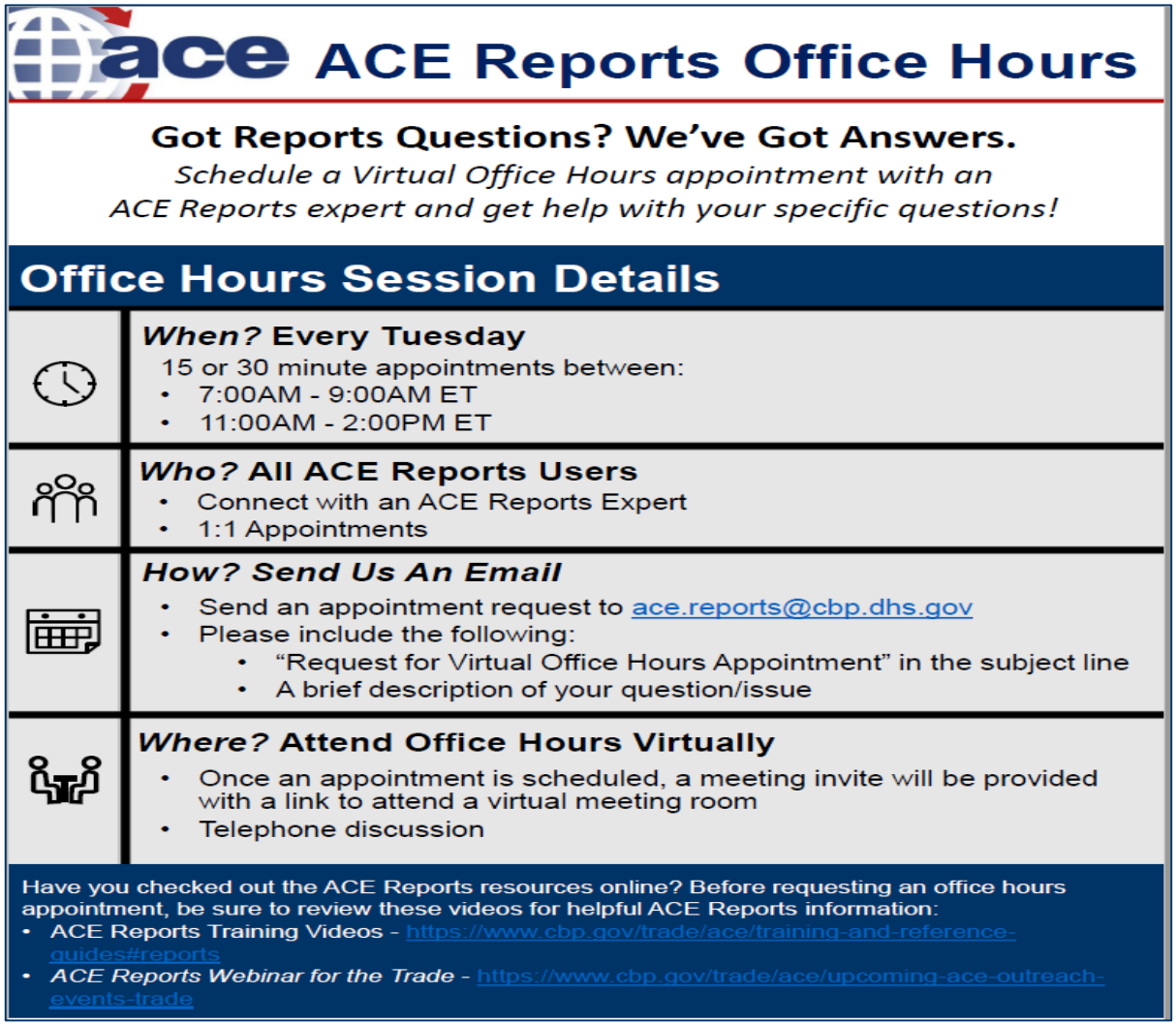
- Full access to ITRAC data in ACE Reports
- Continue to request multi-year ITRAC reports via CD
- ISA participants continue to use CTPAT portal for ITRAC reports

Fall/Winter 2019

- ITRAC data fully implemented in ACE Reports
- Discontinue issuance of ITRAC reports via CD
- ISA participants continue to use CTPAT portal for ITRAC reports

What's Going Away: Requesting import data through ITRAC		**What's Coming:** Gathering import data through ACE Reports
Non-ISA members pay $250+		**Reports available free in ACE**
Wait 3-6 weeks for reports		**Run reports on demand**
Information mailed on CDs		**Access through ACE Reports**

Need Help with ACE Reports?



ACE Reports Training on CBP.gov/ACE

ACE Reports Training

The Reports User Guide, Reports Catalog, and Data Dictionary are located under ACE Reports Training Resources on the ACE Reports landing page, which can be accessed from the ACE Portal.

Learn more about using new ad hoc reporting capabilities. Topics covered include:

- Reports Quick Reference Card
- Accessing ACE Reports Application[New]
- Setting Default Preferences[New]
- Navigating the Home Landing Page[New]
- Navigating the Workspace Module[New]
- Running a Standard Report[New]
- Saving and Exporting a Report[New]
- Modifying the Display of a Report[New]
- Modifying Query Filters[New]
- Creating Ad Hoc Reports[New]
- Nested Filters[New]
- Paste Values to Query Filters[New]

Reports Video Walkthroughs

Accessing ACE Reports
Learn to navigate to ACE Reports from within the ACE Portal.

Setting Default Preferences
Learn to customize ACE Reports preferences.

Navigating ACE Reports
Learn the structure of ACE Reports and navigating features.

Navigating the Workspace
View how to navigate within the reports workspace.

Running Standard Reports
Overview of running standard pre-defined ACE reports.

Saving and Exporting Reports
Learn how to save and export the results of a report.

Modifying Report Queries
Learn how to modify the parameters of a report query.

Modifying Display of a Report
Learn how to customize the fields displayed in a report.

Modifying Query Filters
Learn how to modify the filters in a query.

Scheduling a Recurring Report
Learn to run reports on a dynamic schedule of your choice.

Creating Ad Hoc Reports
Learn how to develop reports from the ground up.

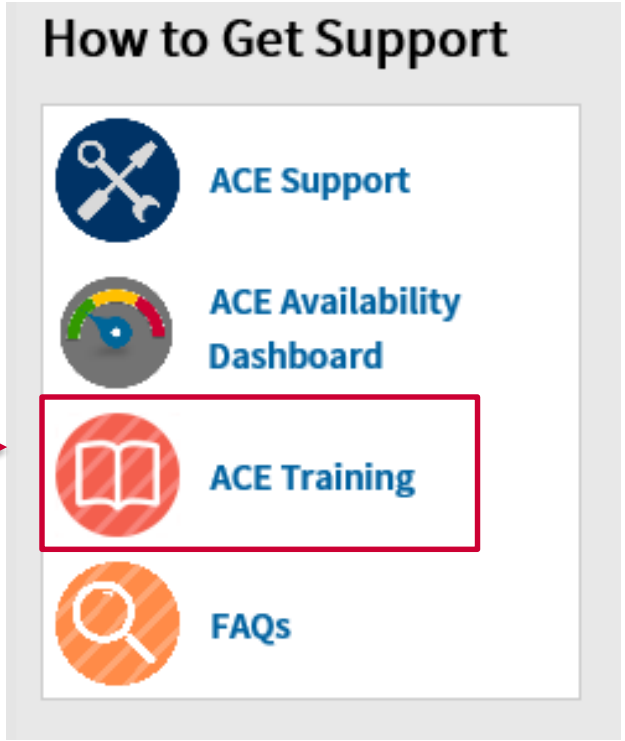
Nested Filters
Learn how to nest filters in ACE Reports.

Pasting List of Values into Filters
Learn how to paste a list of values into filters.

Last modified: March 18, 2019
Tags: Trade

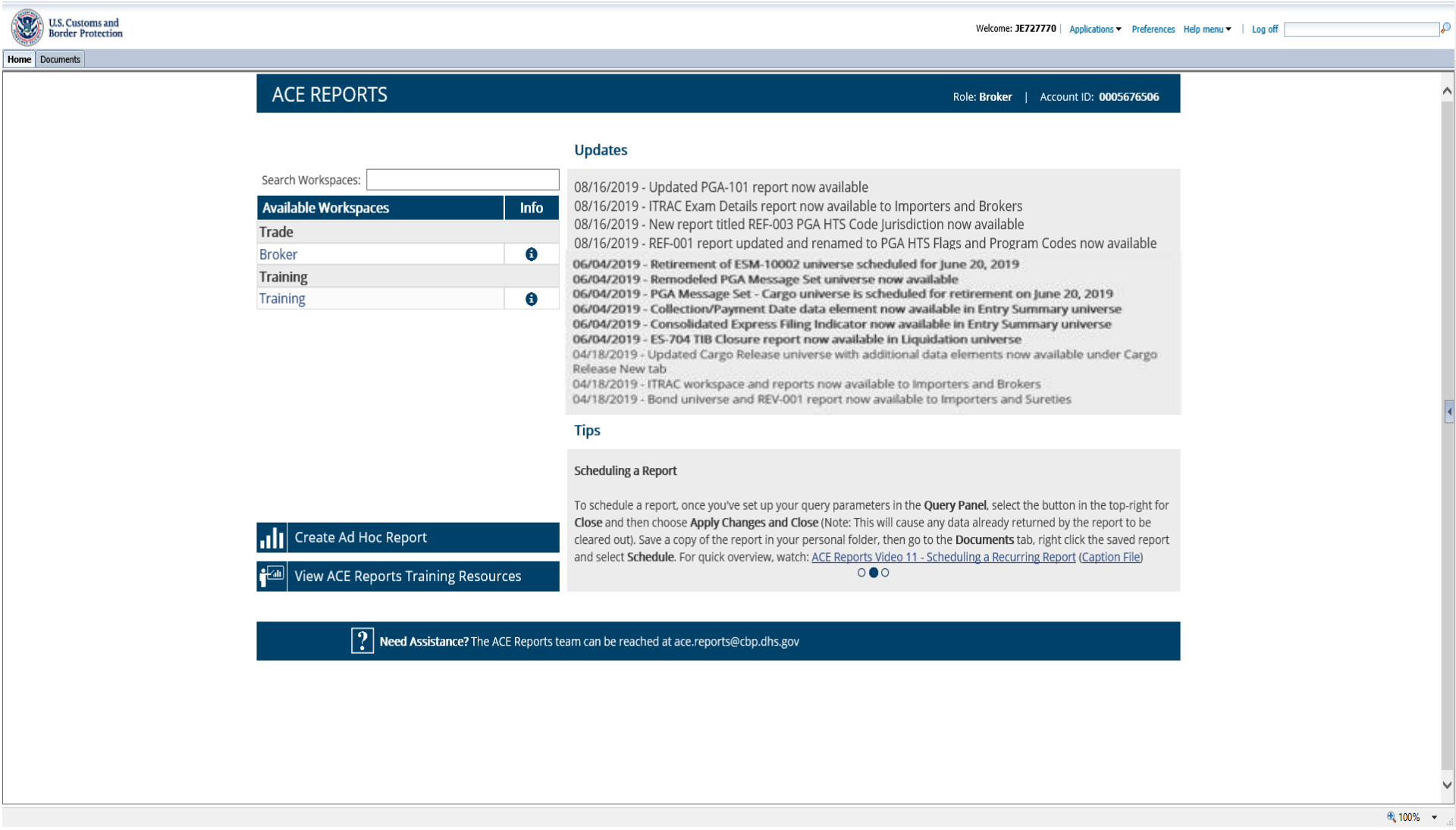
ACE Reports Videos Series and Webinar

- Accessing ACE Reports
- Setting Default Preferences
- Navigating ACE Reports
- Navigating the Workspace
- Running Standard Reports
- Saving and Exporting a Reports
- Modifying Report Queries
- Modifying Display of a Report
- Modifying Query Filters
- Scheduling a Recurring Report
- Creating Ad Hoc Reports
- Nested Filters
- Pasting a List of Values in Filters

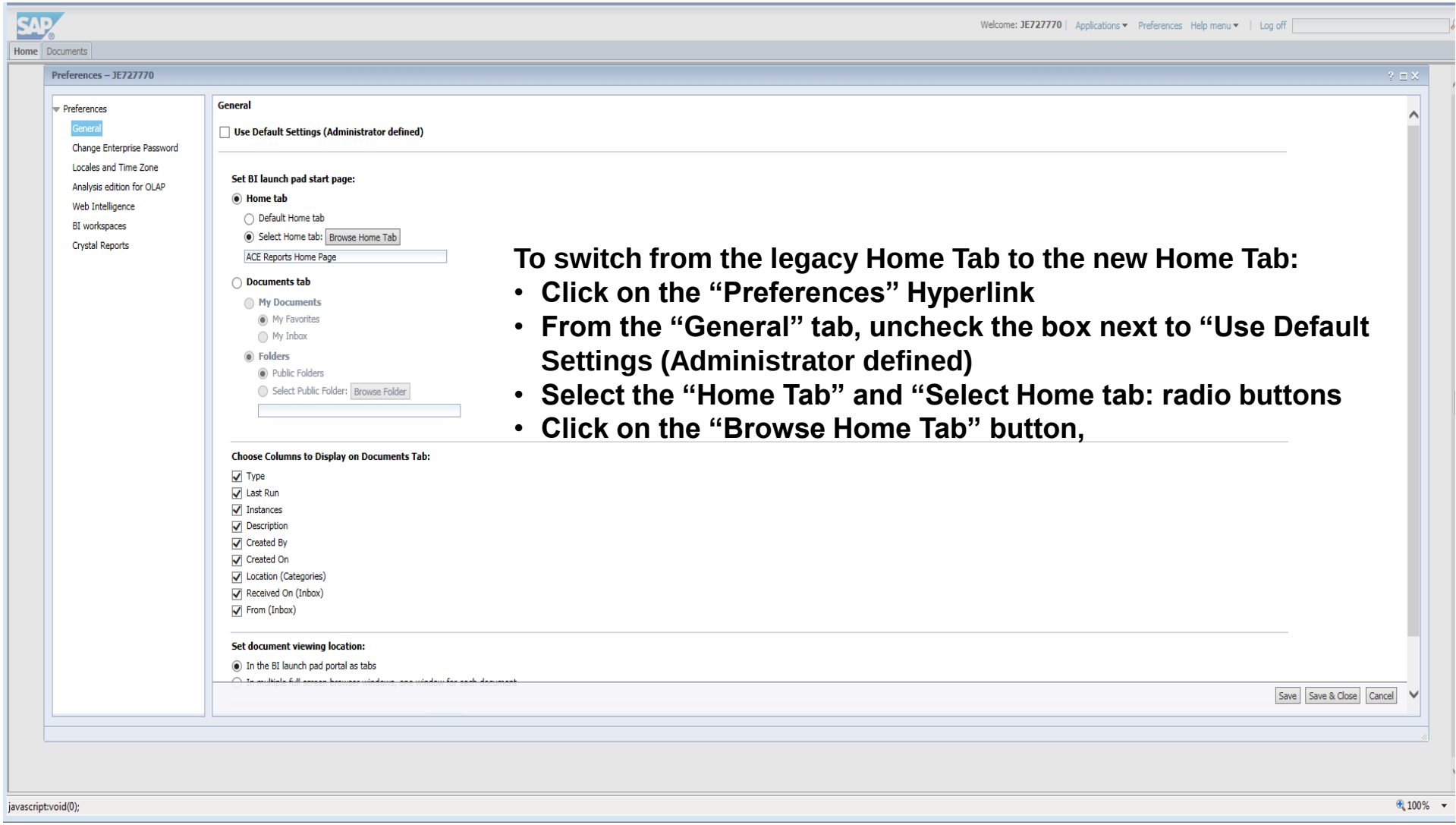


Discussion on ACE Reports

ACE Reports Home Tab – Updates and Tips Panel



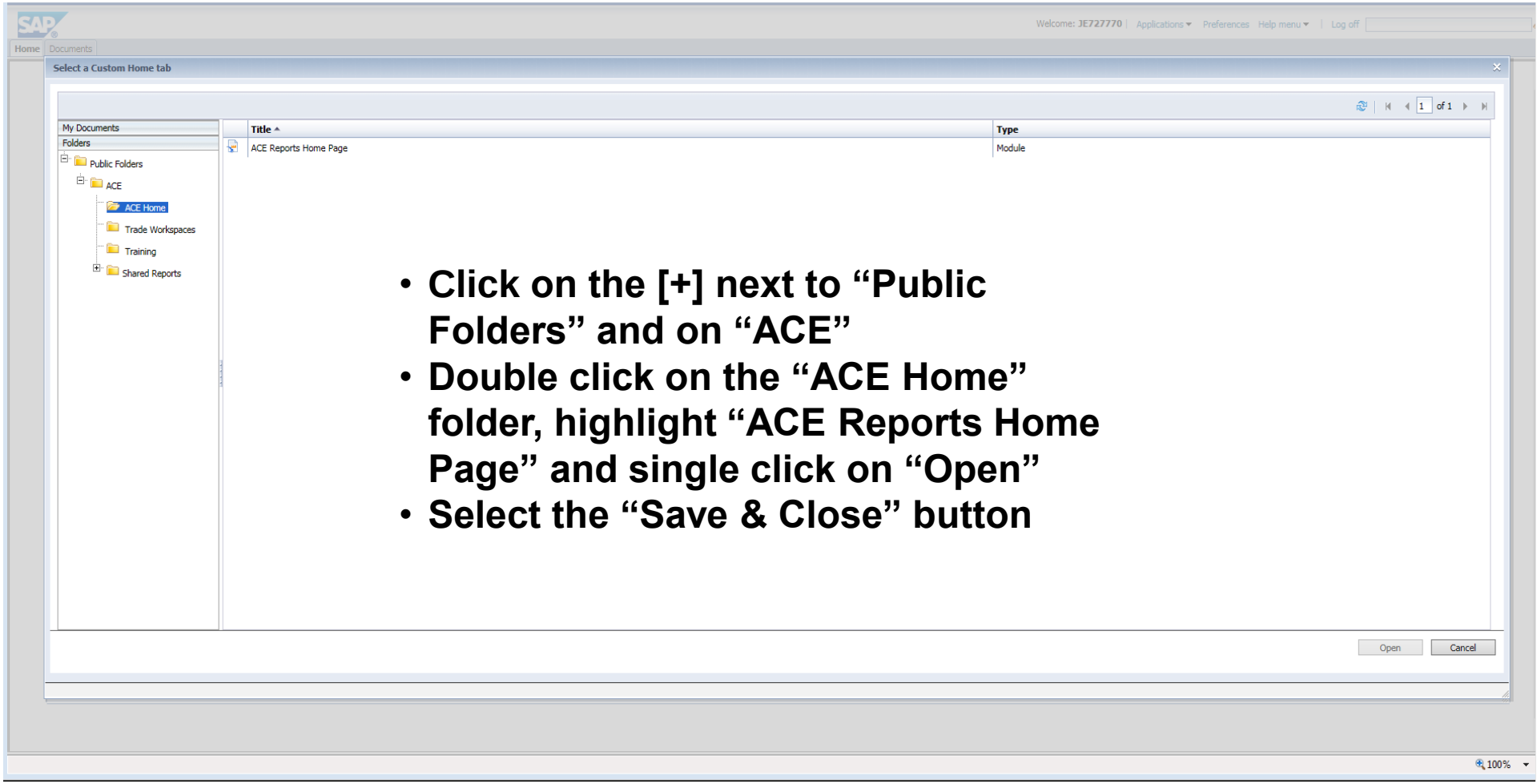
ACE Reports Preferences (Settings)



To switch from the legacy Home Tab to the new Home Tab:

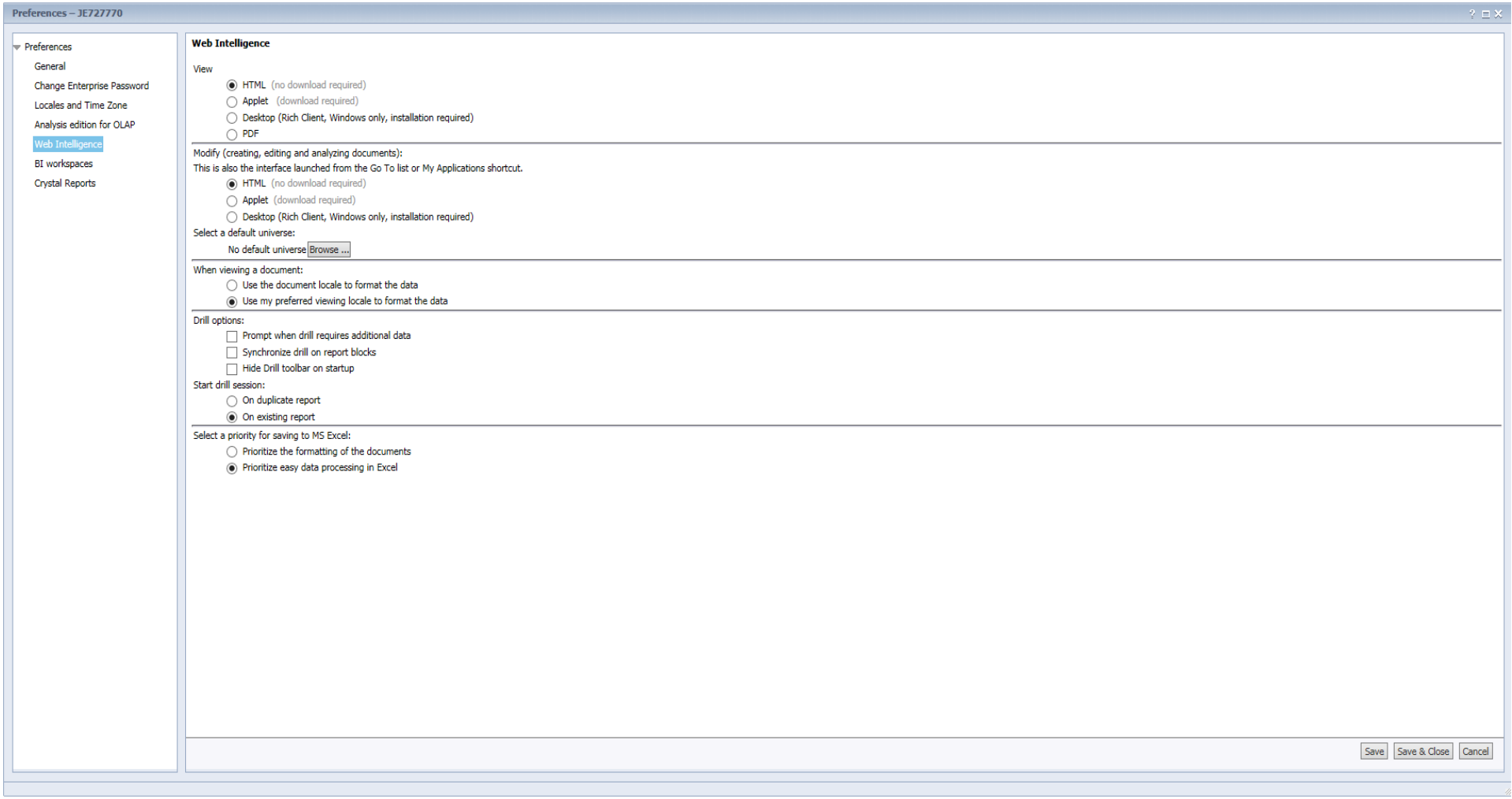
- **Click on the "Preferences" Hyperlink**
- **From the "General" tab, uncheck the box next to "Use Default Settings (Administrator defined)**
- **Select the "Home Tab" and "Select Home tab: radio buttons**
- **Click on the "Browse Home Tab" button,**

Steps to Access the New Home Tab

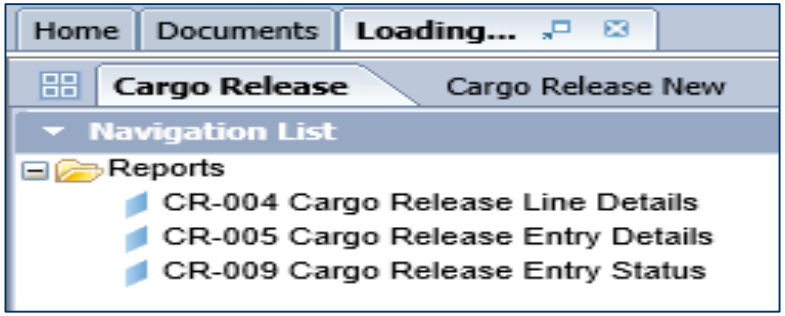


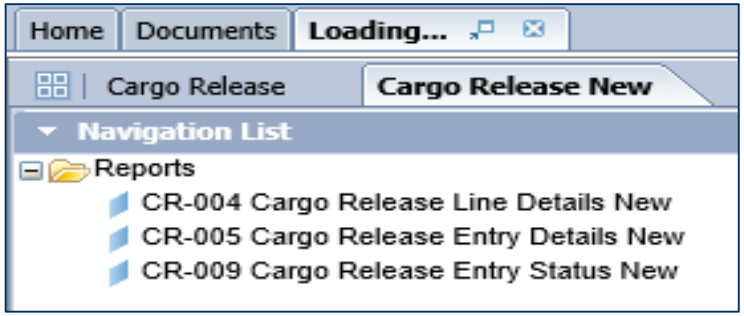
- Click on the [+] next to “Public Folders” and on “ACE”
- Double click on the “ACE Home” folder, highlight “ACE Reports Home Page” and single click on “Open”
- Select the “Save & Close” button

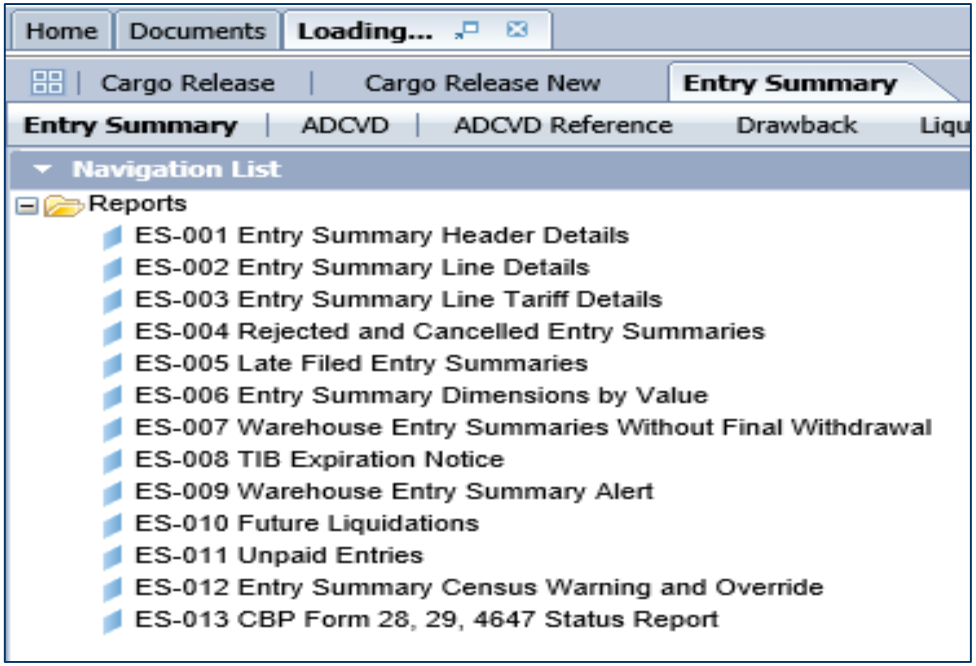
Additional Settings in Preferences



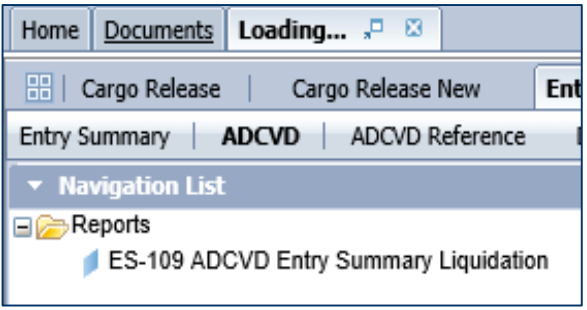
Import ACE Reports

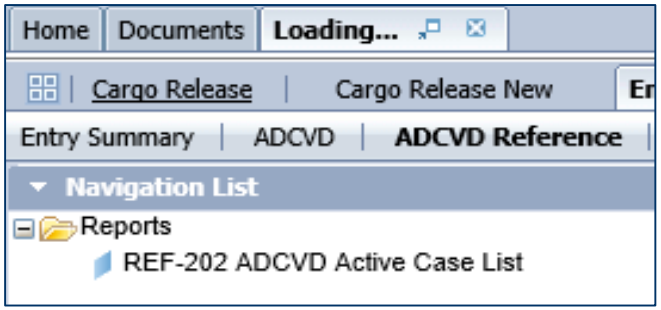


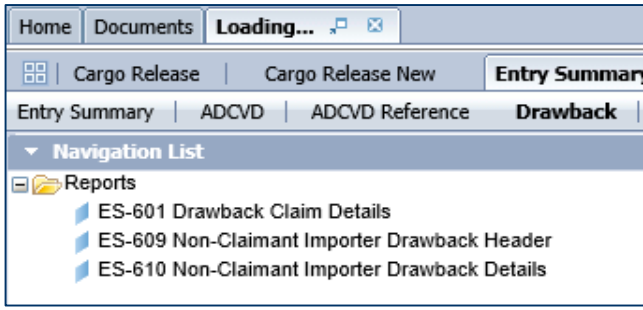


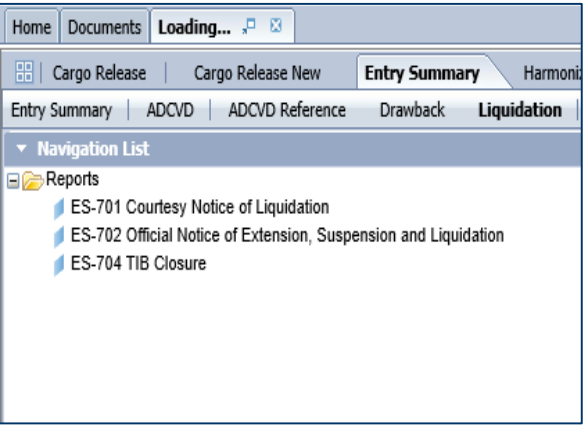


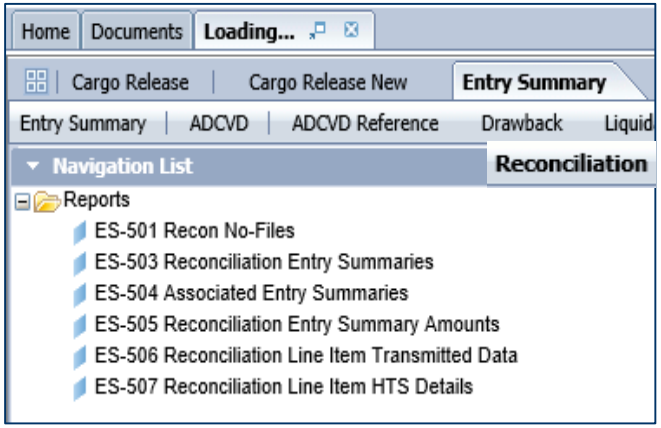
Import ACE Reports (Cont.)

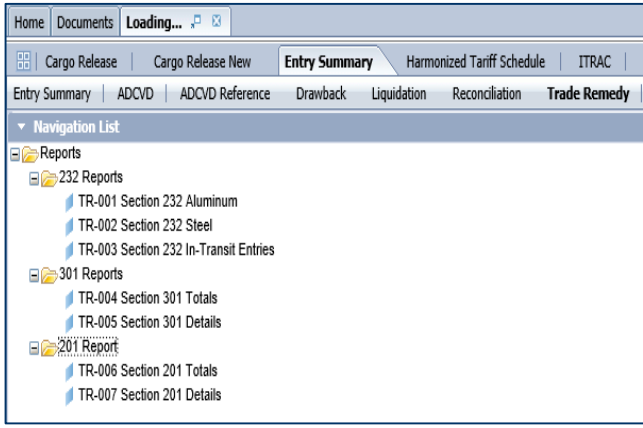


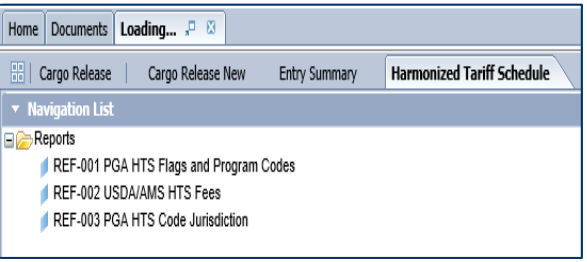


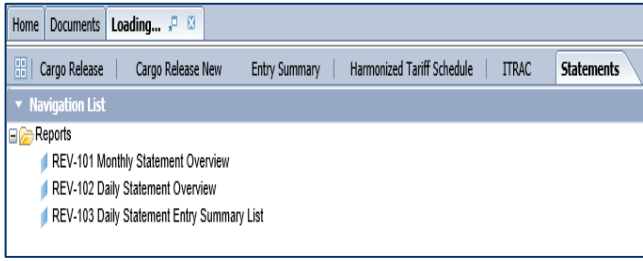




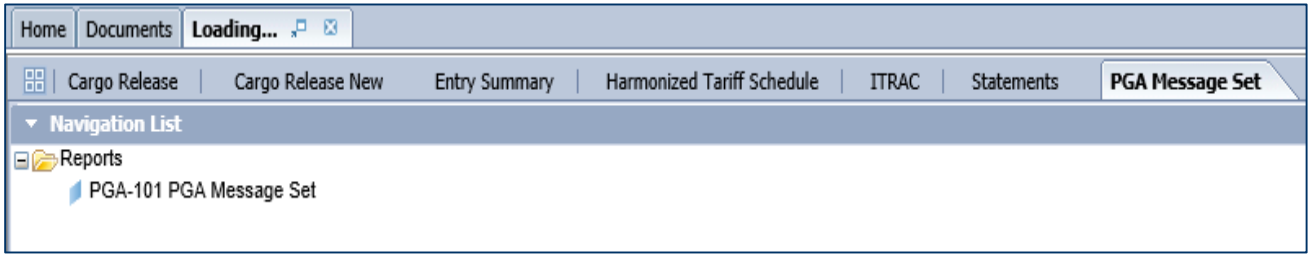


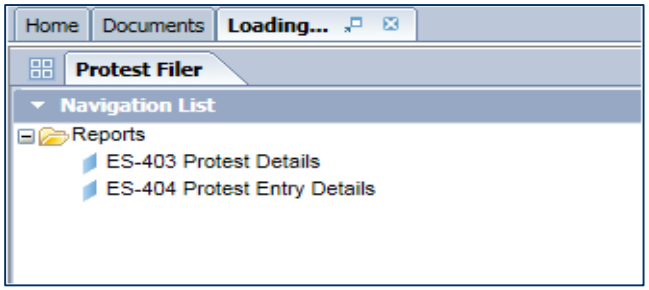


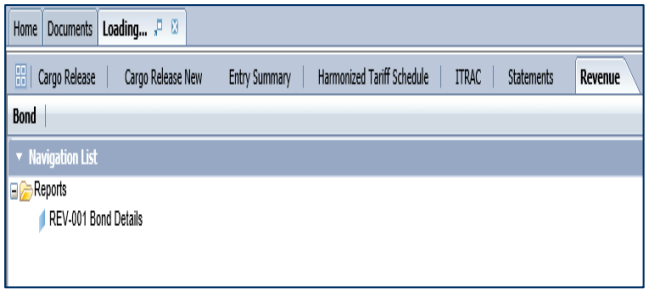




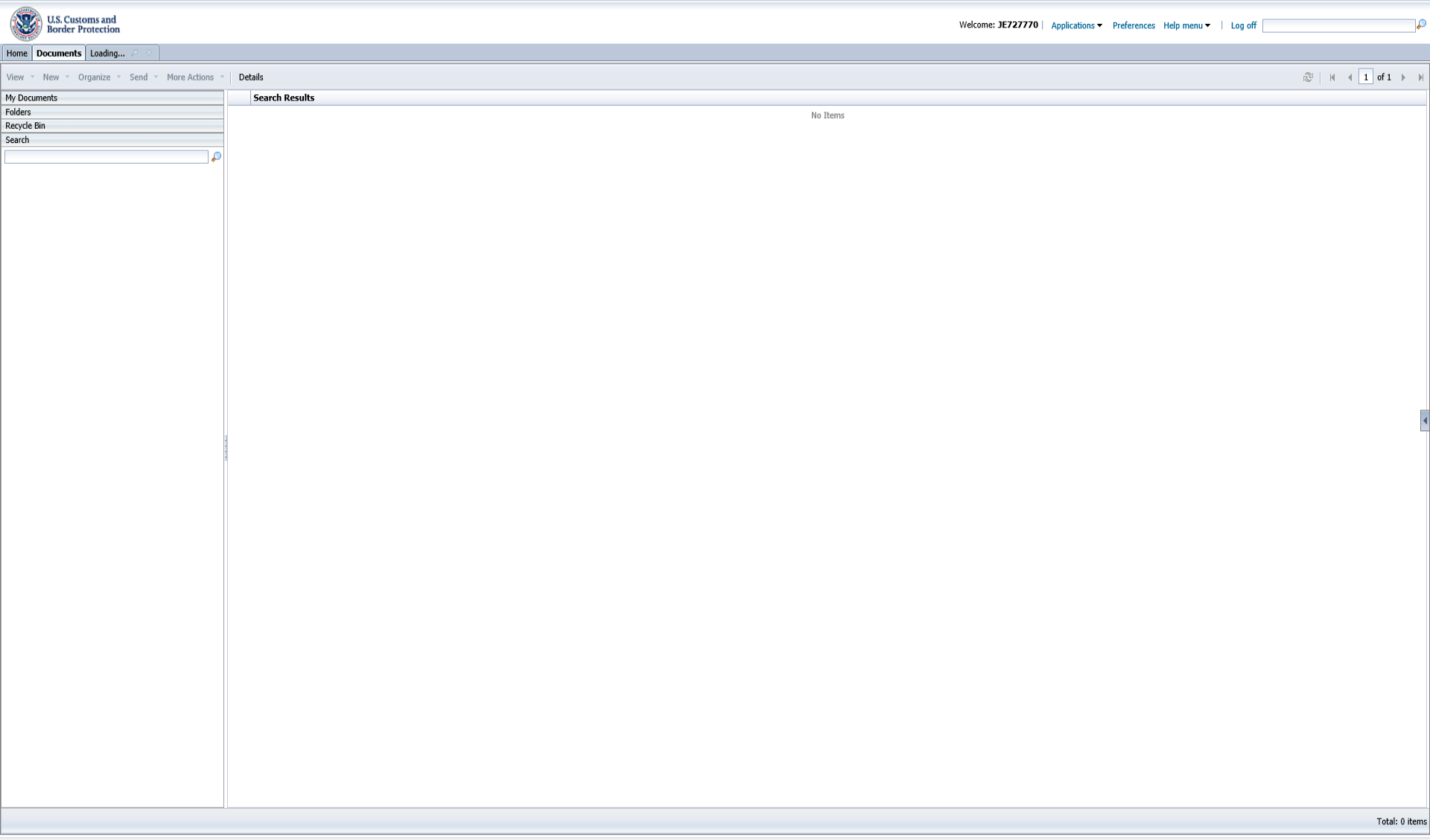
Import ACE Reports (Cont.)



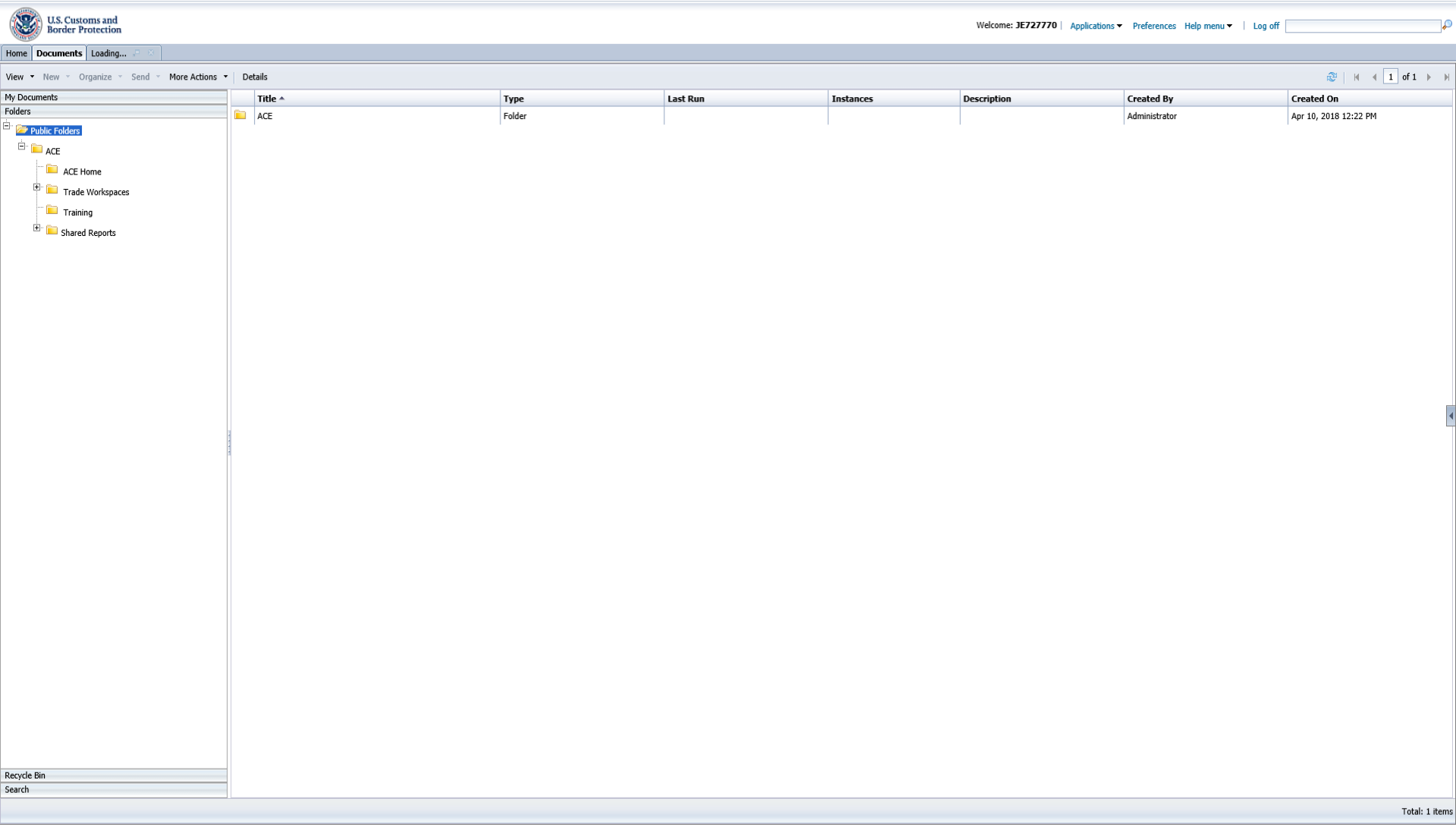




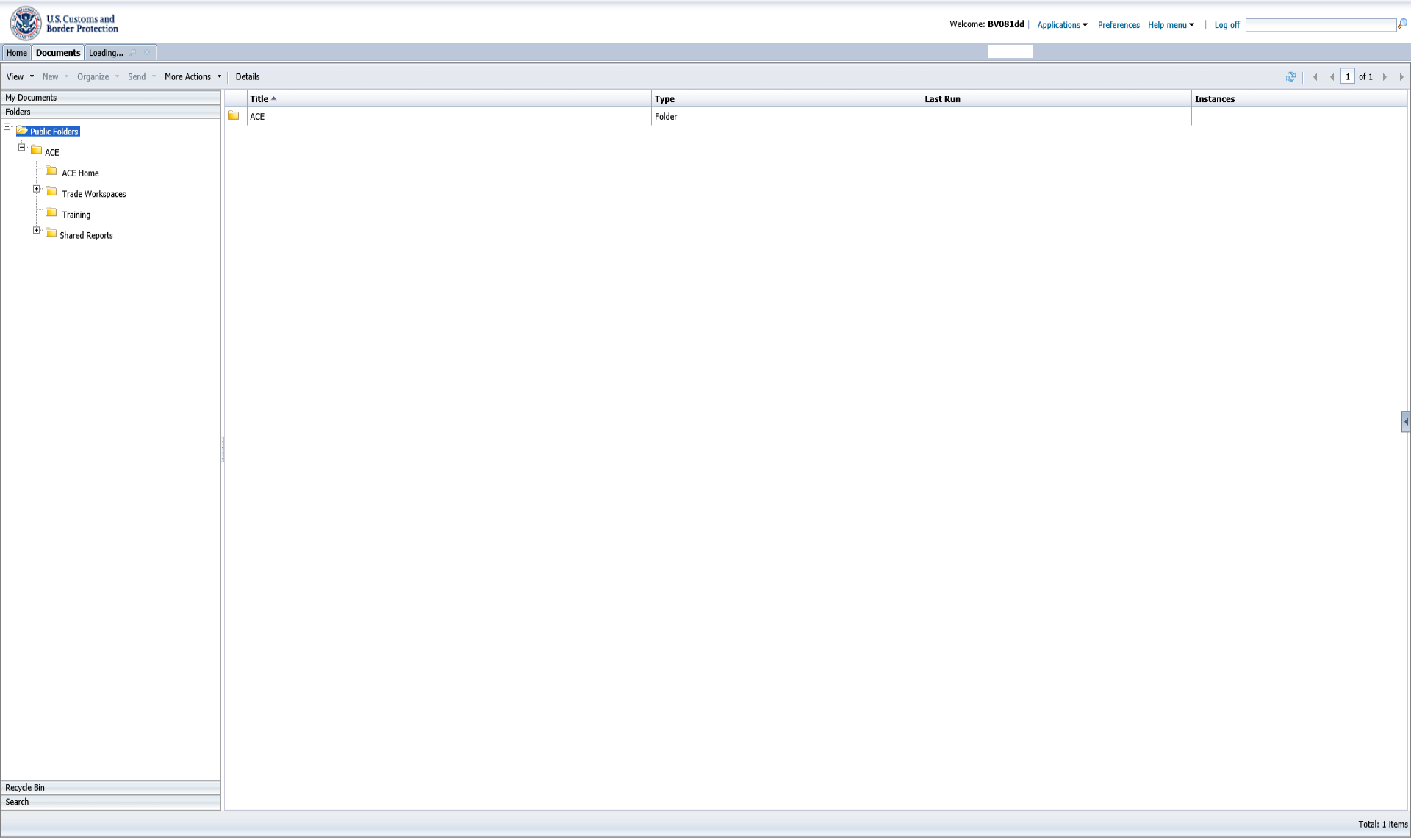
Documents Tab



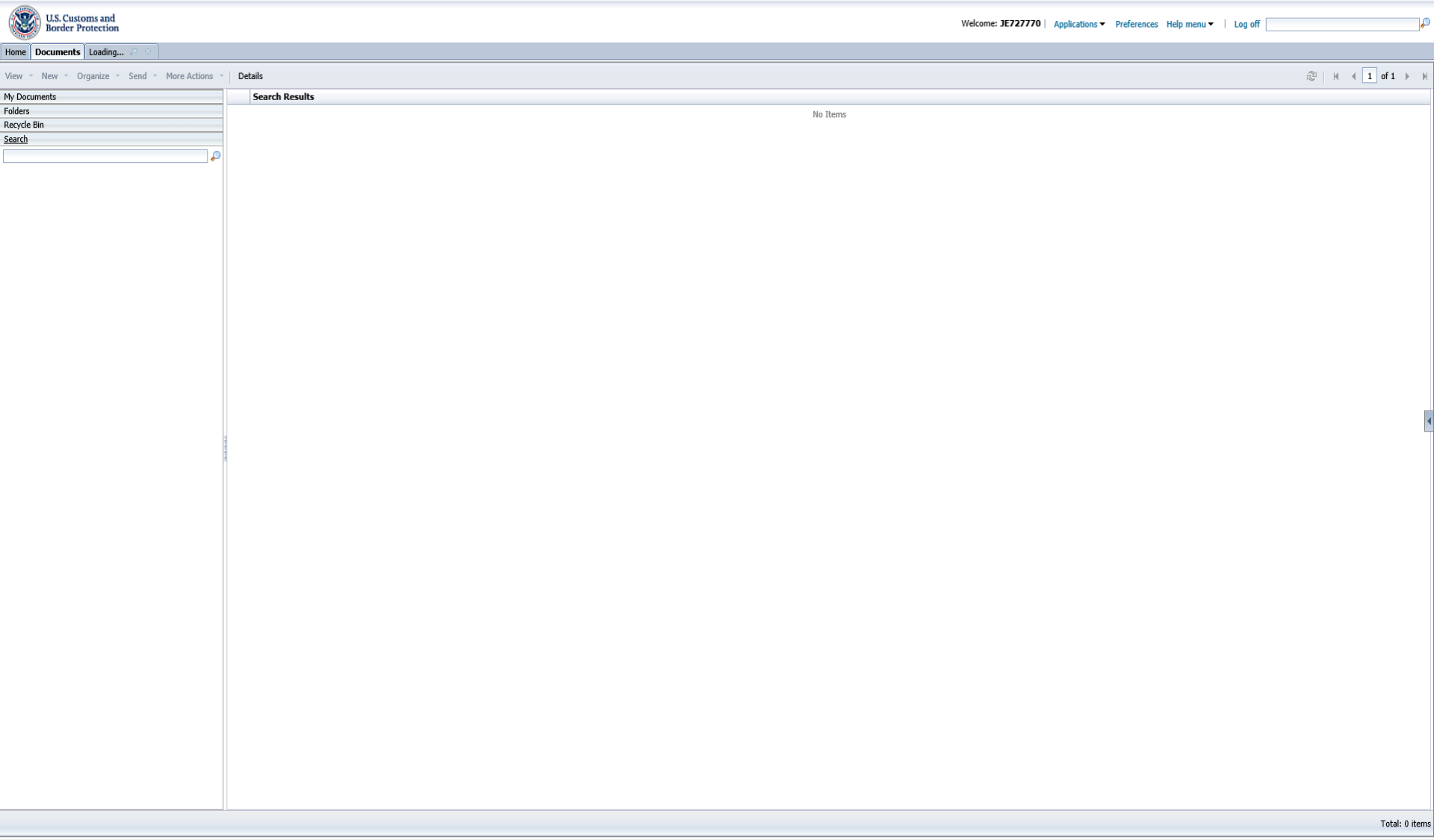
My Documents



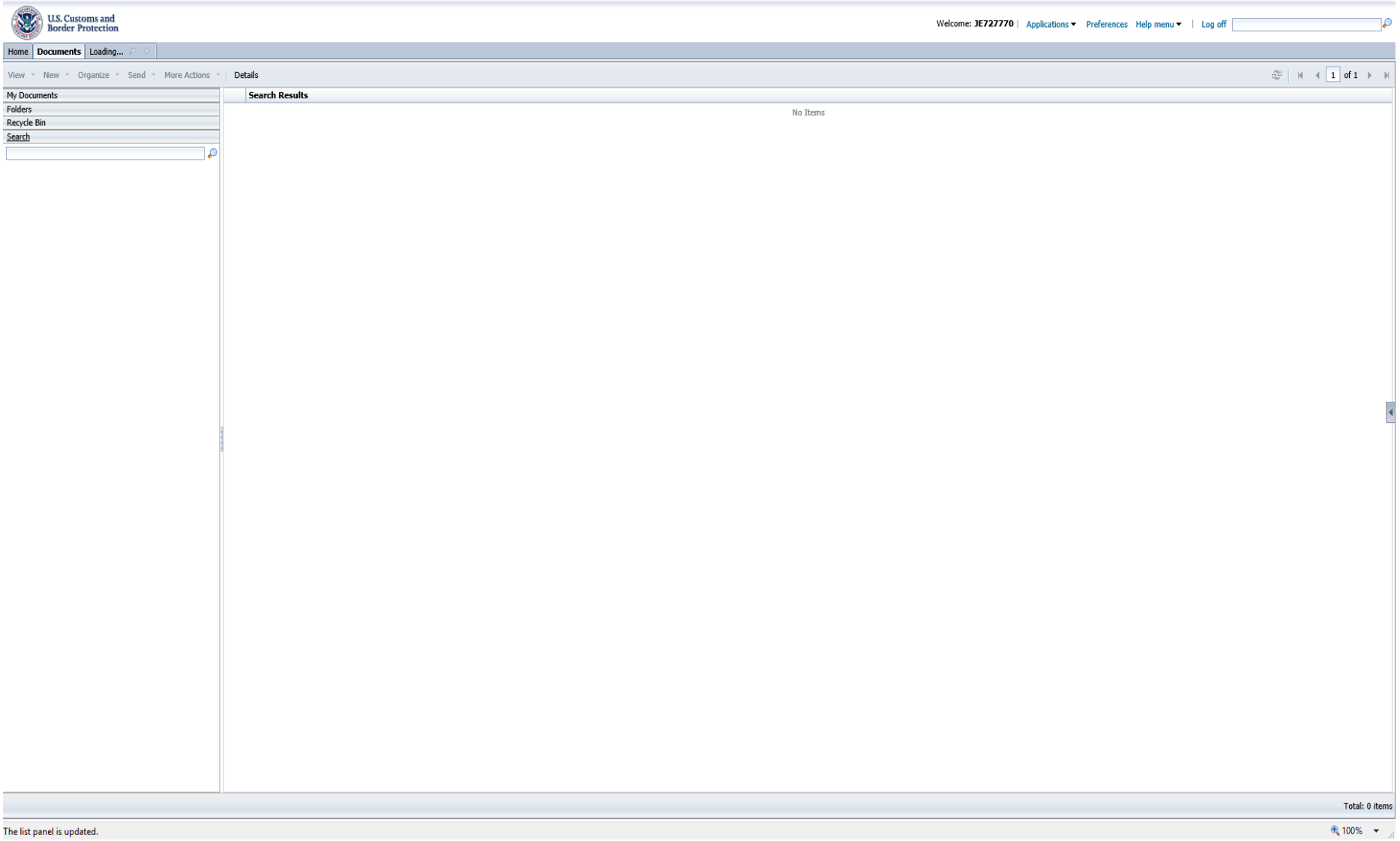
Public Folder



Search


U.S. Customs and Border Protection
Welcome: JE727770 | Applications | Preferences | Help menu | Log off
Home
Documents
Loading...
View
New
Organize
Send
More Actions
Details
1 of 1
My Documents
Folders
Recycle Bin
Search
Search Results
No Items
Total: 0 items
The list panel is updated.
100%

Recycle Bin


U.S. Customs and Border Protection
Welcome: JE727770 | Applications | Preferences | Help menu | Log off
Home
Documents
Loading...
View
New
Organize
Send
More Actions
Details
1 of 1
My Documents
Folders
Recycle Bin
Search
Search Results
No Items
Total: 0 items
The list panel is updated.
100%

Running Canned ACE Reports

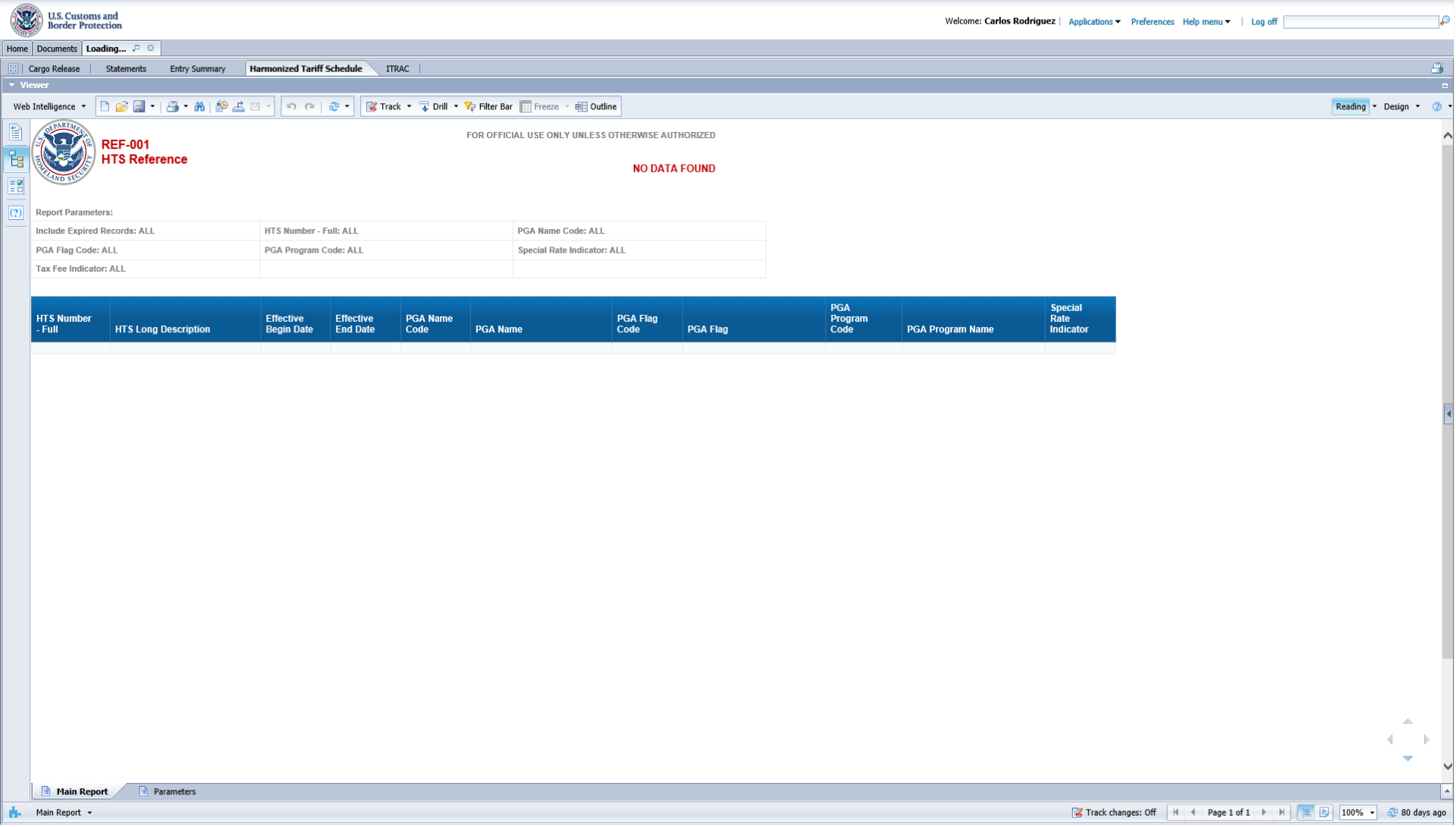
How to Run a Canned ACE Report

1. Launch the appropriate ACE canned report.
2. The report prompts will display, so please complete any of the available date prompts and remember to enter your Importer of Record number (if an importer is running the report) and/or Filer Code (if a broker is running the report) for faster report processing.
3. Run the report and wait for the data results to display.
4. When your report returns results, please save your canned ACE report to your **"My Favorites"** folder in the "My Document" drawer to rerun, access and/or schedule at a later time.
5. You can also export the results of the report to an external application file in the .pdf, .xls, .xlsx, .csv or .txt formats.

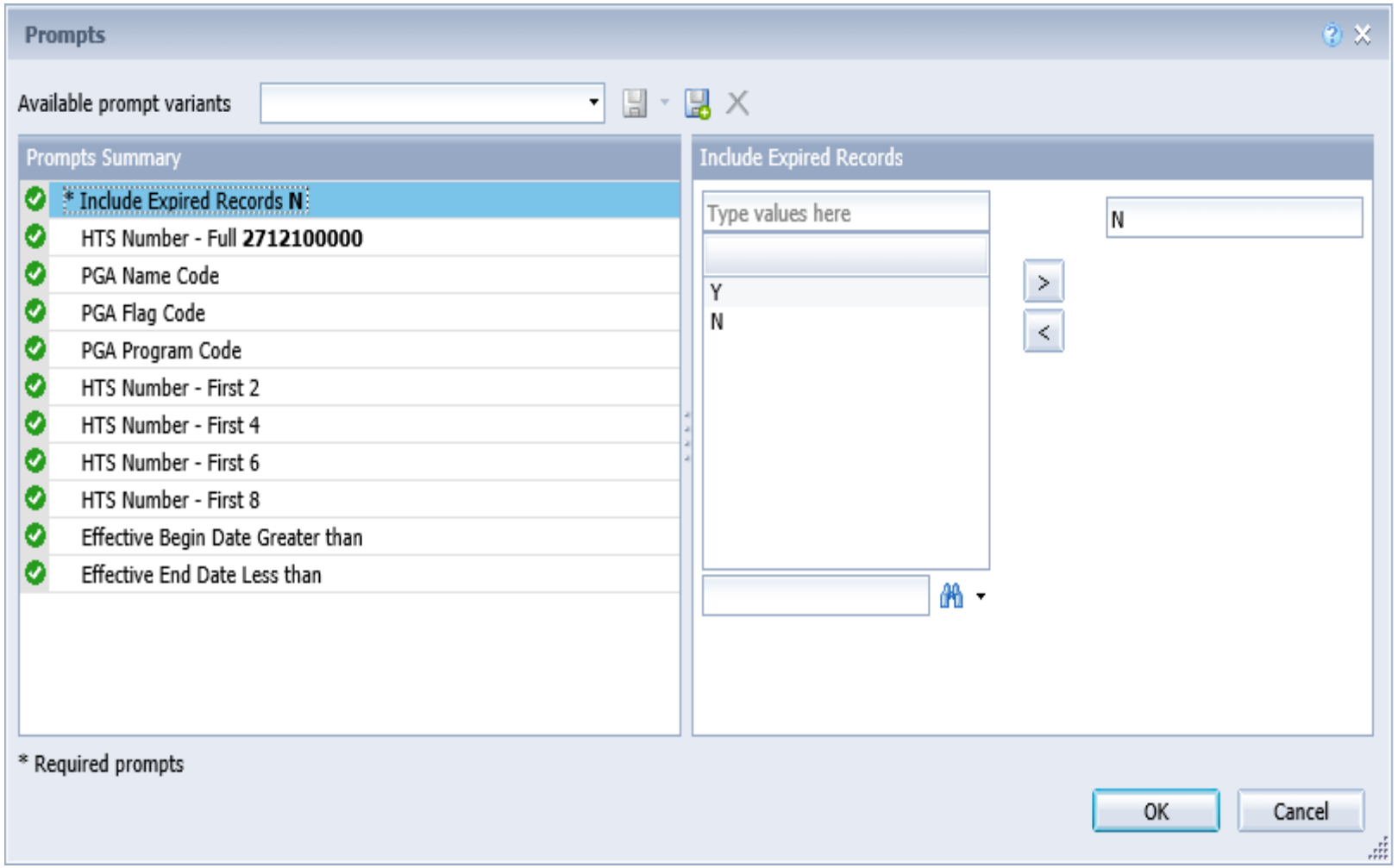
❖ Videos to watch to review the steps above:

- Running Standard Reports
- Saving and Exporting Reports

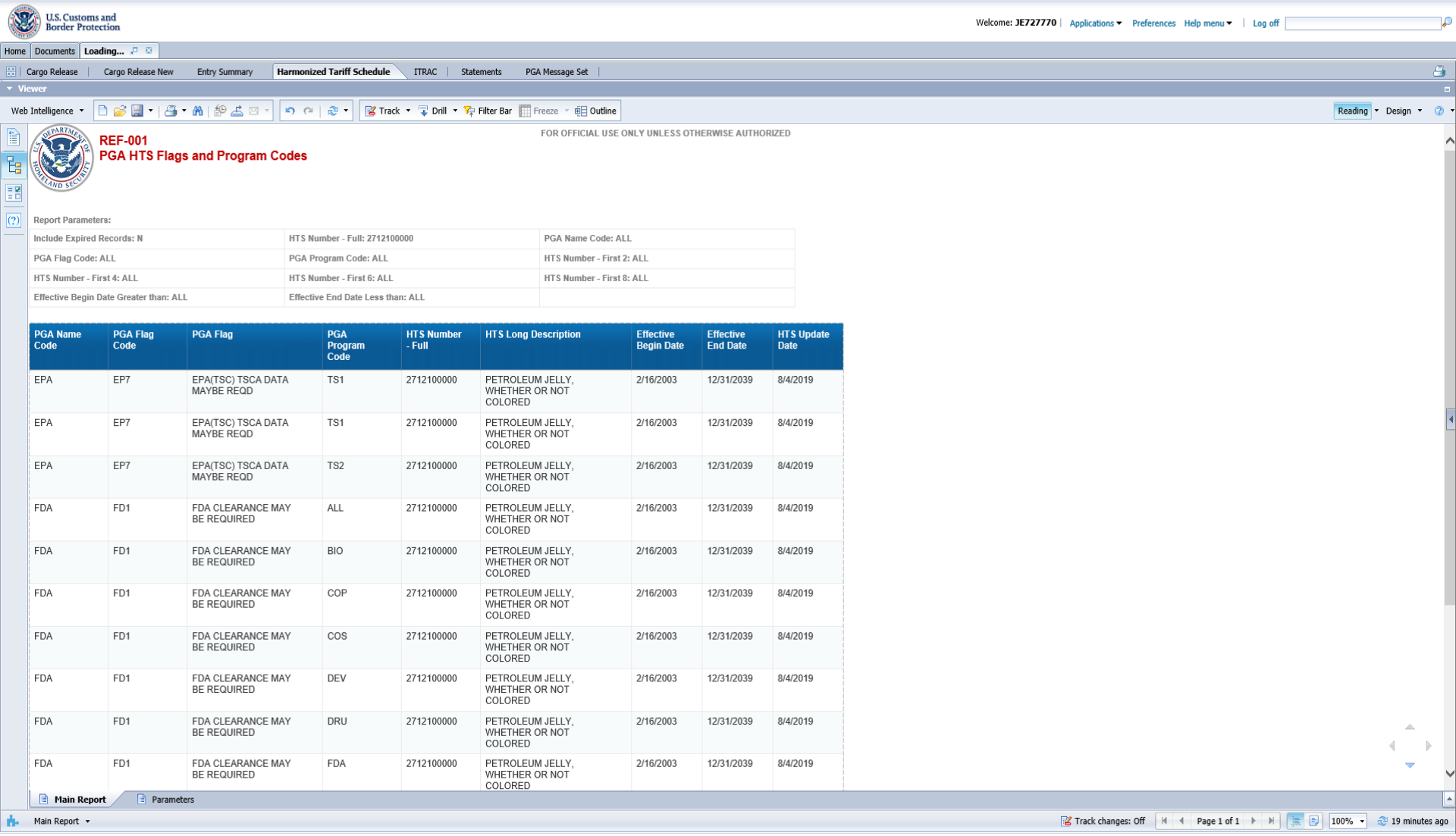
REF-001 PGA HTS Flags and Program Codes Report



REF-001 PGA HTS Flags and Program Codes Prompts



REF-001 PGA HTS Flags and Program Codes Results

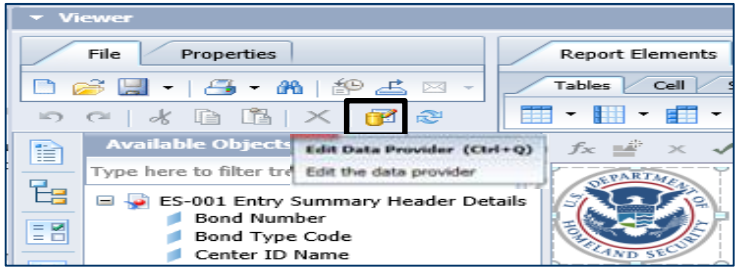


PGA Name Code	PGA Flag Code	PGA Flag	PGA Program Code	HTS Number - Full	HTS Long Description	Effective Begin Date	Effective End Date	HTS Update Date
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS1	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS1	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS2	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	ALL	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	BIO	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	COP	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	COS	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	DEV	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	DRU	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	FDA	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019

Modifying a Canned ACE Report

How to Modify an ACE Report

1. Launch the appropriate ACE Report.
2. Allow the report prompts to display, click on the **"Cancel"** button to display an empty report in **"Reading"** mode.
3. From the report's main toolbar, click on **"Design"** button to switch view modes.
4. Once **"Design"** mode is displayed, click on the **"Edit Data Provider"** icon.

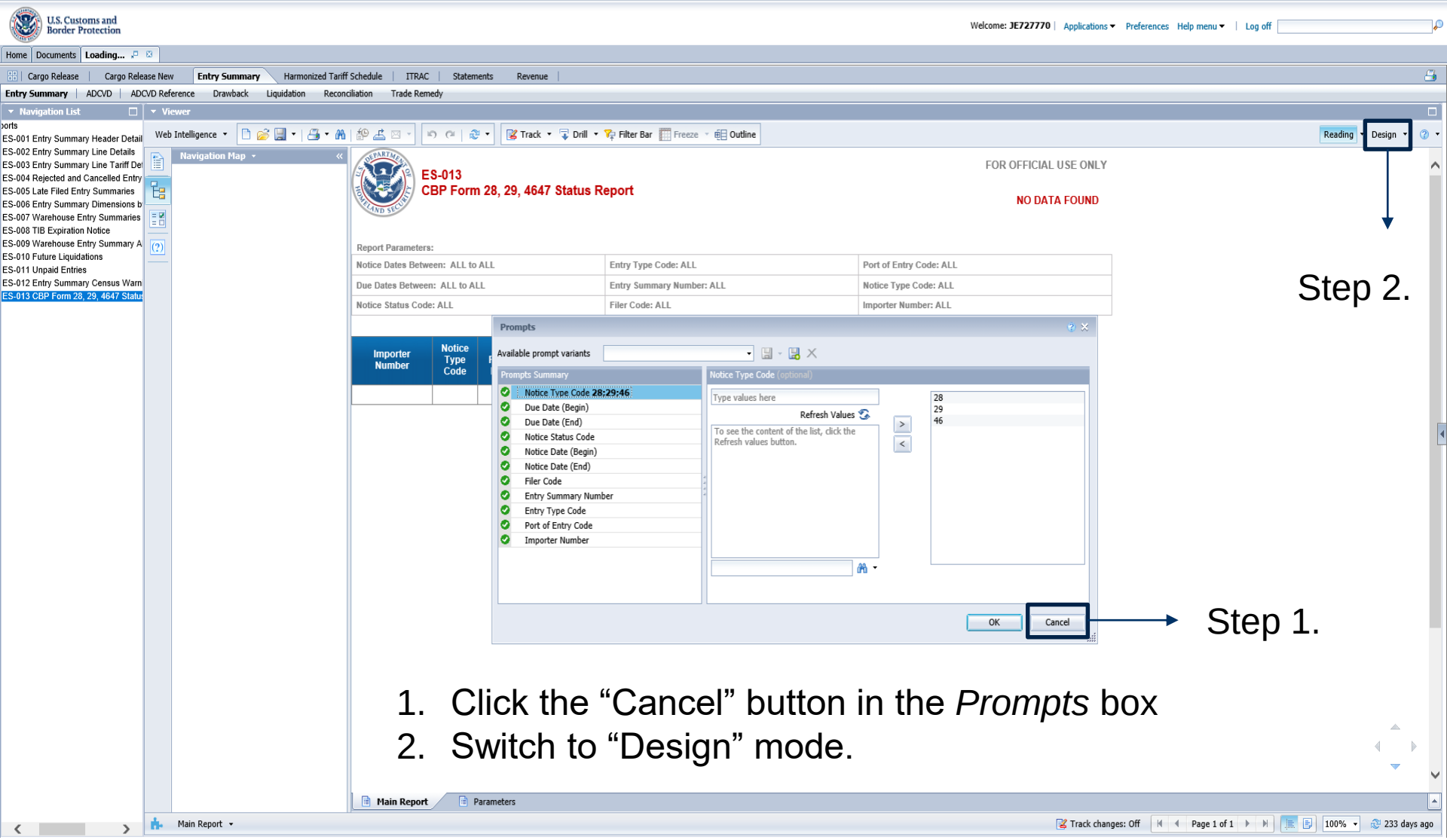


5. The **"Query Panel"** displays providing access to all objects in the report's universe and the ability to choose which objects to display in the results and filter on.
6. Add any desired data object by dragging them to the **"Results Objects"** panel.
7. You can search by data object name or key word.
8. Filter conditions
   - Add or Remove
   - Limit or add combines sets of conditions
9. Click on the **"Run Query"** button to obtain report data
10. Add date parameters (unless date objects are used) and the Importer of Record number (if an importer is running the report) and/or Filer Code (if a broker is running the report) for faster report processing. Run the report and wait for the data results to display.
11. Drag objects from the "**Available Objects**" panel to the report table with results in the order you wish the results to display.
12. Save the modified report to your "My Favorite" folder for future use and to schedule it next time.

❖ Videos to watch to review the steps above:

- Modifying Report Queries
- Modifying Display of a Report
- Modifying Query Filters

Modifying an ACE Canned Report

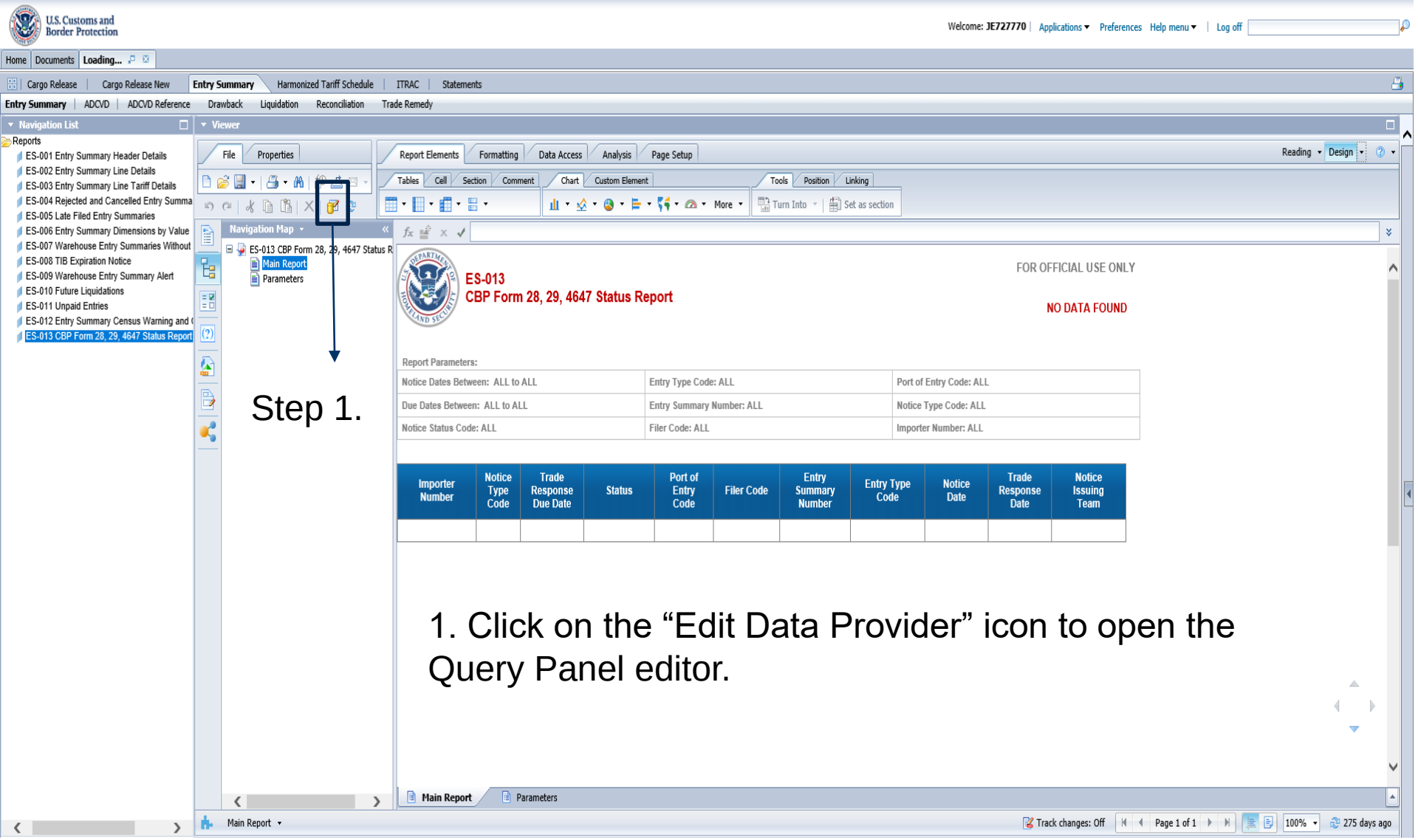


Step 2.

Step 1.

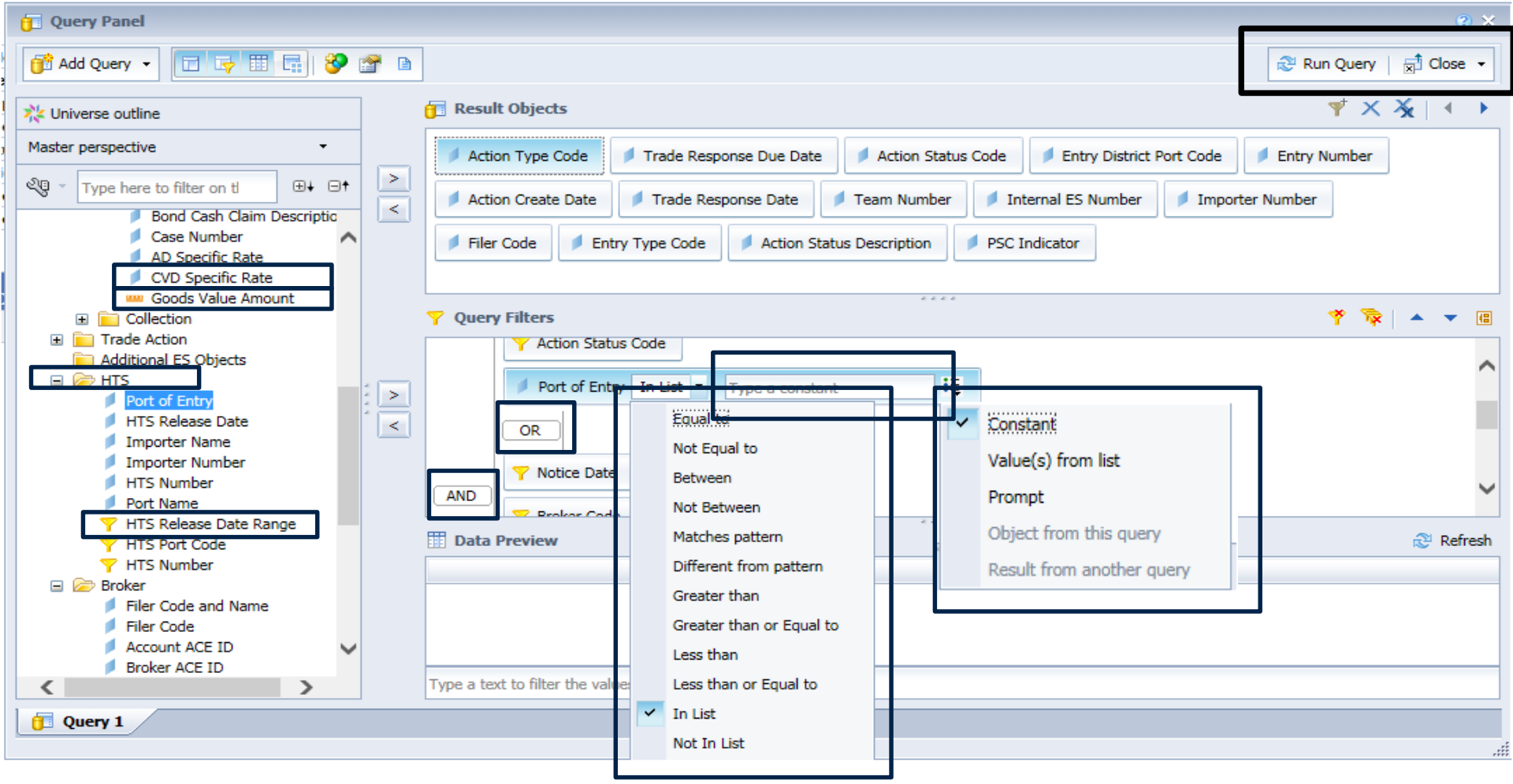
1. Click the “Cancel” button in the *Prompts* box
2. Switch to “Design” mode.

Modifying an ACE Canned Report

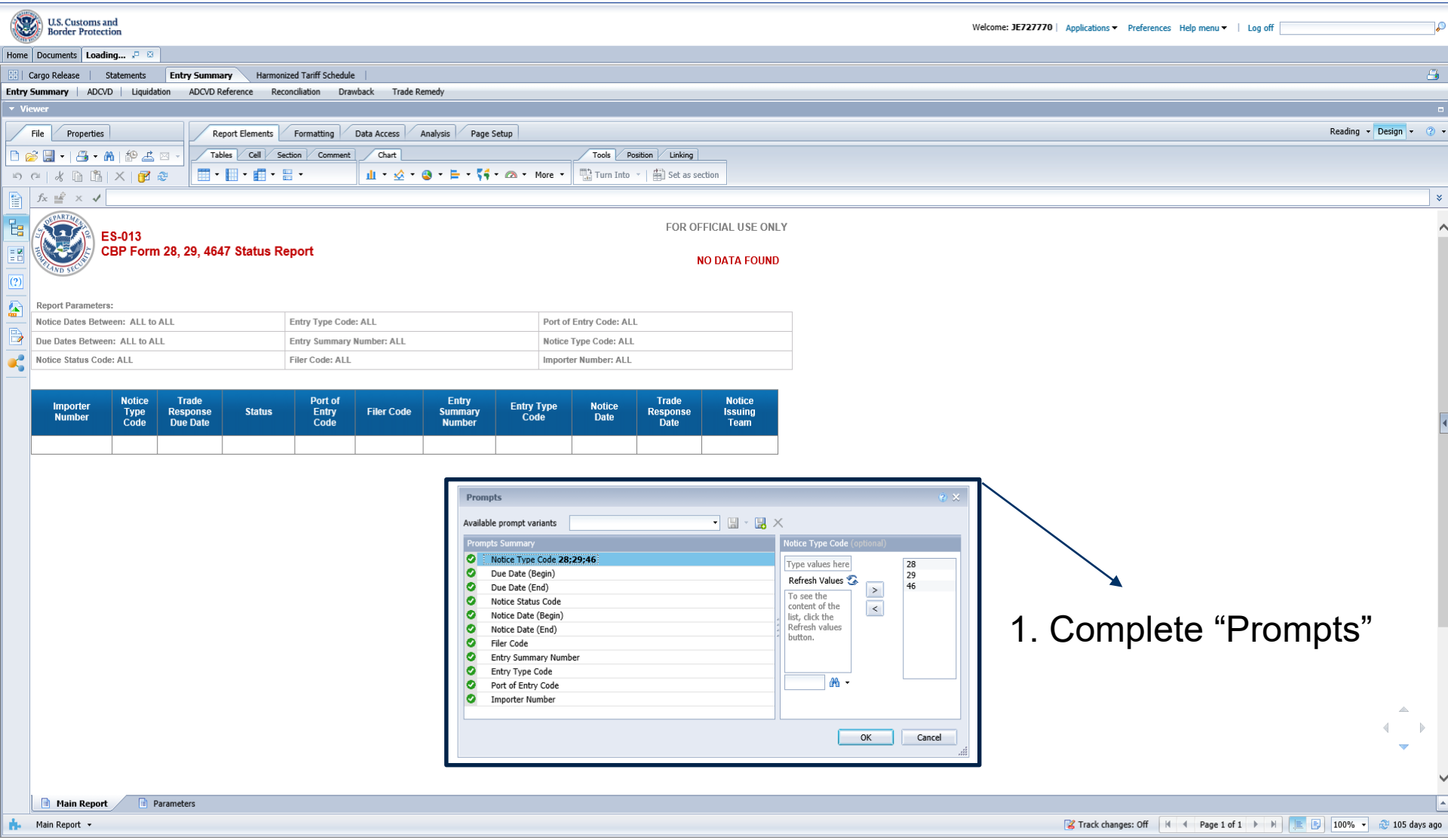


1. Click on the “Edit Data Provider” icon to open the Query Panel editor.

Review of the Query Panel Editor & Features to Modify ACE Reports

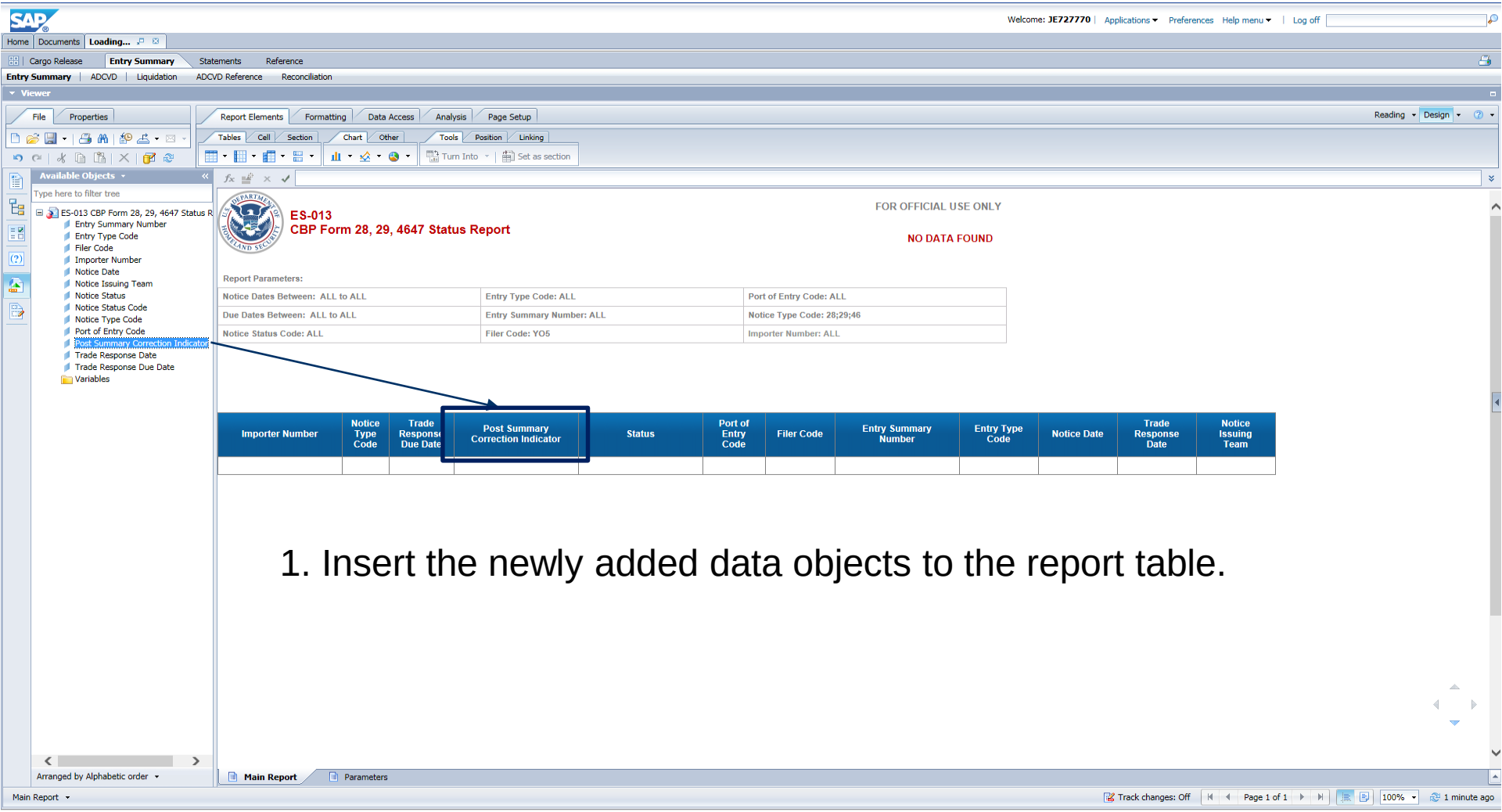


Running the Query After Modifying an ACE Report



1. Complete “Prompts”

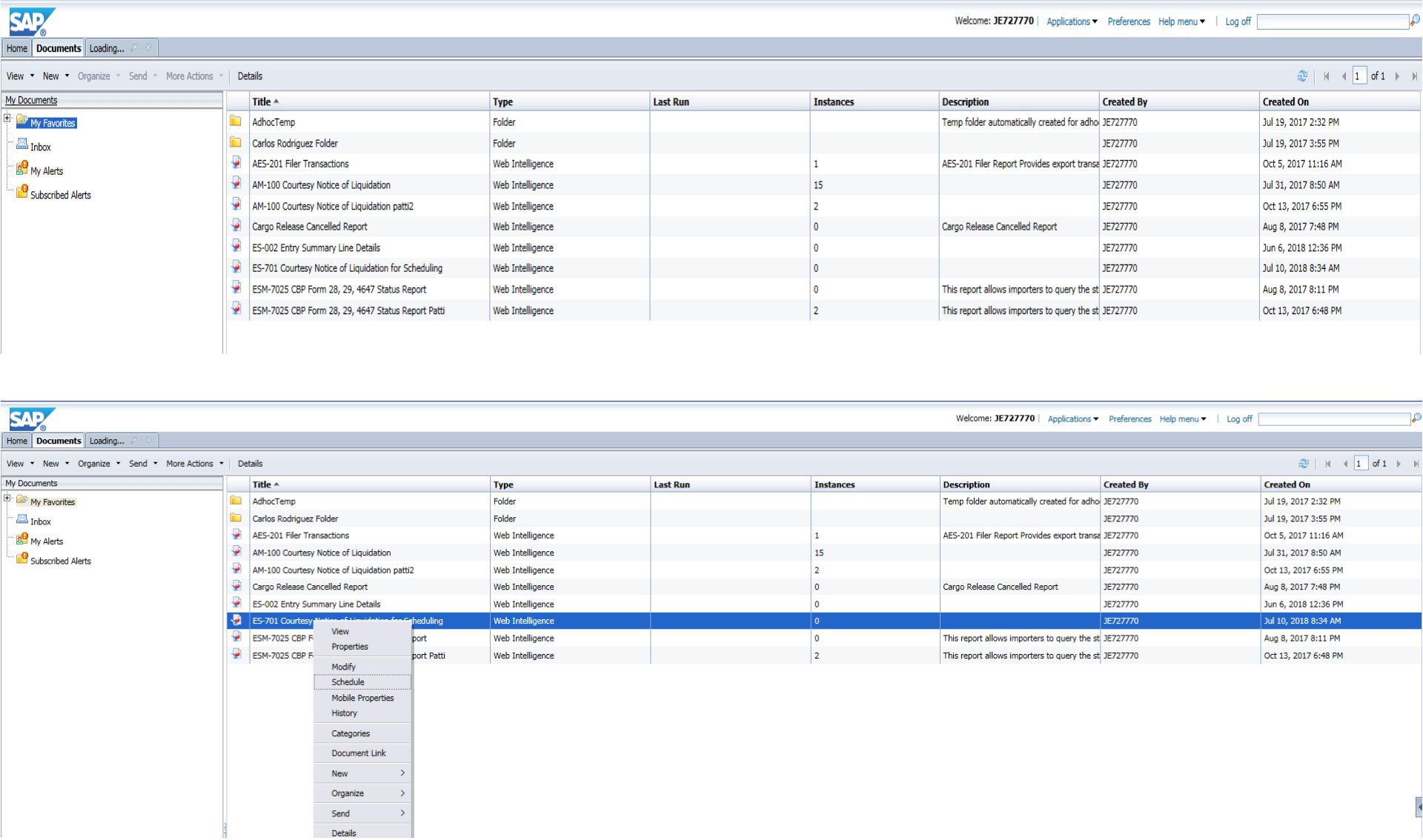
Dragging Objects to the Modified ACE Report after Editing the Query Panel



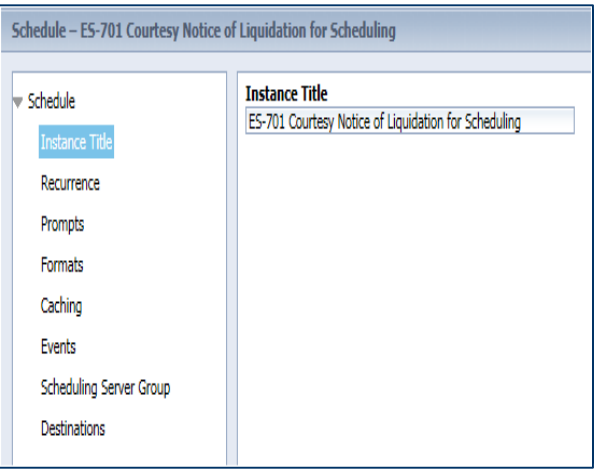
1. Insert the newly added data objects to the report table.

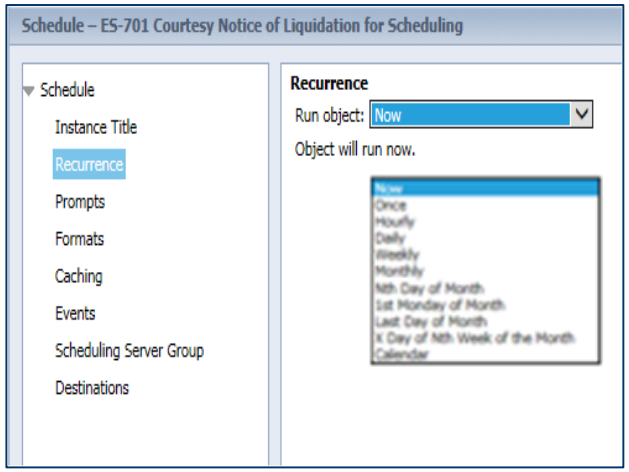
Scheduling an ACE Report

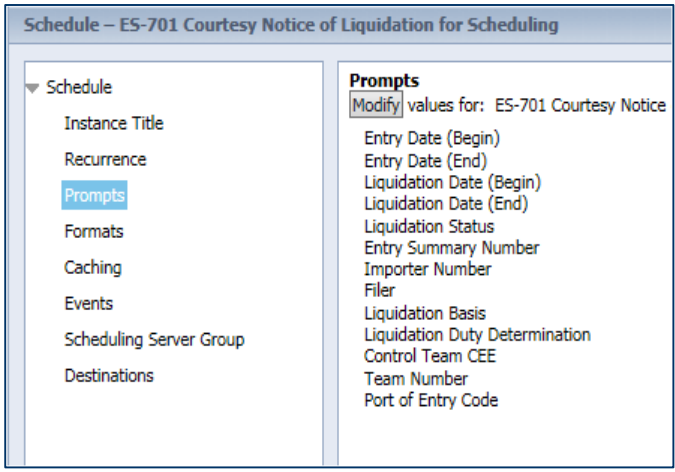
Steps to Schedule an ACE Reports

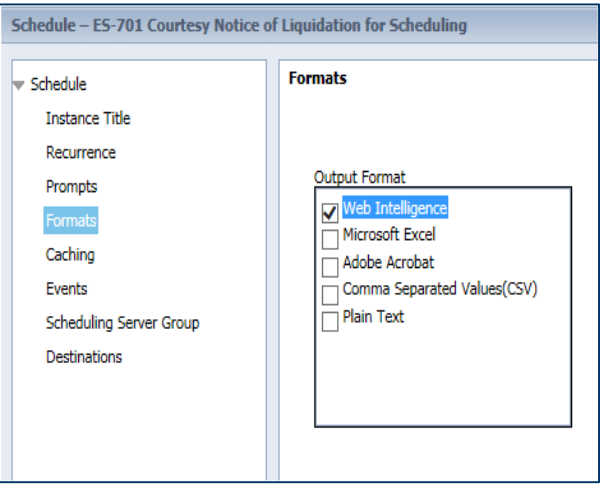


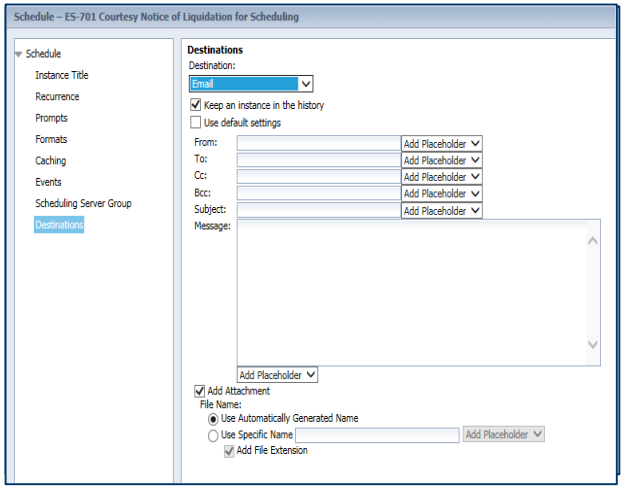
Scheduled Report Settings

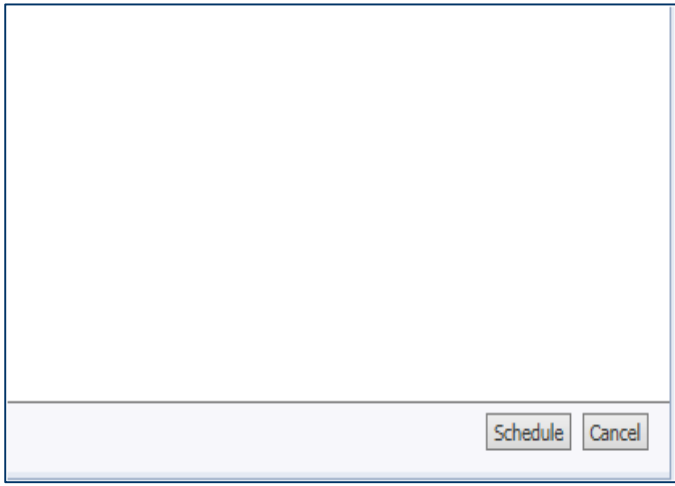




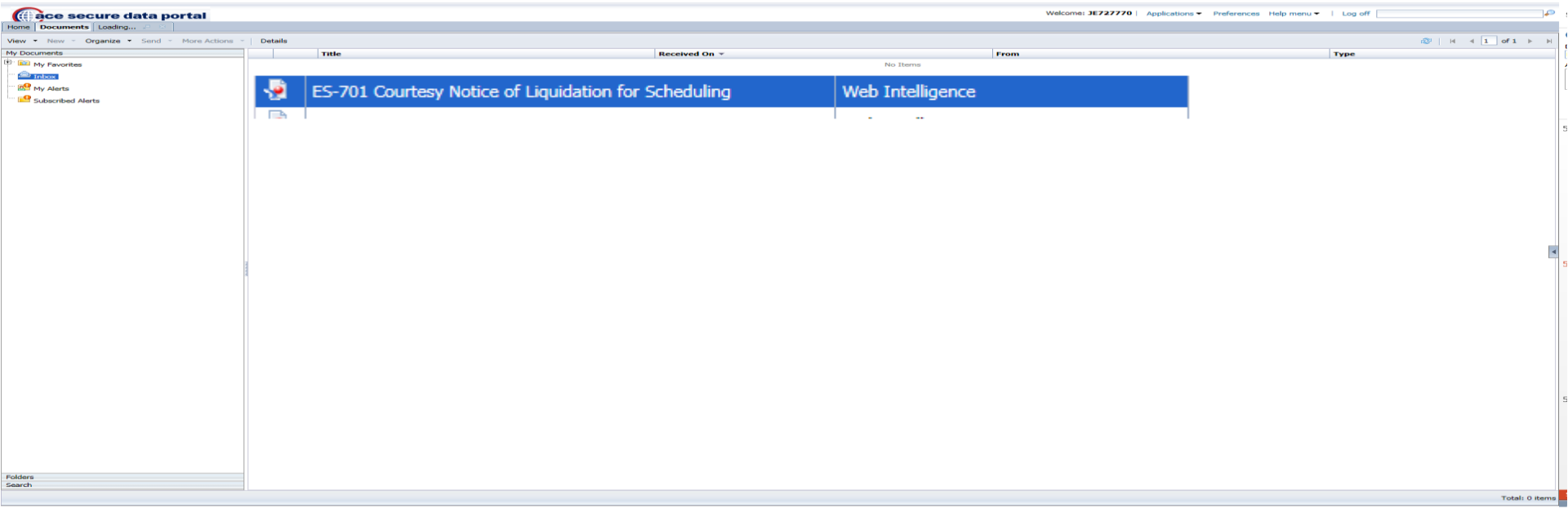






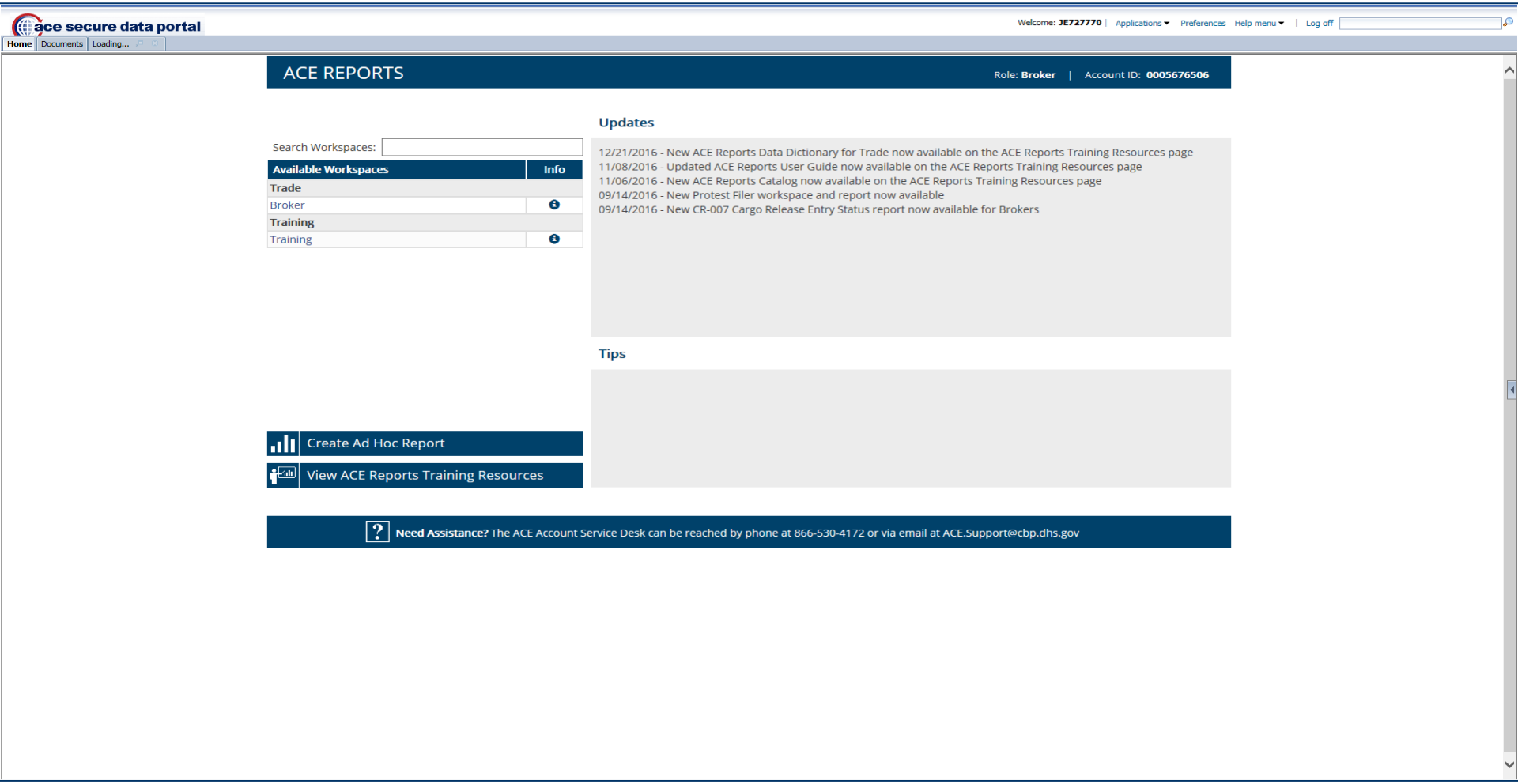


Viewing Results of a Scheduled ACE Report

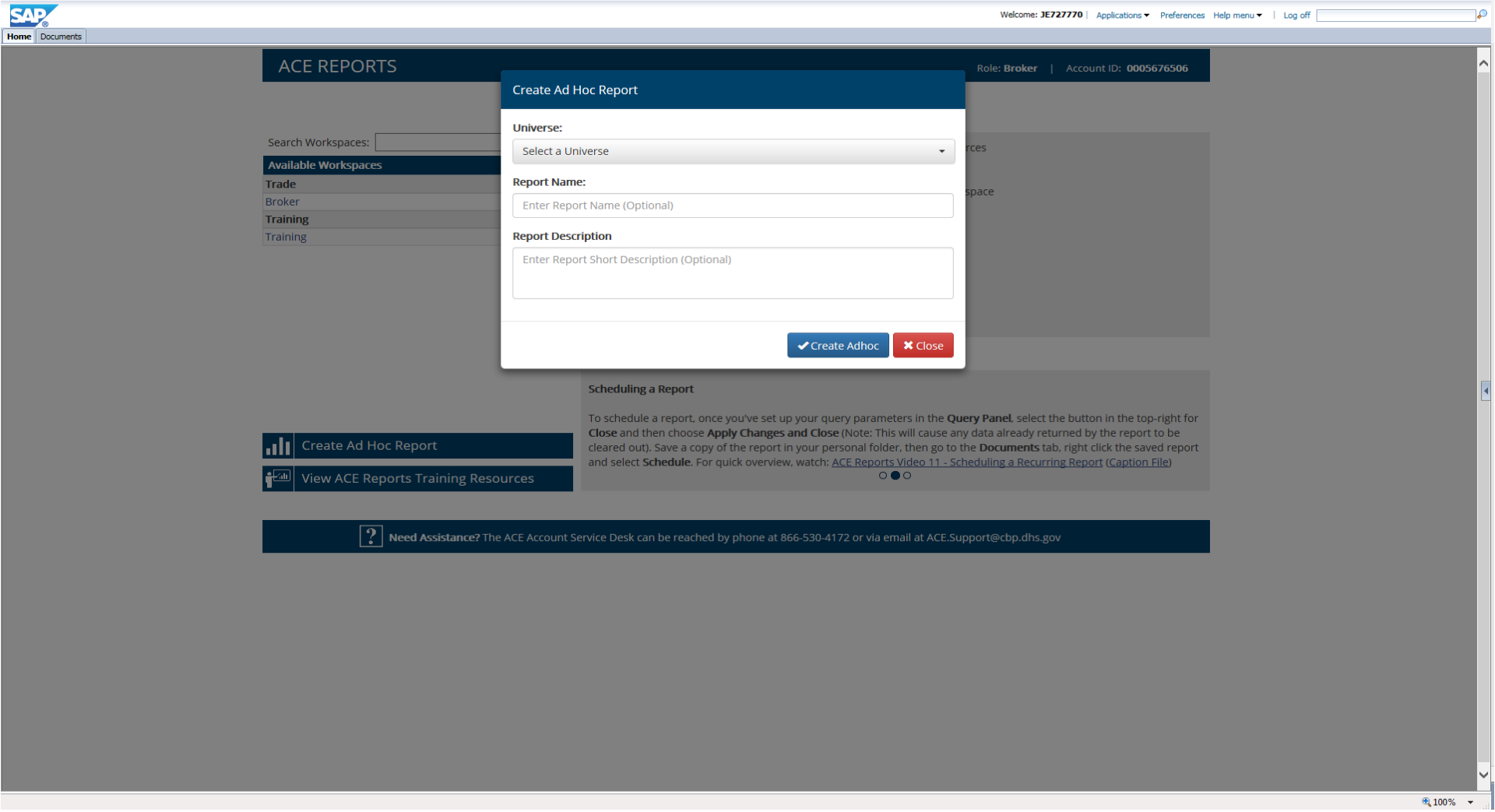


Running Ad Hoc Reports

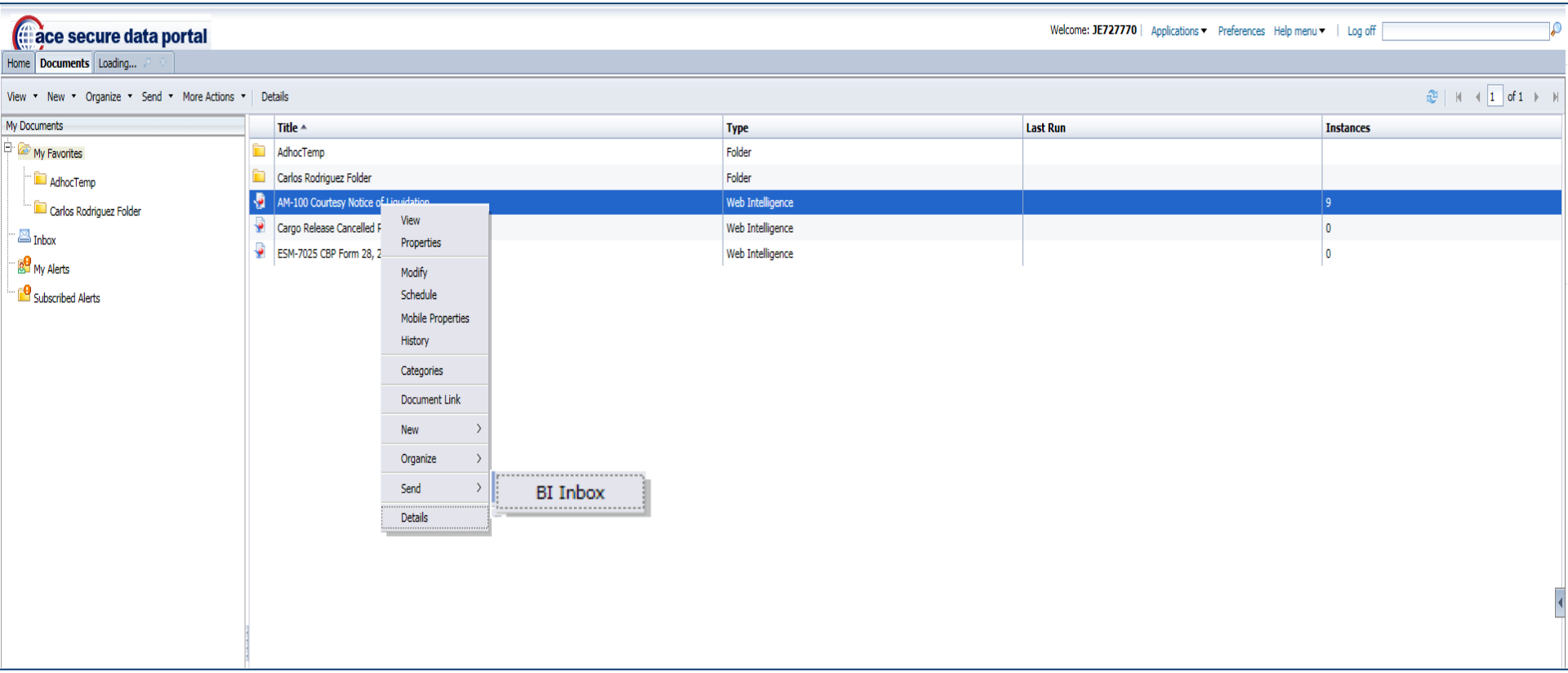
Creating Ad Hoc Reports



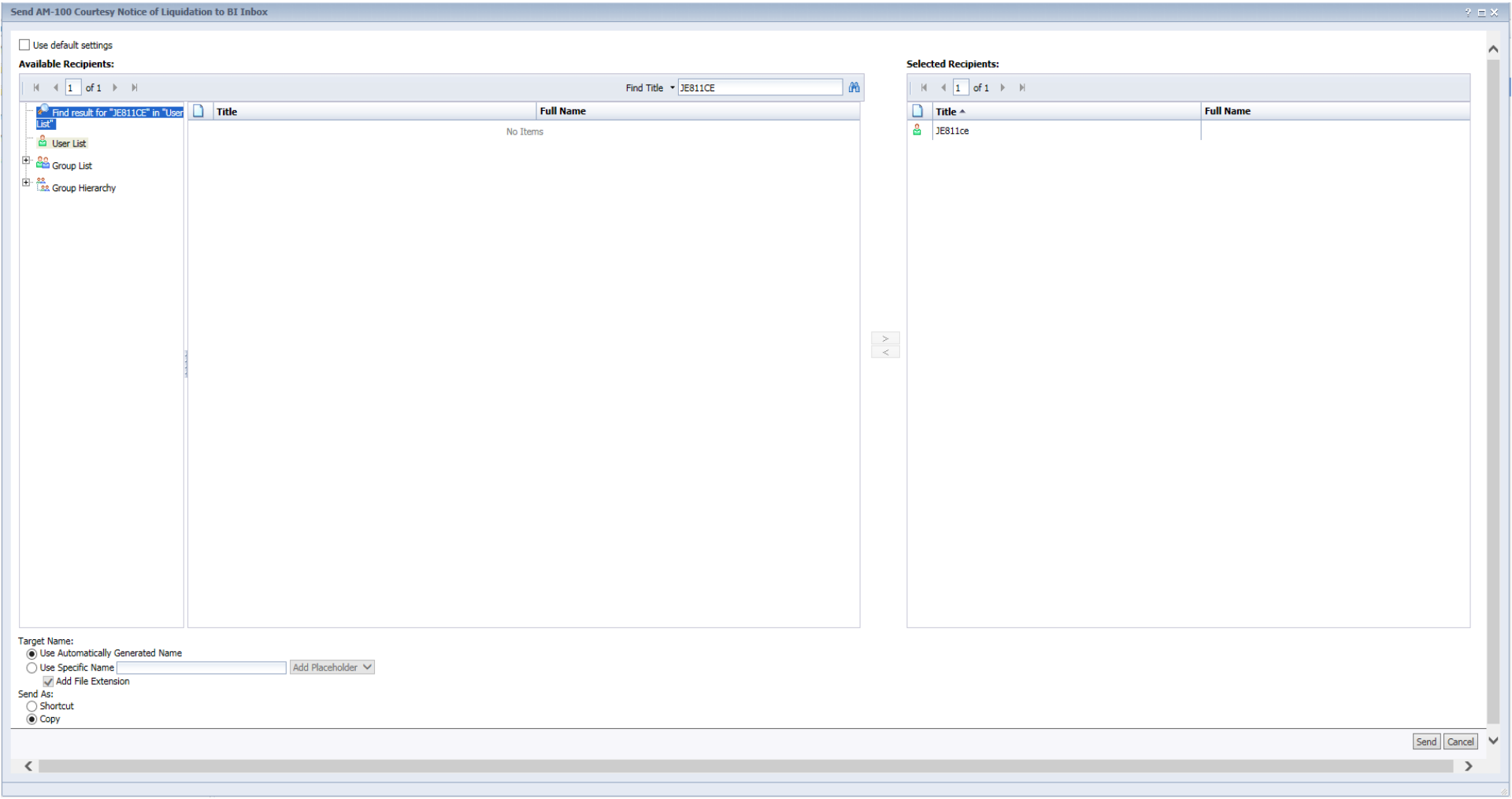
Selecting a Universe for Ad Hoc Reports



Sending an ACE Report to Another ACE Portal Account User



Sending an ACE Report to Another ACE Portal Account User (Cont.)



ACE Trade Resources

Client Representatives

Client Representatives serve as the primary point of contact for system-related problems and questions

Technical Documentation

Find technical specifications needed to electronically transmit data to ACE, including PGA data, along with supplementary guidance.

www.cbp.gov/ace-technical

Training

Find user guides and online courses on the ACE Portal and system functions.

www.cbp.gov/ace-training

Support

For support on ACE, including ACE Portal, ACE AESDirect, technical support, and more.

www.cbp.gov/ace-support

E-mail Alerts

Receive automatic ACE updates: system outages, new capabilities, technical documentation and more.

https://apps.cbp.gov/csms/csms.asp

Bi-weekly Trade Call

The biweekly call provides an opportunity for trade participants to receive ACE-related updates and to request input on technical questions.

FAQs

Answers to some of our most frequent questions on: ACE Portal, manifest filings, cargo release, and more.

www.cbp.gov/ace-faqs

Questions?

ACE.Support@cbp.dhs.gov
1-866-530-4172

www.cbp.gov/trade/automated/ace-faq